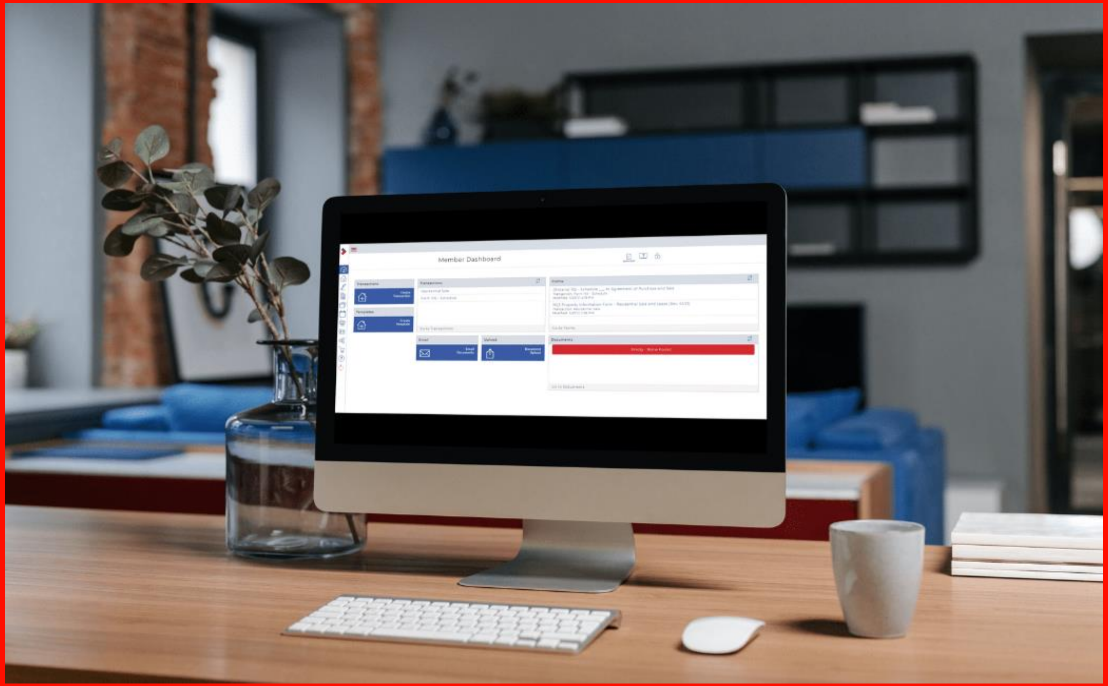
LONDON
ST. THOMAS
ASSOCIATION OF
REALTORS®
Bringing people and properties together



WEBFORMS®
COURSE HANDBOOK

learning@lstar.ca

CONTENTS

WEBFORMS®

Purpose

To help LSTAR Members and Brokerage Staff learn how to use WEBForms® and e-Signature with confidence while performing their daily tasks.

Duration

3 Hours

Course Goals

- Apply and use the tools in the WEBForms® platform to create a template and a clause.
- Prepare an offer or a listing using the WEBForms® template method.
- Complete an AuthentiSIGN® document.

Resource Links for Class

WEBForms®	Thames Valley District School Board https://www.tvdsb.ca/en/index.aspx
Matrix™	
GeoWarehouse®	City of London - https://london.ca/

MODULE 1 (1 HOUR)

NOTES

Learning Outcomes

1. Learn
   - How to unlock and customize the dashboard using widgets
   - Identify the most popular widgets
   - How to expand and close the widgets
2. Review applicable tabs on the left by extending the hamburger menu:
   - Dashboard
   - Transaction Forms
   - Documents
   - Link to e-Signature
   - Platform Set-up: preferences, program settings (only transaction settings, document settings, form settings and email settings), clauses transaction templates, sharing function

MODULE 1 (1 HOUR)

3. Locate and learn how to upload documents for use in transactions.
   a) How to use the file folders and create new ones
   b) How to add a document
4. Locate the areas to create clauses and transaction templates.
   a) Learn how to add a clause by typing a new one or copying and pasting
   b) Learn how to separate into different folders (folder suggestions could include mandatory, multi-family, dual agency, optional, etc.)
   c) Learn how to create an offer template including adding forms and clauses
   d) Suggestions for other templates that they can create at home (residential sale, residential listing)

NOTES

MODULE 1 (1 HOUR)

