

5 Ways To Cut Admin Time on Forms Live

Anita: Hello, Welcome to our webinar, five ways to cut admin time using Forms Live. My name's Anita O'Connor, I'm the general manager at Dynamic Methods - we're the development team behind Forms Live. We've also got a similar platform called REI Forms Live and Realworks - so we're across the nation. With me today I've got Ben, our Business Development Manager in Victoria, which some of you might have spoken to before. Today we're gonna be covering what aspects of Forms Live that can cut admin time and revolutionise your form process, enabling you to spend more time out in the field, without sacrificing efficiency.

Today, 15 minutes, hopefully we know that you are all busy people and we're gonna be discussing electronic signings, CRMs, templates, et cetera. So let's get into, Ben, where do we start?

Ben: Well, let's start with the benefits of being paperless.

I suppose we're in that day and age where everyone prefers digital over paper, and this platform (Forms Live) enables you to do that. Digital is the strongest time saving tool, you don't have to worry about finding a pen and finding a pad and all that sort of stuff if you've misplaced it in your car.




You might ask, how is a digital form any quicker? We believe from our tracking and data that a normal, traditional, paper and pen would be about 25 steps - and with our platform you can shrink that down to as little as seven. So these are obviously time saving tools and get you guys out and doing what you do best.

Anita: I'd like to know if anyone's still using fax machines. My first office job. I've had to stand by the fax machine because that was the quickest way of communication and it's not the way we work anymore. Everyone's on their mobile phones.


Ben: You don't need a fax machine because we've got electronic signing integrated with it as well.

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Anita: I'm glad you mentioned electronic styling because that would be my number two for saving the time, using Forms Live signing electronically. It just makes sense - we're all sitting on our phones. We've all got them available, and the expectation is that you will be sending things electronically for them to execute.




Like I said, you wouldn't be standing by a fax machine or, or delivering it personally. We've seen 95 percent of residential rental agreements being signed within 24 hours - 95%. And let me tell you, some of those are a heck of a lot quicker. We're seeing some being signed within minutes. So on average within 24 hours. And when it comes to sales agreements, sales agency agreements, you know, the maximum time is within six hours. Like I said, we know what the market is like and people are simply wanting to get things done as quickly as possible. Electronic signatures save you time making major issues, minor problems, you know, within Forms Live. I'm gonna hop into Forms Live. If you need to, you can see who's left to sign and you can also resend quite easily. I don't know about you, but I've had people say, I didn't see that, can you resend it with our signing process? You can edit and resend emails really simply a couple of clicks and you can send that on. If you've misspelt an email address you can resend an invitation to sign a form, these dramas have a simple solution by using that edit and resend, which is great.

Ben: It definitely, especially that signing tab there to track the signed who hasn't, and yeah, it's usually the way that the old, oh, I didn't get that email. Well, speaking of integrations, our third point is about CRM. So obviously you will have some pre-populated data already within Forms Live, but the benefit of integrating with your CRM is so extraordinary because data will come across and there's no double handling and that sort of thing. So launching a Forms Live editor within the CRM will generate the form with the key data that you're after and you're not double handling when it comes to those sorts of things. We do partner with most. So, where Anita is just hovering over now with Connections, if you click on that and then go to the top right hand corner with admin, you'll find a list of CRMs that we integrate with there.




Anita: Absolutely, and always check our help guide as well. Um, if you are using our products. In our help guide we list, because not all of them will appear there, but most will under Integrations. And it'll give you a cue into how to set up integrations because definitely we want to stop double handling.

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Most of you live in your CRM, whichever product that is, and we don't want to tell you which ones you should be picking, but we want you to take the best advantage of connections and, and living within one product. I know that I've viewed a couple of integrations and, you know, from the renter's details, it'll have a button which they Create Lease, and it'll populate as much as possible. It's great.

Ben: It saves 70% of your time.

Anita: Absolutely. Absolutely. Another great feature, which fits with CRMs is our fourth number four on our list of five, Template. Create good templates, especially when you're creating dozens of the same particular form and inputting the same information over and over again. If you create your own templates, and I'm hovering, this is the template area, you can save time by putting in that default information from your agency. You know, things like, you can input your required details, you can attach annexures, and every time you generate that particular form, that information will transfer over, and the attachment will come across too when you create a form - and most integrations will honour that as well. So they will give you the option of creating a new blank form, so you have to input all the details, or for you to be able to link to and select your prefilled, your standard information prefilled template - with your PDF attachment. I've seen things like, your property management team, what to do if you like a tenant handbook, what you need to do if there's an emergency in your property, have all of that, it'll be generated from the template with all that saved data. And again, that's just another time saver. Why type it in each time? We're up to five. Ben, what's number five?




