eSigning on Forms Live

Marc: Looks like we have a few people sitting in- okay, good morning, everybody! Thank you for joining us for today's webinar, today we're talking about eSigning, of course, which is sure to be an exciting one. My name is Marc Persico, and I'm the Content Creator for Forms Live. Today I'm joined by Ben Slawitschka, who is one of our Business Development Managers, and we're also joined by Jodie Schickerling from Schickerling Real Estate - she is one of our subscribers, and we're super happy to have her on today, as this is the first time that we've had a subscriber as a guest. How are you feeling today, Jodie?

Jodie: Very well, thank you! Happy to be a part of this...

Marc: Awesome! Happy to have you...just a bit of housekeeping before we start, if you have any questions throughout the session about the features that we're showing you, please chuck them in the chat or use the Q&A feature, and we'll touch on them later during the questions segment. Let's get into it, so eSigning on Forms Live is, of course, inbuilt and included in every subscription, and we decided to make it this month's focus, because there are so many additions and features that you might not be using that can really enhance the signing experience for both agent and client...first, Jodie - how did you find the initial transition to electronic signing? Did our signing capabilities make that any easier for you?

Jodie: Oh, it was so easy! I wasn't so concerned about our ability inhouse to use it, because it is very, very straightforward and intuitive. However, with clients, the take up has been amazing. I've got a lot of older, English second language landlords, and I thought that might have been a bit of problem, because they are challenged by technology somewhat...but it's been easy. If you give them a call and talk them through what to do, and then you get the SMS to confirm everything...it's been amazing! And it's also great too, when you've got people that live interstate or that work crazy hours, and you can't catch up with them during the day - it's just easier for everyone.

Marc: Yeah, awesome. So, what are the different forms that you've been signing on Forms Live?

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Jodie: The best part is getting authorities done quickly, when you pick up a new property and they're like, wow, that's amazing! Leases have been terrific because it's often very hard to get everyone together, it can take up to two weeks, otherwise, by old post or driving around...so, yeah, it just makes everything so much quicker and easier - and you've got an audit trail, which is the most important thing from a compliance perspective.

Marc: Let's kick it off, between Sign on Screen, Remote Sign, and Signature Stamps, what signing method do you find yourself using the most and why, Jodie?

Jodie: Remote - because you can do it whenever you're ready to go, and then people can respond, you know, in their own time, and it's usually quick - you normally have everything fully executed within the next 24 hours.

Marc: Yeah, fantastic! So, why don't we kick off by speaking about Jodie's preferred signing method?

Ben: Yep, sounds like a good idea. So, for those that don't know, we've got three different signing options within Forms Live, and we're going to cover all three of those today, but we'll start off with remote signing, as Jodie mentioned earlier - so, a lot of us have had to use remote signing over the last few years (in particular during COVID...I don't want to mention it), so, remote signing is perfect for agents that want to have clients sign forms from home, at work, or interstate, as Jodie said, wherever they are. This is how you can send a signature request, which is Marc is showing us here, so from the 'Signing Tab', you'll scroll down and put in the signer's details, click 'Next', and there's the subject line which you can edit, and include a message, or send it to someone else with a carbon copy as well...once you've continued and sent a signature request, signing parties will be emailed the link to access the form, as Marc will show you now...and that's how easy it is with our first option, right?

Marc: Yeah, super easy just to adopt a signature as well, or scribbling it in, perfect! Then we can move onto Sign on Screen, so, this is perfect for those who want to invite clients into their offices to sign forms in person. From within the form, you click 'Signing' up the top here, and you'll see the options to 'Start Sign on Screen' or 'Remote Sign'. You'll click 'Start Sign On Screen', the former, and then you'll want to tick the signer who will be signing the form first have them agree, and then click 'Start' - they'll be taken to the signature fields,

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and, of course, click the yellow box and you'll have them scribble in their signature here...of course, we would recommend using a tablet and a stylus and not just scribbling in just like I did! You click 'Save' and then you repeat that process for all the required parties. It's super simple and very much like how you would sign a hard copy form in person, just digital.