NOTES

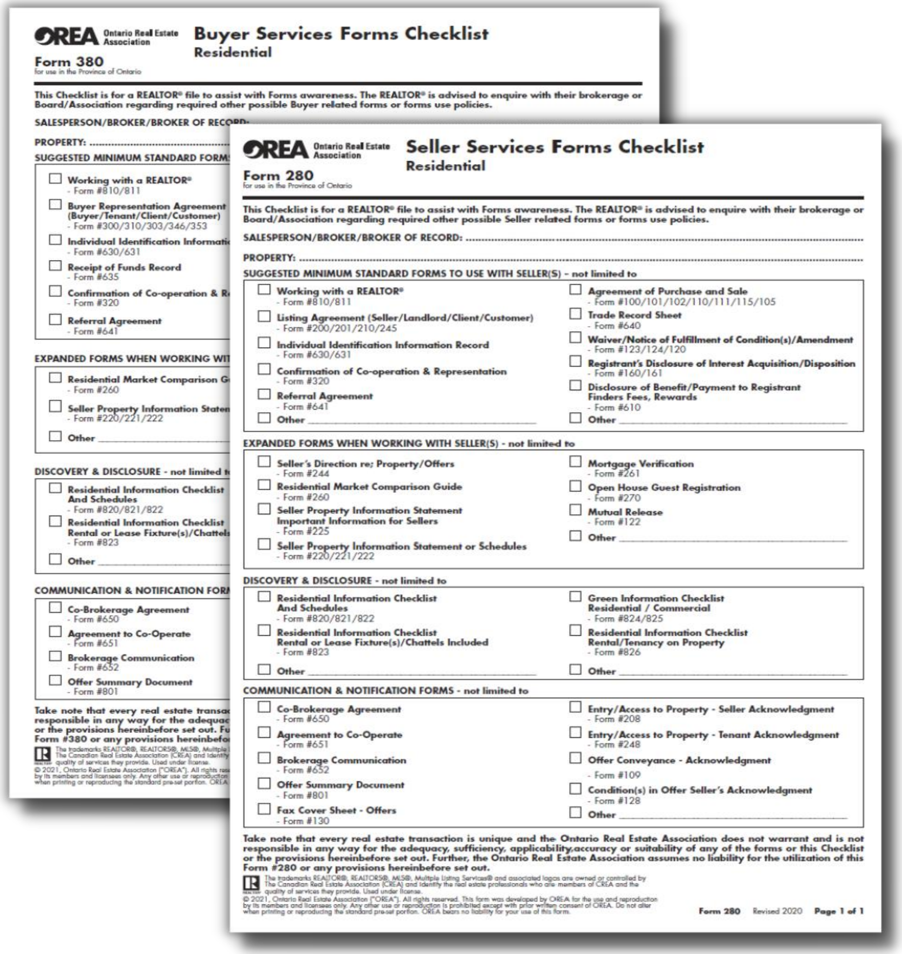
e) Open the template creator and learn step-by-step how to create your own template

- Add appropriate forms - see next page examples (Ontario) 380 - Buyer Services Forms Checklist - Residential (Ontario) 280 - Seller Services Forms Checklist – Residential
- Add 4 standard clauses to the template (pay the balance, pay all costs, electronic signature, electronic pay of deposit)
- Tools for editing forms and clauses
- How to save it, come back to it, add/subtract a page, move clauses around by selecting and dragging or copying and pasting

MODULE 1 (1 HOUR)

NOTES

Checklist



OREA Ontario Real Estate Association

Buyer Services Forms Checklist
Residential

Form 380
for use in the Province of Ontario

This Checklist is for a REALTOR® file to assist with Forms awareness. The REALTOR® is advised to enquire with their brokerage or Board/Association regarding required other possible Buyer related forms or forms use policies.

OREA Ontario Real Estate Association

Seller Services Forms Checklist
Residential

Form 280
for use in the Province of Ontario

This Checklist is for a REALTOR® file to assist with Forms awareness. The REALTOR® is advised to enquire with their brokerage or Board/Association regarding required other possible Seller related forms or forms use policies.

SALESPERSON/BROKER/BROKER OF RECORD: ....

PROPERTY: ....

SUGGESTED MINIMUM STANDARD FORMS TO USE WITH SELLER(S) - not limited to

- ☐ Working with a REALTOR® - Form #810/811
- ☐ Listing Agreement (Seller/Landlord/Client/Customer) - Form #200/201/210/245
- ☐ Individual Identification Information Record - Form #630/631
- ☐ Confirmation of Co-operation & Representation - Form #320
- ☐ Referral Agreement - Form #641
- ☐ Other
- ☐ Agreement of Purchase and Sale - Form #100/101/102/110/111/115/105
- ☐ Trade Record Sheet - Form #640
- ☐ Waiver/Notice of Fulfillment of Condition(s)/Amendment - Form #123/124/120
- ☐ Registrant's Disclosure of Interest Acquisition/Disposition - Form #160/161
- ☐ Disclosure of Benefit/Payment to Registrant Finders Fees, Rewards - Form #610
- ☐ Other

EXPANDED FORMS WHEN WORKING WITH SELLER(S) - not limited to

- ☐ Seller's Direction re: Property/Offers - Form #244
- ☐ Residential Market Comparison Guide - Form #260
- ☐ Seller Property Information Statement Important Information for Sellers - Form #225
- ☐ Seller Property Information Statement or Schedules - Form #220/221/222
- ☐ Mortgage Verification - Form #261
- ☐ Open House Guest Registration - Form #270
- ☐ Mutual Release - Form #122
- ☐ Other

