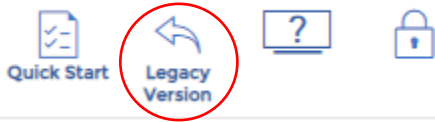


WEBForms® Essentials

Until January 1st, 2020 you can still access the current WEBForms® by clicking the 'Legacy Version' button from the top right-hand corner.



If you want to retain transaction kits from Legacy WEBForm@s, you will need to open that transaction kit in Legacy and click the 'Send Kit to WEBForms® 2019' button. Once migrated, you can find the migrated forms under Documents/Transactions/ and then the folder with the name of your transaction kit.

After January 1, 2020, kits not migrated will be lost.

Printable Forms

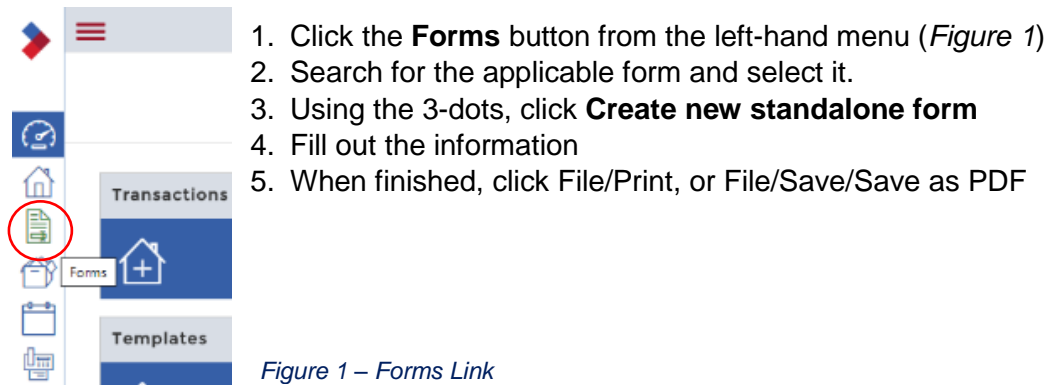


Figure 1 – Forms Link



Figure 2 – Forms Search and Selection

Transactions

1. Click the Transactions button from the left-hand menu (*Figure 3 – Transaction Link*)

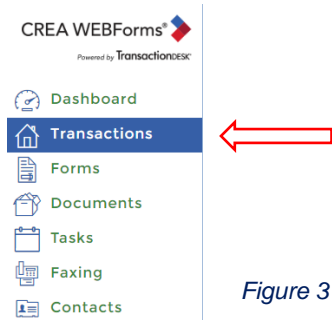


Figure 3 – Transaction Link

2. Click the Add button (*Figure 4 – Add Button*)



Figure 4 – Add Button

3. Enter a name for this transaction
4. If you would like to use a template, choose that template, and enter the type

If you would like to import a listing to be the focus of this transaction, choose the “Calgary Real Estate Board” as the source under “Import Data”, and enter the MLS Number

5. Set whether you will be the Selling Agent, or the Buying Agent

Close		Create Transaction	Create
Name *	Name of Transaction Here		
Type	Residential ▼		
Import Data (optional)	Calgary Real Estate Board ▼		
	MLS123456		
Add me as the	Selling Agent ▼		
	<input checked="" type="checkbox"/> Use Wizard		

Figure 5 – Create Transaction Window

6. Using the wizard is optional, but this guide assumes you are using it. Click “Create” to continue. The screen looks like the one as pictured. (*Figure 5 – Create Transaction Window*)
7. Enter the information about the property. All information here is optional, but if any of this information is used on the forms you select, it will be auto populated. When done, click Next near the top to go to the next page of the wizard.
8. Enter the Transaction and Mortgage Dates relevant to this transaction and click Next.

