

Migrating your Transaction Kits to CREA WEBForms® 2019

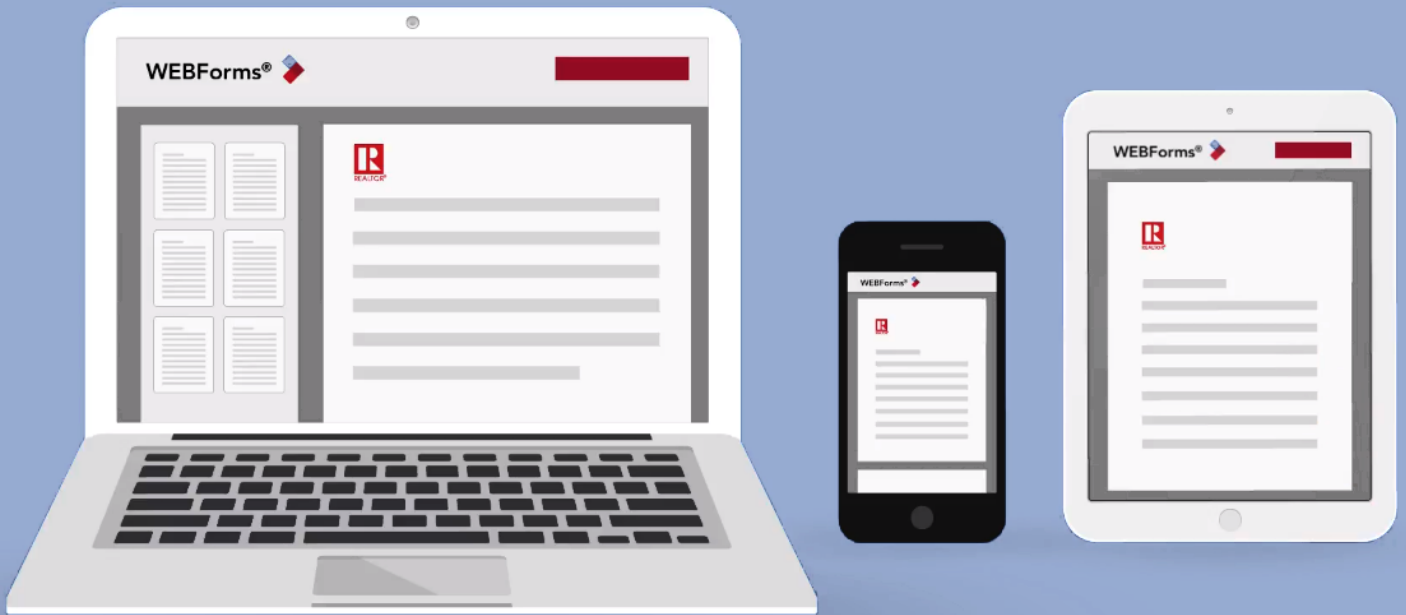


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WEBForms® Help Resources

CREA Help Resources

[CREA WEBForms® Training Hub](#)

Access the online *Help Guide, Quick Start Videos, Tutorial Videos, Training Webinars* and *Recorded Webinars*.

[CREA WEBForms® Member Support Page](#)

Contact CREA Member Support via email, phone or by filling out an online support form. Also includes links to other help resources.

REBGV Help Resources

[REBGV Online WEBForms® Help](#)

Access the *WEBForms® Transition Guide, Training Manual, Video resources* and *Recorded Webinars*.

REBGV Help Desk



Call 604-730-3020 (toll free 1-800-304-0565)

Please have your member number handy.



Email: support@rebgv.org



Regular Help Desk hours: Monday to Friday - 9:00am to 5:00pm

Extended Help Desk hours in January 2020:

- Weekdays: 9:00am to 6:00pm
- Weekends: 10:00am to 2:00pm

Migrating Your Transaction Kits to WEBForms® 2019

About Migrating Your Transaction Kits

As you may know, the legacy version of WEBForms® will cease to be available after the end of 2019. If you wish to continue to access Transaction Kits you created in WEBForms® Legacy, you can “migrate” those Kits to the new version: WEBForms® 2019.

Note that the contents of your migrated Kits will be accessible only as “flattened PDF documents”. They will no longer behave as functioning Transaction Kits and the forms they contain will not be editable. They will be useful mostly for archival purposes. However, you can copy content (such as a clause) from a migrated document, which you can then paste into a WEBForms® 2019 transaction or template.



