

CREA WEBForms®

Workbook

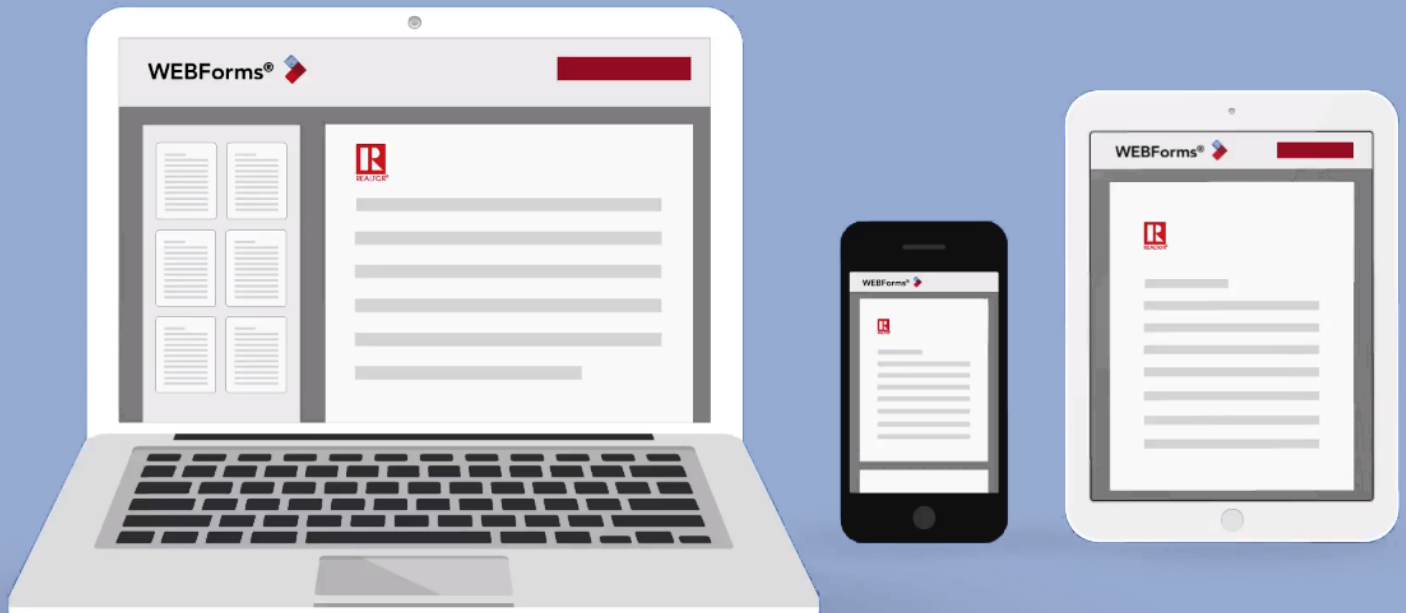


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CREA WEBForms®

Course Description

Welcome to the *CREA WEBForms®* course at the Real Estate Board of Greater Vancouver.

Every REALTOR® spends valuable time and money preparing the necessary documentation to present or close a real estate transaction. WEBForms® can make your tasks easier!

Members can securely access, print, email and save real estate forms and contracts quickly and easily, producing readable, professional-looking documents, ready for signing.

This hands-on course will provide you with the skills to use WEBForms® to facilitate your real estate transactions and to work smarter, not harder, when facing transaction deadlines.

Learning Objectives


After successfully completing this course, participants will be able to:



1. Access and navigate WEBForms®
2. Create transaction templates for listings and sales
3. Start a new transaction based on a template
4. Work with the forms in a transaction
5. Manage your transactions
6. Add and manage clauses
7. Use standalone forms
8. Configure your preferences and program settings
9. Access WEBForms® help resources

Using this Workbook

Navigating

You can use the links in this document to navigate around the document:

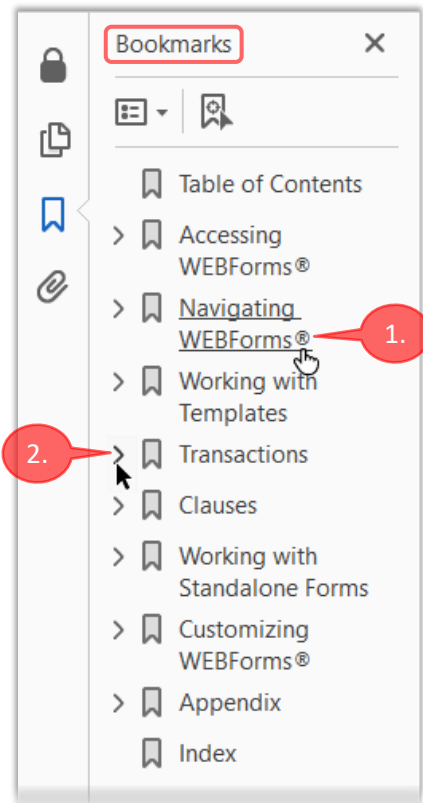
- Click an entry in the [Table of Contents](#) to navigate to that particular topic.
- Click  near the upper-left corner of a page to return to the [Table of Contents](#).
- Click a reference to a page number to go directly to that page.
(E.g. “see page [1](#) for more info”)
- Click on a web address to open the web page in your browser.
(E.g. www.rebgv.ca)

You can also recognize a link by its *blue colour and/or underline*, or by the mouse pointer turning into a “hand” ( or ) when you hover over it.

Navigating in Adobe Reader

If you open this document in Adobe Reader (instead of your web browser), you’ll also be able to navigate by using the **Bookmarks** pane, as shown at the right.

1. Click on a heading to jump to that topic.
2. Click > to expand a heading and view its sub-headings.



The Bookmarks Pane in Adobe Reader

Hands-on Activities



The computer symbol at the left indicates a hands-on activity to be done using your computer or mobile device.

Updates to the Workbook

Updated versions of this workbook will be posted from time to time on the REBGV member portal at www.rebgv.ca.

Click the [PARAGON HELP RESOURCES](#) link in the Paragon Center Panel to access the latest version of this workbook, as well as other help resources.

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Click on a topic below

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Accessing WEBForms®

What is WEBForms®?

WEBForms® is a web application that provides REALTORS® with access to a library of up-to-date real estate forms, contracts and clauses supplied by your provincial association, local boards, and brokerages/offices.

You can fill-out, save, download, email and print online forms from almost any computer, tablet or phone. WEBForms is cloud-based, giving you access to your forms whenever an Internet connection is available, so that you always have your forms with you.

WEBForms is integrated with your board's MLS® system, so it can automatically populate your forms with listing/property details. This information is shared among all the forms in a transaction, to save time and reduce errors.

WEBForms is integrated with TransactionDesk, a document management application that provides unlimited storage and allows you to manage all your transactions online. WEBForms can also be linked to your favourite e-signature application, to facilitate entirely paperless transactions.

System Requirements

WEBForms is meant to run on almost any phone, tablet or computer that has an up-to-date operating system and web browser. Please ensure that the software on your computer or device has been updated with the current versions.

About WEBForms and Help Resources



WEBForms has been integrated with the TransactionDesk application.

As a result, some of the available help resources are not specific to WEBForms and instead describe only TransactionDesk functionality.

The CREA WEBForms-branded help materials are your preferred learning resources, as these have been tailored specifically to help you learn to use WEBForms.

See *WEBForms Help Resources* on page 120 for more information.

About this Course - Disclaimer




This course is intended only to help you learn to use WEBForms as a tool, and is not meant to teach you how to write contracts. Nor is it intended to prescribe which forms you should use in a particular type of transaction, or instruct you on how to fill-out specific forms. Please refer to your managing broker and/or Council for further guidance and information on these topics.



Signing in to WEBForms

You are advised to access WEBForms from the REBGV member portal (www.rebgv.ca), as explained below.

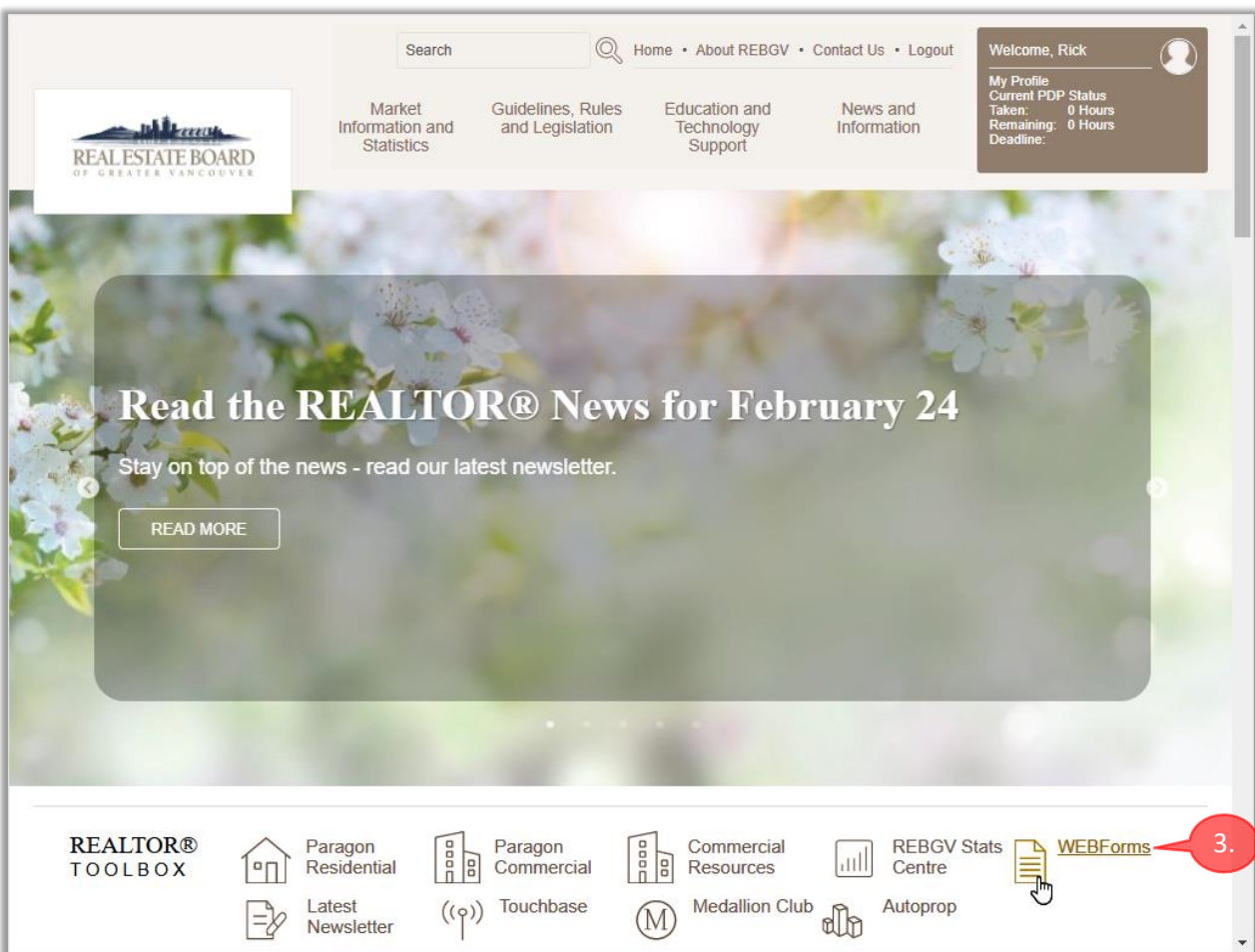
Alternatively, you can access WEBForms from links on the Paragon home page, from the WEBForms *Action Icon*  in a Paragon listing report, and from CREA's website, as explained on the following pages.




► To access WEBForms from the REBGV member portal:

1. Launch your web browser and go www.rebgv.ca.
2. Sign-in in the usual manner at the **MLSLink SafeAccess® Login Page**.

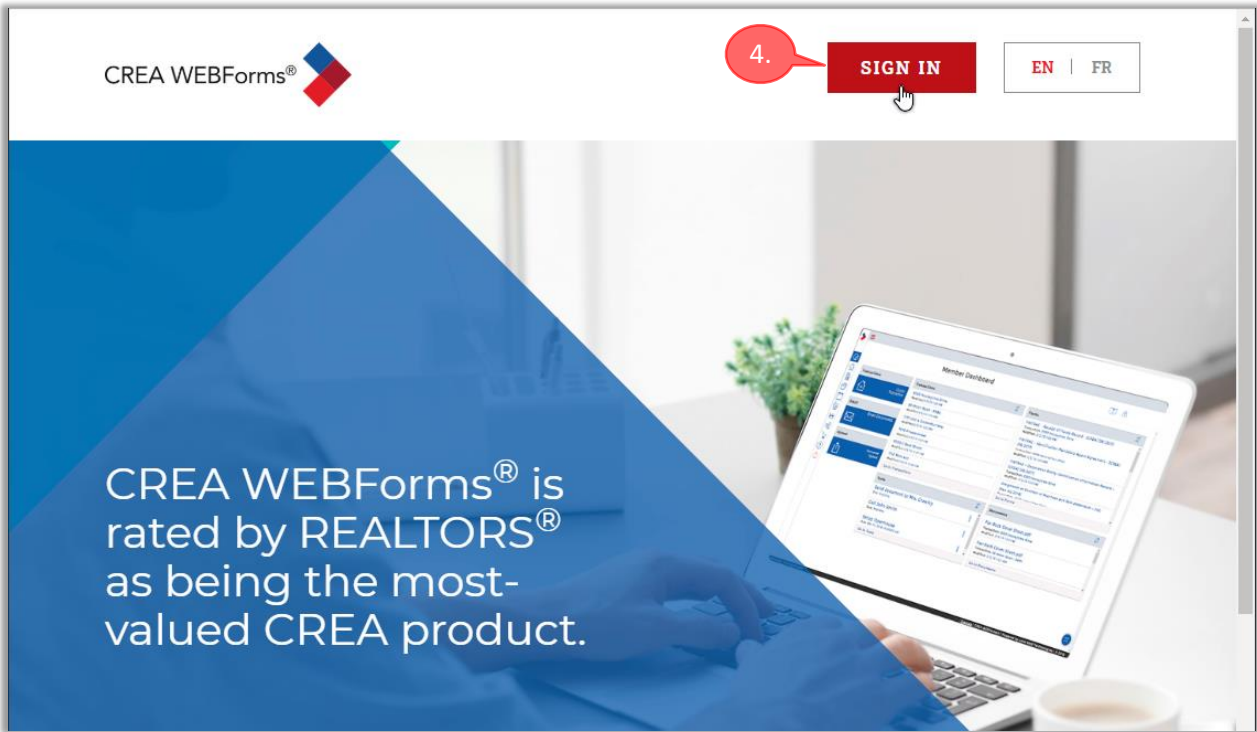
The home page of the REBGV member portal will open in your browser, as shown below.



