BCREA Webinar: Making Sense of CREA's WEBForms®

Frequently Asked Questions

Questions covered in the presentation:

1. **Can I download an editable form so that I can continue to make revisions from my computer?**
   Forms can be downloaded both as editable forms & as PDF files. Open the form you want to download as an editable form and follow the steps below.

   Select file → Save → Save as editable PDF

   The form will be downloaded as an editable and fillable form.

2. **When a form is automatically updated in my template, will my clause appear in the updated form?**

   When a template is created in the new WEBForms® and a new form version is released, it will automatically update in your templates. All the clauses that were residing in the template will appear in the updated forms.

   If a form is no longer in use or a new form is introduced, the template will not update. A message will display that the form is no longer in use. Templates will need to be manually updated.

3. **Can I use the new WEBForms® on mobile devices?**

   The new WEBForms® is responsive in design, which means that it can be used across all devices, including PCs, laptops, tablets, and phones.

4. **How do I link AuthentiSIGN® to CREA WEBForms®?**

   To link AuthentiSIGN® to CREA WebForms®, view the Linking to an AuthentiSIGN® Account tutorial and video.

5. **How do I link to DocuSign® or other signature providers?**

   For information on linking DocuSign® or other signature provides, view the Linking to a DocuSign® account tutorial and video.

6. **How do I create clauses?**

   Both **clauses** and **transaction templates** are now accessed by clicking the **setup** icon in the left sidebar.

   View information on working with clauses.

   View information on creating a personal clause tutorial and video.

   View information on inserting a clause into a form tutorial and video.

7. **How can forms and documents be sent to e-signature providers at the same time?**

   CREA is working on a seamless format for forms and documents to be sent together to the e-signature provider.

   You can follow the steps listed below to accomplish combining forms and documents so that they go to the e-sign provider simultaneously, until there is a single step solution from CREA.

   > Open the transaction kit → Open forms → Select the forms that need to be sent to the e-sign provider → Click the basket → Select copy on the toolbar → Click copy to here (this will create PDF versions of the selected forms and copy the PDFs to the documents section of the Transaction Kit).

Open documents → Select all the documents and PDF forms → Click the basket → Select send to AuthentiSIGN® or send to DocuSign®.

8. How do you send to an e-signature provider?

To send to an e-signature provider, view the following resources:

Linking to an AuthentiSIGN® Account tutorial and video.

Sending to a DocuSign® Account tutorial and video (includes other providers).

9. How do you create a transaction without an MLS® number?

You can create a transaction without adding an MLS® number. Once you click on **create transaction**, leave the Import Data (Optional) field and MLS® field blank.

Note: If you select a Board from the **import data** drop down, it will not allow you to move on to the next step without adding an MLS® number.

10. How do you create a transaction template?

To create a transaction template, view the Creating a transaction template tutorial and video.

11. How often does MLS® data get pulled?

MLS® data is available in real time, however, there may be some slight delays depending on individual member boards.

12. How do I access and use clauses?

To access and use clauses, view the Creating a personal clause tutorial and video.

To **create a clause**:

i. In the left sidebar menu, click the **setup** icon

ii. Click **clauses**

iii. Click the **personal clauses** folder

iv. Click **add** at the top right of your screen

v. Click on **add new clause**

vi. Enter a name the clause in the **title** field

vii. Enter the text for your clause in the **content** field

To insert a clause, view the Inserting a clause into a form tutorial and video.

To **insert a clause**:

i. In the form, click inside the text box where you would like to insert the clause

ii. Click the **clause** icon at the very top of the form

iii. You can now select one or more categories the three categories of clauses:

Personal Clauses

Office Clauses

System Clauses

iv. Click the folder in which your clause resides to open a list of clauses

v. Click the circle beside the clause(s) you want to select. The clause(s) is/are added to the basket

vi. Click **ok**

The clause(s) is now inserted into the form.

13. How do I get super user access?

Broker tools provide functionality that is useful to brokers to help them manage office settings, templates, transactions for the office, and document review. Staff users with super user access to the system can also access broker tools.

If you require super user access, your brokerage owner will need to send that request to support@crea.ca and provide the following:

- your complete name, and
- the name and address of office(s) that you require super user access to.

14. How do I report form bugs and population errors?

Please report bugs and population errors to support@crea.ca and provide the following:

- exact name of form,
- screenshots of issue, if possible, and
- step-by-step description of the bug – the more details, the better!

Top 10 webinar questions:

1. **Are there additional training opportunities?**

   Many boards in BC offer WEBForms® training. Check the learning centre to see what opportunities your member board is currently offering.

