Forms Live's 2022 Year in Review

Ben: Morning, Chelsea.

Chelsea: Morning, Ben.

Ben: A few cool things to talk about. Some you might be aware of, some you might not. We'll kick off. Hey, so welcome everyone. Thanks for joining us. I'm Ben Slawitschka, and I'm joined by my colleague, Chelsea Dwyer, where the two Business Development Managers for Forms Live. It's been a pretty big year for us, we've added some exciting features and some new tools that we're super excited about that hopefully have helped you in your day to day activities in your role.

Chelsea: We're super excited to look back at what we've added with you today. And there were so many great new features. Ben, where do you think we should start?

Ben: One of my favourites is Info Request. This feature has been really well received. With this feature, you can actually send draft forms to clients. So you might be asking, well, why would I do that? The benefit of Info Request is that upon receiving the draft form, clients can directly enter information into the forms fields. Over to you Ben.

Ben: So this is predominantly Property Management, so just to take you through it, I've logged in, I'll go back to the first screen where you see our news announcements. So always keep an eye out here. We'll advertise any webinars that we've got going on new features that have been released. But once we click into our form section, we have a history of all the forms we created. If we go to Create, we'll bring up a list of all the forms that are available - and where Info Request is available, you'll see this blue button. So they are available on the Rental Application, the Rental Provider's Instructions, the Pet Request Form, your Disclosure Statements, and your Minimum Standards so far. Actually, let's have a look at the Rental Providers instructions.

Contact our *Business Development Managers*:

Ben Slawitschka

☎ | 0419 165 989
✉ | bens@formslive.com.au
📅 | calendly.com/bensformslive

Chelsea Dwyer

☎ | 0488 002 539
✉ | chelsead@formslive.com.au
📅 | calendly.com/chelsead-formslive

So rather than sitting on the phone taking these details from your rental provider, you simply click on the form. We obviously need to give it a name - I'll just call this webinar - and click Create and you'll see that the form is open and ready for data entry. Where you would normally fill this data in in a normal form. But if you want your rental providers to do so, simply click on the Info Request button. We're sending it out to the rental provider. You can put in his or her name, their email address,include their phone number, any message that you want to. This is just set as a default, but you can edit that if you like. Click Send Now and you've got your signing tab. If we go to my inbox, I might just have to jump into a new share. So once you receive the email, they'll click on the View form, it'll open up in the browser, they click Get Started and they'll fill in the details that are required. You might be after their bank details, so they would include those with the BSB, Account name and number. So once they fill in the details that they've been asked to, they click Complete and then that is sent back to you with those details that you've requested. So it saves you time rather than having to chase them and fill it out over the phone and all those sort of things. So that's quite handy.

Chelsea: That's excellent. So I think it's important that we discuss as well while we're here, Ben, is the Two-Factor Authentication, we can all agree that security and privacy are really relevant topics at the moment. So for everyone at the Forms Live team, keeping our subscribers data secure has always been of the utmost importance. On our ongoing mission to further strengthen our systems, we've introduced two factor authentication to Forms Live. It's so simple to activate.

Ben: Yeah, it is. And I suppose it's really become a big issue, especially with the data breaches recently, hence why we've added this feature. I'll just play a quick video here which will take us through what it actually does. So it's quite easy to add. All you need to do is click on your name and account details, which is down the bottom left hand corner. Click on the user details, scroll down, you'll see the ability to add a Two-Factor enable and click on that. Download the code app that you're after, Google Authenticator

Contact our *Business Development Managers*:

Ben Slawitschka

| 0419 165 989
| bens@formslive.com.au
| calendly.com/bensformslive

Chelsea Dwyer

| 0488 002 539
| chelsead@formslive.com.au
| calendly.com/chelsead-formslive

or there are others, we scan that, it adds your accounts, and this will generate a one time code every time that you're going to login. So rather than just having your password, you'll also be required to enter that one time code that's presented. So as you can see there, we've put in our normal password, then it asks for the Two-Factor Authentication and we're back into Forms Live.

Chelsea: Yeah, perfect. And that one time password is a unique password that refreshes every 30 seconds or so, which is good. So this feature is a great way to boost security around your Forms Live account. So keep your agency's data and forms as safe as possible with this added layer of protection. I love this addition. What else can we discuss Ben?

