

## Form Guru's Choice: Info Request

Marc: Hi everyone, thank you for joining us today. I'm Marc Persico, I'm the content creator here at Forms Live, and I'm joined with Ben Slawitschka, our Business Development Manager.

Ben: Hi all.

Marc: So Ben, what are we going to be talking about today?




Ben: So we're going to be talking about a very exciting feature called Info Request, with which an agent or manager will be able to create a draft form and send it to clients for them to handle the information on the agents or manager's behalf. This feature has been highly requested over the last sort of six to twelve months, so we're glad to finally bring it out, aren't we Marc?

Marc: Yeah, we are. We definitely are. So, as Ben mentioned, it is a very new feature, so it's not yet available on every form, though we are working on that. Currently, Info Request is available on the Rental Provider's Instructions, the Pet Request Form, Pre Rental Disclosure Statement checklist and the Rental Minimum Standards checklist. I should also note the Rental Provider's Instructions form has annexures for both of the checklist and the property description and particulars, so they can all be sent as one with Info Request. If you're ever wondering which forms have Info Requests available, if you go to our Forms page and check out these little blue icons, those forms can be sent within for request.




Ben: Yeah, correct. So the four that we've got at the moment are probably the four that are in high demand for this sort of feature. I'm probably a little bit biased to think that Forms Live helps you cut your time in regards to admin, but this feature with these four forms is actually going to help you even further. But if there's any others that you might think that are worthwhile using this feature on, you guys are using it every day. We'd love to hear any feedback. You can shoot me an email or pop it in the chat and we'd be happy to do so. I think we're going to actually get into a form now, Marc, aren't we?

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So we'll actually use the rental provider's instructions. How does that sound?

Marc: Awesome.




Ben: So let's say I'm an agent and I'm working to obviously find this information and I've hit a point where I need more information from the client before I can proceed. We open up the Info Request tab which Marc is displaying here. We've put in the details of who we're going to send it to. So Marc is the rental provider, we've got his email address and his phone number. Then as you would notice that on some of the other forms we've got a message that will be sent out with the email. There's a standard template in there, but you can change it if you want to, as Marc's doing here - and it's as simple as that. This is sent out so your landlord or client will receive this for the information that you're seeking. It's worth clarifying though, that by sending this form out, it doesn't mean that they fill it in and sign it at that particular time. They'll add in the data that you've requested and then it'll be sent back for you to review and approve. And then once you've approved that, you can actually send that out for them to sign through DocuSign.

Marc: Awesome. So it shouldn't take long, but they'll get the request via email and they will see the message that you provided as Ben said, which is important to leave so they know what kind of information to provide you with. So here it is. As you can see here, this is the message that was left in the message box and they'll click this button and here they'll have this screen and it will say we need information from you. They'll click get started and yeah, they'll be able to view the form and they can edit all these text boxes with the information required of them and check any boxes. And once they've got everything, they can either save it and come back to it later or it autosaves or they can click Complete - Yes, complete - and done. They've inputted the information and on the agent or managers and in Forms Live they'll just need to refresh the form. And here you can see all the information that the client inputted and since the form isn't finalised yet, it's still in draft. If the agent or manager needs to make any edits, they can still do that and then send it for signatures. It's as simple as that.




Ben: It is quite simple and easy to use, like all of our forms, but as I said earlier, it's a real game changer when it comes to saving time. Rather than yourself filling these in with your rental providers instructions, you can send it off to your rental provider and they can provide all the information that's needed and so on.

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As I said earlier, we've got those four forms available at the moment, but if you have any recommendations that you think this feature would be good on, we'd be happy to hear, pop it in the chat or shoot me an email if you've got my email address. Has anyone got any questions this morning?

Ben: Okay. We like to keep these short and sweet because we know that you're busy during the day and don't want to take too much out of your diary, but want to highlight any new features that we've got coming up. And you'll always see anything once you've logged into the platform under the news section of any webinars that we've got coming up for any new features or refreshers and so on. So keep an eye out on that.

Marc: We got one here. Can you create your own form to send out?




Ben: No, unfortunately all our forms are pre populated due to legislation, requirements and legalities. Obviously, we consult with our solicitors Colin, Biggers and Paisley, to make sure that they're all legal and so on. But Nikki, if there is a certain form that you're after, please let me know and we're happy to have a look at it. I'll just type in my email address and my mobile number, so if you want to shoot those details through, we're happy to have a look.

Marc: Well, if that's it, I'll just put your details up on the screen, Ben. So if anyone has any questions, feel free to follow up with Ben, send a message, and book a meeting.



Ben: Well, thanks for joining us and thanks for your time. I hope that this is going to be a help and assistance to you. If you've got any questions, feel free to reach out and give me a bell. If not, we'll see you on the next webinar.

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