9. Enter the contacts for this transaction. Contacts can be listing agents, selling agents, buyers, seller or lawyers. Again, this information is optional, but will populate the forms.
10. Choose which forms will be in this transaction. Click the Add button to bring up the “add form” window. (*Figure 6 – Form Selection*). Make strong use of the search here to find the forms you need. When you have selected all your forms, click Add, then click next to go on to step 5 of the wizard. To see or manage which forms you have added, click the basket next to the search.

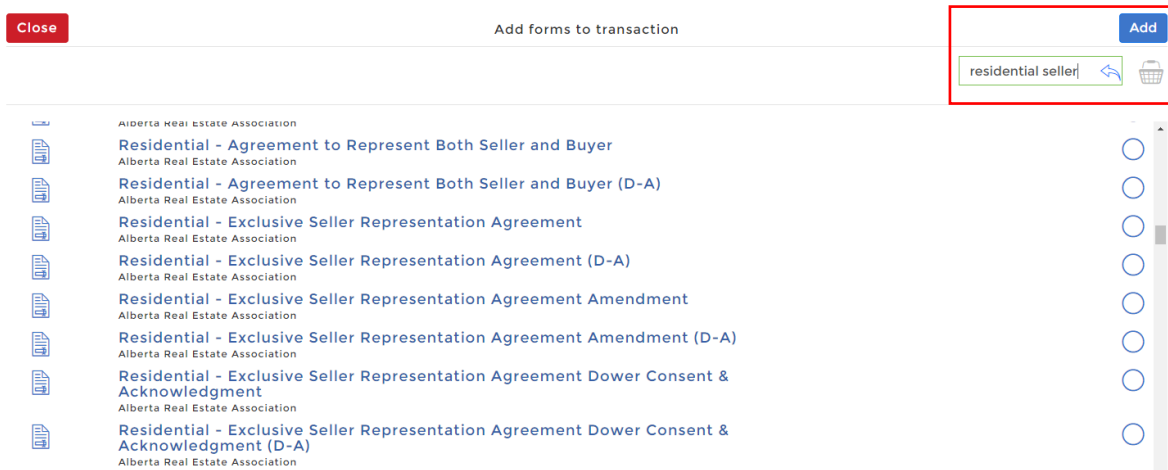


Figure 6 – Form Selection

11. If you want to add any additional documents (not forms), you can do that here. When done, click Done. You are now on the dashboard of this transaction. (*Figure 7 – Transaction Dashboard*)

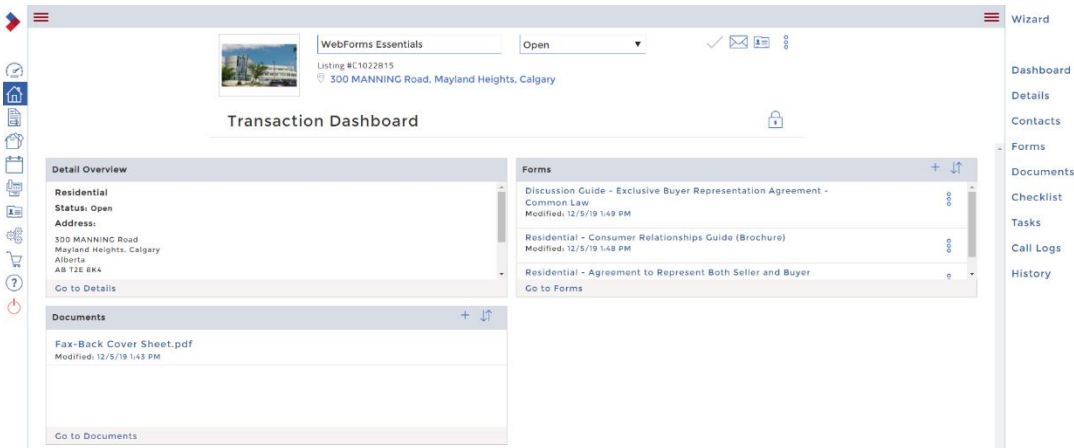


Figure 7 – Transaction Dashboard

12. To view the forms, click the forms button on the right-hand side
13. To rearrange the forms, click and drag on the thumbnail, and move them up and down.

