The Power of Forms Live's 100+ Integrations

Anita: Hello everybody. I'm Anita. I'm the General Manager here at Dynamic Methods. We're the team behind forms platforms across the nation. Actually, we're talking about Forms Live today. We've also got the brand names REI Forms Live and Realworks. And I'm happy to see people roll in for our webinar, and I wanted to introduce everybody to Helen. Helen is here - She's got 32 years, maybe I shouldn't have said that, exactly, a long time in the property management industry, and she's a trusted expert in training, mentoring and helping agencies streamline their operations. She has a deep understanding of the challenges property managers face and how the right technology can drive efficiency and growth. Helen's extensive knowledge of property management software and systems integration allows her to guide businesses to optimise their workflows. She's passionate about helping agencies leverage the right tools to improve productivity, reduce admin burdens and enhance overall performance. Perfect fit, right? I'm so excited. It's very cool because, you know, it's a two-way street. We've got a platform which has some of these efficiencies. We connect to products that have other efficiencies, and you're across both, Helen. I'm super excited to have you here today and have people on online listening and watching us.

Helen: I'm happy to be here, and I'm very excited about it as well, because I, as you say, I'm definitely passionate about helping everyone streamline their businesses and their workday life, right? So, it makes their lives a bit easier.

Anita: One question we get so often, and what we talk about is integration, and why integrated platforms for real estate make sense. It's that connection, and it's more than a connection. I've been in real estate agencies, and I'm sure you have Helen as well, and you see them with multiple pages open, you know, where's the music coming from? All this stuff is going on. The challenge is, they're juggling multiple platforms manual data entry and compliance. And we believe, we know, that integrated platforms can reduce admin time and improve efficiencies. What are your thoughts on integrations?

Helen: I think integrations are imperative to all the businesses, especially if you've got a team. So, if you've got it all set up properly, as long as you know that your templates, and although you know the integration is set up with your software, the admin or your assistance, or even you, when you're busy, you should be able to just press a button and you get all the documentation you want. We shouldn't have to be going out from one platform to the other - they sync. We should be able to go in, add your tenancy, new landlord, press the button, and you know that if someone's picking that template within that template is everything. And I think a lot of people still go to three or four templates, whereas we should have that all merged into one template. So, you know that the one thing's done, also your client is only getting that one PDF to go through and sign, instead of three different documents. So that's where I think a lot of people that are even probably already using your system may not have it as integrated as great as they could to make their life a bit easier.

Anita: It makes sense. It all leads towards that working smarter, not harder. In any programme that people use, whether it's your CRM, whether it's Forms Live, our platform, even Outlook, we know this much of it, because that's what we've learned, and that's all that we're really using. And it's opportunities like this to understand it's a wider piece. There are other pieces in play that can be connected and what's available to you.

Helen: Like a lot of people, and I've been in PM a long time, we press the button, we get that document, we move on to the next one. We keep going and doing it that way. Whereas, if we really do look at the systems that you probably already got, there's so much more to Forms Live than what we're just doing for that one lease agreement or whatever (form) it is. So, it's like everything - when people went to *'the cloud'*, everyone is shooting you Excel, which we all probably know how to now, just maybe look at a report. But do we know how to filter it and really drill down into it? So, I think, we all go into these jobs, and yes, Forms Live is there, amazing, press the button, get it done. But do we really understand what else that platform can do to help us, which is why we're here today.

Anita: Correct! Okay, it leads into my next spot. You know, what does integration actually mean? There's integration that comes in; there's integrations that go out. Most people would understand that CRM integration, so your trust accounting software, some of which you're going to show us a little ping of a view of what it looks like in a trust accounting software, and how we populate a form. So, that's data that's held in the CRM to populate forms - I like to explain it that the data is pushed from your CRM into our platform and our compliant forms, because we don't want to think about compliance. We just want that information to come across, but there's also an outward going integration as well. Signing is an outward it's pushing out that information.

In Victoria, we have Ownership Checks - how can I check that the person I'm dealing with actually owns that property? I can do an Ownership Check. We're talking about Verification of Identity. That's a push out. You've pushed the data in from your trust accounting software, and then I can push that out to verify someone's identity, which is going to become more and more prevalent as AML, KYC, let me say another few letters is going to come through, and even to an extent, utility providers, that's a push out as well. So, it's not just about connecting those platforms. You can do some connections in Forms Live, but what do they all mean in a workplace? Helen, what do you see when you go into agencies and people working with all the various products?

Helen: I think most people are still going in and out into separate software and don't have it all coming together. You mentioned there about your utilities, like that's another sort of revenue which we're all going down the world of sort of click revenue in your business, I suppose. So, you can also have that integrated with your Forms Live, so that when those documents are going out, it's also going to your utility provider. So, what you may have maybe missed if you haven't even got that integrated with your trust platform or your software, your CRM - that's another opportunity for the business to be making money, and just by making sure that's set up properly, click revenue, right? You don't have to think about it. I don't know if we've got anyone on here from sales as well. So, think about it in that space as well - you're sending out a contract, that's another information that could go to your utilities person to gain revenue for the office - because those people are going to be disconnecting connecting power. It's not just your PM side of things, it's exploring all the extra things that Forms Live can also do for you, outside of just to get your document populated with your information from your software. So, integration is very simple as well.

