Teamwork on Forms Live

Marc: Shall we get started? Well, hello, everyone. First of all, we just wanted to say 'thank you' for tuning into today's session. We're super happy to have you here, as always, I'm seeing a few familiar names in the chat but some new ones as well, which is great! If you haven't attended before, my name is Marc Persico, I am the Content Creator here at Forms Live, and today I'm joined by Ben Slawitchka and Chelsea Dwyer, who are our Business Development Managers. Feel free to ask any questions that you may have throughout the session in the chat or the Q&A feature and know we will also be allocating time at the end of the session as well for any questions that you might have. So, when we were planning our theme for this month, we thought it would be a good idea to spotlight the features and benefits that Forms Live has that encourages teamwork and communication. You know, our team know from experience solid communication is the only surefire way to achieve success in the workplace. So, without further ado, our team will be working together to show your team how easy it is to work as one on Forms Live.

Ben: Let's jump into it, so for starters, let's say you have a team member that's going on leave or maybe they're out sick - whatever the situation may be someone will obviously have to take up their workload, which isn't easy to do since you don't know where to start from. So, as you're dealing with the forms and properties your co-worker has history with, and you'll inevitably have to go back and sort through all the forms they've written up in order to find certain specks of information, which let's be honest, can be hard, frustrating work and very time consuming. That's unless you're using Forms Live, of course.

Chelsea: Exactly, so when it comes to Forms Live, finding old forms and property details is a breeze thanks to our form filtering capabilities. As you'd expect, you can start by visiting the Forms Page, since this is where you'll find all the forms your team have ever created. So, we have quite a few options for filtering - to filter the list by form status, click the drop down that says 'All' up the top there, and you'll have options to filter forms by 'Draft', 'Final', 'Staging', 'Info Requests', and more. To filter the list by team member, click the drop down that says 'Everyone', and you'll see the names of all users with access to Forms Live, and you can filter the list to display all the forms they've ever created! Now, while this is the webinar about teamwork, there's something still worth mentioning, for those on the complete opposite end of the spectrum - you can keep all of your forms private from your team

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

members, so from your name on the bottom left, open your 'Account Settings', then move to the 'User' tab, scroll down, and tick the 'Make forms private by default' option. This will only make forms created in the future private, though. So, all previous forms will remain available to all team members.

Marc: Awesome, yeah, that feature is definitely a worthy mention, Chelsea. Just moving on in the same vein as saving time by not having to sort through forms for the sake of finding nuggets of information - we also have template and duplicate options as well. I think templates are great, especially for team leaders who have documents and annexures that must be included with all of their forms that team members are sending out. It's just the best way to keep things consistent across the board while also making sure the terms and conditions are included on every form, isn't that, right?

Ben: That's 100% right, Marc. So, tying it in with when someone is away or sick, everyone is using the same thing, right? So, for any managers and team leaders tuning in, it's quite simple to create and complete a template - it's just like creating a form actually, except you're starting from the Templates page, which Marc is on now, instead of the Forms page. Once you've found the form you want to turn into a template, you start customising it for your team. If you'd like to add any attachments, you can click the 'More' button, click the 'Choose File' button, then find the file that you're after, and then click 'Upload'.

Chelsea: And if you then move to the form sidebar, you'll find the 'Annexure' tab. So, from here, you can tick any of the annexes you'd like your team to be regularly using and click 'Update' to have them added to the document - all you have to do is scroll down to see them.

Marc: Yeah, fantastic! I'll also take us into duplicates as well. Now, duplicates are super easy for everyone to use and create new forms from an existing form - they'll carry over all that field data, attachments, annexures, and everything. So, this time we're starting from the Form list, we'll just find the form in question, click the three dots beside it, and then click 'Duplicate', you'll give it a name, and then click 'Save' and just like that you've created the form and it'll carry over all that data as well. So, just quickly moving on to eSigning, now we have spoken about eSigning quite a few times on these webinars - and we'll cover it a bit today as well - however, there is a certain aspect of eSigning that we actually haven't

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

touched on before and that would be CCs. With CCs, it's possible to have several team members sent a completed PDF version of the forms after it's been signed, we'll take you through it now, Chelsea, can you take our viewers through the signing process and highlights the CCs?