Note that any Kits you start on the Legacy system must be completed on the Legacy system; you will not be able to continue to work on them in the new system. The migration option is intended only to provide you with a way to archive your *completed* transactions.



Also note that the Legacy system will be switched to *Read-Only* mode on Dec 16, 2019. That means you will no longer be able to create new Transaction Kits or duplicate any existing Kits after that date. You will be able to continue to update and complete your existing transactions. However, you must complete those transactions before Dec 31, 2019, when the old system will become unavailable.

Do you really need to keep your old Transaction Kits?

There is some effort involved in migrating your old Transaction Kits, as you need to migrate them individually. So, you might ask yourself if it’s worth the effort to migrate all your Kits.

Also, consider how often you have previously accessed your completed Transaction Kits. If you haven’t needed to access your old Kits in the past, you probably won’t need to in the future.

And keep in mind that the Kits don’t included the signed documents, which are required to be retained by your brokerage.

Some of your Kits may contain custom clauses or other content that you might wish to access in the future, so those Kits would be worth migrating.

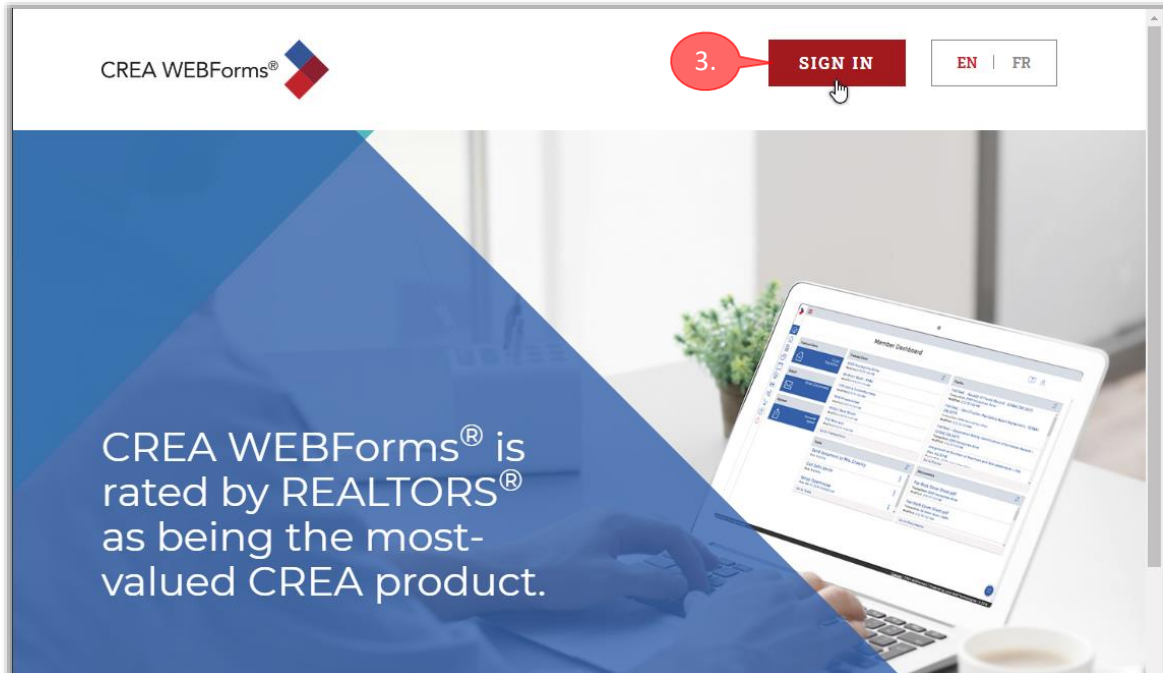
Therefore, you are advised to migrate only those Kits that contain content that you might wish to access again in the future.

