Migrating your Transaction Kits to CREA WEBForms® 2019

© WEBForms® ≱	
	WEBForms® >
	WEBrans"



Table of Contents

Migrating Your Transaction Kits to WEBForms [®] 2019	1
About Migrating Your Transaction Kits	1
Do you really need to keep your old Transaction Kits?	1
Migrating a Transaction Kit	2
To migrate a Transaction Kit to WEBForms [®] 2019:	2
Accessing Migrated Transactions	5

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: <u>support@rebgv.org</u>



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.



4. The **REALTORLink** dialog box appears.

	REALTOR Link*
5.	Greater Vancouver G. Sign in to Board/Association Notice: By clicking above you will be sent to an external page to sign-in.
	CREA> Privacy Policy Terms of Use
5.	Select your board in the drop-down list.

6. Then click Sign in to Board/Association to continue.

	CONTACT SYSTEM HELP
Username: v101010 Password:	
Residential listings: <u>bcres.paragonrels.com</u> . Commercial listings	Cods.paragonreis.com
<u>Contact System Help</u> ©2019 MLSLink All rights reserved.	

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 Legacy near the upper-right corner to switch to WEBForms[®] Legacy.

>	=					10.
	Member Dasł	nboard			Legacy Version	?
	Transactions	Transactions Empty - None Found	J.Î	Forms	Empty - None Found	↓↑
A	Email					
		Go to Transactions		Go to Forms		
ŝ	Upload			Documents		ĴĴ
?	Upload				Empty - None Found	
Ċ						
				Go to Documents	;	

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

JREA 🌮					SWITCH TO WEBFOR	MS® 2019 🛛 😵 FR	ANÇAIS	9	OOLS	C> I	LOG OUT
CREA WEBForms	•					Wel ABC	Come b Realty I	ack, Ltd, V	Bob s	Smith ver	n PREC
Transaction Kits	Clauses	Printable Forms	Apps Store	News	Help						
Transaction k	Kits										
Search by Kit	Name, Address or	MLS® Number	Q				+ 0	Create	e Trans	action	n Kit
10 Results											
									⊞ Lis	t 📰	Tile
Kit Name		Address	MLS® #	Board	Created	Modified 🗸	Actio	ons	⊞ Lis	t II	Tile
Kit Name Brooke Buyer	- 9876 Pine St	Address 9876 Pine St	MLS® # R2327982	Board REBGV	Created Oct. 29, 2018	Modified - Jul. 31, 2019	Actio	ons 🖨	⊞ Lis	t ==	Tile
Kit Name Brooke Buyer	- 9876 Pine St <u>5526 Fable Lane</u>	Address 9876 Pine St 5526 Fable Lane	MLS® # R2327982 R2327982	Board REBGV REBGV	Created Oct. 29, 2018 Dec. 14, 2018	Modified - Jul. 31, 2019 Jul. 31, 2019	Actio I	ons D	■ Lis	t ::: *	Tile × ×
Kit Name Brooke Buyer Brooke Buyer Bobby Buyer -	- 9876 Pine St <u>5526 Fable Lane</u> 1111 Drake St	Address 9876 Pine St 5526 Fable Lane	MLS® # R2327982 R2327982	Board REBGV REBGV REBGV	Created Oct. 29, 2018 Dec. 14, 2018 Dec. 17, 2018	Modified - Jul. 31, 2019 Jul. 31, 2019 Dec. 17, 2018	Actio a a a	ons D D D	■ Lis	t ::: * *	Tile X X X

- 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.

Transaction Kit Details								
WEBForms® 2019 Migration This kit has not been migrated	on d to WEBForms@) 2019.						
← Back	Name	Brooke Buyer - 5526 Fable Lane 🖋	Туре	Trans	action			
Modify Kit	Address	5526 Fable Lane 🖋	Board	Real E	state B	loard	of	
🖋 Edit Forms	MLS® Numbe	r R2327982 🖋	Created	Decen	er vand 1ber 14	ouve	l8 2:	24 P
Add Forms	Client E-mail	Ø	Modified	July 3	1, 2019) 3:3	B PM	
Print	Forms 4							
🖂 Email	Order	Form	Org	anization	Actio	ons		
초 Download	¥	CPS - Residential	Briti Colu	ish Imbia	۲	۲	*	×
× Delete	↑ ↓	Privacy Notice and Consent	Briti Colu	ish Imbia	۲	۲	ø *	×
Apps	↑ ↓	Disclosure of Representation in Trading Services	- English Briti	ish	۲	۰	A	×
P Send Kit to WEBForms® 2019	•	- RECBC	Colu	imbia				

