




Form Guru's Choice: Templates

Marc: Good morning, everyone! Thank you for joining us for today's webinar - we're super happy to have you all here - if you haven't attended before, my name is Marc, I am the Content Creator for Forms Live, and today, joining me is Ben and Chelsea, who are our Business Development Managers. If you have attended our webinars before, welcome back! This should be a short and sweet one - and if you have any questions throughout the session, you know, please chuck them in the chat or use the Q&A feature, and we'll leave time at the end of the session as well to answer any of your questions. So, let's get into it, if you know us, you know we always keep an ear out for our subscribers needs and feedback, and recently, we've had a lot of questions regarding Forms Live's templates, which is why we've decided to sit down with you today and discuss templates. In today's session, we'll be going through templates step-by-step and sharing our tips and tricks for using templates to erase repetitive data entry, save time, and boost productivity to new heights. So, if you're often reusing the information that you have in forms like the Leasing and Sales Authorities or any forms for that matter, then allow us to show you how to streamline that process with templates. Let's hit it off with the basics, Ben?



Ben: Great, Marc! Always a great place to start. So, for those who haven't dabbled in creating templates before and filling them out, it's quite easy, it's just like creating any other standard form - so, it's just a matter of looking in the right places. So, Marc is going to put a demo on screen. So, you'll find the Template Page via the navigation menu once you see an open the platform, from here, click 'create', and the forms list will generate. Then, find the form that you'd like to create a template with by scrolling down or searching by name, select the form, give it a name, and then click 'create' again to generate it. Now, you have a base to work off, so you'll fill in any data or information that you need. For starters, you might want to start by clicking into a field and entering any data that you frequently use in that form, of course, don't forget to save as you progress as you go along, so you can either return to the template or continue editing at a later stage, if you wanted to. And now I think we're going to jump a little bit deeper with annexures, Chelsea?

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Chelsea: My pleasure, Ben! it's simple, super simple from this point forward, simpler than my talking! So, just so we're all on the same page, annexures will allow you to add additional Vendors and Conveyancer details, blank pages, and essentially whatever additions you need that aren't already included in the base form or template. So, to view and add them, simply move to the template sidebar and find the annexures tab. Click any annexures that you would like to include in the template, then click 'save' and have them added to the template. If you scroll down, you'll notice that the annexures added are added as new pages and generated at the end of the form.

Marc: Yes, fantastic, Chelsea! Annexures can be super handy, especially when you need additional Vendors or Signers on a particular property, as Chelsea mentioned. This takes us directly into PDF attachments, which you can, of course, include in your templates as well. Ben let's talk about PDF attachments!




Ben: Of course, Marc. So, as Chelsea mentioned, it's super simple. I'm sure many of you want to attach some PDF at some stage, either as a Renter's Handbook or a Section 32 to a Contract of Sale, here's how it's done. So, from the above toolbar, click 'more', then click 'files' like you would with any other search. Select the file that you're after, from here you would find the document you would like to include in the template, it needs to be obviously in a PDF format, click 'upload', and once you're ready and done, the document is attached, and you can attach as many documents as you want to any form or template.

Marc: It might seem like we're really flying through today's session but that's just because, like we've been saying, the process really is that simple once you get the hang of it! As you guys have been doing, please let us know in the chat if you are confused about anything, or if you have any questions about anything that we've mentioned so far. Until then, let's get to the fun part - Chelsea, can you talk us through the process of turning templates into actual forms that our viewers can use in their transactions?




Chelsea: Yep, on it, Marc. So, creating forms is obviously what we're preparing these templates for in the first place! So, here's how you can do exactly that from the Templates Page. Find the template you'd like to turn into a form, click the three dots beside the form, beside the template, then click 'create form'. You'll be prompted to then give it a name and tick or untick if you'd like to carry over attachments or not. Then

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click 'save', and you're done! The new form will be generated and can be completed and signed, as per usual, it'll be located on the form page once it's been saved.

Marc: Good job, Chelsea! Again, as easy as that might sound, it might not be the most straightforward aspect of creating templates because you must find the option.

However, we're sure you guys will quickly get the hang of all of this. Now, Ben, can you take us into template creation from existing forms?

Ben: Sure, Marc. So, this is a handy feature. So, if you've ever created a form and you think that it'd be great to have a template version with all the details that you've already uploaded, you don't need to create a duplicate of a duplicate, and so on, you can just create a template! So, you would go to the Forms Page and find the form that you're after, you would click on the little three dots off to the right, find and click 'template', and then give it a name! Once you click 'create template', it'll be generated and can be found in the template section as well. So, you can now reuse the information, the attachments, and annexures from the forms that you've already created.




Marc: That pretty much covers the basics of templates, you know, hopefully you've learned a lot about that process, and you can start utilising them a bit more within your agency and among your team! They really are huge time savers and can completely boost your productivity levels with less data entry and preloaded annexures. Now's a good time to ask questions which we have them coming in now (Link back up to FAQs). I'm just going to spotlight the Partners Program; this is something new that we've established for existing subscribers. When you recommend Forms Live to a friend or another agency and they successfully subscribe to the platform, you'll be given a free additional month of access if they mentioned your name so you can claim additional months of access for every person you successfully refer us to, for more information on that program, I'll point to the partners page, which you'll find on our website. Or I'll point you to our BDMs, their contacts are on the screen right now - they're happy to talk to you about forms, trials, pricing and, of course, templates and any questions that you need following up with today!

Ben: Thank you for tuning in everyone!


Chelsea: Thank you, bye all!

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