Migrating a Transaction Kit

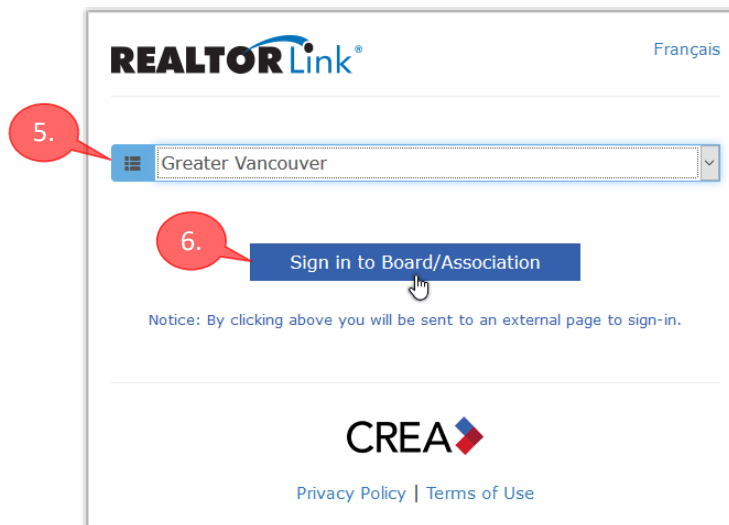


► To migrate a Transaction Kit to WEBForms® 2019:

1. Launch your web browser and go to webforms.ca.
2. The **CREA WEBForms® Sign In** page opens.

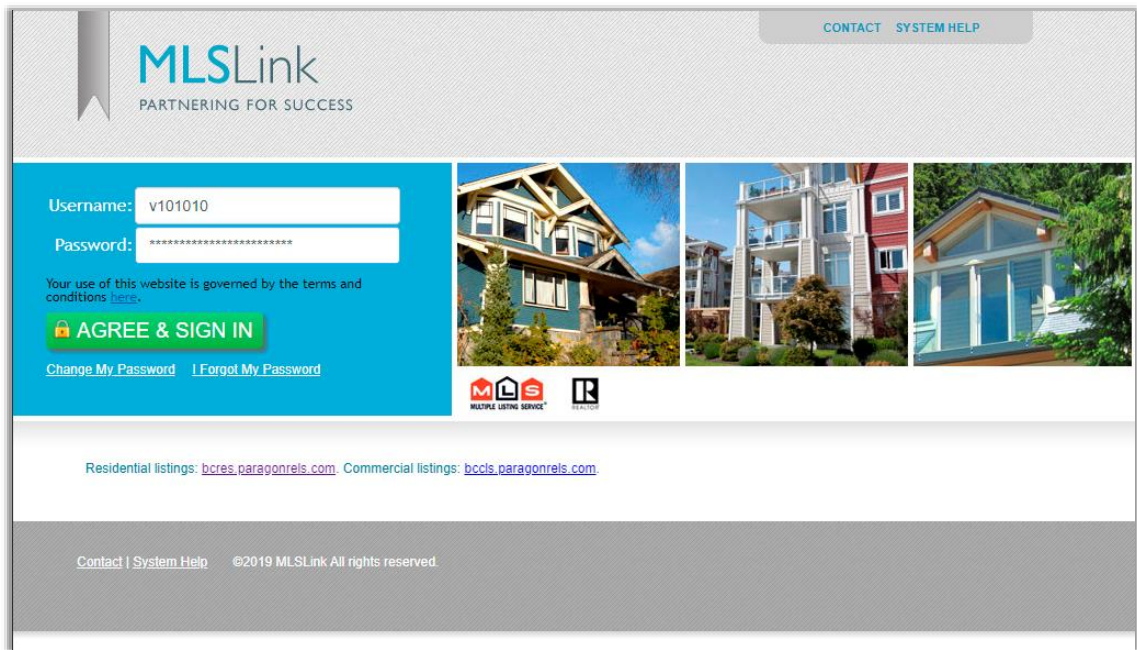


3. Click **SIGN IN** to continue.
4. The **REALTORLink** dialog box appears.




5. Select your board in the drop-down list.
6. Then click **Sign in to Board/Association** to continue.

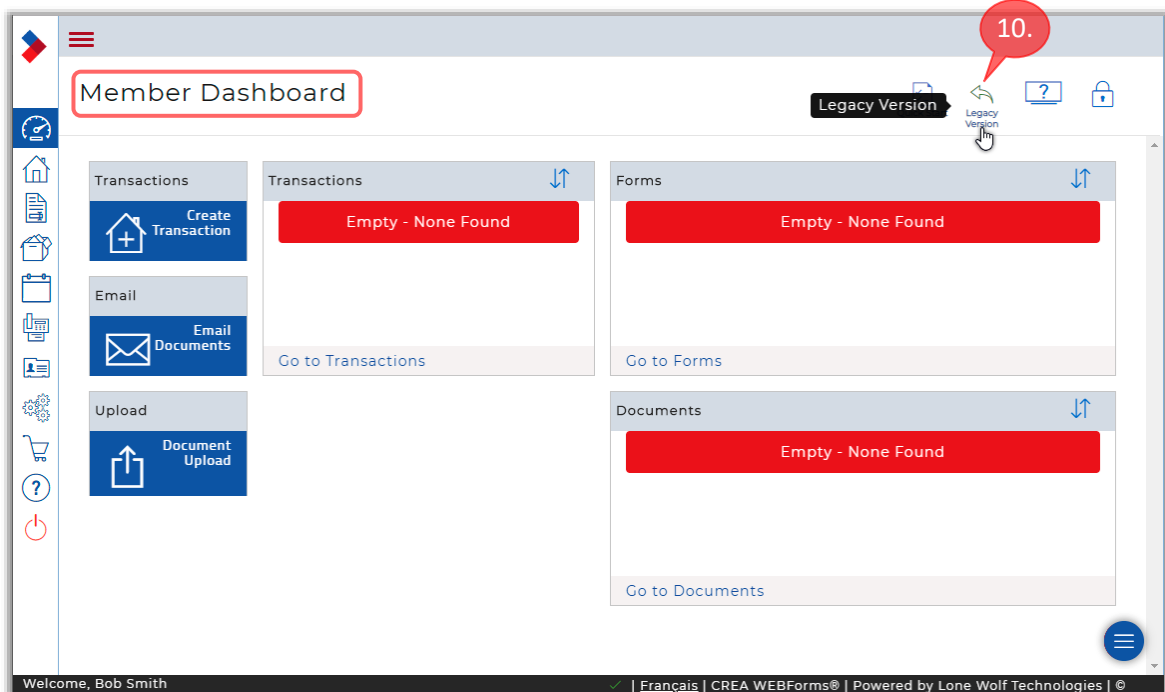
7. The **MLSLink SafeAccess® Login Page** opens.



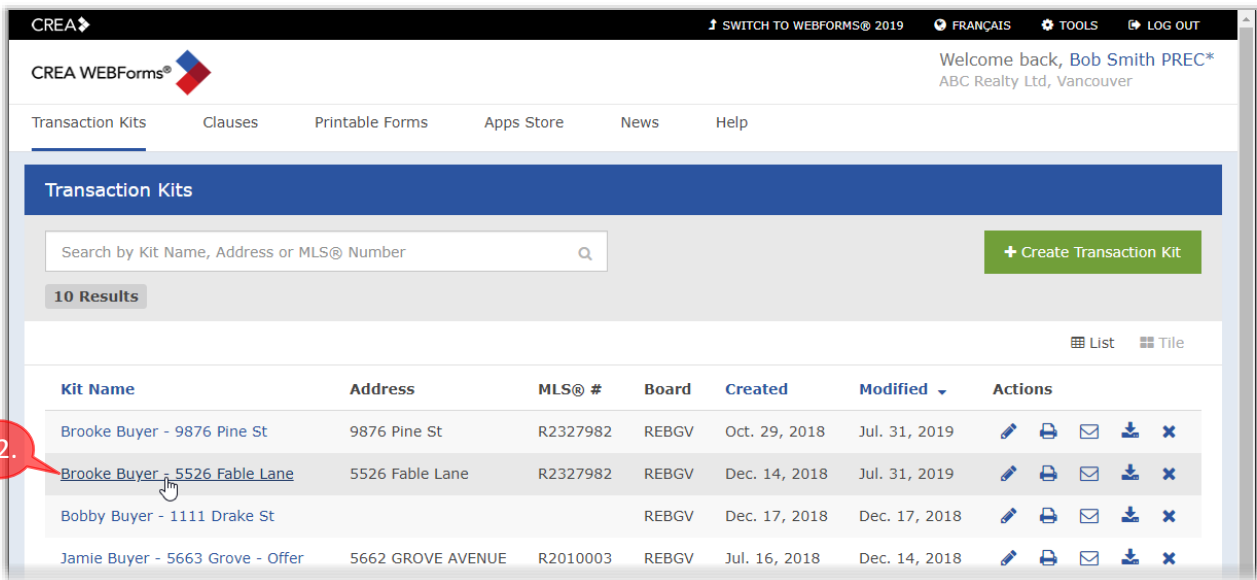
8. Sign-in in the usual manner.