DISCOVERY & DISCLOSURE - not limited to

- ☐ Residential Information Checklist And Schedules - Form #820/821/822
- ☐ Residential Information Checklist Rental or Lease Fixture(s)/Chattels Included - Form #823
- ☐ Other
- ☐ Green Information Checklist Residential / Commercial - Form #824/825
- ☐ Residential Information Checklist Rental/Tenancy on Property - Form #826
- ☐ Other

COMMUNICATION & NOTIFICATION FORMS - not limited to

- ☐ Co-Brokerage Agreement - Form #650
- ☐ Agreement to Co-Operate - Form #651
- ☐ Brokerage Communication - Form #652
- ☐ Offer Summary Document - Form #801
- ☐ Fax Cover Sheet - Offers - Form #130
- ☐ Entry/Access to Property - Seller Acknowledgment - Form #208
- ☐ Entry/Access to Property - Tenant Acknowledgment - Form #248
- ☐ Offer Conveyance - Acknowledgment - Form #109
- ☐ Condition(s) in Offer Seller's Acknowledgment - Form #128
- ☐ Other

Take note that every real estate transaction is unique and the Ontario Real Estate Association does not warrant and is not responsible in any way for the adequacy, sufficiency, applicability, accuracy or suitability of any of the forms or this Checklist or the provisions hereinbefore set out. Further, the Ontario Real Estate Association assumes no liability for the utilization of this Form #280 or any provisions hereinbefore set out.

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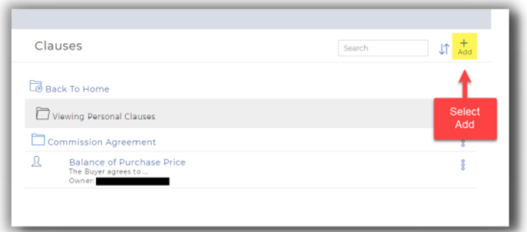
MODULE 1 (1 HOUR)

NOTES

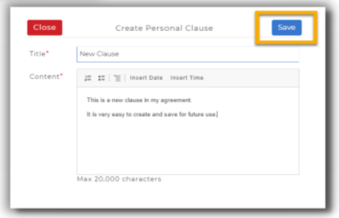
How to Add / Create a Clause

To view the CREA video go to:
https://vimeo.com/329856224/35915f3a8f

- Log into WEBForms® from your Dashboard Select – Setup
- Select - Clauses
- Select - Personal Clauses (only option available to you)
- Select - Add
- Select - Add New Clause



- Enter your Clause
- Select - Save



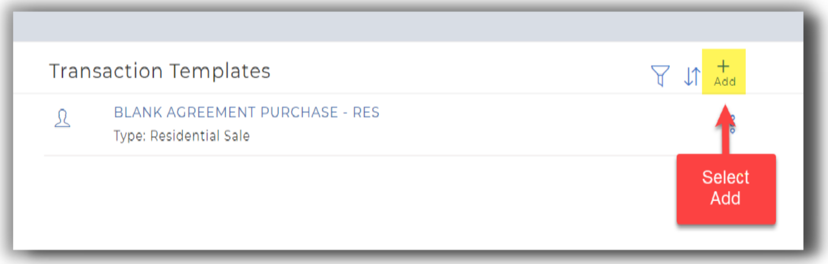
Note you can also create Folders to organize your Clauses

MODULE 1 (1 HOUR)

How to Add / Create a Template

To view the CREA video go to:
https://vimeo.com/322638850

- Log into WEBForms® from your Dashboard
- Select - Setup
- Select - Transaction Templates
- Select - Add

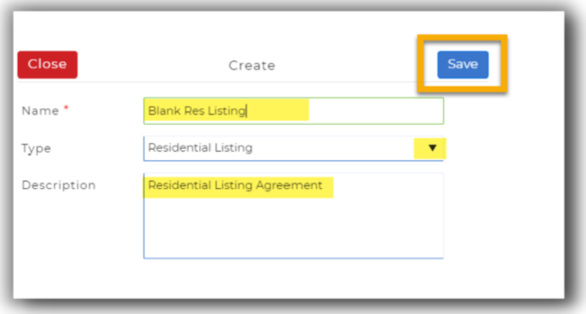


NOTES

MODULE 1 (1 HOUR)

NOTES

- Name your template (blank listing, blank offer)
- Select – Save

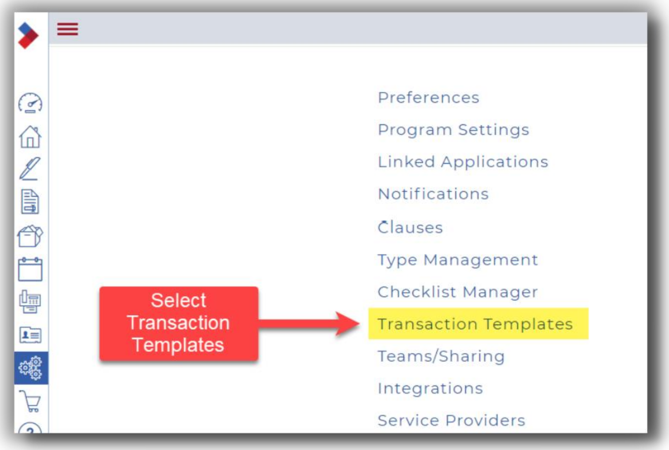


- Add documents if needed i.e.: Schedule "B" for interest bearing account
- Add forms - add anything you would need in a transaction including Mutual Release and Notice of Fulfillment
- Go through each form adding any clauses or information that you would use EVERY TIME. You will always have the option to delete in the actual transaction if the item is not required

MODULE 1 (1 HOUR)

NOTES

- Select - Update
- Go back to your Transaction Templates



- Your new template will be there now for use on all transactions

MODULE 2 (1 HOUR)

NOTES

Learning Outcomes

Start a transaction offer and label it as the property or client's name.