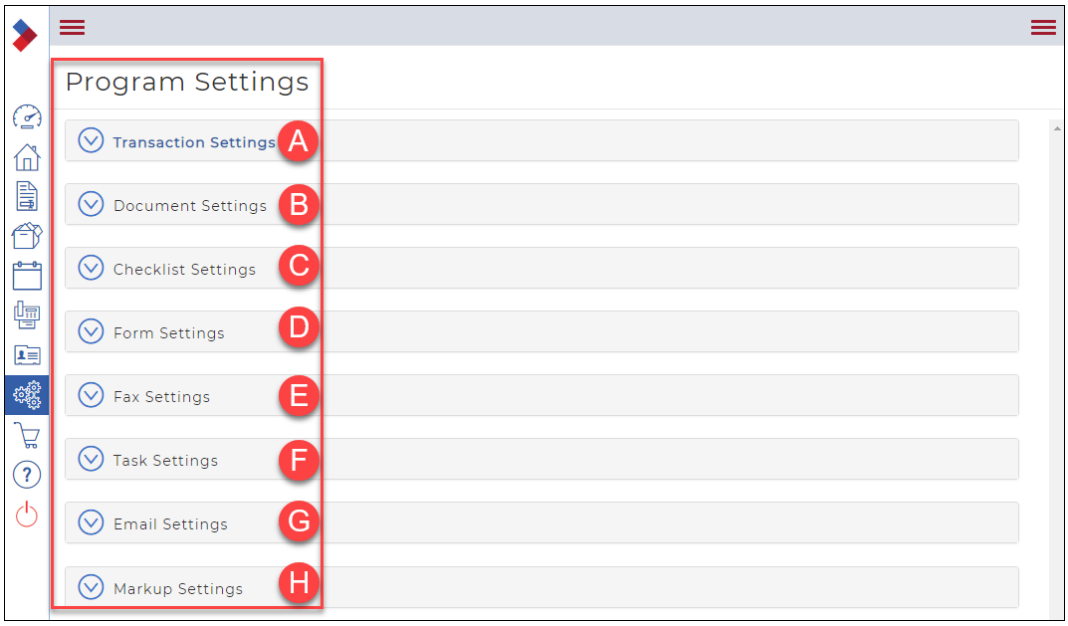
   In addition, you can register for one of CREA's free weekly webinars, led by their in-house WEBForms® experts.

2. **Where do we go to give feedback on the things not working or things that need improvement on the current webforms?**

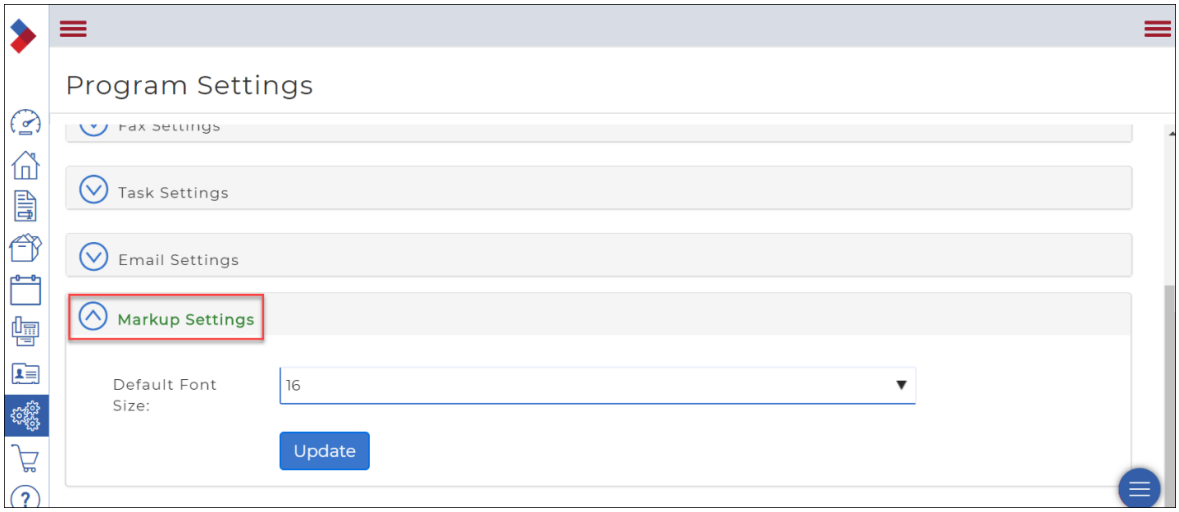
   To provide feedback to WEBForms® on any issues or any improvements you would like to see with the program. You can either call them at #1-888-237-7945 or email: support@crea.ca .