9. Either *WEBForms® 2019* or *WEBForms® Legacy* will open, depending on which version you last accessed.

10. If *WEBForms® 2019* opens, as shown below, click  near the upper-right corner to switch to *WEBForms® Legacy*.

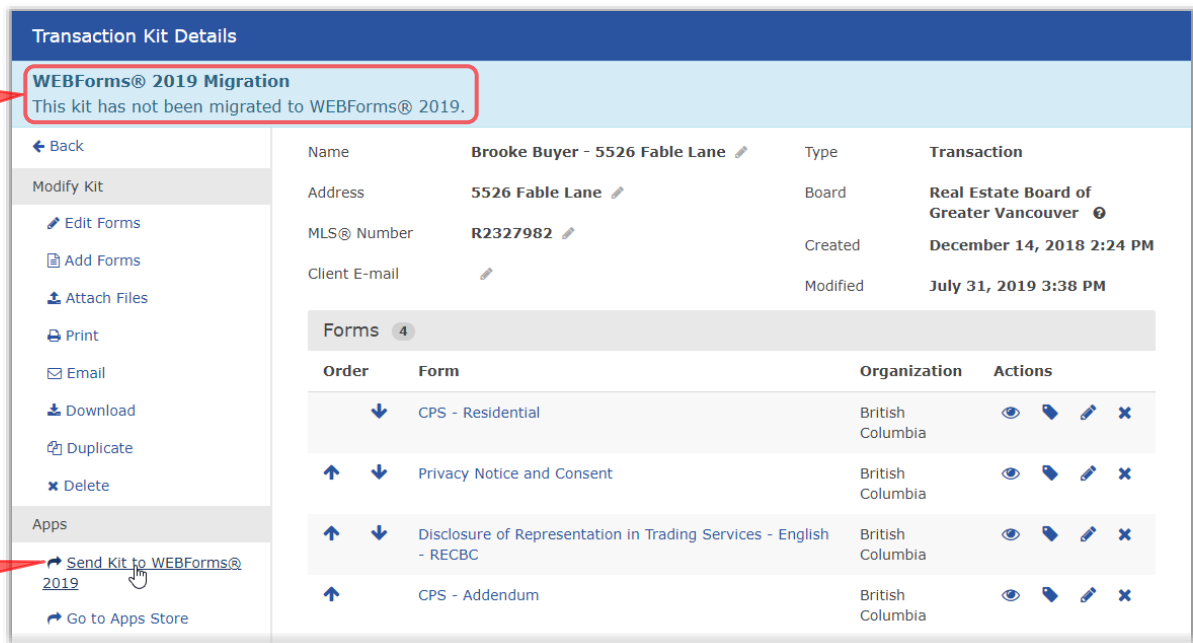


11. WEBForms® Legacy opens, displaying the **Transaction Kits** page.



12. Click on the name of the Transaction Kit that you want to migrate.
Note that you can migrate only one Kit at a time.

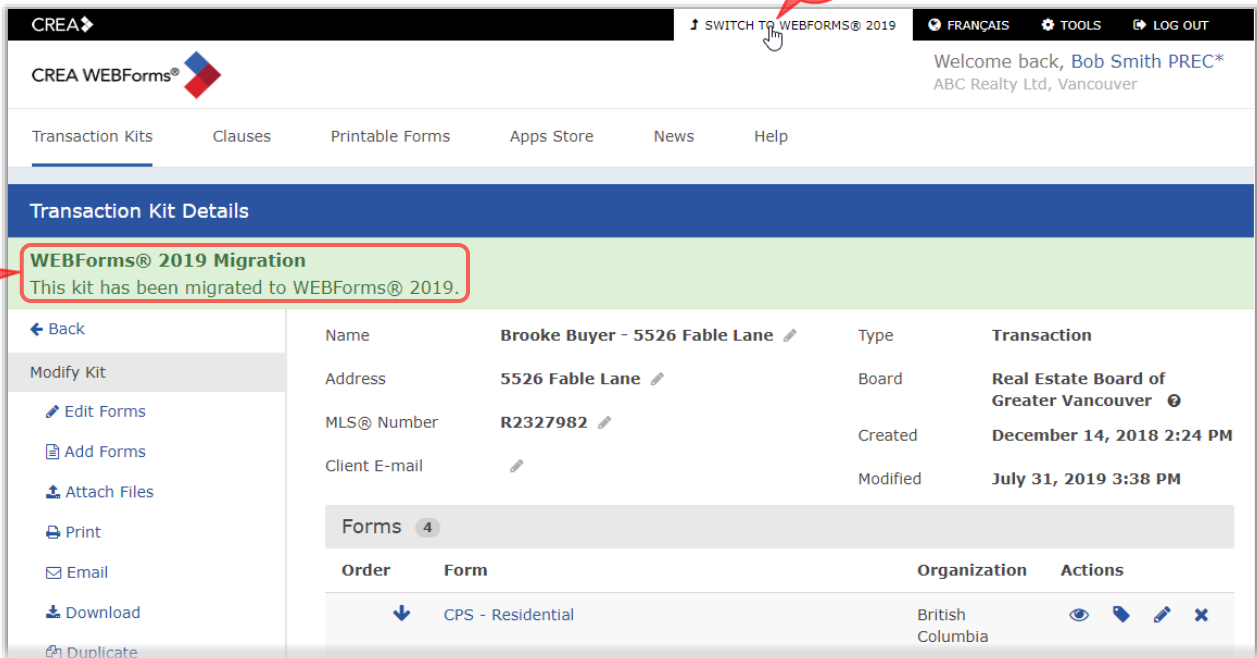
13. The **Details** page for the Kit opens.