14. To view and fill and individual form, click on the form name.
15. To switch to another form, click Transaction Forms in the top menu bar, and then click the name of the form you want to switch to. (*Figure 8 – Transaction Form*)

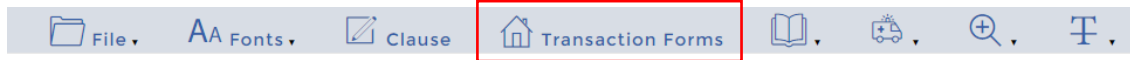


Figure 8 – Transaction Form

16. To return to the transaction dashboard, click File then Exit.
17. To print all form, click Forms on the right side of the transaction dashboard, then click the circle in the top toolbar to select all forms and add them to the basket. (*Figure 9 – Form Selection and Basket*)
18. Click the basket. From here you can print all forms, save all forms as PDF, or email the forms. If you subscribe to Authentisign or DocuSign, you can also send this transaction from here

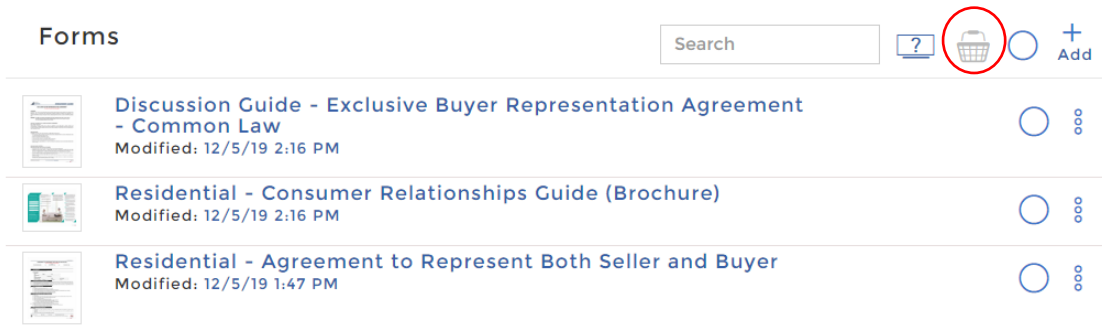


Figure 9 – Form Selection and Basket

Clauses

Clauses allow you to enter typically used clauses into your forms.

1. To add to your clause library, click the settings button on the left, and then click clauses. (Figure 10 – Clauses)

2. Open the Personal Clauses folder
3. Click the Add button at the top right, then click “Add new clause”
4. Give the clause a title and enter the content. Wherever you use this clause, the content will be populated. Click the save button to continue.

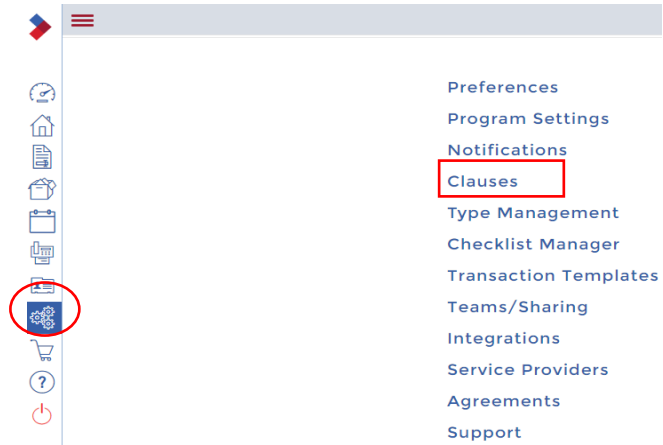


Figure 10 – Clauses

5. To use a clause while entering on a form, click in the field where the clause should be entered, and click the clause button from the top toolbar (Figure 11 – Clause Toolbar)