Chelsea: Absolutely Marc, CCs are also good for people like office managers, even potentially conveyances, brokers, people like that. So, think along those lines there, from the 'Signing' tab in the form sidebar, you click the contact details for the signers, then click 'Next', here is where you'll have customization options, below the subject option, you'll find the CC option, click the 'Add Recipient' button. So, you'll fill out the recipient details, click 'Add Recipient' again to continue and add more emails, or click the minus on the right-hand side to remove the recipient you added. Then once all the parties have signed, there'll be emailed the completed document as a PDF. Ben, can you take the rest of the signing process?

Ben: Sure, Chelsea. So, following those steps, we click 'Send' and the signature requests will go out, here's one that Marc has prepared earlier. So, they'll wait for the email, of course, and they'll click 'View and Sign' form which will open the form, they'll click 'Get Started'. Once you click 'Sign Here', you'll be able to leave your signature as Marc is showing, click 'Complete' once you've done and it's done just like that.

Marc: Yeah, such an easy way to sign and now we wanted to get into the communication aspect of the platform as well - you might know this already, but you can of course see the status of any and all forms created by users under your Forms Live account, which you saw earlier when we were delving into form filtering. But we wanted to delve a little deeper into it now, as well.

Ben: That's right, so once we click into the Form section, we're going to have a look at the list of forms that have been created, so, any form that has been created under your subscription, we've got here. So, this time, we're looking at the 'Status' in particular, which is the second column box we're hovering over. You'll see different statuses such as 'Draft', 'Final', 'Signing', or 'Signed', which is generally green. This is sure to improve communication within the office, not having to chase people up or see where things are at - and you can allocate your time to other tasks as well.

Chelsea: Yeah, fantastic, Ben. I do hope the status updates along with the other features we've shown you today can help you and your team to sharpen your communication skills

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

and work together in a more seamless way. I think tools like eSigning CCs and form filtering in particular will help you all work together more effortlessly, especially when people are away working in the field or out sick.

Marc: Awesome! Thank you, Chelsea. If anyone has any questions, please use this time to flick them in the chat or use the Q&A feature, we're happy to clear anything up or answer any new questions that you have right now. So yeah, let us know. Okay, we have one question..."Instead of adding an extra rental provider in annexure, can we have an option to add it in the main document?"

Ben: You can add more through annexures but the reason that the annexes are there is because the format then sort of changes, if that makes sense. But I might reach out to seperatly, it's just that each form has got a standard template within the system and then that's what the annexes are there for if you need additional rental providers, or tenants, or vendors and those sorts of things.

Chelsea: That was actually really helpful, thank you. If people do have questions and feedback around that even when you're just using your forms guys, feel free to email Ben, or myself, or even support if you have any ideas because sometimes there's features, we may already have that you haven't found yet that we can help you find them! But yeah, it all definitely goes towards working out what we do for updates and development next. So, thanks very much the questions and keep them coming.

Marc: Before we go, I just wanted to spotlight the Partners Program. This is something new that we've established for existing subscribers, basically when you recommend Forms Live to a friend or another agency and they subscribe to the platform, you'll be given a free additional month of access when they mention your name. You can claim an additional month for every person who you successfully refer us to. I'd also like to mention for anyone who isn't subscribed to Forms Live that's tuning in today, we have an End of Financial Year Deal going at the moment - please reach out to either Ben or Chelsea, they're happy to help you with that deal. You can see their details on the screen right now. They're also happy to talk forms, free trials, pricing and more. That's about it today, everyone. Thank you for tuning in, keep an eye on our socials and emails for future webinars.