Ben: We've also made a lot of improvements in regards to PDF attachments and signing, so we'll probably have a look at that. Some of you might be aware that you can add PDFs to a form and you can also add signature fields that might be required. So if I actually bring one up, if I go to Forms again, I actually got one here that we used earlier. So this one here is just a Sales Authority that I'm using - I know you guys might be using Property Management Forms. So once I've filled in the form with all the details that I'm after, I go up to More, I click Files. You simply click Choose Files. So find the file that you're after on your computer, which is my Marketing Schedule - here you can see that that's been added in, I close that. Once I've finished the form and it's ready for signing. I obviously need to finalise the form - that's now locked and ready to go. I include the details of who I'm sending it to and I send it to myself as the client.

We've also got the file that we've actually attached and prepared, so that's ready to go as well. We click next again, you'll come up with the standard DocuSign email - again, you can edit this if you like. That will be sent out. And again, we should hear the ding shortly that will come through to my inbox, which I've got here.

Contact our *Business Development Managers*:

Ben Slawitschka
✆ | 0419 165 989
✉ | bens@formslive.com.au
📅 | calendly.com/bensformslive

Chelsea Dwyer
✆ | 0488 002 539
✉ | chelsead@formslive.com.au
📅 | calendly.com/chelsead-formslive

So I'm reviewing the document - it's as simple as they normally sign with. They agree to electronic signing, click Continue, they're signing as the vendor there, and they're also going to sign your Marketing Schedule. Once that's done, you click Finish, and once all parties are signed, it's sent back to you and you've got your marketing schedule attached with a signature from the vendor confirming they agree to those terms. It doesn't have to be a marketing schedule, it could be other things like Special Conditions. You can also add in any of the Annexures here that might be available and added into - Blank Annexure that you might have filled in, Assignable Annexure as well. I think that just about covers that topic, doesn't it, Chelsea?

Chelsea: I think you've doubled down really well on that one. I think that's all we've got, all of 2022 up to date now. [referring to the slide with all 2022 features listed]

Ben: Yeah, that's a few that we've introduced this year, so things that we think have been great additions to the platform to assist you in your day to day workload. We do have some more things coming out in 2023, so stay tuned for any webinars that you may see booked in. We do have a really cool feature coming up, which is going to be the Business Dashboard, which is the one down there, so you'll be able to view sort of statistics and key performance indicators within the platform, a high level overview. We'll also be introducing VPA and Bond Integrations, which you might be using at the moment through other third parties, which is a great addition to the current services.

Chelsea: There's also going to be a new Resources page as well, which is essentially a learning hub that will host all of our video guides, webinars and Feature Spotlights. So keep an eye on our socials and In-Platform News page to keep yourself in the know. You'll find us as Forms Live on Facebook and dynamic methods on LinkedIn, so we're looking forward to all of those new features. Now, let's take a moment to open this up to our viewers. Do we have any questions?

Contact our *Business Development Managers*:

Ben Slawitschka

✆ | 0419 165 989
✉ | bens@formslive.com.au
🗓 | calendly.com/bensformslive

Chelsea Dwyer

✆ | 0488 002 539
✉ | chelsead@formslive.com.au
🗓 | calendly.com/chelsead-formslive

Ben: Everyone's very quiet or they're in holiday mode, ready to go. We've put our details up anyway, so if you do think of something once we hop off this call and would like to ask a question, you can reach out to myself or Chelsea, and be more than happy to assist when it comes to that.

Chelsea: That's right - and we'd also like to wish everybody Merry Christmas from the Forms Live team. Enjoy the holidays. If you have any questions, as Ben said, we've got our details always ready to go and accessible on the screen, so please take them down, take a screenshot, take a photo and contact us as you need to. And have a lovely and safe holiday and a happy New Year, everyone.

Ben: Yes, I times two that. So. Well said, Chelsea. Have a great Christmas and we'll see you in 2023.

Both: Thanks everybody, see you guys.

Contact our *Business Development Managers*:

Ben Slawitschka
| 0419 165 989
| bens@formslive.com.au
| calendly.com/bensformslive

Chelsea Dwyer
| 0488 002 539
| chelsead@formslive.com.au
| calendly.com/chelsead-formslive