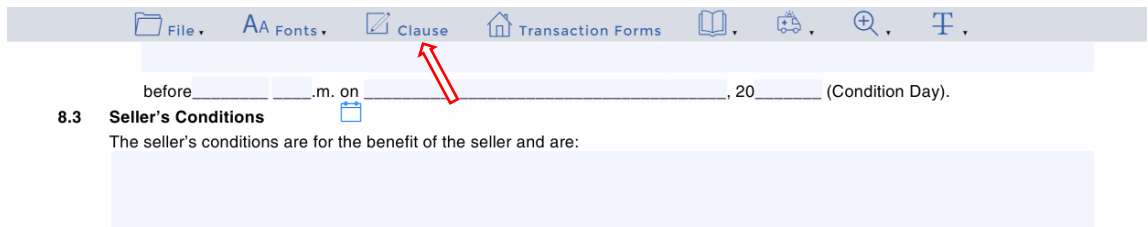


Figure 11 – Clause Toolbar

6. Search for, or find your clause. (Figure 12 – Clause Selection)
7. Click the circle next to the clause. You can add more than one clause at a time. Clauses can be managed in the basket at the top right. When done, click ok.

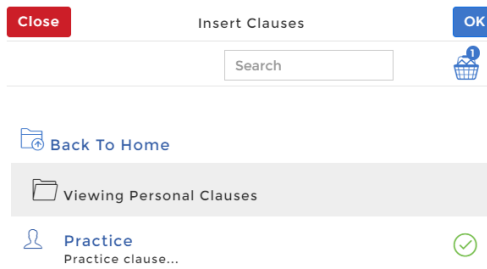


Figure 12 – Clause Selection

Templates

Templates allow you to save groups of forms together so that you can quickly create a new transaction with your typically used forms. In the future, when a form is updated, transaction templates will automatically get the new form, but existing transactions will not.

To create a template:

1. Click the settings button, then click transaction templates (*Figure 13 – Transaction Templates*)



Figure 13 – Transaction Templates

2. Click the add button at the top right.
3. Give the transaction template a meaningful name, type and description. (*Figure 14 – New Transaction Template*)

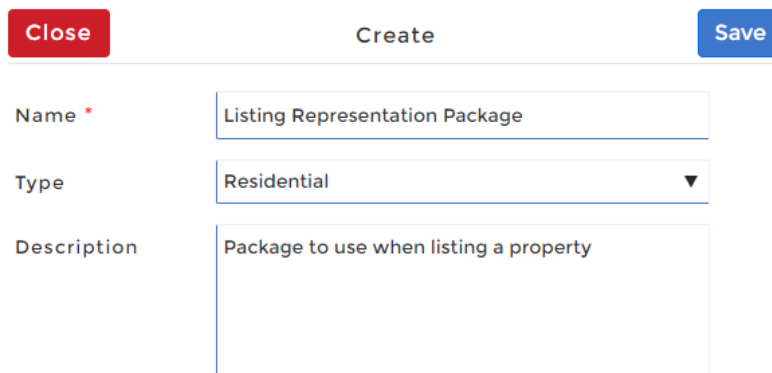
A form titled 'Create' with 'Close' and 'Save' buttons. It contains three fields: 'Name *' with the value 'Listing Representation Package', 'Type' with a dropdown menu set to 'Residential', and 'Description' with the text 'Package to use when listing a property'.

Figure 14 – New Transaction Template

- Click the save button to continue
- Click the +icon on the forms accordion dropdown (*Figure 15 – Add Forms*)