3. **How do I change the default font?**

   In the menu bar on the left-hand side of the screen, under "**Program Settings**," select "**Markup Settings"** to change your default font.



Click **Markup Settings** to configure default markup settings, such as the default font size. When you have finished making changes to the markup settings, click **Update**.



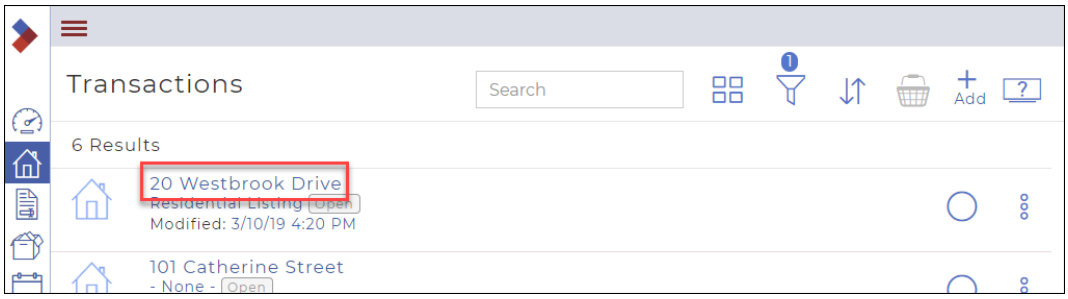
Currently in British Columbia, Helvetica 11 is a very popular font for using in contracts, however, you are free to choose the font that best suits your needs.

4. How do you create a transaction template from an existing transaction?

If you have an existing transaction that contains all the forms, documents, and checklists that it requires, you can create a transaction template from that transaction, to save time in template creation.

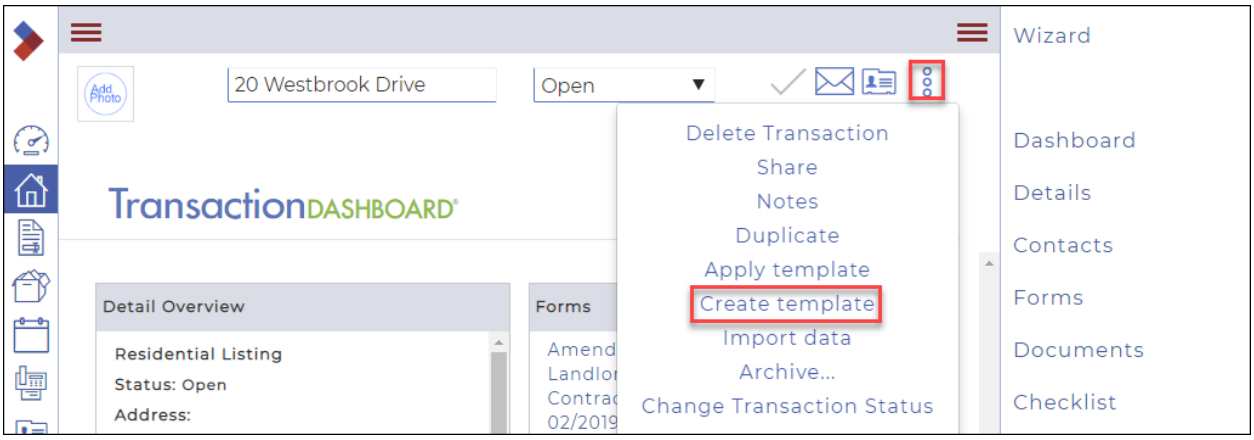
To create a transaction template from an existing transaction:

Click **Transactions** in the Sidebar. This will bring up your **Transactions** display.

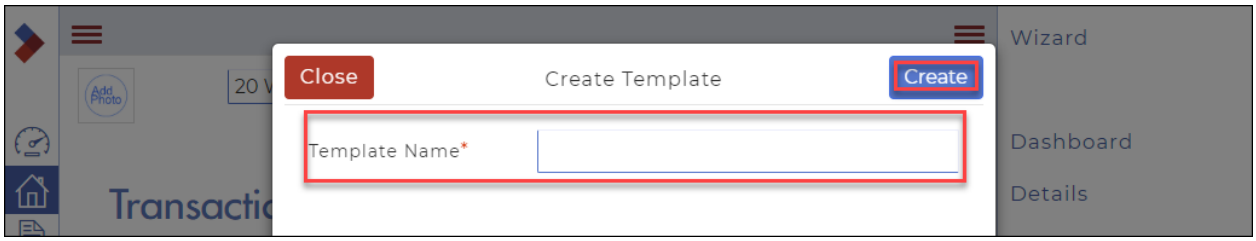


Click the name of the transaction that you want to use as a base for the template.