1. Make sure to start with the template that was created
2. Walk through the steps of the template by clicking on "Next"
3. Scroll down to the forms section and complete each form
4. Review how to add clauses to Schedule A and edit them
5. Complete the transaction
6. Review how to retrieve a transaction
7. Sending of a transaction to email or e-Signature
8. Using the share function

MODULE 2 (1 HOUR)

How to Complete a Transaction

To view the CREA video go to:
https://vimeo.com/374942965

Summary

Describes how to create a transaction in TransactionDesk using the MLS® number to pull in the listing information from the MLS® listing, and a template to pull in the forms and documents required for the transaction.

Context

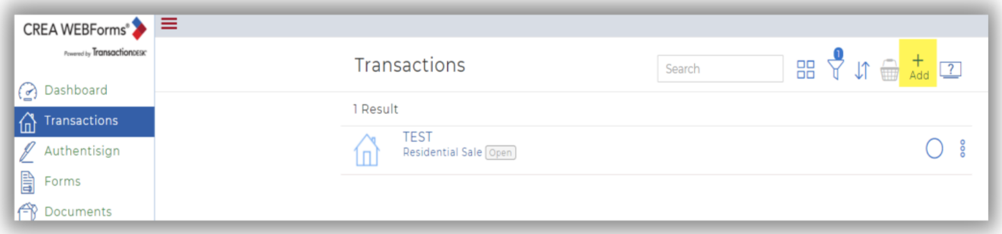
You can use a transaction to represent any interaction with a client, from a new listing to the completion of a sale.

You can add a transaction where you manually provide all of the transaction information, or you can use the MLS® number to populate many of the fields.

NOTES

MODULE 2 (1 HOUR)

- Navigate to Transactions - the list of transactions appear
- Select – Add



- In the Name field, enter a name for the transaction. Typically, this is the street address of the property
- Use the Template dropdown to select the appropriate template to automatically add a checklist, forms, and documents. If you have not yet created any templates, the option is not available.
- Consider creating a template first

NOTES

MODULE 2 (1 HOUR)

- Use the Import Data dropdown to select the MLS® Association you want to pull the data from
- Enter in the MLS® number for the property
- If no MLS® number go to "Add me as the" section
- In the "Add me as the" section - select your role
- Select - Create
- The Wizard appears with much of the listing information being pre-populated from the MLS® Listing
- In the Property Information area, enter as much information as you can

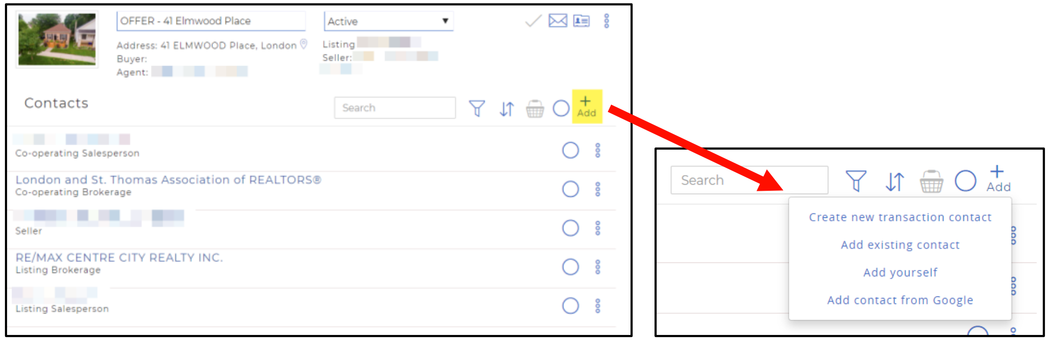
NOTE
The brokerWOLF number applies to integrations with brokerWOLF, and is not available until after the transaction is sent to brokerWOLF.

NOTES

MODULE 2 (1 HOUR)

- Scroll down to the Listing Information area, and enter as much additional information you can
- Select - Next
- The Contacts page appears. This page lists all of the contacts associated with the transaction
- Add any contacts that may be missing by clicking "+"

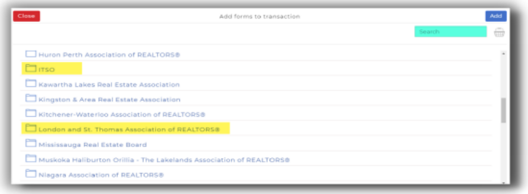
NOTE
If you added yourself to the transaction, your name appears.
Other contacts are populated from the MLS® listing.