14. If the Kit has not been migrated, a message to that effect will be displayed near the upper-left corner.

15. Click **Send Kit to WEBForms® 2019** near the lower-left corner of the page.

16. After a few moments, the message will change to indicate that the Kit has been migrated to WEBForms® 2019.

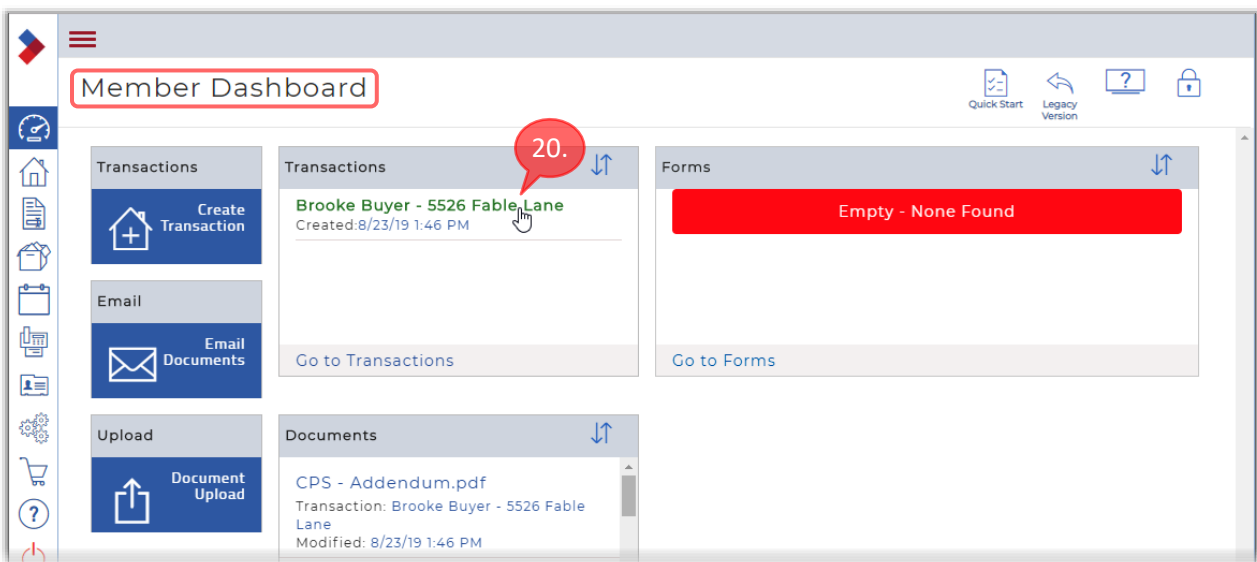


17. Repeat the above procedure to migrate additional Transaction Kits, as desired.

Accessing Migrated Transactions

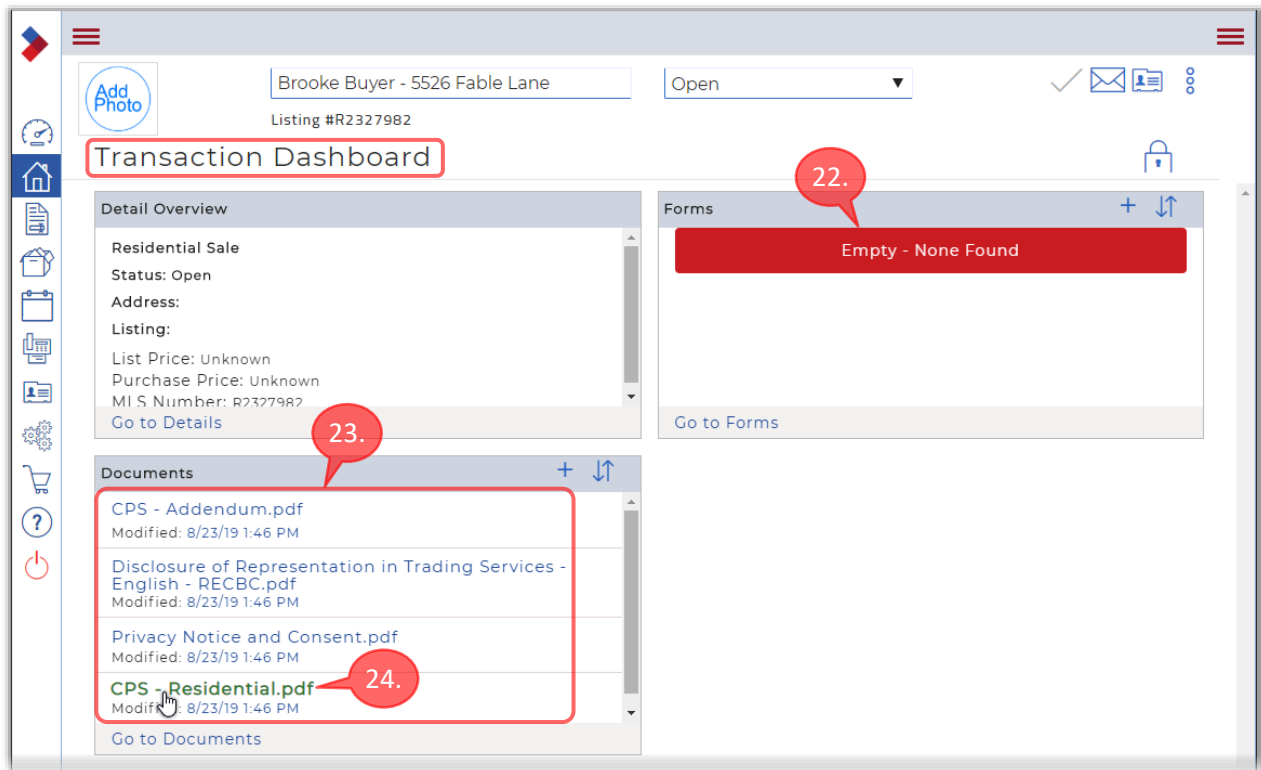