3. Click  [WEBForms](#) in the REALTOR® TOOLBOX section of the REBGV home page.

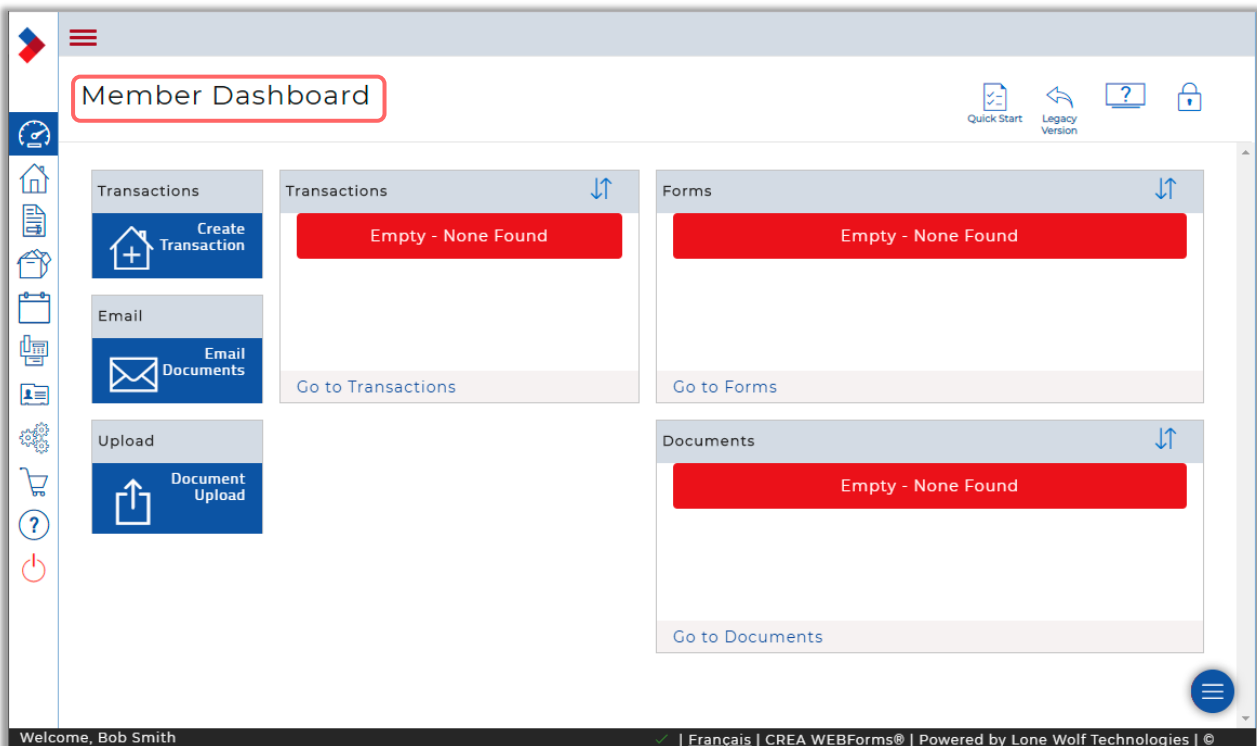


The CREA WEBForms® Sign In page opens in a new tab in your browser.



4. Click **SIGN IN** to continue.

The WEBForms home page, also known as the **Member Dashboard**, opens.



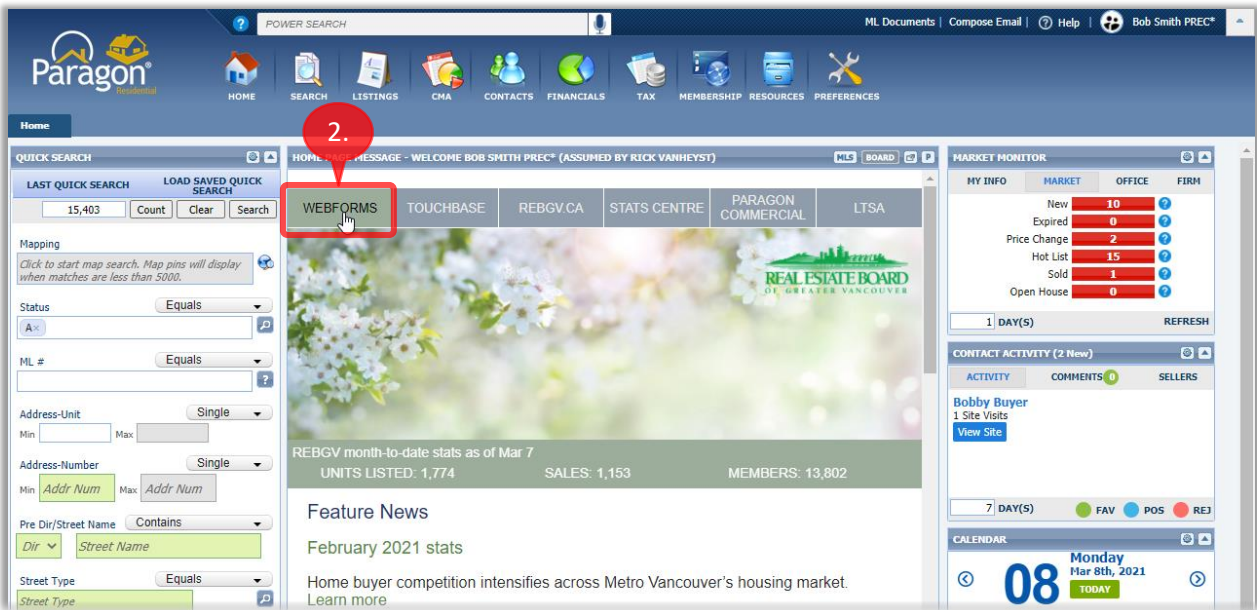
Other methods of accessing WEBForms are described on the following pages.



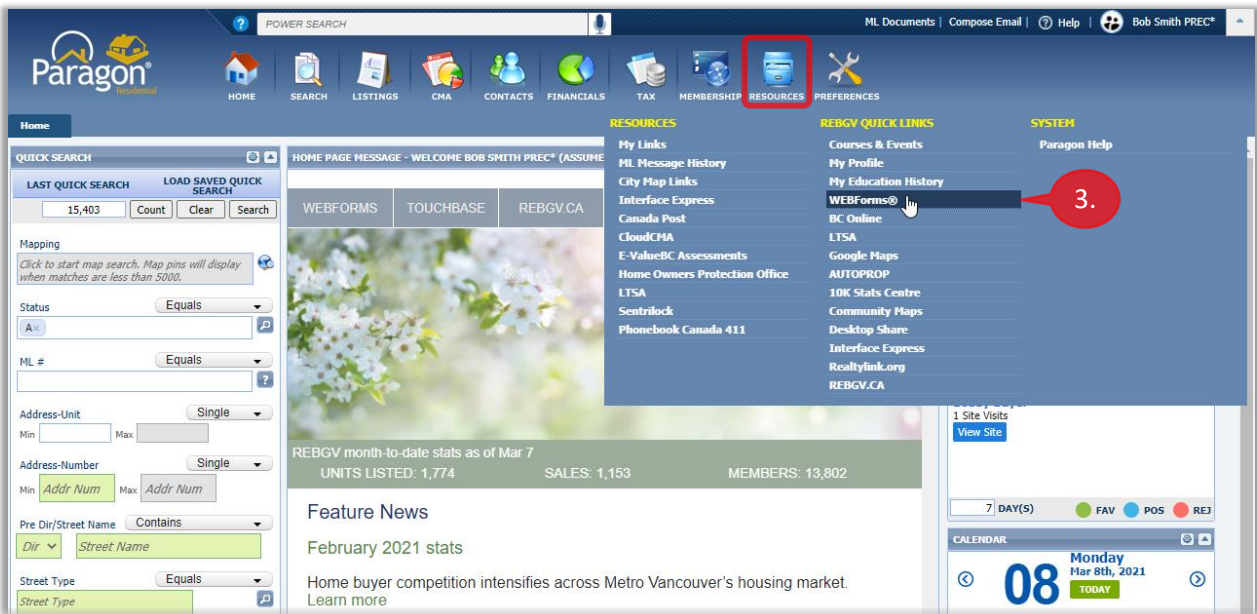
▶ To access WEBForms from the Paragon home page:

You can access WEBForms from the Paragon home page, using either of the two methods described below.

1. Make sure that you are on the Paragon home page (bcres.paragonreels.com).
2. Click the **WEBFORMS** link in the Center Panel.



3. Or, click **RESOURCES**, and then click **WEBForms** in the menu that appears.



The **CREA WEBForms® Sign In** page opens in a new tab in your browser, as shown on the preceding page.

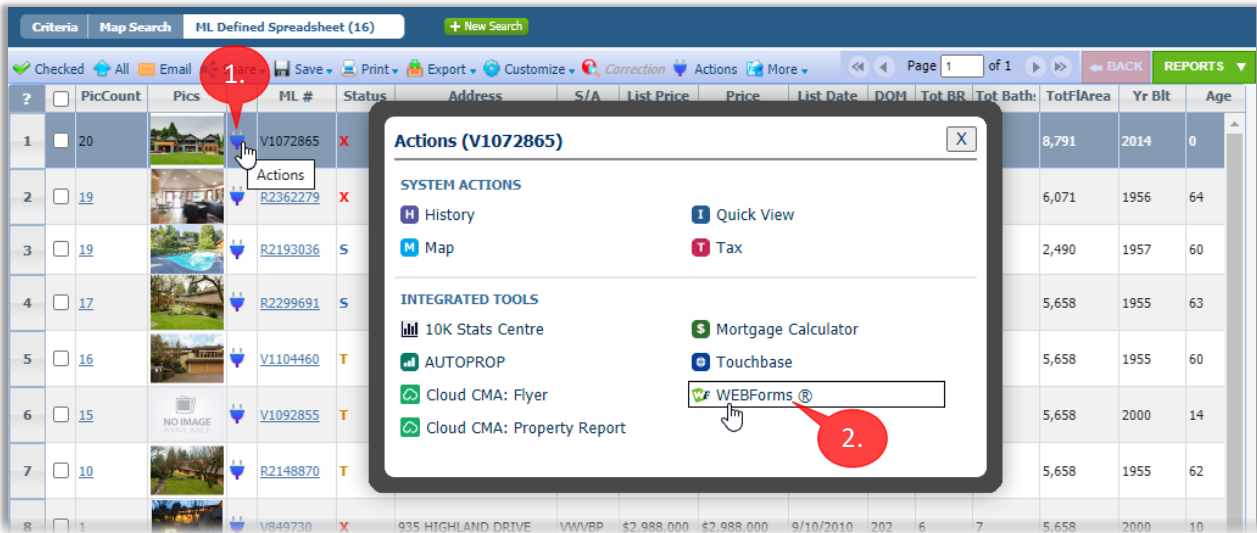
4. Click **SIGN IN** to continue to the WEBForms home page.