Anita: And you brought up a really valid point. You know, whilst I love having you here, and you're an expert in property management, you're also seeing those workflows in sales as well. We have a suite of CRMs that are integrated with us for this, for your sales teams as well. And we see agencies that connect - be it one of the PropertyMe or Property Tree, but they also have Agentbox, because they've got both of their teams, and I'm not trying to highlight one over the other. But if you're using a product, if you're using a product, check and see whether we have that integration set up. Our platforms have been around for a decade plus - we're always working with them and updating them. But these integrators, and it's not just CRMs - we actually receive integration requests from agencies themselves. They may have some wonderful, smart person on their team that wants to build an integration that's possible too. So, it's not just CRMs, it's that ability to start that workflow, which is really cool. One of the things I'm just going to quickly share my screen.

[demonstration on how to find the right connection and generate a token]

Anita: What I want to point out is connections. Connections is where you want to look for who is connected, who we can connect in your platform. In Forms Live, I went to the left-hand side, I've clicked on connections, and if I scroll down, I can see the connections that are available immediately. These are the outward connections, so if you've got your own DocuSign account - by the way, if you use Forms Live, we've got in-built signing - this is where you can select and choose your utility connection provider. And as Helen said, you may have it set up in your CRM, but why not set it up here as well? That way you can make sure, no matter which way it's going through, it's getting through. And then in the top right *New* button. This is where you'll find the third-party connection, the token that you often have to put in your CRM. And this is where I'm going to switch over to you Helen, because products will often ask us to create a token, and I'm going to pick one, create a token. And that token is available here, so it's at the top of my screen. I can then copy it to my clipboard, because each platform is different, each CRM is different about where that needs to be placed, because that's their product. So, I copy it to my clipboard, and then it's available for me to put into my product, and then that's where you start exploring.

[demonstration on how to use the Forms Live token to connect a third-party provider]

Helen: The integration is where you're going to need to have a token, so that's where you get that from, in your Forms Live. So, you would grab that and go in there. I'm just going to jump into, let's go into Property Tree first. In Property Tree, you would have your configuration down the bottom left. In our configuration, down on the bottom left-hand corner, over on the right-hand side, you have your integration. This would have your REI Forms - this one is linked because it already has our token. If you have one (a token) that you need to link, just go into a different integration. You see here, I've got Forms Live, and it's asking me here for the token. So, that's the token where Anita just went to once we got that code from Forms Live and copied it - you would just paste that in there. You'd need to verify that, and then that's going to allow you to have all your forms in here to be accessible.

The best thing with the Forms Live, when you're adding your owner, let's say you're going to go and do your management agreements, or your leases. When you're in the database you'll have in here your integrations. This is where it will sit in the platform. Then once you've got your integration, you would, like a mail merge, select the form that you want to use, and it will go out and populate it. I've heard quite a lot with regards to multiple documents in the one Forms Live. A lot of the times I find in PM, people want to add their own, maybe about our office or, this is our maintenance plan, this is our emergency plan - documents that aren't necessarily on Forms Live. You can load that into that same template, so you don't then have to go and pull five or six documents, which I do see people doing. So, just be mindful, and go and set your template to have your about our office, or whatever else you want in there, and it just goes out there with that document. So, if they've got that entire Form 1, it's got everything in it for you.

And then just in PropertyMe, same thing, you'd need to put that token into the clipboard. And then when you're in a tenancy, you come up to forms, and all the forms here will be to integrate, to go straight out into Forms Live, to populate, obviously, send it out to get signed. When it comes back, you would just copy it and drag it into your document folders in there. So having that integration in your software is, I think, imperative to make you work well, you can also come and do bulk so if I wanted to create a bulk batch of forms for all my tenants or whatever, and you wanted them to sign off on a document, why not think outside the square, and also use that for Forms Live.

I definitely think that integration into your platforms, and as I said, it goes into sales CRMs as well. But don't just think of it that I'm going to do a lease agreement, then I'm going to go and do our maintenance schedule - put it all into the one and have the one document go out. I think it's a better option for the tenants and the landlords. They're only getting one instead of, all of a sudden, they've got these five different things from DocuSign to read and sign, and it's all a bit too much.

Anita: I really appreciate you showing that. You know, it's interesting on this side of the desk. I know Forms Live almost like the back of my hand, and I don't often get to see how easy it is, and as you just explained and showed, once you've got that connection, then there's the list of forms or your templates that you can merge to, or create from. It's not copying and pasting, and I've seen, I'm sure you've seen it too, people will have your multiple screens, Helen, copy and paste, copy and paste. And you know if, if you're using a product that doesn't have an integration push them to do it, because it's a really important piece to connect systems and use them efficiently.