18. Click **SWITCH TO WEBFORMS® 2019** near the top of the page to open WEBForms® 2019. You can then confirm that your Kits migrated successfully and also see how to access content in the migrated transactions.

19. WEBForms® 2019 will open, displaying the **Member Dashboard**.



20. In the **Transactions** widget, click on a transaction that you just migrated.

21. The **Transaction Dashboard** opens for the selected transaction.



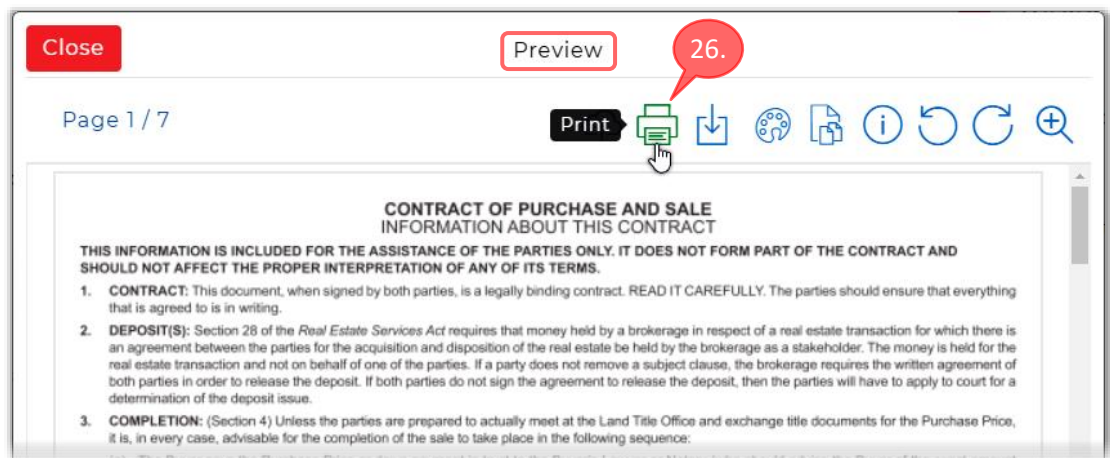
22. Note that the **Forms** widget indicates that the Transaction has no forms.