NOTES

MODULE 2 (1 HOUR)

- The Forms page appears
- Any forms associated with the transaction through the template are listed here
- To add more forms to the transaction, click Add
- The Add Forms to Transaction page appears
- Navigate / scroll through the folder structure
- Ontario Real Estate Association
- ITSO - area specific forms (listings etc...)
- London and St. Thomas Association of REALTORS® - area specific forms (listings etc...)

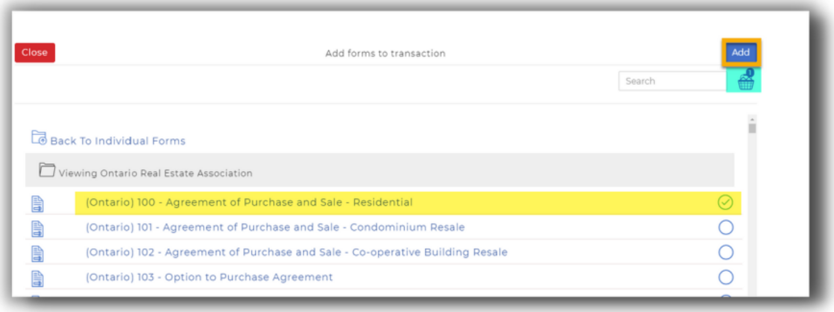


NOTES

MODULE 2 (1 HOUR)

NOTES

- When you locate a form you want to include, use the selection box to the right of the form name to select the form for inclusion in the transaction
- Your basket will indicate the number of forms you want to add
- Select – Add



- In the Wizard click Next
- The Documents page appears
- To attach a document to the transaction, click Add

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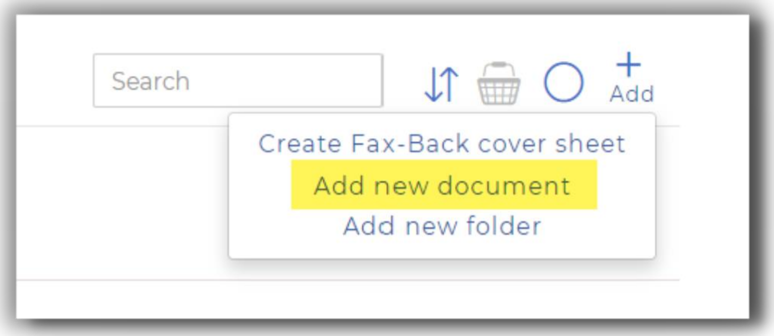
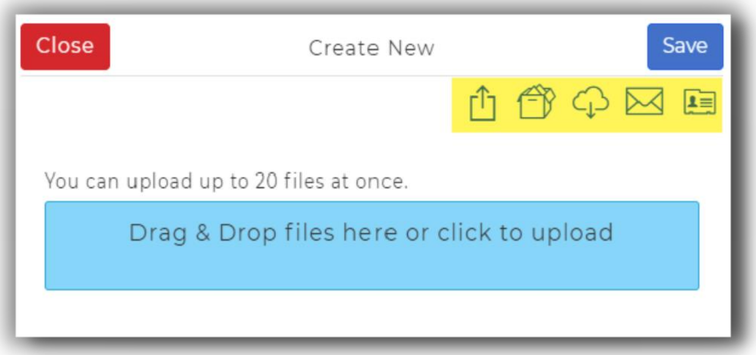
MODULE 2 (1 HOUR)

- Select what you want to add



- The Create New page appears



NOTES

MODULE 2 (1 HOUR)

You can do one or more of the following:

- To upload a document from your computer, drag and drop files from your computer to the Drag & Drop Files Here area, or click the blue bar to browse for the document(s) you want to upload.
- To copy documents from your Documents, Navigate to and select the appropriate document, and click Save.
- To import a document from Dropbox, Google Drive, or another third-party document storage system, select the appropriate third- party document storage system, locate the document, and click Add.
- To upload a document from your email account, Click Open in Email Client, locate the document, and click Add.
- Download a contact card for the transaction, so that you can email documents directly to the transaction.
    - This adds an email contact to your email. In future, you can email documents directly to this contact, and the documents are attached automatically to the transaction.

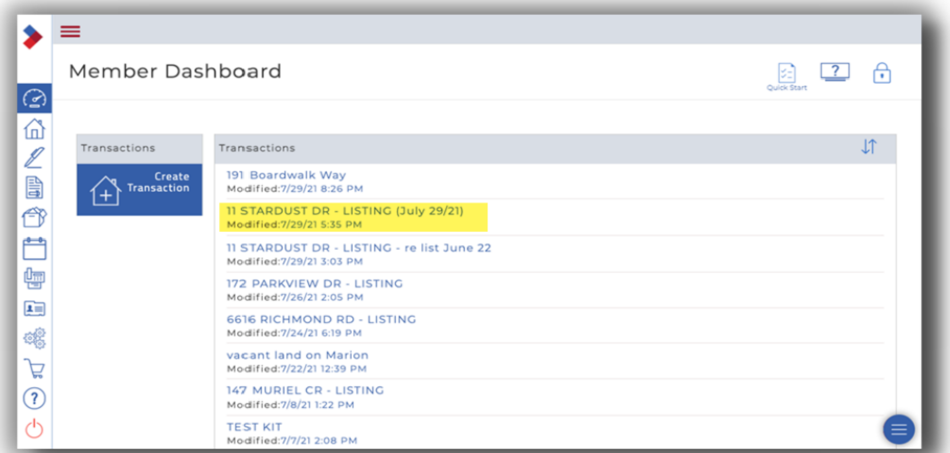
Select - Done

The transaction will now be added to the list of transactions in the system

MODULE 2 (1 HOUR)