And I love that comment that you put in about Forms Live. You can create a template, and let's say it's a tenancy agreement or a rental agreement, depending on which state you're from, and here's my tenant renter guidelines. Here's the people you've got to contact for maintenance. The very unique pieces, have that as a PDF, attach it to your template, and that way, every time you generate from your CRM that is created and you're sending it out - it's consistency. And if I change who I use as my maintenance, I change it once in that document and keep pushing forward. Your expertise, Helen, you go into agencies, because we were discussing the other day how everyone's workflow is a little different, right? It's very unique. I'd love for you to talk about that, how a couple of different places work, if there's a specific workflow example, you know, where one agency may say, Great, yep, everything do it this way, whereas someone else will go, oh, no, we'll do it another way.

Helen: Yeah. Look, everyone does set up their unique things, because obviously, especially, we've all got our legislative forms that we do, but then other people have all their other little bits and pieces and quirks that they like for their office to do. I think the biggest thing with that, over and above the forms, is making sure, in your software, with your tasks and your checklist in there. So, even on that front, a lot of people think they just use a task, and they haven't got a template of their tasks in it. Now, in that template of the task, you could also have what form you want it to go to. It's all about making sure that is set up in full for you to be able to allow to delegate work to other people, because they're just following a checklist, right? You see different levels of people using those integrations within the software and their checklist, which is unique to each office. But I find, we're in different offices every day with software product training, so many people are still also touching the surface in that space. So, bringing all that together with Forms Live as well, it’s going to be very helpful to any team member. It's more about the streamline as well to making sure everything's getting done. Legality wise, you know that if they're pressing that button and in that is everything you need. It's a bit of a safety net for you as well.

Anita: Agreed, agreed. And that's what you and your team do. You go out and help individual agencies with their own unique workflows. That's not to say team members, people that are online right now, look at your product and what it can do, because often it's far more than you think. Take the opportunity and we at forms live. We're looking to do more webinars, just to give you a little bite size, usually a Tuesday, but we want to continue having these little informative Lunch and Learn - I hope you're sitting there with a coffee or maybe a sandwich and learning something new about your product in bite sized pieces, share it with your team, share the video.

I'm just going to quickly share my screen because I wanted to just give a small view of some of the integrators that we have in SA and VIC in Forms Live. So, you can see it's not just PM, its property management, and its sales. They're different products. There are some crossovers. You can have multiple connections and then, because, especially when we're talking about trust accounting software or some of these CRMs, you're propagating from that product, which most of you live in all day, into a form, right? We do the compliance bit. Here's your data bit. Have a view of what it is, and if you change, we often help people, and I'm sure, Helen, you do the same. Help people when they're changing their products. We all have our flavour of the month, the year, right? Connecting your product is important. So, just thought I'd give you that little view. I should have said at the beginning, if anyone's got any questions, but I'm going to say it now. Does anyone have any questions or comments, anything that you would like to ask? Please feel free, t's a question and answer. Helen, is there anything else you want to say about integrations?

Helen: Obviously, if anyone wants any help, we’re happy to help. I think the biggest thing, as well is we've just given you a lot of information about what can be set up. And I think a lot of people, hence why we're in the space of helping you do that set up, you're all time poor, right? Yes, we know we should do it, and it does take time to sit back and check your templates and your procedures and put it in place. But once they're in place, you run with it. So, we're definitely more than happy to help anyone you know, making sure they've got that all ready to go, so that you can just come in basically tomorrow or another day, and press the button and it's there for you. It’s definitely worth doing, but I understand it is very time consuming, and that's the other hurdle I think we find with a lot of people in that space that - yes, they might be using Forms Live and you know, it's working for now, but it could probably be working a bit better for them if we get some better structure in place, which is that we can do the time, and then you can obviously save time.

Anita: Like I said at the beginning, that's one of the reasons why we wanted Helen to be on this webinar, because it's not just a simple piece. I'd love to say that the Forms Live platform answers all the questions, I know the reality is, it doesn't. We cover the compliance and the forms you need, your CRM, your trust accounting software is your Bible that contains all that information about your customers, your clients. And Helen's the person who can put these things together, right and work out that spider web of which workflow or what works for your agency. And like I said, I thought it was a great introduction for us to both be on here.

Now, I'm going to pop up another screen which has Helen's contact details as well as our team's contact details. So if you have any questions, if you want to reach out and talk to Helen about workflows and how your agency can improve, if you want to reach out to Forms Live, if you're not with us as your platform provider, your form provider, got Chelsea's details on here as well, and we encourage you to reach out and see how either of us can help you out.

Helen: If you have Chelsea going through your platform, it might save you a few hours.

Anita: Well, between the two of you, absolutely, and that's what it is - identifying what works for your agency. Everyone who registered will get a recording of this webinar. If you thought it was valuable, share it with your teammates that that didn't click the button, and we're always here for you. Helen, thank you, and we're looking at how else Helen can help us on webinar shorts in the future. So, if you've got something, an idea, or you'd like something shared on this Lunch and Learn forum that we are going to continue with, reach out, send us an email, contact us, and we will look to implement that because, half an hour, I think that's good. If we can make it shorter, even better, and if you can get a snippet of information, and you need to learn one thing a day, and you're one thing better than yesterday, right?

Helen: Thank you very much for having me, Anita, and if anyone needs help, please reach out to us.

Anita: Thank you so much for people that are online, and we'll see you next webinar.