Ben: Just touching on that as well...you could be sitting in their lounge room, or a cafe, and it's simply like signing the form, as you said, like an old pen and paper. Just bear in mind though, if you do select 'Sign on Screen', but all parties need to be there to sign that - you can't send that out in different stages and so on, if you want to do that, we suggest you use remote signing. The third one that we're looking at is the Signature Stamp, okay, so it's the choice for agents who need a form signed only once by themselves, with no additional parties. So, that can be entirely done in our platform, which is much like Sign On Screen, but before we start stamping, we obviously need to upload a signature -and Marc is going to show us that - under 'Account Settings' on the bottom navigation panel, open the 'User' tab, and then 'Signature', and then from there you can open the blank box, select what you want to obviously include, and then click 'Save', and you're done! So, that isn't available for every form, it's only available on those tagged, as Marc is showing here, with the red stamp label. So, here's how you can sign a form with an uploaded signature...open one in draft, click the yellow signature field down here, select the signature, click 'Save' and you're done.

Marc: That pretty much covers the three main signing methods that we have available, but don't tune out just yet! There are a few features that are worth mentioning that we think will make these solutions run even smoother for you! Just to get us started on those, Jodie, what related eSigning tools are you using the most often? You know, we have SMS verification, CCs, etc.

Jodie: The SMS verification, yep!

Marc: Yeah? Awesome! We'll get into that, right now, actually...so let's just take it back a bit, because when we were filling out these signature requests, you might have noticed a sign a 'Mobile Field', and you're probably wondering, you know, what does this mean? What does it do? So basically, when you input the signers contact number into that 'Mobile Field', they will be required to enter their phone number before they get access to sign the document, and then that will be followed by a one-time password that they'll get via SMS, and then

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they'll have to enter that into the Forms Live Sign screen as well. This is just an added layer of security to make sure it's the correct person signing, however, it's optional, and since it's optional, if you leave this field empty, then the signing process will continue without the verification, just the same!

Jodie: Can I just jump in there, Marc? With the SMS verification, it seems like you get a much quicker up take from that! Because people have always got their mobiles on them, you know, especially for the older landlords that don't check emails, you know? They're not connected to email all the time - like younger people are - you get a much quicker response, which is great.

Ben: Yeah, I agree with that. I find that also and the Two-Factor Authentication, for those that are worried about data privacy issues that people have had recently, you can put their mind at ease that things are secure. So yeah, next one we're going to look at is our 'Custom Signing Order', which is worth mentioning, continuing on after the contact details have been entered, it'll be the first thing you see, which Marc is showing us here...each contact will be separated into its own group, depending on their title, obviously, Renter, Rental Provider and Agent, so on. All you do to change the signing order is click the arrows, as Marc is showing there, up or down - and it will shift into the position that you desire, then the signature request will be sent out in that order and it's that simple!

Marc: It is particularly useful for agents who want to have Renters sign first before Rental Providers, so that if there are any issues with the conditions, the Renter can then let them know! Another quick and worthy mention, and this is a super, super handy feature for those who want to have non-signers sent completed, signed documents once the signing has been completed. You'll find the CC option with the customisable subject and message fields, you'll simply click 'Add Recipient' and type in the name, etc - and then you'll just repeat that with as many people that you want to have it sent to...and yeah, it's pretty much as easy as that, it happens automatically from there!

Ben: From there, the completed form will be automatically sent out without having to lift a finger, and once all that's been done and the signature requests have been sent, you might notice you've misspelled something or the contact details or something might need to change! All you need to do is click 'Edit & Resend', and you can simply do it from there as well, makes it super easy. So, if you misspelled an email address (I know mine gets

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misspelled all the time), yeah, it's quite simple and easy. Just need to revisit the 'Signing Tab', as Marc showed.

Marc: Yeah, sweet! Okay, we're covering a lot of ground here today, so hopefully everyone's keeping up...this is just one last feature that we're going to cover before we jump into a bit of a discussion and questions, and that's Signing Notifications - Jodie, how do you feel about the number of emails you received during the signing process? Do you like having that visibility, or do you prefer changing up a bit?