Ben: Well, probably one of the most important actually Compliance. We all know how important it is having clients sign contracts and legal documents and so on. You wanna make sure that they are the correct form and have all those legislation requirements that are needed. And you don't need to stress when it comes to our forms because we are fully compliant. You can rest easy knowing that all the forms available within Forms Live are updated accordingly.

Probably about 14, 15 months ago now. We had all those rental changes




Anita: The 29th of March, 2021. I'll never forget that date

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Ben: Our forms were ready to go. There were quite a few changes and our clients benefited from the fact that they're ready to go when required. So you can rest easy. We work with property lawyers at Colin Biggers and Paisley, in order to make sure that any changes or updates that are required flow through to any form that needs to be updated. I suppose the benefit also is, Anita, if you've got one that's in a draft mode and there's a change made - don't worry, when you actually do go to complete it, it will update.

Anita: Absolutely. I'm looking at my template screen and you can see that there's this little marker next to the form. So this particular Residential Rental Agreement, I originally created it on the 13th of August, 2020. Looks like I haven't used it very often, and it's got an update because like I said, 29th of March, 2021, there were sweeping changes. And you get this little update flag and it is simple as this - you click, it prompts you that an update is required and that's it. My template's updated. So whether it's a form in draft or a template, it is as simple as that. Click and use. Using electronic forms, when you're using Forms Live, you're always going to have the very latest version of the form.

I know we said five, but I've got a feeling we've got more than five up our sleeve, Ben, to save admin time. What do you think, what's your pick of our tools that will help make an agent's life easier?




Ben: Well, we know Property Management's a big section of our industry. So I would say utility connections. We connect with a few utility providers, found on the Connections page, which Anita is showing here. So it's a benefit to your tenants that once a Residential Agreement is signed, the offer will automatically pop up for them to obviously opt in or, or decline, which can be a major time saver. It eradicates that back and forth, trying to get ahold of someone, leaving messages and so on. So again, it's all digital and at everyone's disposal.

Anita: Absolutely agree. We've seen that people have them send out letters or emails separately. Why not have it at the end of that signing process, at the end of the signing process that offer will pop up. How simple is that? I think it's an awesome choice.



I've got a couple that are up my sleeve that are coming out soon - we've had a lot of people ask us about sending draft documents - to get your client to complete them.

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We've got that on its way and I think it's actually in a couple of forms where you can send, and we call it Info Request. It's the ability to start a form in Forms Live and send that form to your client for them to put in their details, which we think is great. What we are looking at the moment, we've got it exclusively added to the Rental Provider's Information, the Pre-Rental Disclosure Statement checklist, and Rental Minimum Standards. So when you create one of those forms you'll see that Info Request on the left hand side. I'm gonna quickly create one, because then you can send that form for your client to complete it. We're looking at how we can incorporate that into other forms as well. Rental provider instructions, that's the one.

When you create your form, you have an option to send that. So we're looking at how we can expand that out into the Property Management Agreements so your client can fill out their policy information, their bank details, instead of you getting on the phone and getting that information from them. So, Check it out. Keep an eye on our news page because we will always provide you with the most recent updates on our news page and how you can do all these Info Requests, how you can access it and watch a video, or see our help guide on new features as we release them.




Ben: We are right on time as we said cuz we understand you guys are busy. Are there any questions about anything that we've covered today? Pop 'em in the chat.

Anita: I wanted to mention Ben and I are going to be at the Re-edge conference at the convention centre next Friday 3rd of June. So if any of you are at Re-edge, please come over and say hello. You'll see us in person. We're not just on the screen, but we're in person. And if you've got any questions, reach out to us. Come and see us. Reach out if you've got any questions, and we'd be more than happy to help. And keep an eye on our news page because I think we've got another webinar scheduled soon, Ben, where we're trying to do them every three weeks or so.




Ben: If anyone wants a demo or anything like that, in depth and has some questions, feel free to reach out to me. More than happy to have a chat and organise something.

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Anita: Awesome. Well, it looks like, doesn't look like we've had any questions. That's good. Must have all been really informative then. So, we'll leave it there. Thank you. Come and say hello or reach out to Ben. Thank you on behalf of Forms Live for giving us a bit of your time.



Ben: Thanks guys, have a wonderful day.

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