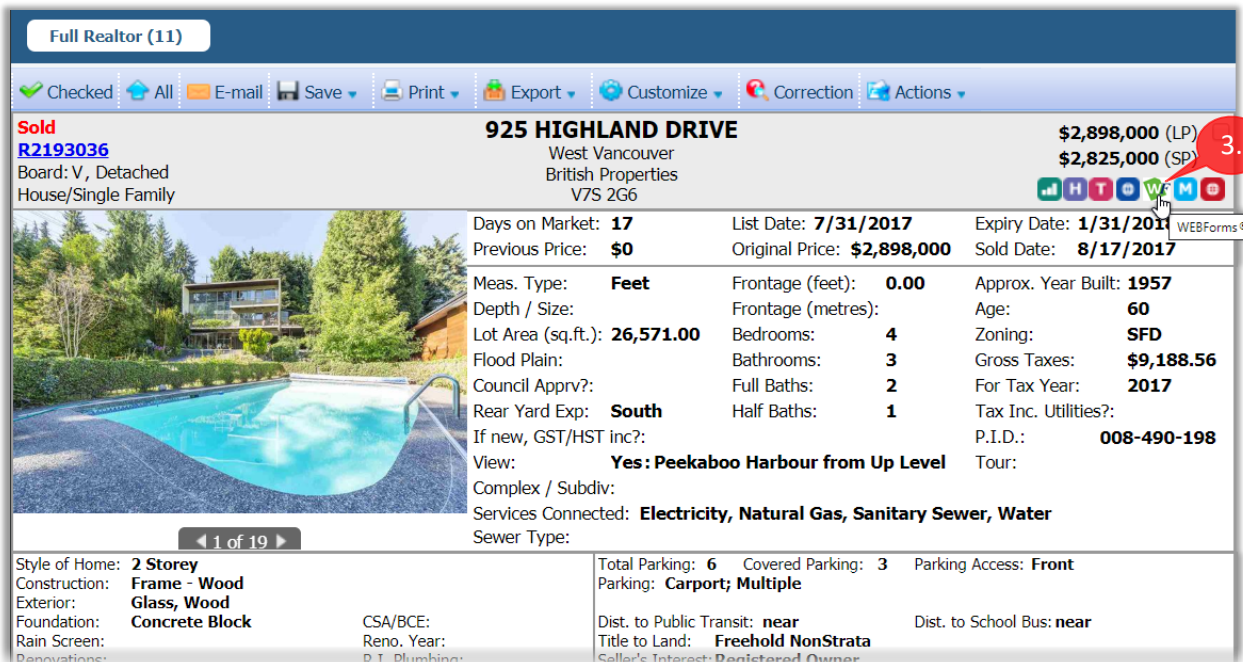
▶ To access WEBForms from a listing report in Paragon:

You can conveniently access WEBForms from the *Spreadsheet* report and the *Full Realtor* report in Paragon.

1. If you are viewing a *Spreadsheet* report, click the **Actions** icon.
2. When the **Actions** dialog box appears, click **WEBForms®**.



3. If you are viewing a *Full Realtor* report, click the WEBForms icon near the upper-right corner of the report.



The **CREA WEBForms® Sign In** page opens in a new tab in your browser, as previously explained.

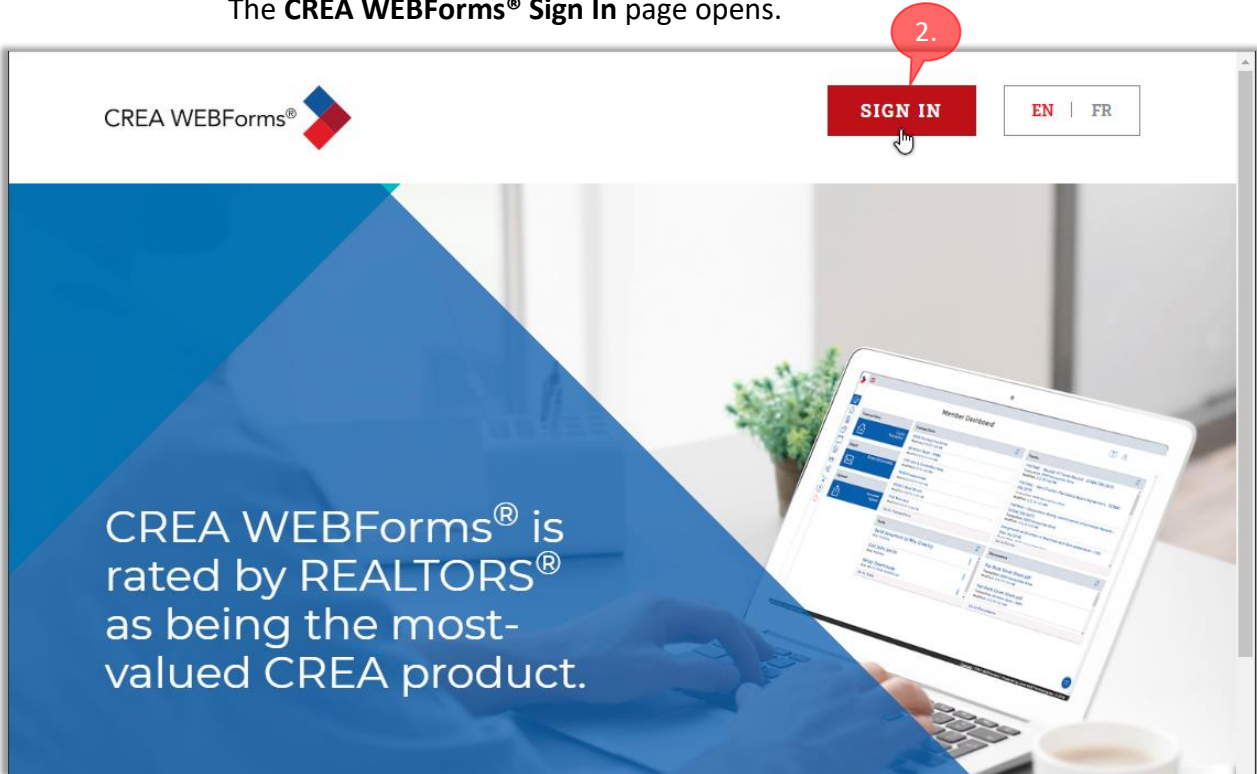
4. Click **SIGN IN** to continue to the WEBForms home page.



▶ To access WEBForms from the CREA WEBForms home page:

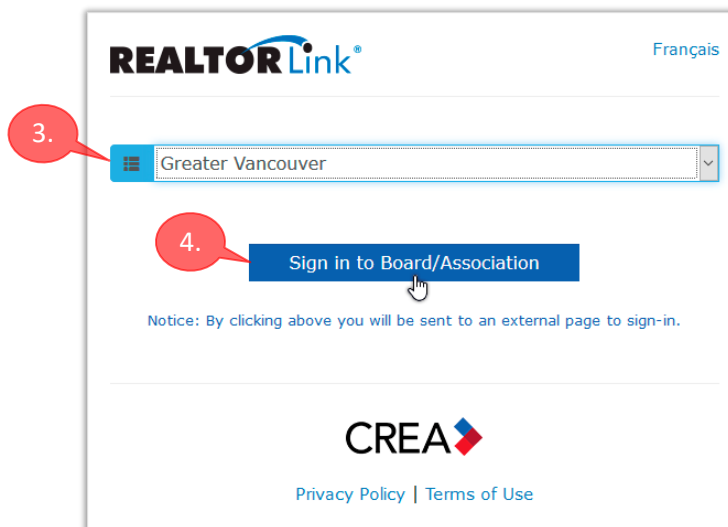
1. Launch your web browser and go to webforms.ca.

The CREA WEBForms® Sign In page opens.



2. Click **SIGN IN** to continue.

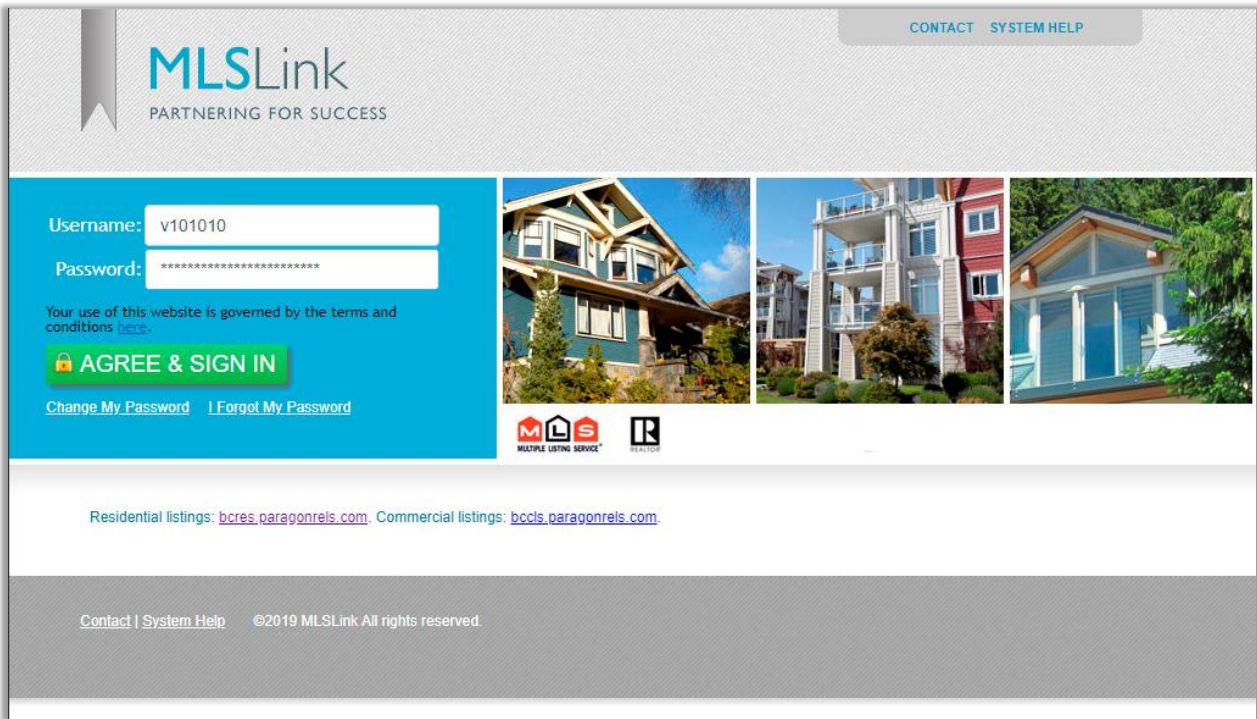
The REALTORLink dialog box appears.



3. Select your board in the drop-down list.
(or press "G" twice to select *Greater Vancouver*)
4. Then click **Sign in to Board/Association** to continue.

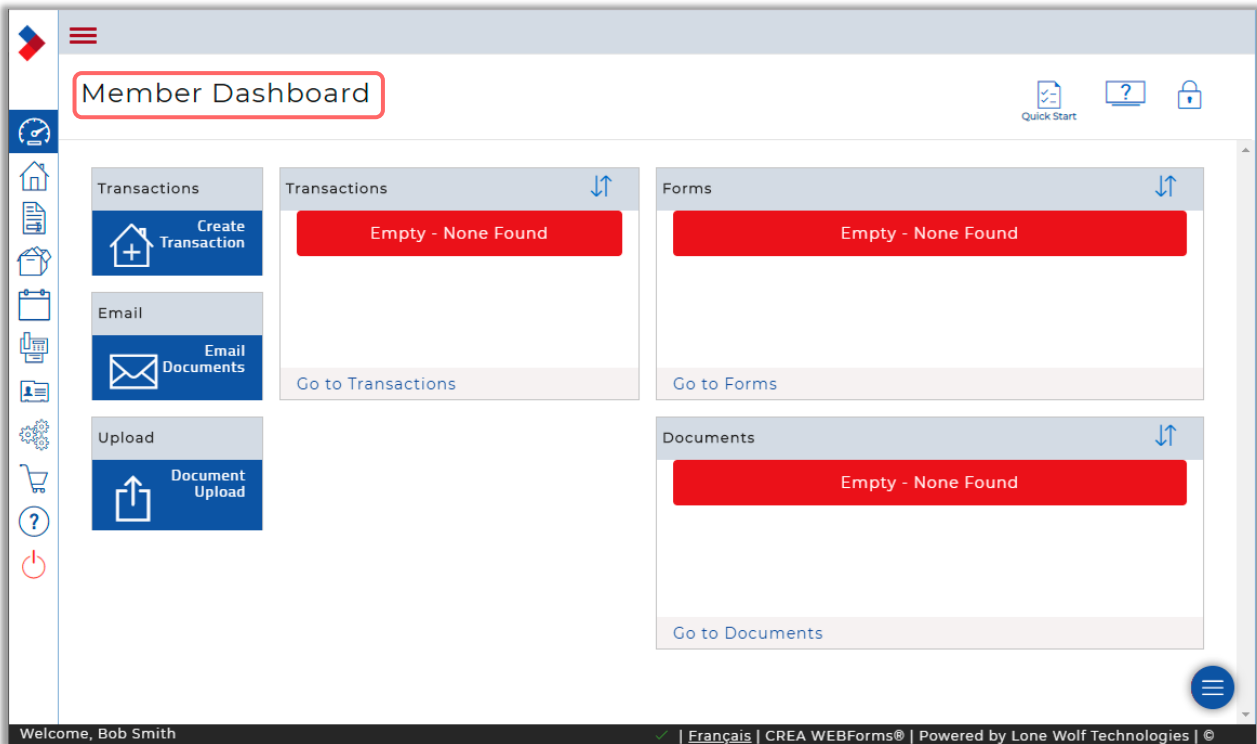


The **MLSLink SafeAccess® Login Page** opens.



5. Sign-in in the usual manner.

The WEBForms home page, also known as the **Member Dashboard**, opens.