Jodie: I know we all complain we get too many emails, but I love the fact that you can see when the recipients view it, because sometimes people will tell you a story and it's like...no, I know you've got it, I know you've opened it! So, from that perspective, it's good - I don't think there's too many emails, and you can change the settings anyway.

Marc: Yeah, just as I was about to say, you know, some do want complete visibility, like you said, but others probably feel like they receiving too many emails as is.

Jodie: Depends on what form you're talking about as well - like, some are straightforward, but if you said, like, Rental Increase Notices and people try to tell you that they haven't seen them or haven't received it, but you can see that they've viewed it actually!

Marc: That's a great point! For those who do want to have a mess around with these notification settings, you just need to revisit the 'Account Settings' again, and this time go to the 'Agency Tab'. You'll scroll to the bottom and see these four options here for 'Forms Live Sign - Notifications'. If you want to receive an email at every step, then just keep them all ticked, but if you're someone who only wants to receive them at certain points...like when it's been completed or when they've viewed and signed, then just tick and untick accordingly, and yeah, it's super simple to change how much visibility you have over that. I think that pretty much covers the tools, the solutions, the features, all of that! So, I'm just going to take a step back and I'll let Jodie and Ben have a quick chat about her experience using eSigning on Forms Live.

Ben: Thanks Marc! And thanks Jodie for joining us, because we speak about it all the time, but obviously it's our job too, so it's good to have someone that's using the product and does see the benefits!

Jodie: I speak about it often as well! because it's a game changer for me as a small agency - it just saves so much time and just gives complete transparency, and from an audit perspective, it's unbeatable, and at the price! it's amazing, yeah...

Ben: We've probably answered some of these questions already, but as you said, has it been beneficial to your business as a whole?

Jodie: Yeah, I mean it's streamlining processes and it's also been really appreciated and well-received by clients, both Landlords, Tenants, the works!

Ben: Oh yeah! It is especially when going paperless, I know there are a lot of people that prefer that model rather than the wastage of paper. I find myself even now with anything I do, having worked here, I say, "Well, haven't got a paperless form?" I don't want a piece of paper and so on!

Jodie: It's fabulous! And there's workarounds with everything - if you get a client that wants a paper copy, then that's fine, you just print it off and mail it to them or drop it off. You can always work around everything, but it just makes everything so much quicker and easier! Without a doubt...and to be able to edit, like there's nothing, there's nothing I can fault about using it because there's workarounds.

Ben: Yeah, the 'Edit & Resend' option is a good one...because some of our competitors charge you to redo a form - or it goes towards your allocation of forms - but you can simply duplicate ours, say for instance, if a tenancy starts dates change or an auction date change. You don't have to go through and fill out our form again, it's just simply changing, resending, and it's done. We did touch on it earlier, but how do you find your client's response to the secure signing with the SMS authentication and so on...do they feel comfortable with that?

Jodie: Fantastic. I was a bit concerned about that at the start, particular for the older clients that aren't so tech savvy - but if you explain to them, 'just follow the prompts', they'll surprise themselves, like, 'oh, wow, that was so easy!' and that's amazing. Yeah, so I have not had one sort of grizzle, one complaint, no one's pushed back - if you talk them through it...and explain to them it's okay! It's all safe, it's quick and easy, and I think it's almost like a triumph that they get through it.

Ben: Oh, wow. This is great - I tend to agree...and lastly, but I think I know the answer this! Would you recommend us with our inbuilt eSigning feature?

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Jodie: Absolutely!

Ben: Yeah! Most of the people that are on the webinar here are current subscribers anyway, but we do have a referral program that Marc is going to mention anyway shortly. But thank you, Jodie for joining us, we appreciate all the support.

Marc: That does cover all the eSigning basics on Forms Live, we hope you've all learnt a lot and can improve the signing process to make it all run quicker and easier! Thank you so much for joining us today, Jodie - it's amazing to have you on and hear your thoughts as our first subscriber guest - and thank you, everyone for joining us today!

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