Click the **ellipses** to display a dropdown menu.

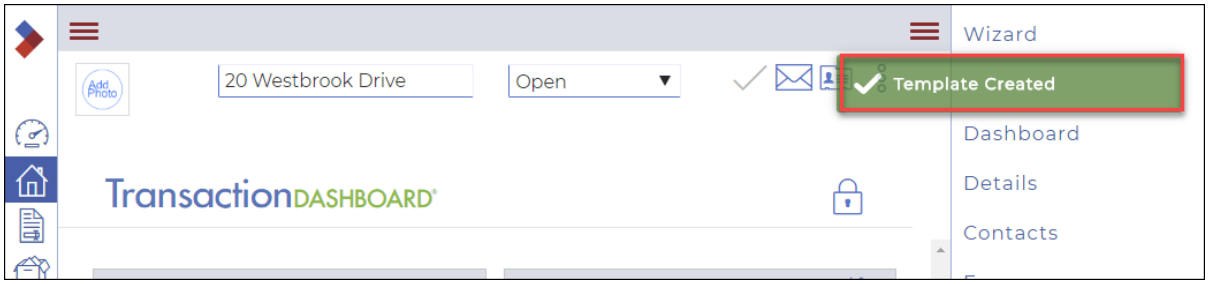


Click **Create Template.** This will bring up the **Create Template** dialog box.



Enter a **Template Name,** then click **Create**.

A message will briefly display in the top right corner confirming the template was created.



The template is created with all the same contacts, forms, documents, and checklists as were in the original transaction. You can edit the template to add or remove items. Signed forms remain filled and signed when a new transaction is created from the template.

5. How do I create a custom dashboard?

The dashboards are your main workspaces. The initial dashboards you see on login are the default workspaces. These are fully customizable. The dashboard lock allows you to unlock the dashboard so that you can customize your workspace with widgets. Once you are done customizing your workspace, you can then lock your dashboard.

For more information, view the Customizing Your Dashboards Using Widgets video.

6. How do I email multiple forms from the forms folder?

You can use the system to email multiple forms to a specific recipient from within the application. This functionality is convenient because it means you do not have to download the form from the system, attach it to an email, and then send it to the recipient.

For more information, view the Emailing multiple forms from the forms folder tutorial and video.

7. How can I delete a transaction?

If you have a deal that falls through before any of the paperwork is loaded into CREA WEBForms®, you may want to simply delete the transaction.

For more information, view the Deleting a transaction tutorial and video.

8. How do you share a document folder with your team?

To share documents with your teammates, you need to create a document folder that is shared with your team.

Note: Before you can share a document folder with your team, the team or sharing group must first be created.

For more information, view the Sharing a document folder with your team/sharing group tutorial and video.

9. Are Docusign® or AuthentiSIGN® the only e-signature providers through WEBForms®?

There are alternate signature providers in WEBForms® such as eZsign and SecureShare, which can be accessed through the WEBForms® App Store.

10. What are the best practices for CREA's WEBForms®?

In CREA WEBForms®, the transaction is the basis of the entire workflow. Think of a transaction as a file, just like the files you have in your office – it contains information on a client, on a listing, on a sale, a lease or whatever you are working on and organizing. Creating a transaction is the foundation for introducing efficiencies, reducing redundant data entry, sharing, and allowing clients and vendors to participate in using the system.

Creating a transaction (or adding to an existing transaction) is the first step anytime you:

- make initial contact with a new prospect,
- schedule a listing appointment and presentation,
- create a listing agreement,
- create an offer to purchase or sell,
- write a lease listing or offer to lease, and
- start a project of any kind.

Creating a transaction allows you to do the following:

- import listing data from your MLS® System,
- import tax or public record data,
- use all the data imported into or manually entered into a transaction to autofill every form added to the transaction;
- create a place in your WEBForms® account to store all the contacts, forms, documents and service orders associated with that transaction or event, and
- start a brokerage file for a newly listed or sold transaction upon notice from the listing or selling agent.

Stay up to date on WEBForms® enhancements

Stay up to date on WEBForms® improvements and software enhancements by visiting the WEBForms® Status Hub!

Questions?

Have questions on CREA's WEBForms®?

Contact CREA Member Support:

1.888.237.7945

support@crea.ca

Extended hours

5:00am PST – 9:00pm PST Monday-Friday

5:00am PST – 5:00pm PST Saturday/Sunday

View the Help Guide:
https://education.realtorlink.ca/wf/help/#t=Introduction.htm