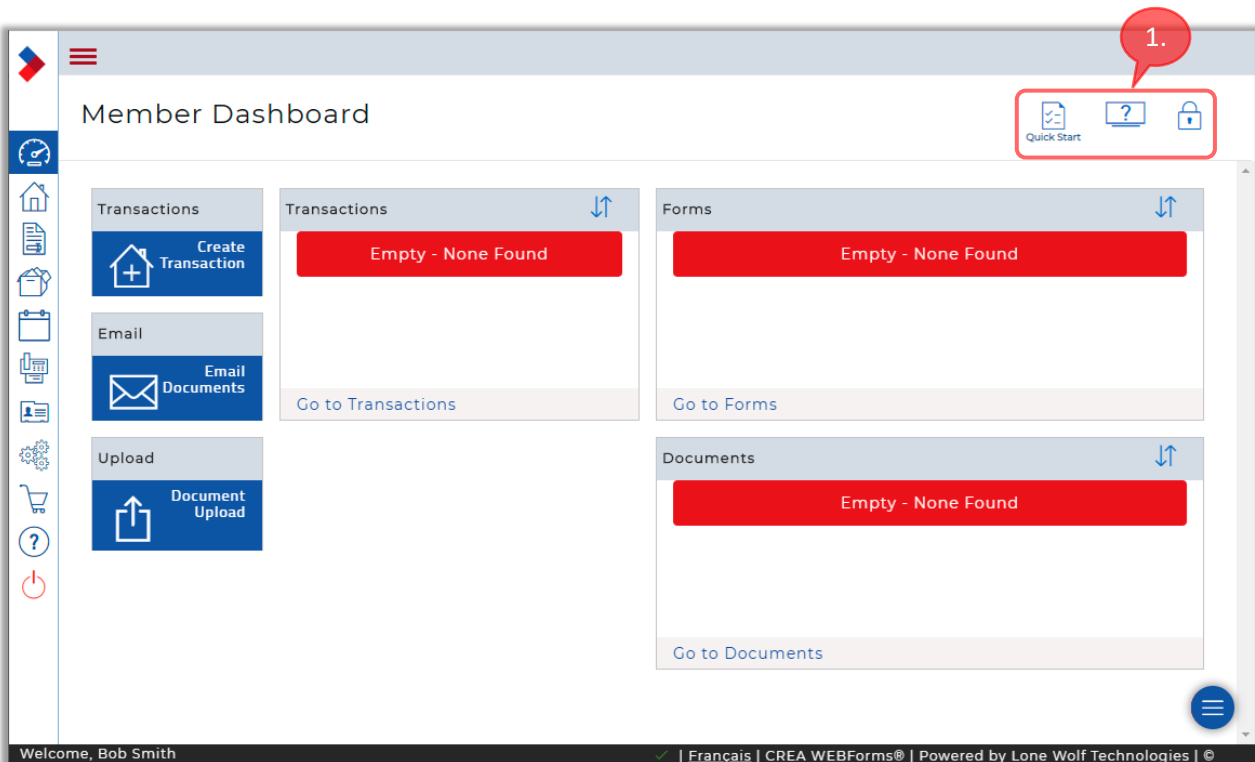
Navigating WEBForms



Note that it is permissible to use your browser's *Back* button while in WEBForms. However, you should make sure to save any data you have entered on the current page, or it may be lost when you click the *Back* button (a warning message usually appears when you are at risk of losing data you entered).

The Member Dashboard

After signing in, you will arrive at the WEBForms home page, which is also called the **Member Dashboard**.



Member Dashboard Links

1. The upper-right corner of the Member Dashboard contains several useful links, which also appear in several other locations within WEBForms.



Quick Start - displays the *CREA WEBForms® Help* page in a new browser tab. This is your preferred resource for learning about WEBForms.



How do I...? – opens a *CREA WEBForms® Help* page in a new browser tab, displaying a list of *Tutorial Videos*.

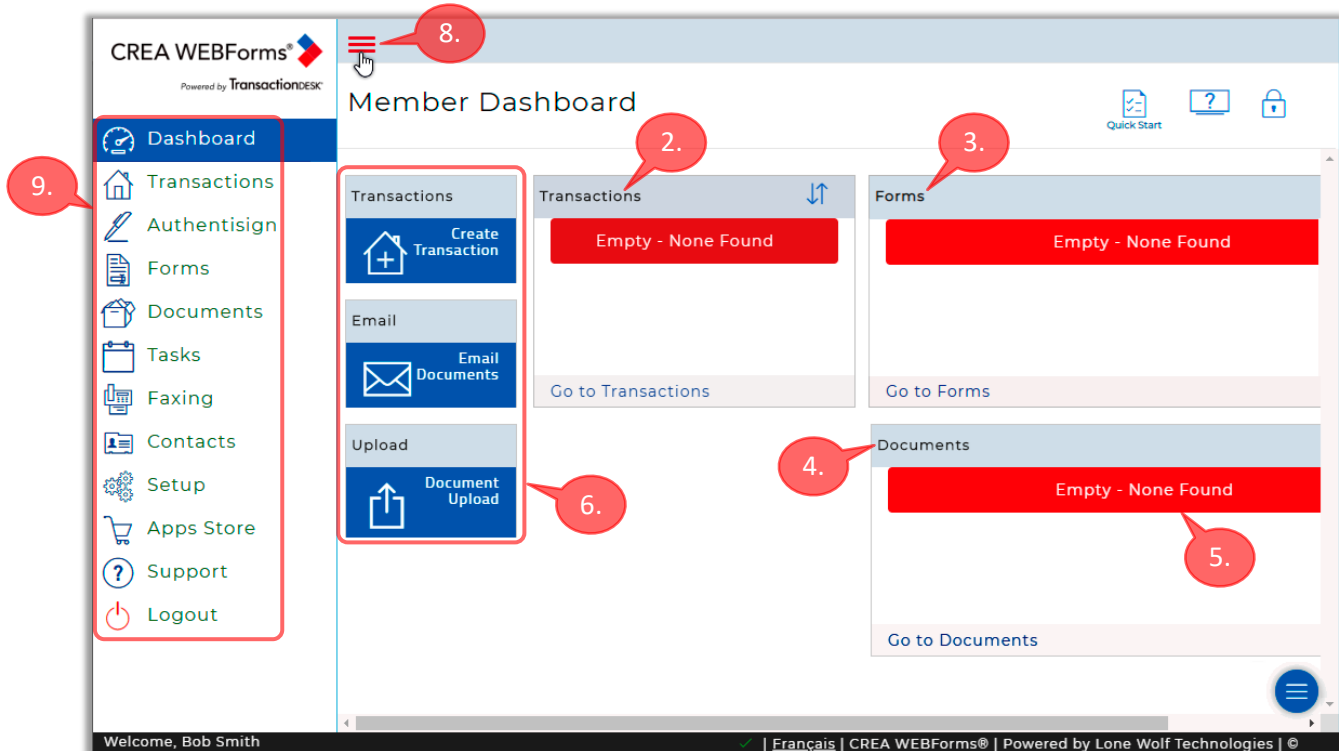


Lock/Unlock Dashboard - allows you to customize your Dashboard. See *Customizing Dashboards* on page [114](#) for more information.



Widgets

The centre section of the Member Dashboard includes a number of “widgets” that give you access to frequently-used functions directly from this page.
















2. The **Transactions** widget lists all the transactions that you have created.
3. The **Forms** widget lists all the forms that you have added to your transactions, as well as any stand-alone forms that you have created.
4. The **Documents** widget lists all the documents you have included in transactions or uploaded to your document folders.
5. If this is the first time you have signed in to WEBForms, these widgets will not yet contain any items, as indicated by the **Empty - None Found** message.
6. Three blue “shortcut” widgets are included by default: **Create Transaction**, **Email Documents** and **Document Upload**.
7. As mentioned above, you can customize your dashboard, specifying which widgets will be included. See [Customizing Dashboards](#) on page 114 for more information.



The Sidebar Menu

The Sidebar menu on the left allows you to navigate the various areas of WEBForms.

8. Click the Sidebar Toggle  (aka “hamburger” icon) to expand the Sidebar menu and display a text description for each item.
9. The **Sidebar** menu includes the icons listed below. Please familiarize yourself with these icons, as they appear in several locations within WEBForms.
 -  **Dashboard** – return to the Member Dashboard page.
 -  **Transactions** – work with your transactions.
Displays a list of your transactions. You can view and modify details of existing transactions, create new transactions and change their status.
 -  **Authentisign** – this icon will be present if you have an Authentisign account linked to your WEBForms account, allowing you to send forms for signing directly from WEBForms.
 -  **Forms** – access the forms in your transactions and in the Forms Library. You can preview forms, download or print forms, add a form to a transaction and create a standalone form.
 -  **Documents** – access your documents.
View and manage your documents, add new documents, upload, download, markup, and share your documents, and more.
 -  **Tasks** – view and manage tasks assigned to you or other members of your team.
 -  **Faxing** – create fax cover sheets to send with documents or forms.
 -  **Contacts** – work with your list of contacts, to facilitate their inclusion in a transaction or to send them emails or faxes.
 -  **Setup** – manage settings for your WEBForms account.
Set up your user and office information, email signature and branding, configure program settings, manage clauses and templates and more.
 -  **Apps Store** – purchase and link third party apps, such as e-signature and document management apps, to your WEBForms account.
 -  **Support** – access CREA’s Member Support resources.
This is your preferred source of support for WEBForms. Some other help resources focus on TransactionDesk functionality instead of WEBForms.
 -  **Logout** – logout of WEBForms.
Make sure to log out to prevent unauthorized access to your account, especially on publicly-accessible computers or devices.



Navigating Pages and Dashboards

Although WEBForms offers several ways to accomplish most tasks, you generally use the **Sidebar** menu on the left to navigate to the main areas of WEBForms. Alternatively, you can use the widgets and shortcuts on the **Member Dashboard** to navigate to the desired areas.




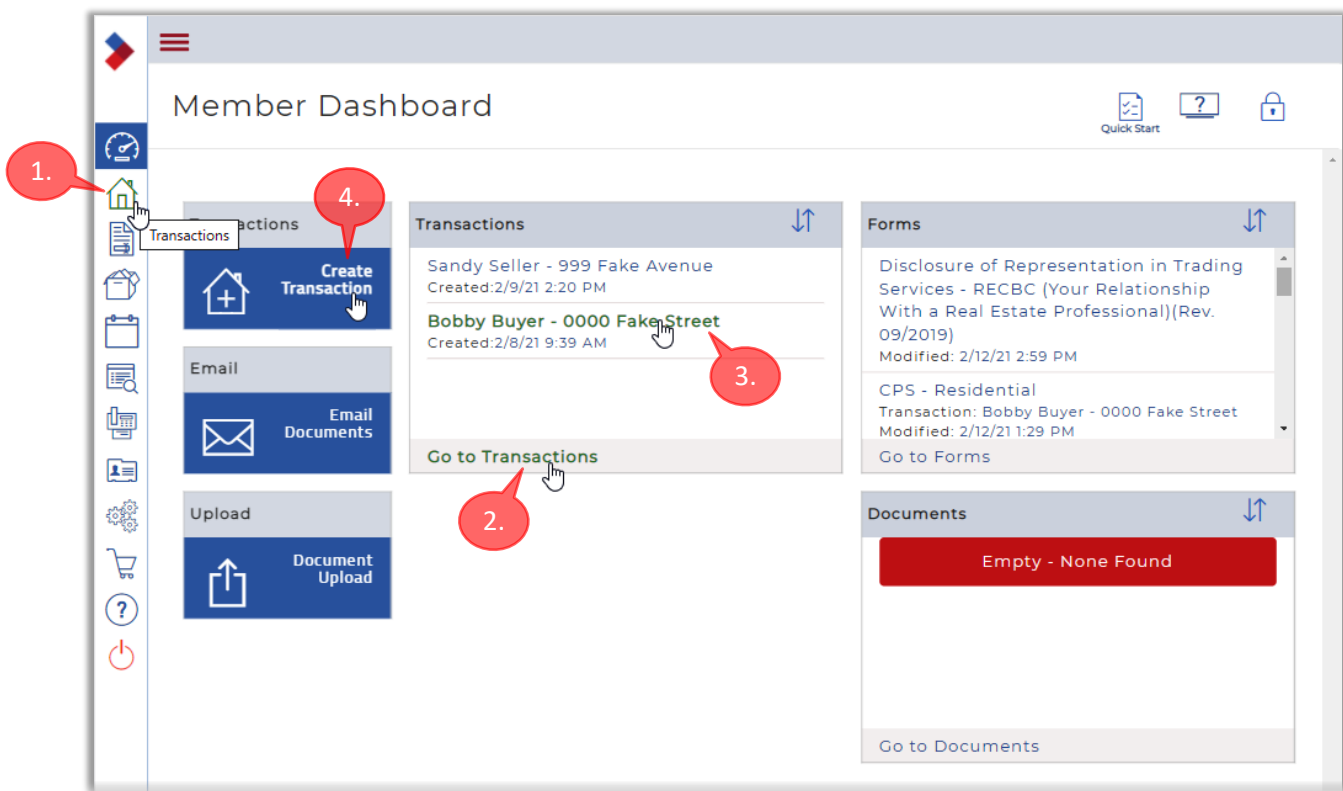
Note: the examples on the following pages demonstrate how you can navigate in WEBForms once you have created some transactions and forms. If you are just starting with WEBForms, you won't have any transactions or forms yet.



► To navigate your Transactions via the Member Dashboard:

As explained above, there are often several ways to accomplish a task in WEBForms. For example, you can access your transactions using any of the methods described below.