How to Retrieve a Transaction

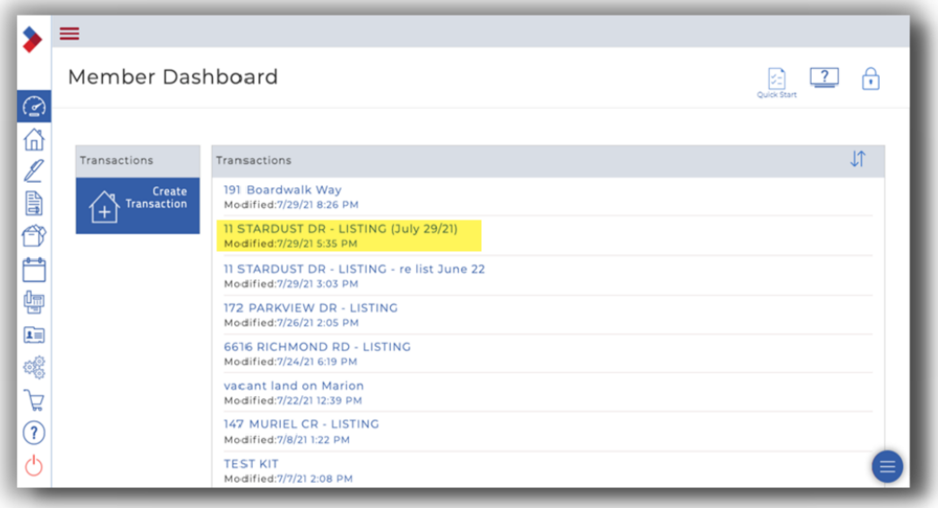
- Review how to retrieve a transaction
- Choose a Transaction from the Member Dashboard



NOTES

MODULE 2 (1 HOUR)

- The Transaction will open
- Select - Go to Forms
- Update as required



NOTES

MODULE 2 (1 HOUR)

How to Link an account for e-Signatures

NOTES

Linking to a DocuSign® Account

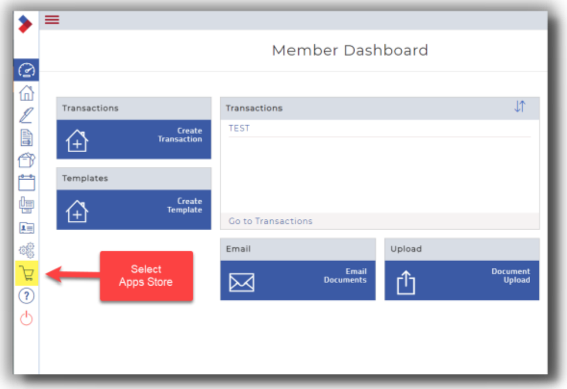
To view the CREA video go to:
https://vimeo.com/378608719

Linking to an AuthentiSIGN® Account

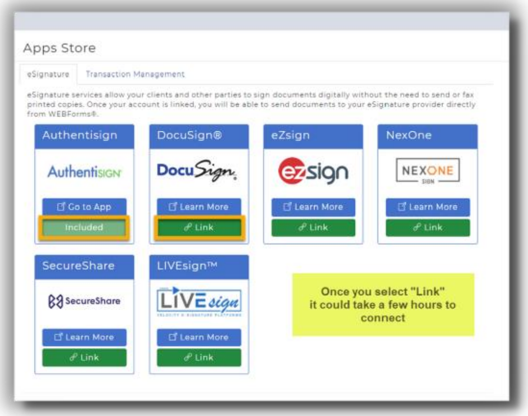
To view the CREA video go to:
https://vimeo.com/378608746

MODULE 2 (1 HOUR)

- Select - Apps Store



- Select - Your preferred platform using the "Link"
- This can take a few hours to connect

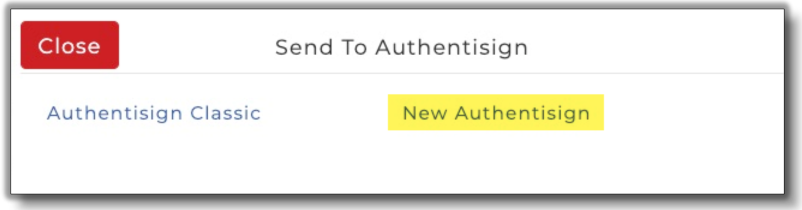


NOTES

MODULE 2 (1 HOUR)