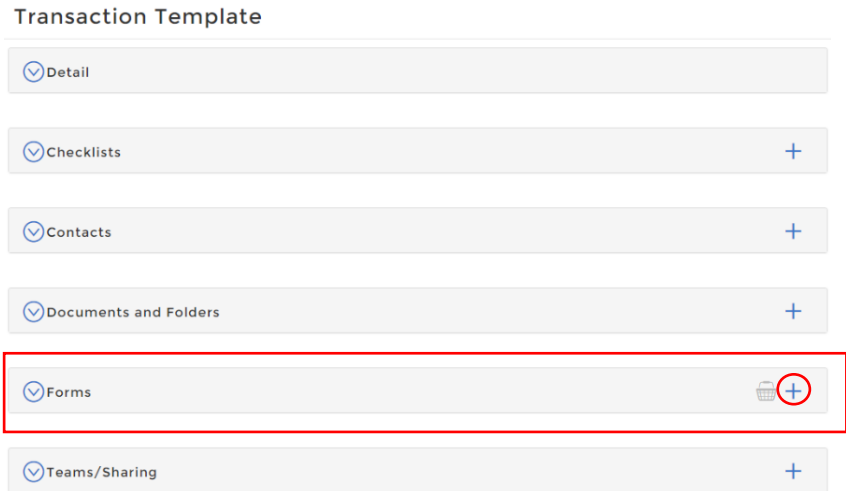


Figure 15 – Add Forms

- Search for the forms you want to add to this template. Click the circle next to the forms to add them. When done, click add at the top right. Forms can be managed in the basket at the top right. (*Figure 16 – Add Forms Dialog*)

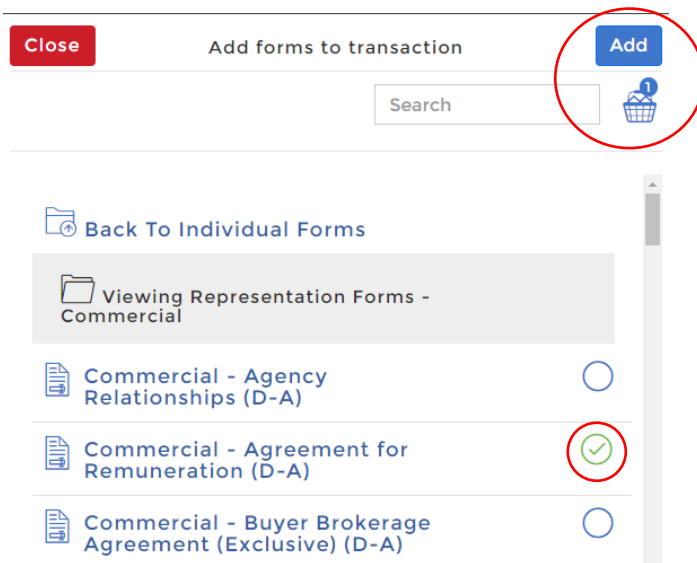


Figure 16 – Add Forms Dialog

- To use a transaction template when creating a new transaction, simply choose your new transaction template in the template box. (*Figure 17 – Select Template*)

Close Create Transaction Create

Name *

Template Listing Representation Package ▼ ←

Import Data (optional) - Select Source - ▼

Add me as the Neither ▼

Use Wizard

Figure 17 – Select Template

Migrating Kits from WEBForms® Legacy to WEBForms® 2019

1. Access the legacy version from the Member Dashboard as circled in (Figure 17 – Switch to Legacy Version)

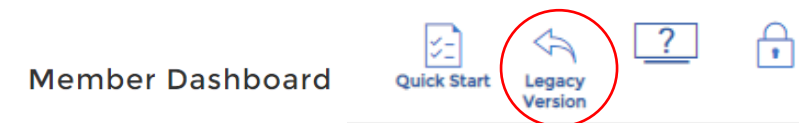


Figure 17 – Switch to Legacy Version

2. In Legacy WEBforms®, click on the title of your kit (Figure 18 – Legacy Kit Name)

Kit Name	Address	MLS® #	Board
Test Kit			CREB

Figure 18 – Legacy Kit Name

3. On the left side click under the Apps section, select 'Send Kit to WEBForms® 2019' to migrate your kits to the new platform.

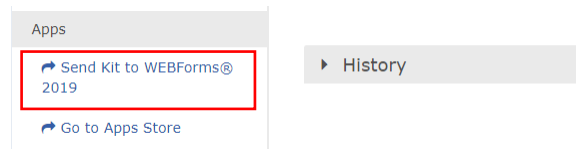


Figure 19 – Send to Kit WEBForms® 2019