1. You can click  to go to the **Transactions** page.



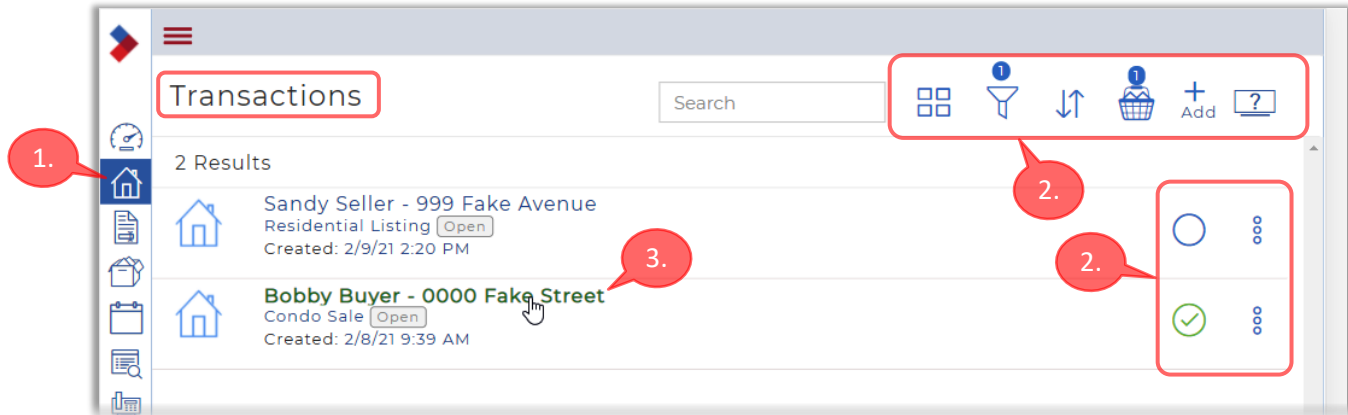
2. Alternatively, you can click **Go to Transactions** at the bottom of the **Transactions** widget.
3. You can also click on the name of a transaction in the **Transactions** widget to work with that transaction.
4. Or you could click the **Create Transaction** shortcut to start a new transaction.














► To navigate the Transactions page:

1. Click  in the **Sidebar** menu.

The **Transactions** page opens, listing all your existing transactions.



2. The **Transactions** page includes the icons listed below. Please familiarize yourself with them, as they appear in several locations within WEBForms.

-  **Grid/List toggle** – switches between a *List* view (default) and a *Grid* view of the available items (i.e. transactions, in the image above). List view is recommended, as it displays more information than Grid view.
-  **Filter** – applies a filter to narrow down the list of items being displayed. The number indicates how many filters are currently in effect.
-  **Sort** – displays a menu allowing you to specify the sort order of the listed items. Click a menu item to sort by that item. Click the item again to switch between *ascending*  and *descending*  sort order.
-  **Basket** – the Basket is used to operate on several items at once. The number above the basket displays a count of how many items are currently selected. Click the Basket to display a dialog box of options that will operate on all selected items.
-  **Add** – click to add an item, such as a transaction, form, clause, etc.
-  **Help** – click to access Tutorial videos.
-  **Traffic light menu** – displays a menu of options that act upon the corresponding item only.
-  **Select** – click to select the corresponding item, so that you can then use the Basket to operate on all selected items.
-  **Selected** – the green checkmark indicates that the item is selected.




► To navigate the Transaction Dashboard:

3. On the **Transactions** page, click on the name of a transaction, as shown on the preceding page.

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

The screenshot displays the Transaction Dashboard for a specific transaction. The top section shows the transaction name 'Bobby Buyer - 0000 Fake Street' and its status 'Open'. Below this, there are sections for 'Detail Overview' (showing 'Condo Sale' and 'Status: Open'), 'Documents' (showing 'Empty - None Found'), and 'Forms' (listing various legal forms like 'CPS - Residential' and 'Subject Removal and Appointment of Conveyancer'). A 'Menu' button is located in the top right, which opens a dropdown menu with options such as 'Delete Transaction', 'Teams/Share', 'Notes', 'Duplicate', 'Apply template', 'Create template', 'Import data', 'Archive...', and 'Change Transaction Status'. A red circle '4' highlights the 'Menu' button, and a red circle '5' points to the 'Subject Removal and Appointment of Conveyancer' form entry. A red circle '6' points to the 'Go to Forms' button at the bottom of the Forms widget. A red circle '7' points to the 'Forms' menu item in the right-hand navigation menu.

As usual, there are several options for working with the transaction:

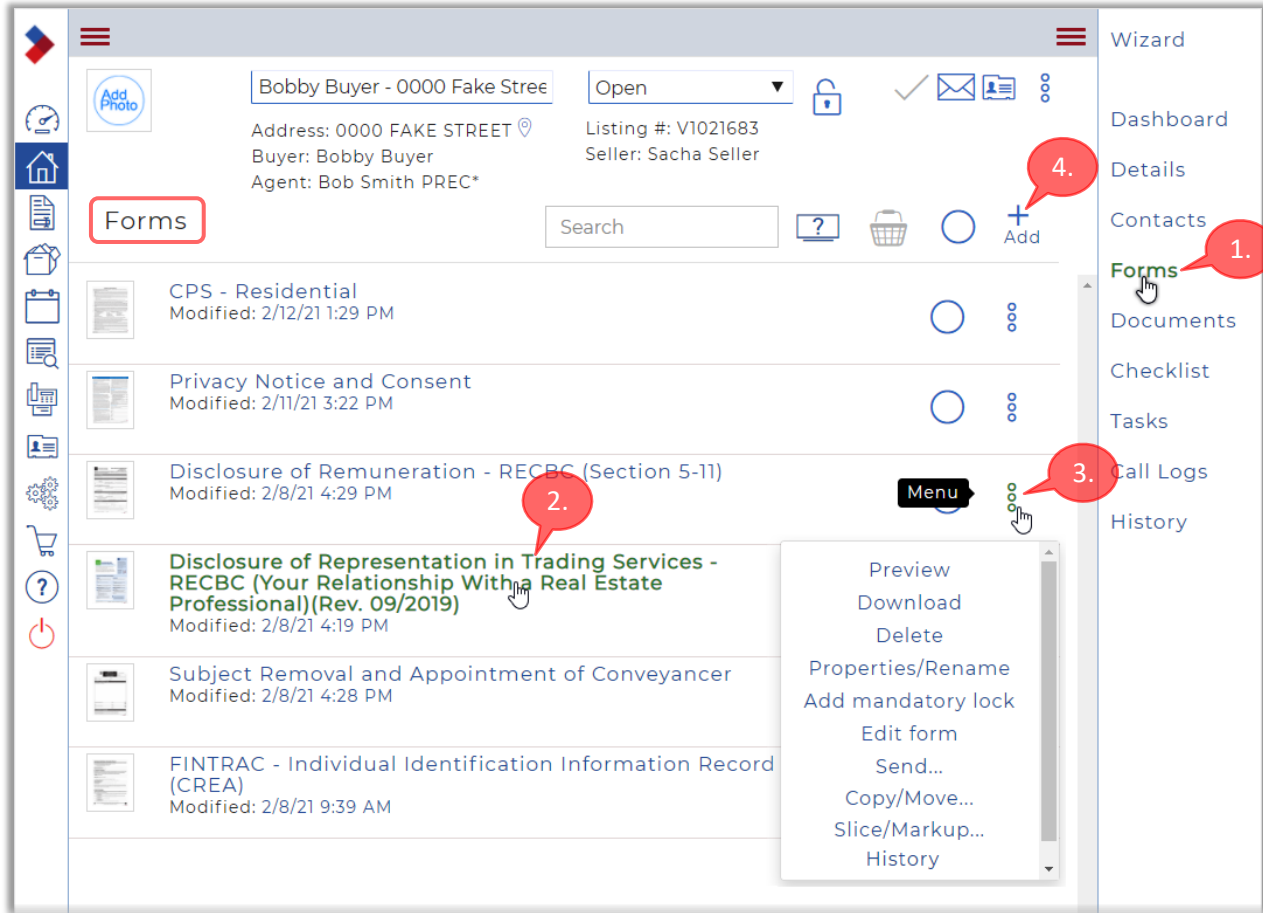
4. Click  **Menu** to display a pop-up menu of operations that you can perform on the transaction, such as *Delete Transaction*, *Duplicate*, *Apply template*, etc.
5. To work with a specific form, click on its name in the **Forms** widget.
6. To open the *Forms* page (which allows you to work with multiple forms), click **Go to Forms** at the bottom of the **Forms** widget.
7. Or, click **Forms** in the menu at the right.



Note that you can also access the transaction's *Dashboard*, *Details*, *Contacts*, etc. using the menu at the right.



► To navigate the Forms page:

1. Click **Forms** in the menu at the right, as explained on the preceding page.
The **Forms** page opens, displaying a list of the forms in the transaction.



2. To edit a form, simply click on its name. It will open in the *Form Editor*. Working with the Form Editor is explained on page 60.
3. To operate on a single form, click  **Menu** to display a pop-up menu of options for the form. The menu includes options to *Preview, Download, Delete, Edit, Send, Copy/Move* the form, and more.
4. To add a new form to the transaction, you would click .

That concludes the explanations of how to navigate the various pages and dashboards of WEBForms.

In the activities on the following pages, you will prepare several *Transaction Templates*, which will facilitate the creation of your actual transactions. But first, you'll make sure that your Form Settings are properly configured.




Configuring your Form Settings

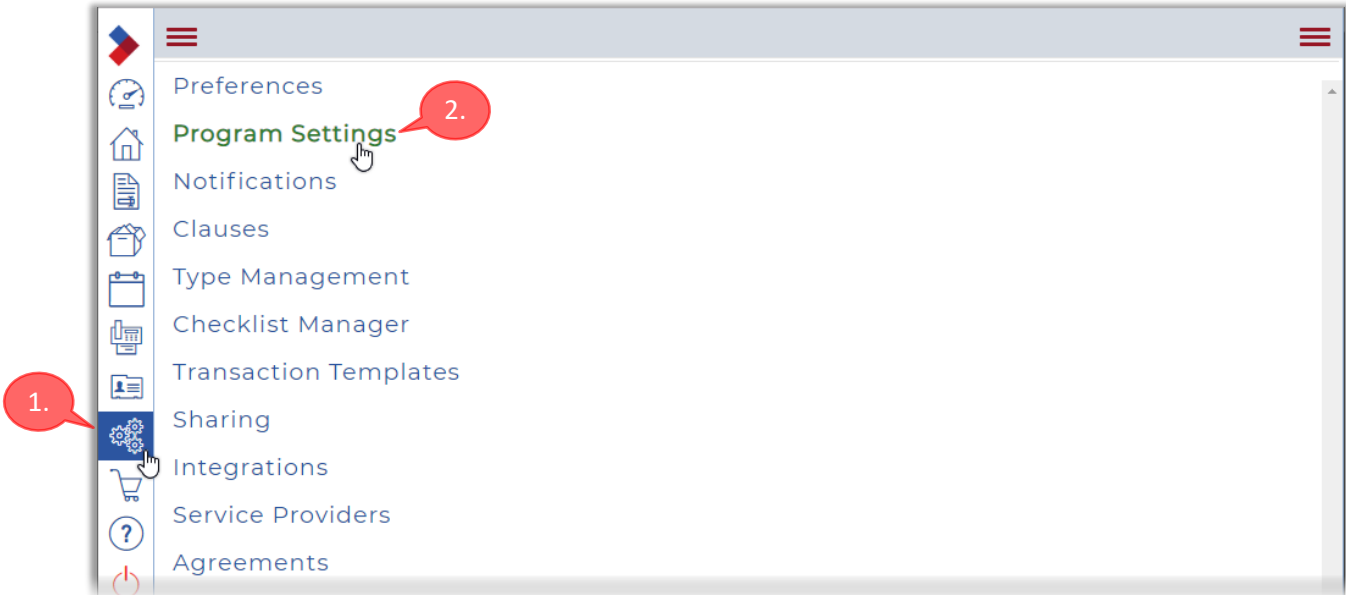
Before you start to work with the forms in transactions and templates, it is helpful to configure a few settings so that you obtain the best results with your forms.



► To configure your Form Settings:

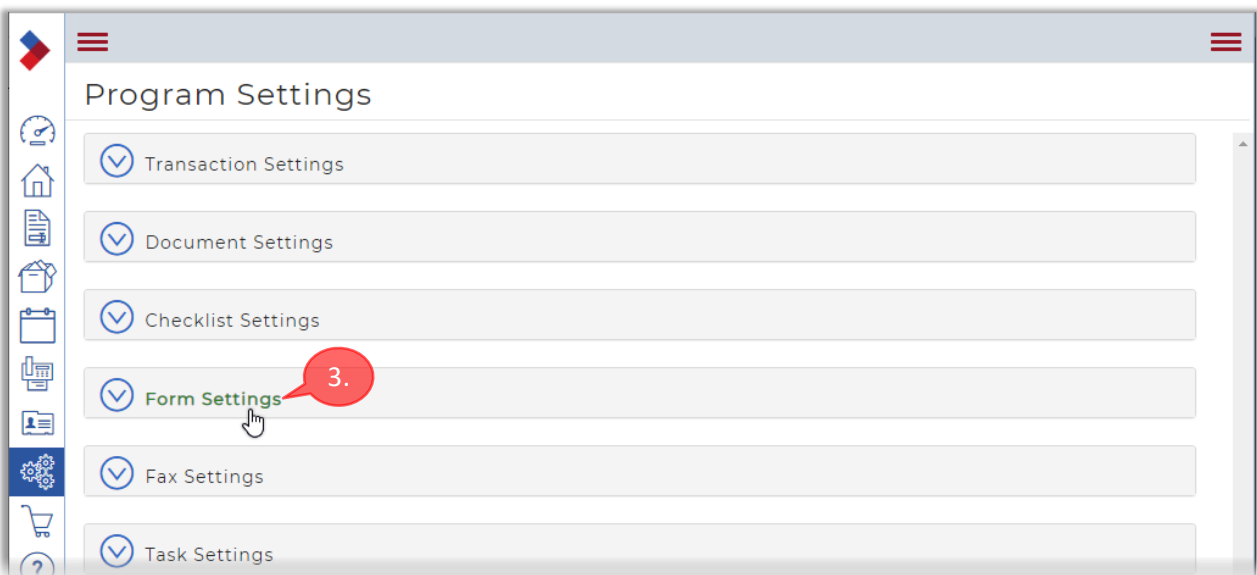
1. Click  **Setup** in the Sidebar on the left.