NOTES

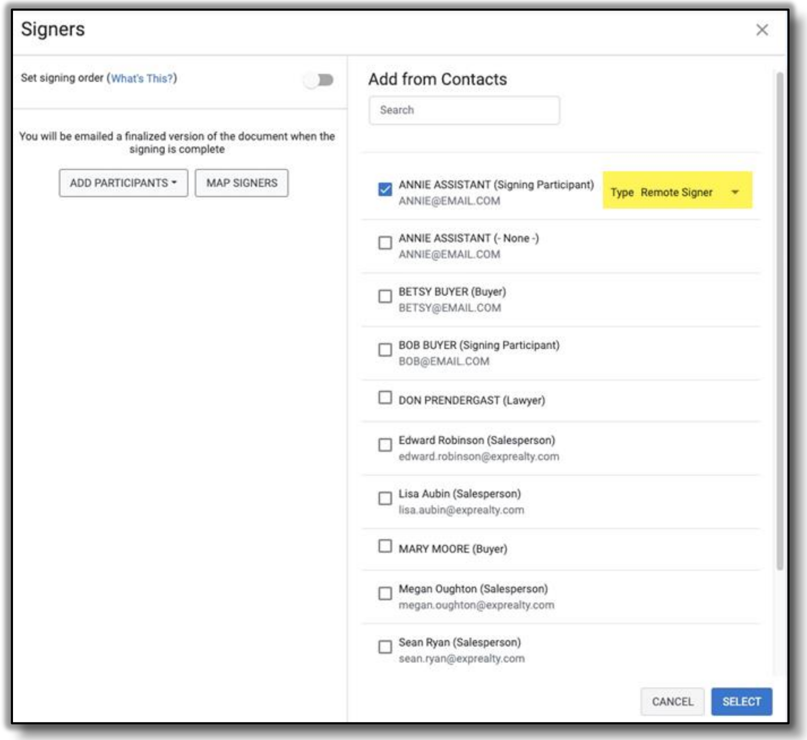
- Choose New Authentisign®.



- Add Participants by using the drop-down list. If you are including a CC (carbon copy), choose that person first by adding from contacts or add new. Then choose “add from Transaction” to have Authentisign® place the template on the documents, and automatically add the tabs needed.

MODULE 2 (1 HOUR)

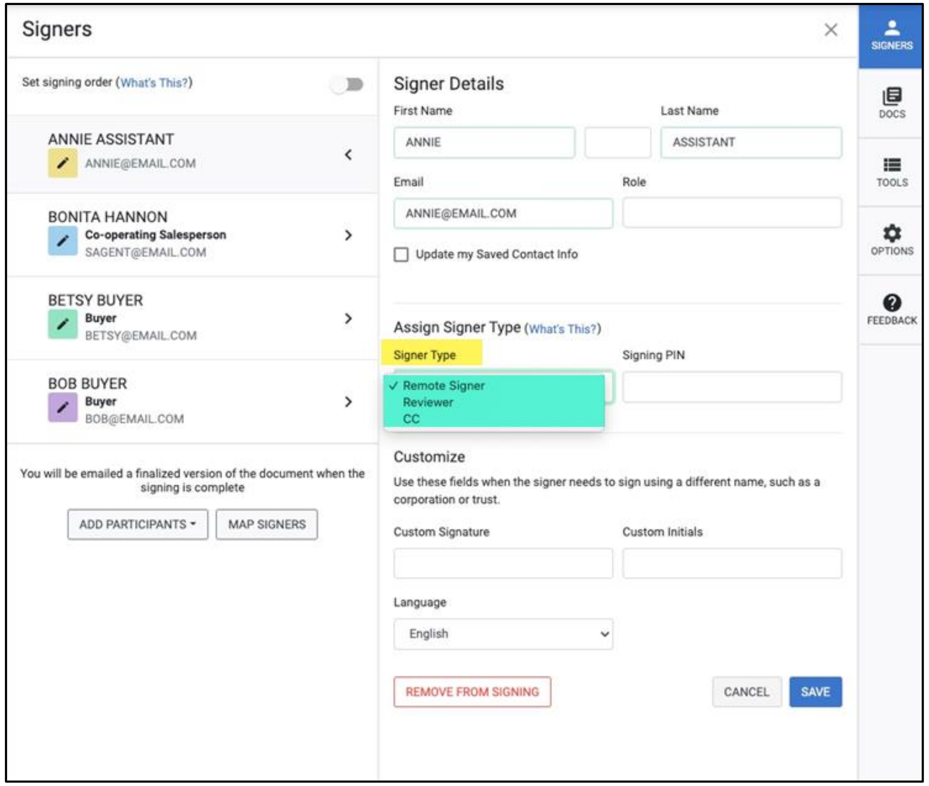
- When selecting the signers, use the drop down list to assign the type i.e. remote signer or CC (carbon copy).



NOTES

MODULE 2 (1 HOUR)

- Set the signing order and make sure each signers name and type is filled in and correct.
- Be sure to save.