23. When you migrate a transaction, its forms are converted to PDFs and moved into the **Documents** widget. You can still view the forms, but can't edit any fields or make any changes—they are for archival purposes only. That's why you must complete the transaction in WEBForms® Legacy before migrating it.

24. Click on one of the documents to preview it.

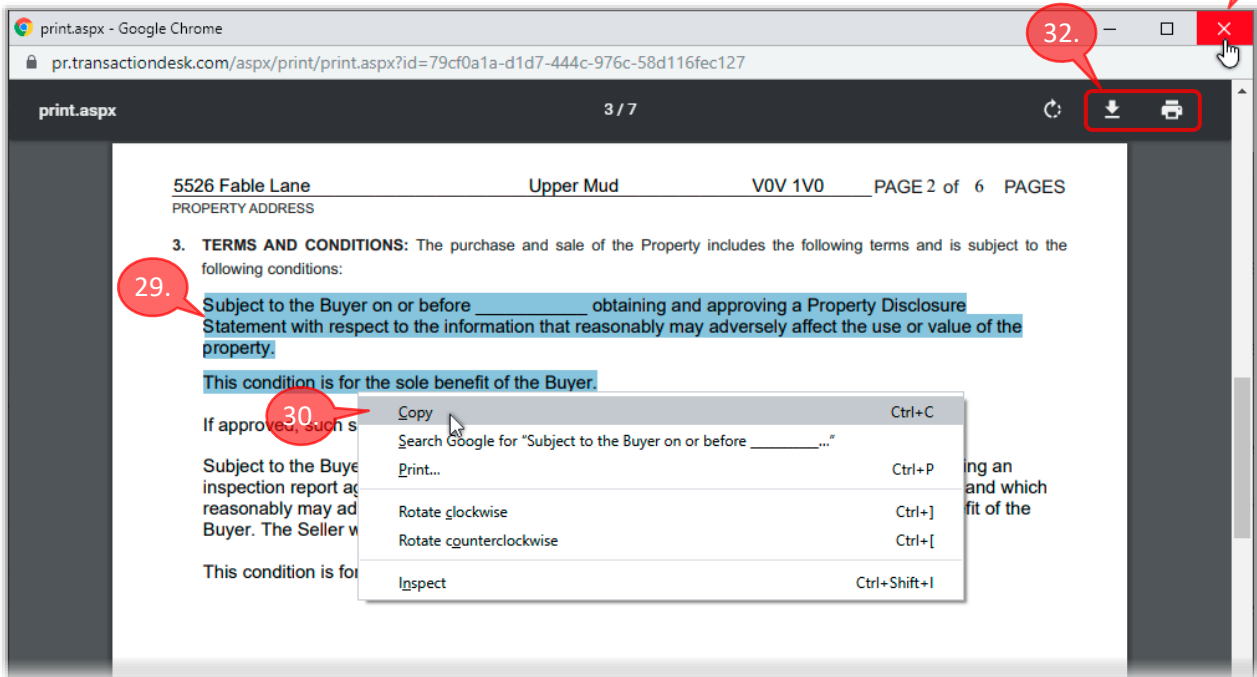
25. The document is displayed in a **Preview** window.

(Note that you can't copy any content from the Preview window.)



26. Click **Print**  to continue.

27. The document opens in your browser's PDF reader.






28. Unlike the **Preview** window, the browser's PDF reader will allow you to select and copy text, so that you can paste it elsewhere, as required.

29. To select text, drag across it while holding down your mouse button.

30. Then right-click on the selected text and choose **Copy**. That will copy the text onto your computer's clipboard.

31. Once it's on the clipboard, navigate to the desired destination and right-click on a text field. Then choose **Paste** in the menu that appears. The contents of the clipboard will be copied into the selected text field.

32. Note that you can optionally **Download**  or **Print**  the document using the icons in the PDF reader's toolbar.

33. When you are finished with the document, click  to close the PDF reader and return to WEBForms® 2019.

34. That concludes the activities in this document. Thanks for reading!