The **Setup** options page opens, as shown below.



2. Click **Program Settings** to continue.

The **Program Settings** page opens.



3. Click **Form Settings** to expand that section.

The **Form Settings** section expands to display the available options.

4.

5.

4. You are advised to select the following options for best results:

- **Default Font:** *Times-Roman* or *Helvetica*
- **Default Size:** 11
- **Autosave:** *Checked*

The other options can remain at their default settings.

5. Click **Update** to save your changes.

See [Customizing WEBForms](#) on page 106 for more information about configuring additional settings.



Working with Templates

You can use *Transaction Templates* to simplify the creation of your transactions. They also help prevent errors and omissions when filling out forms in a transaction.

A template acts as a starting point to create a specific type of transaction. The template is pre-populated with all the forms, clauses and other information that is common to that type of transaction, while omitting any information that is specific to the property or participants involved in the transaction. Therefore, only transaction-specific information will need to be entered when you actually create the transaction, thus expediting the process.

WEBForms has been specifically designed to work with templates, so you are strongly encouraged to incorporate the use of templates into your own workflow.

You are advised to create a template for each type of transaction that you regularly use. For example, you could create a template for detached listings, for detached sales, for attached listings, attached sales, and so on.


In the following activity, you'll create a template for the buyer of an attached property.

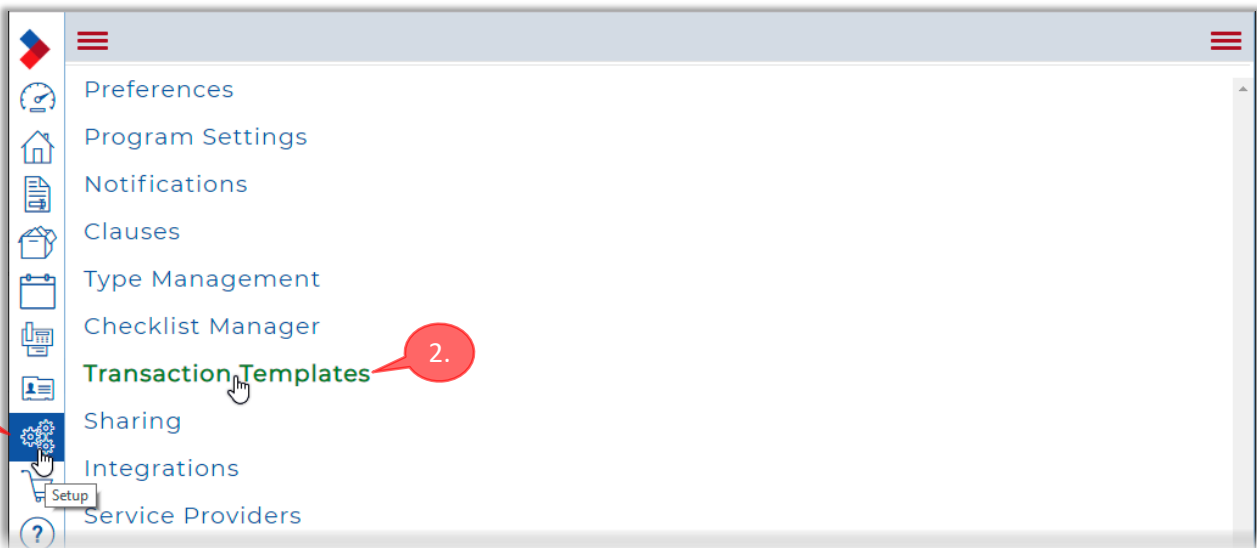
Creating a Template for an Attached Sale

You will now create a template for the buyer of an attached property. You will also insert clauses into one of the forms in this sales template.



► To create a template for the buyer of an attached property:

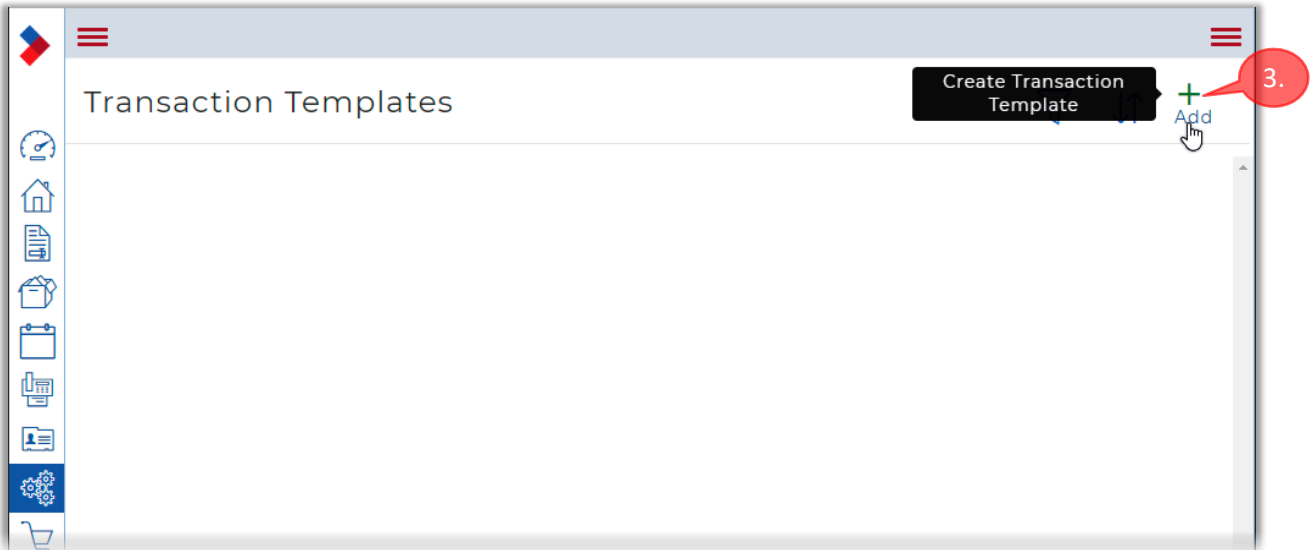
1. Click  **Setup** in the Sidebar on the left.



2. Click **Transaction Templates** to continue.

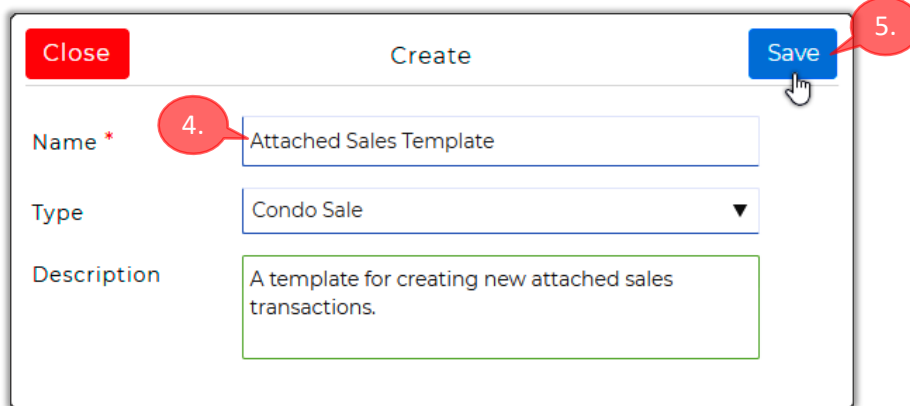


The **Transaction Templates** page opens, listing your existing templates, if present.



3. Click **Add** to start to create a new template.

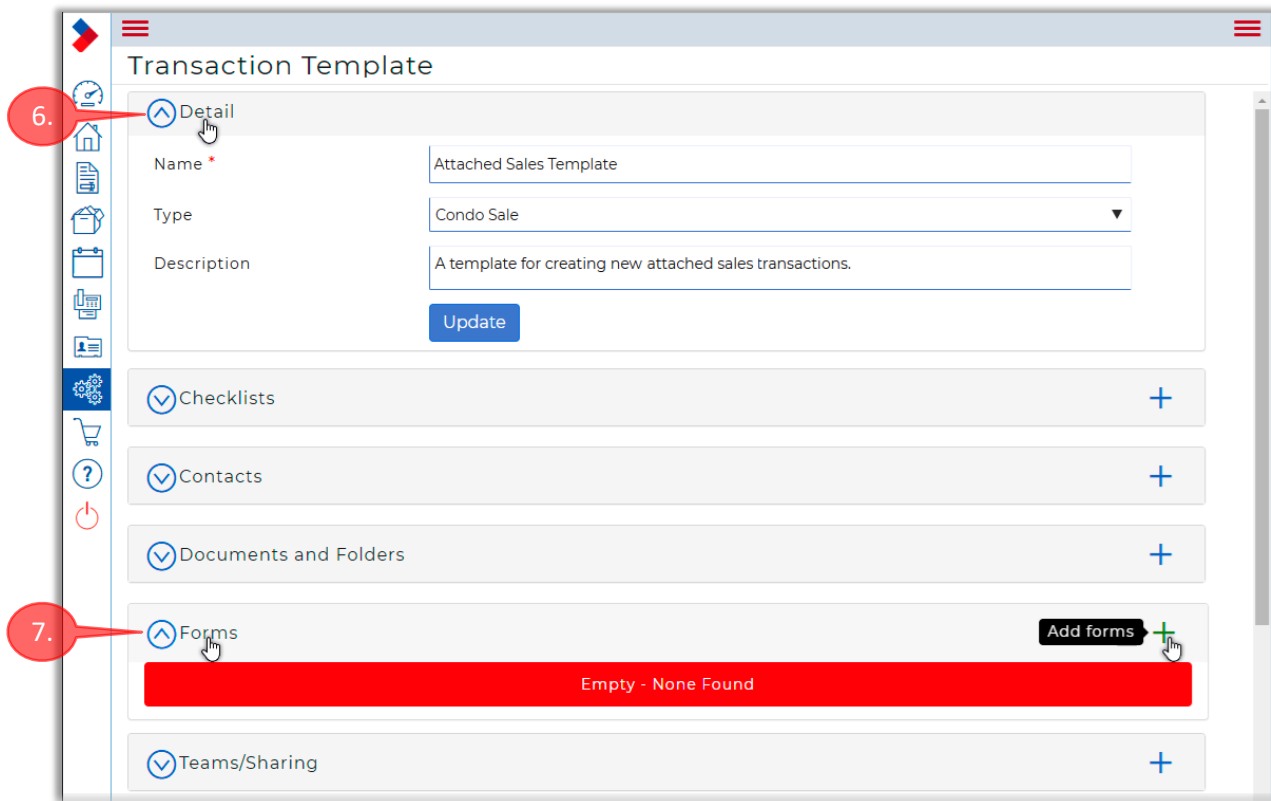
The **Create** dialog box appears.



4. Enter a descriptive name into the **Name** field.
Choose a name that will help you identify the template in the future.
Optional: select a **Type** for the transaction.
Optional: enter a **Description** to help you identify the template in the future.
5. Click **Save** to continue.



The template is created and a new **Transaction Template** page opens.



The template contains six sections, which are described below.

Aside from the *Detail* section, all other sections can be left blank.

However, you will usually need to add some forms to the *Forms* section.

- **Detail** – this section is populated from the fields in the **Create** dialog box, which is described on the preceding page.
- **Checklists** – you can optionally add a checklist to the template that will be added to all transactions created from the template.
- **Contacts** – you can optionally add one or more contacts to your template so that they will be included in every transaction created from the template. However, it's unlikely that the same contacts would be relevant to every transaction created from the template, so you would usually leave this section blank.
- **Documents and Folders** – you can optionally add certain documents to every transaction you create from the template.
- **Forms** – use this section to add the required forms to the template.
- **Teams/Sharing** – allows you to share the transactions created from the template with your “sharing group”. The group must be created first.

6. To expand or collapse a section, click the bar at the top of the section.

7. Click **Forms** to expand that section. It will currently be empty.



Adding Forms to a Template

The following forms will be added to this *Attached Sales Template*:

- ***CPS - Residential***
- ***Privacy Notice and Consent***
- ***Disclosure of Remuneration - RECBC (Section 5-11)***
- ***Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional)(Rev. 09/2019)***
- ***Subject Removal and Appointment of Conveyancer*** (REBGV version)
- ***FINTRAC - Individual Identification Record - (CREA)***



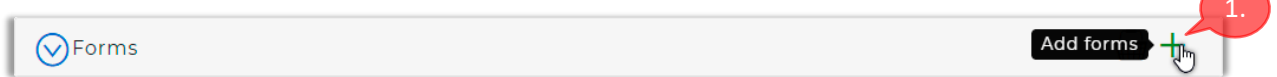
Templates Summary

See the [Templates Summary](#) on page 118 for a list of the forms and clauses that you will add to the various templates you create during these hands-on activities.