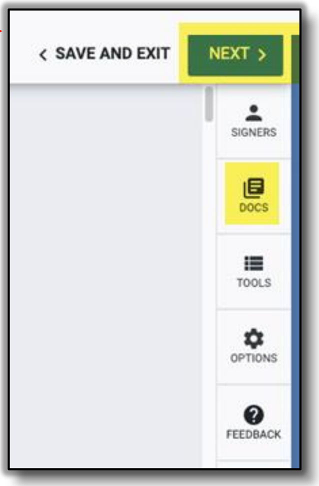


NOTES

MODULE 2 (1 HOUR)

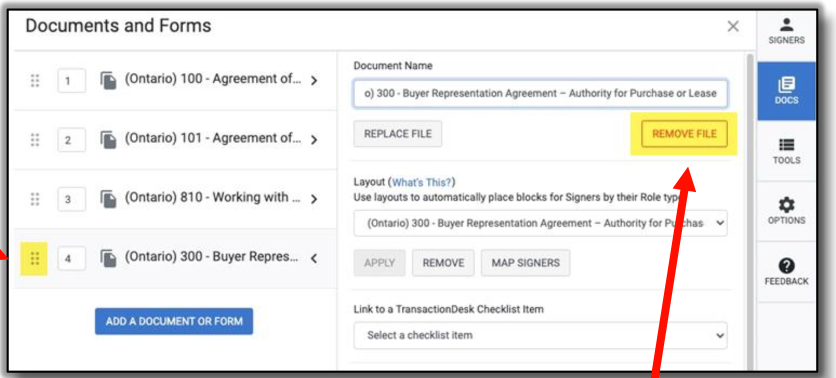
NOTES

- Click on NEXT or DOCS TAB.



- Check each document for tabs applied, missing info, tabs or signatures, and put them in the order you want.
- If there are any documents that are there in error, delete them.

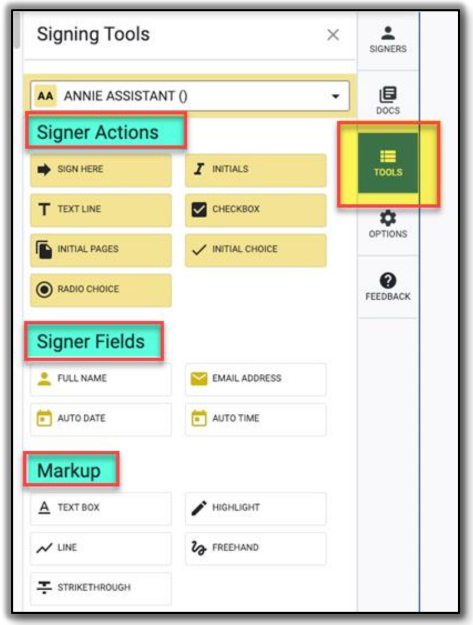
Move document into the signing order you want them in



Remove File if needed

MODULE 2 (1 HOUR)

- Click on TOOLS TAB to do any mark ups, create text or more signature lines.



- Corrections needed will be pointed out. Go back to the SIGNERS TAB to make any corrections by clicking on the tab in the document. This opens another window to make adjustments.
- Each signer needs at least one mandatory signature tab.

- Use the Options Tab to add expiration dates and reminders.
- Click on the NEXT to email, adding personal messages on each if required.

NOTES

ADDITIONAL INFORMATION

Residential vs. Multi-Family Forms – How to Properly Use Each

Residential Form

USE IT FOR
- Single family or townhouse freehold Single family or townhouse condo
- Single family lease (including townhouses and apartments) Apartment condo
- Modular home Mobile home
- Cottages or waterfront properties
- Any home that has a common element fee but is not a condo
- Deeded parking

DO NOT USE IT FOR
- Any sort of multiple family home

Multi-Family Form

USE IT FOR
- Duplexes
- Triplexes
- Homes with 4+ units

DO NOT USE IT FOR
- Single family homes of any type
- Condos of any type

IMPORTANT THINGS TO NOTE

If you list your multi-family home using a single family residential form, it will get loaded as residential listing, and buyers looking for a multi-family home may NOT find your listing.

You may list your multi-family as both multi- family and single family residential, but, primarily, it must be listed as multi-family.

All of the new ITSO forms can be found in WEBForms® under the LSTAR folder, as well as the ITSO folder.

ADDITIONAL INFORMATION

How to get multiple documents/forms signed for a Transaction

Summary

Describes how to make documents or forms available to responsible parties for signatures.

Context

When documents or forms for a transaction are ready to be signed, you can use WEBForms® to make them available for signatures. You can send the actual document or form electronically to those who need to sign, or you can email links to the electronic documents.

Before You Begin

You require access to Authentisign® for digital signatures.

ADDITIONAL INFORMATION

- Navigate to Transactions
- The list of transactions will appear
- Locate the transaction that has the documents or forms to be signed and click on the name. The transaction dashboard appears
- To select forms for signing, go to the forms widget in the Transaction Dashboard. Select "Go to Forms“

- Select a form that requires signing by checking to the right of the form
- The form is added to the basket
- Repeat until all forms are selected
- Click the basket
- Click the Electronic Signature's icon