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

bee	n migrated to v	VEBForms [®] 2019.	18.		
CREA		e t	WITCH TO WEBFORMS® 20	019 😯 FRAM	NÇAIS 🔅 TOOLS 🕒 LOG OUT
			0	Welc ABC F	ome back, Bob Smith PREC Realty Ltd, Vancouver
Transaction Kits Clauses	Printable Forms	Apps Store News	I SWITCH TR WEBFORMS@ 2019 Image: FRANÇAIS Image: Tools Image: Log out Welcome back, Bob Smith PREC* ABC Realty Ltd, Vancouver Welcome back, Bob Smith PREC* ABC Realty Ltd, Vancouver News Help er - 5526 Fable Lane Type Transaction Greater Vancouver Lane Board Real Estate Board of Greater Vancouver Created December 14, 2018 2:24 PM Modified Modified July 31, 2019 3:38 PM		
Transaction Kit Details					
WEBForms® 2019 Migrat This kit has been migrated t	ion o WEBForms® 2019.				
← Back	Name	Brooke Buyer - 5526 Fab	le Lane 🥒 🛛 Ty	pe	Transaction
Modify Kit	Address	5526 Fable Lane 🖋	Во	ard	Real Estate Board of
🖋 Edit Forms	MLS® Number	R2327982 🖋			Greater Vancouver 🔞
Add Forms	Client E-mail		Ch	eated	December 14, 2018 2:24
🌲 Attach Files		<u>.</u>	Mc	odified	July 31, 2019 3:38 PM
🖨 Print	Forms 4				
🖂 Email	Order For	m		Organi	zation Actions
🛓 Download	V CPS	- Residential		British Columb	🕐 🔖 🖋 🗙
🖞 Duplicate				oolamb	

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

Accessing Migrated Transactions

18. Click **J 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.

	=				
	Member Das	hboard		Quick Start Legacy Version	
(公) (合)	Transactions	Transactions	Forms	↓↑	*
	Create Transaction	Brooke Buyer - 5526 Fable Lane Created:8/23/19 1:46 PM		Empty - None Found	
	Email				
	Email Documents	Go to Transactions	Go to Forms		
	Upload	Documents			
() () () ()	Document Upload	CPS - Addendum.pdf Transaction: Brooke Buyer - 5526 Fable Lane Modified: 8/23/19 1:46 PM			

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

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

Brooke Buyer - 5526 Fable Lane Listing #R2327982 Transaction Dashboard	Open •	✓ ⊠ III :
Detail Overview Residential Sale Status: Open Address: Listing: List Price: Unknown Purchase Price: Unknown	Forms Empty - None Found	+ ↓↑
MIS Number: R23779R2 Go to Details 23. Documents + ↓↑	Go to Forms	
CPS - Addendum.pdf Modified: 8/23/19 1:46 PM Disclosure of Representation in Trading Services - English - RECBC.pdf Modified: 8/23/19 1:46 PM Privacy Notice and Consent.pdf Modified: 8/23/19 1:46 PM CPS - Residential.pdf Modified: 8/23/19 1:46 PM Go to Documents		

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.)

Close	Preview 26.
Page 1	
	CONTRACT OF PURCHASE AND SALE INFORMATION ABOUT THIS CONTRACT
THIS INF	FORMATION IS INCLUDED FOR THE ASSISTANCE OF THE PARTIES ONLY. IT DOES NOT FORM PART OF THE CONTRACT AND ONOT AFFECT THE PROPER INTERPRETATION OF ANY OF ITS TERMS.
1. CON	NTRACT: This document, when signed by both parties, is a legally binding contract. READ IT CAREFULLY. The parties should ensure that everything is acreed to is in writing.
2. DEF an a real both dete	POSIT(S): Section 28 of the Real Estate Services Act requires that money held by a brokerage in respect of a real estate transaction for which there is greement between the parties for the acquisition and disposition of the real estate be held by the brokerage as a stakeholder. The money is held for the estate transaction and not on behalf of one of the parties. If a party does not remove a subject clause, the brokerage requires the written agreement of parties in order to release the deposit. If both parties do not sign the agreement to release the deposit, then the parties will have to apply to court for a miniation of the deposit issue.
 COI it is, 	MPLETION: (Section 4) Unless the parties are prepared to actually meet at the Land Title Office and exchange title documents for the Purchase Price, in every case, advisable for the completion of the sale to take place in the following sequence:
(0)	The Busin save the Durchase Pelce or down serviced in fruit to the Busin's Leaver or Notary fails should advise the Busin of the exact encount
26. Click	Print 📄 to continue.

	Chrome				32)-	
ransactionde	esk.com/aspx/print/print.as	px?id=79cf0a1a-d1d7-444c-976c-58d116fec1	27				
aspx		3/7			¢	È	ē
	5526 Fable Lane	Upper Mud	V0V 1V0	PAGE 2 of	6 PAGES		
29.	3. TERMS AND CONDITION following conditions: Subject to the Buyer of Statement with respe property.	ONS: The purchase and sale of the Property incomo or before obtaining and ap ct to the information that reasonably may ac	udes the following	terms and is ty Disclosure use or valu	subject to the		
	This condition is for th	Copy		Ctrl+C	1	_	
	If approved, such s	Search Google for "Subject to the Buyer on or bef	iore"				
	Subject to the Buye	<u>P</u> rint		Ctrl+P	ing an	_	
	inspection report ac-	Rotate <u>c</u> lockwise		Ctrl+]	fit of the	_	
	reasonably may ad			Ctrl+[_	
	reasonably may ad Buyer. The Seller w	Rotate counterclockwise					
	reasonably may ad Buyer. The Seller w This condition is for	Rotate c <u>o</u> unterclockwise	с	trl+Shift+I			

- 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 I** or **Print T** 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!