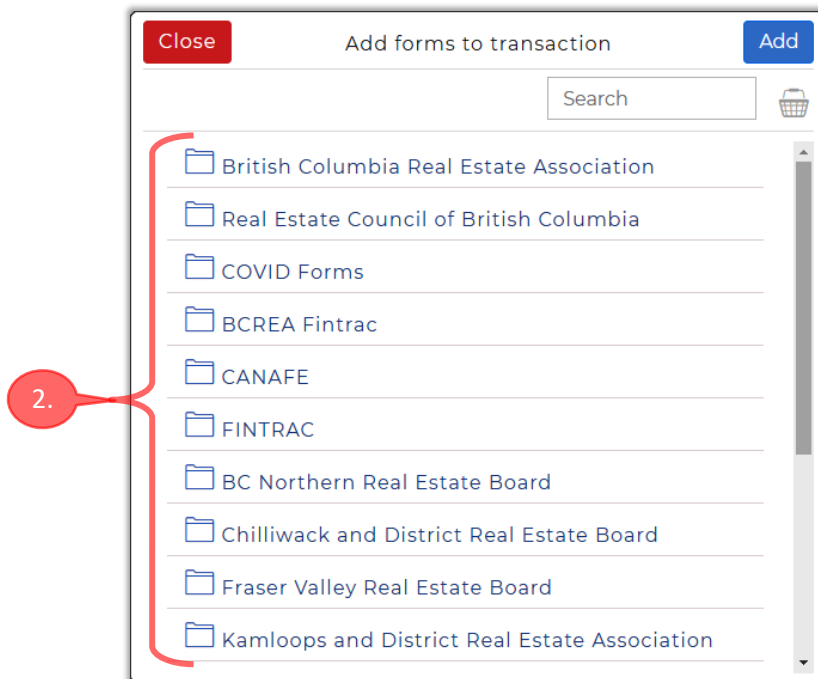


► To add forms to the template:

1. Click **+** **Add Forms** to start to add forms to the template.



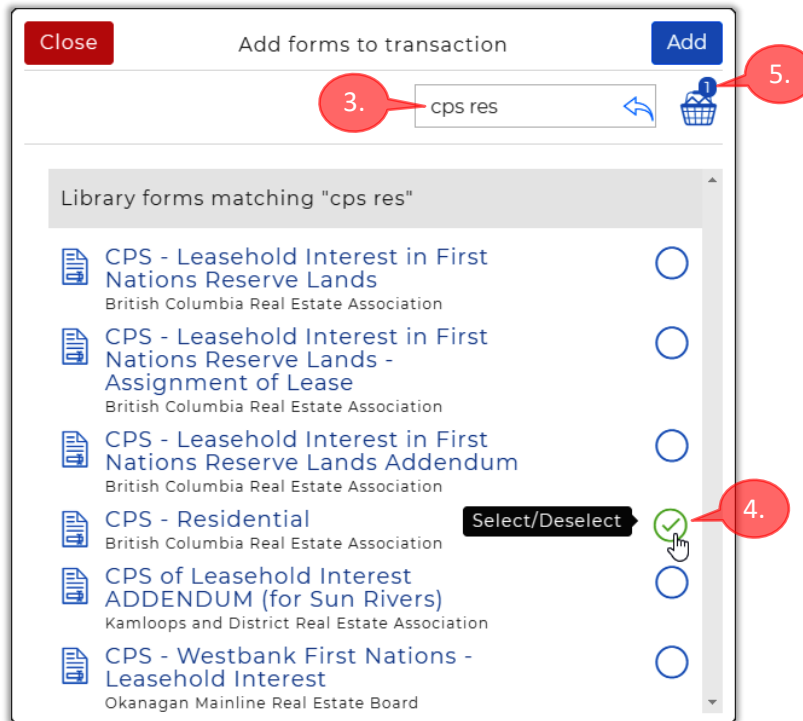
The **Add forms to a transaction** dialog box appears.



2. The available forms are grouped into folders, corresponding to the various boards, BCREA and RECBC. Although you could browse these folders to locate the desired form, you are instead encouraged to use the **Search** field, as the large number of available forms makes browsing impractical.



3. Click in the **Search** field and start to type “cps residential”.



As you type, any matching forms are listed. Continue typing until the desired form appears in the list.



Note: you can type any part of the form name you are searching for; you don't need to start with the beginning of the name. E.g. “residential” would also work in this case.

4. Click the form name or the circle at the right to select the form. The green checkmark indicates that the form is selected.
5. The number above the basket displays a count of how many forms are currently selected.

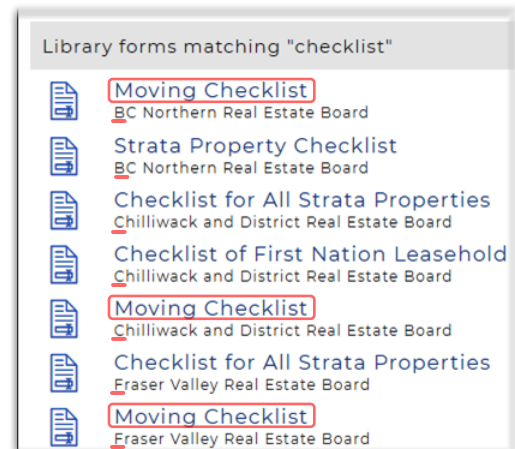
About the sort order of Search results

The forms listed in the Search results are grouped by their boards, and the boards are sorted alphabetically. Within each board grouping, the forms are sorted alphabetically. Please keep this in mind if you can't initially find your desired form.

Note: Search does not filter by board

WEBForms will search the entire library for matching forms, even if you have already selected a board.

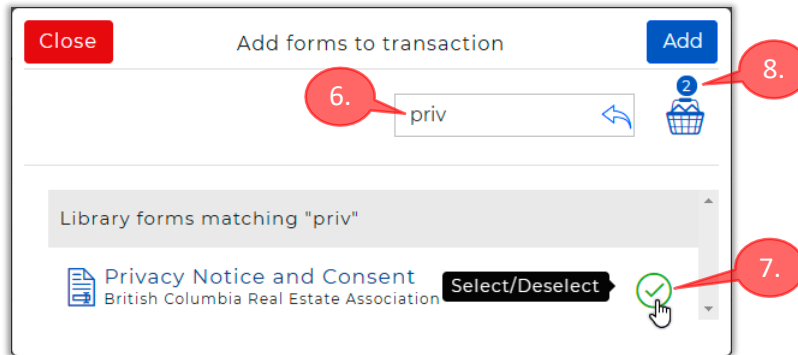
Also, the name of the board or association is displayed in a small font, so be extra careful to choose the form associated with your board.



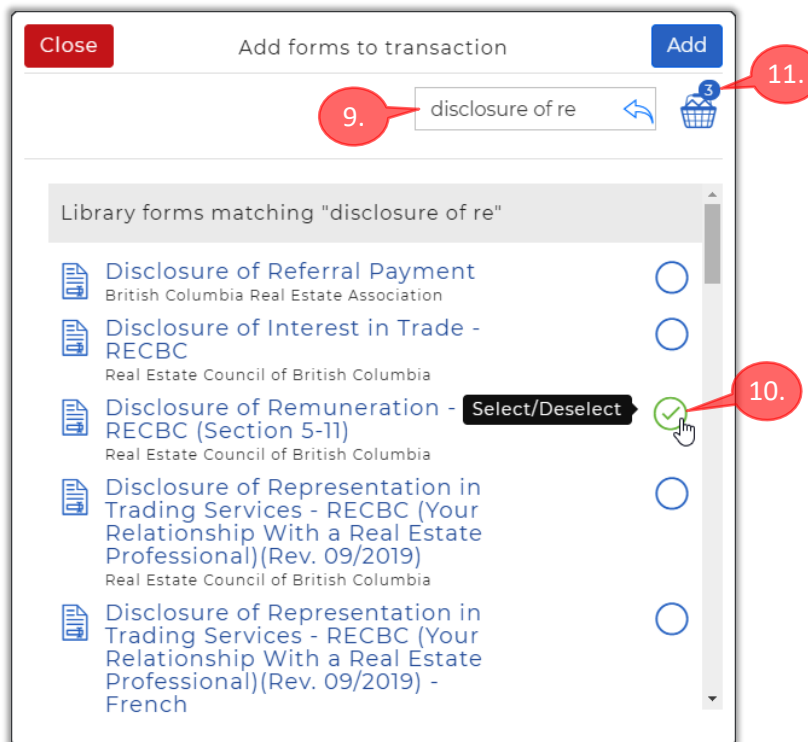
Sort Order Example:
 - Primary sort order is by board.
 - Secondary sort is by form name



6. Click  to clear the **Search** field, and then start to type “privacy”.



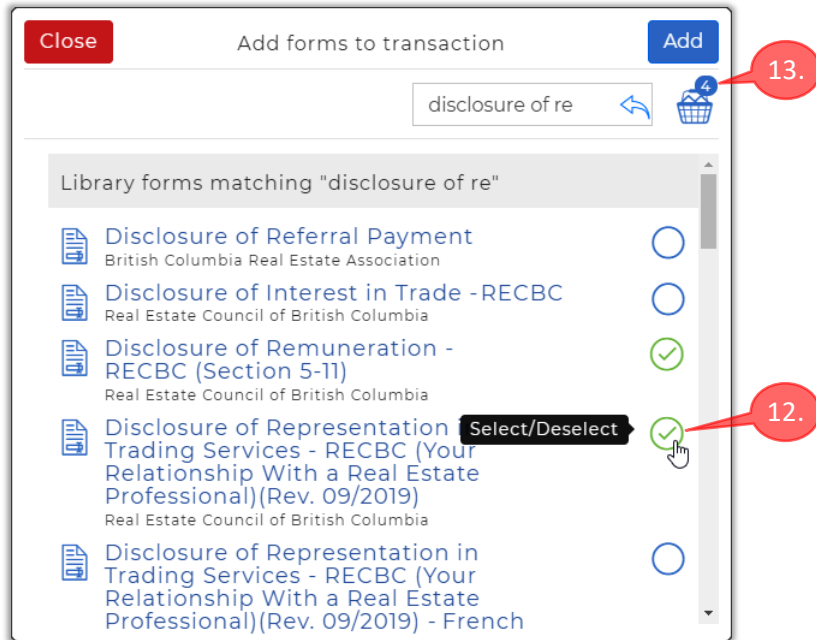
7. Select the **Privacy Notice and Consent** form when it appears in the list.
8. The basket icon will now indicate that two forms are selected.
9. Next, clear the **Search** field and start to type “disclosure of remuneration” into the field.



10. Select **Disclosure of Remuneration - RECBC (Section 5-11)** when it appears in the list.
11. The basket icon now indicates that three forms have been selected.



12. Also select the **Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional)(Rev. 09/2019)** form.

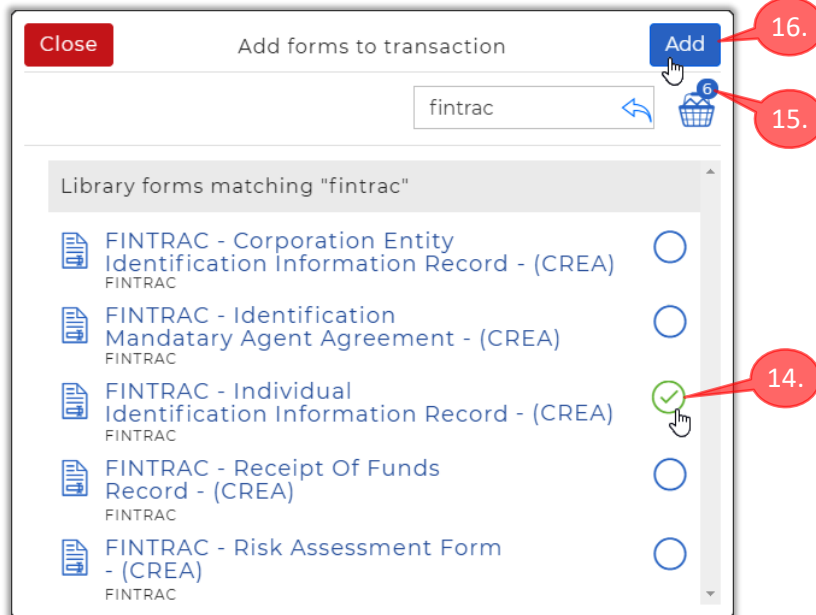


13. The basket icon now indicates that four forms have been selected.

14. Search for the following forms, and add them to your template using the techniques described above:

- **Subject Removal and Appointment of Conveyancer**
- **FINTRAC - Individual Identification Information Record - (CREA)**

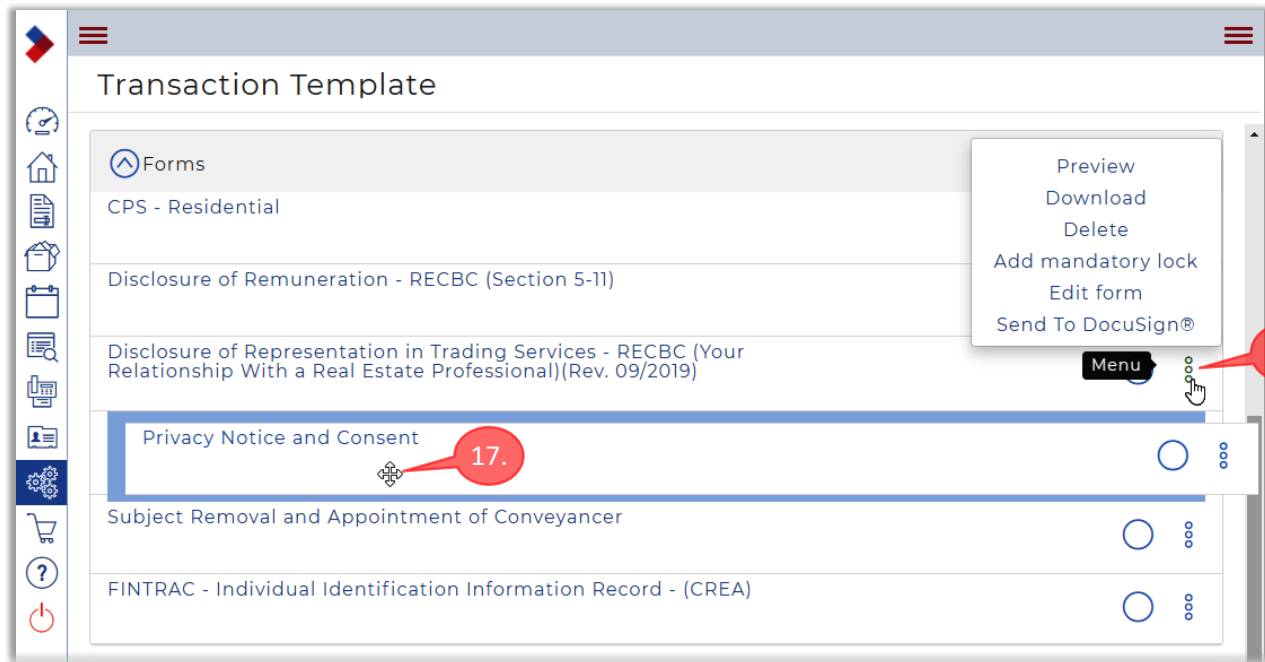
15. The basket icon should now indicate that you have selected six forms.





16. Click **Add** to add all six forms to the template.



You are returned to the **Transaction Template** page.



The **Forms** section of the template should now contain the six forms you added, as shown above.

17. You can change the order of the forms by holding your mouse pointer near (but not on) the form name to display a crosshair mouse pointer . Then drag the form to its new position in the list.
18. Note that you can click  **Menu** to the right of a form to display a pop-up menu that allows you to perform various operations on that form:
 - **Preview** – display a preview of the form. You can optionally print or download the form while previewing it.
 - **Download** – download a PDF copy of the form.
 - **Delete** – delete the form from the template.
 - **Add mandatory lock** – this “locks” the form so that any transaction created from the template must include the form, i.e. the form can’t be omitted from such a transaction.
 - **Edit form** – edit the form in the Form Editor. Same effect as clicking the form name. Working with the Form Editor is explained on page 60.
 - **Send to...** – this option will appear at the bottom of the pop-up menu if you have linked an e-signature application to WEBForms.



Adding Clauses to a Form in a Template

Certain forms, such as the *CPS*, include fields that allow you to enter clauses. Clauses can be added from the Clause Library provided with WEBForms, or from personal clauses that you have previously created. Creating personal clauses is explained on page 85.

You will use the *Form Editor* to enter clauses, and to fill-in the other fields in the *CPS - Residential* form.

Since you are creating a template and not a transaction, you would add only generic clauses that pertain to the *type* of transaction you will create from the template. Any transaction-specific information will be added later; at the time that you create the transaction from the template.



► To add clauses to a form using the Form Editor:

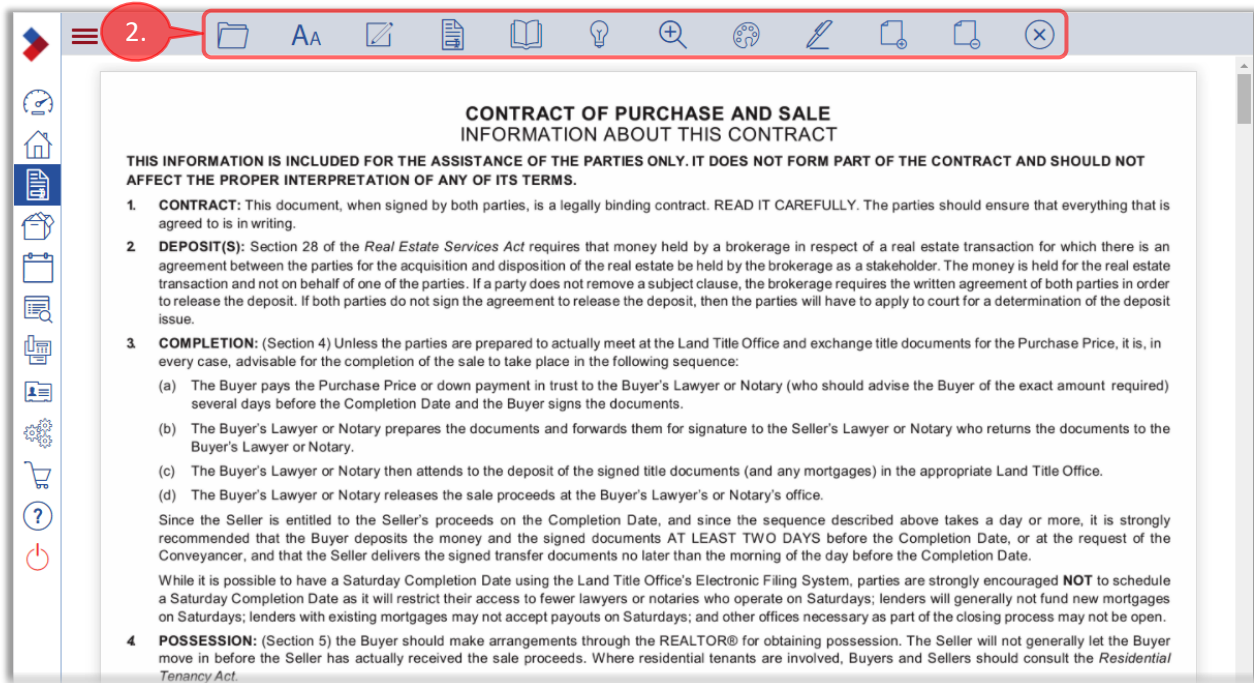
1. Click on the name of the form that you wish to add clauses to. In this case, click on the ***CPS - Residential*** form.

(Note that you can add clauses only to forms that include *clause fields*.)

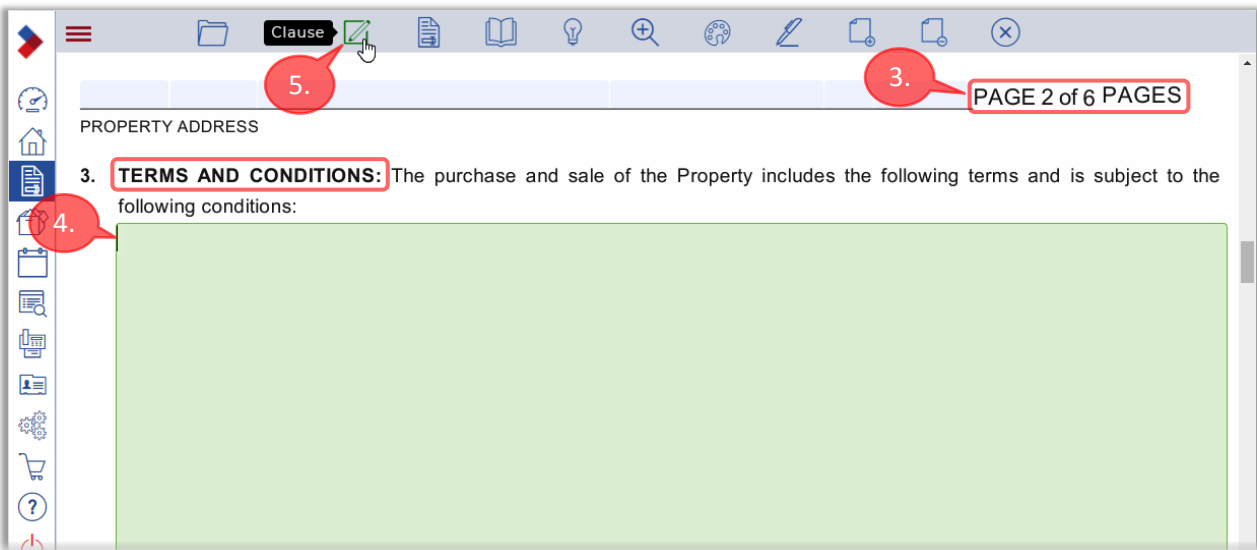





The **CPS - Residential** form opens in the *Form Editor* window.



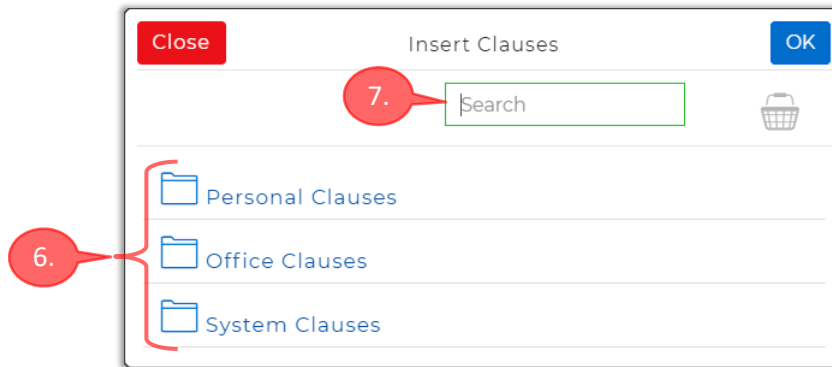
- You can recognize the Form Editor by the menu bar at the top of the page. Use of the Form Editor is described in more detail on page 60.
- Scroll down to the **TERMS AND CONDITIONS** section on the third page of the form (**PAGE 2 of 6 PAGES**).



- Click in the clause field to open that field for editing. The field will be highlighted with a light-green colour.
- Next, click  **Clause** in the Form Editor menu bar.

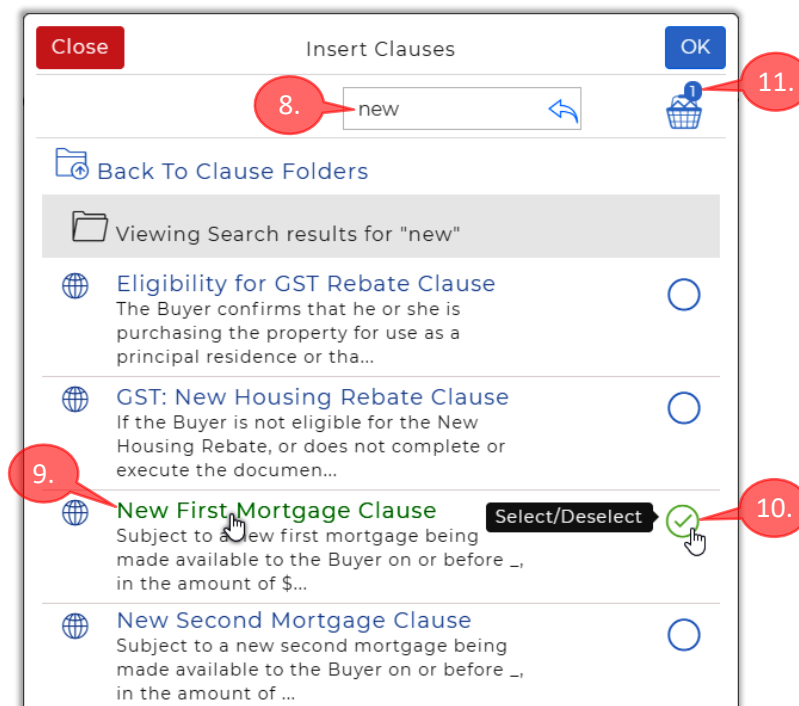


The **Insert Clauses** dialog box opens.



6. The available clauses have been grouped into three categories (folders):
 - *Personal Clauses* contains custom clauses that you previously created.
 - *Office Clauses* contains clauses provided by your Office/Brokerage.
 - *System Clauses* contains an extensive library of clauses provided by your board, BCREA, and RECBC.
7. As with forms, you are encouraged to use the **Search** field to locate the desired clauses, as the large number of available clauses makes browsing impractical. When searching for clauses, both the body of the clause and the clause title will be searched for text that matches your search criteria.
8. Click in the **Search** field and start to type the title of the desired clause; e.g. *New First Mortgage*, in the image below.

As you type in the **Search** field, a list of matching clauses is displayed below.




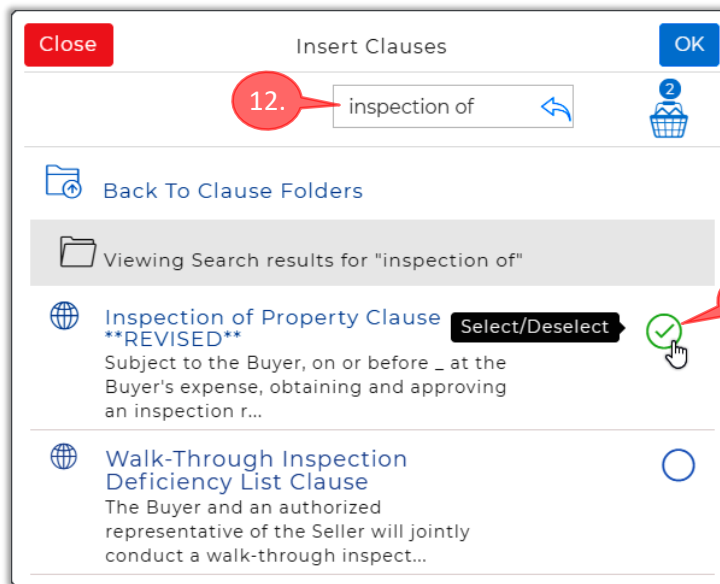


9. To preview a clause, simply click on the clause name.
10. Select the **New First Mortgage Clause** by clicking its green circle at the right. (Unlike forms, you can't click the name of a clause to select it.)
11. The basket icon displays a count of the number of clauses you have selected.



Note that clauses will be added to the form in the order in which you select them; i.e. the first clause selected will be the first one listed. It's not easy to re-order them later—you would need to cut and paste—so it's best to add them in the desired order.

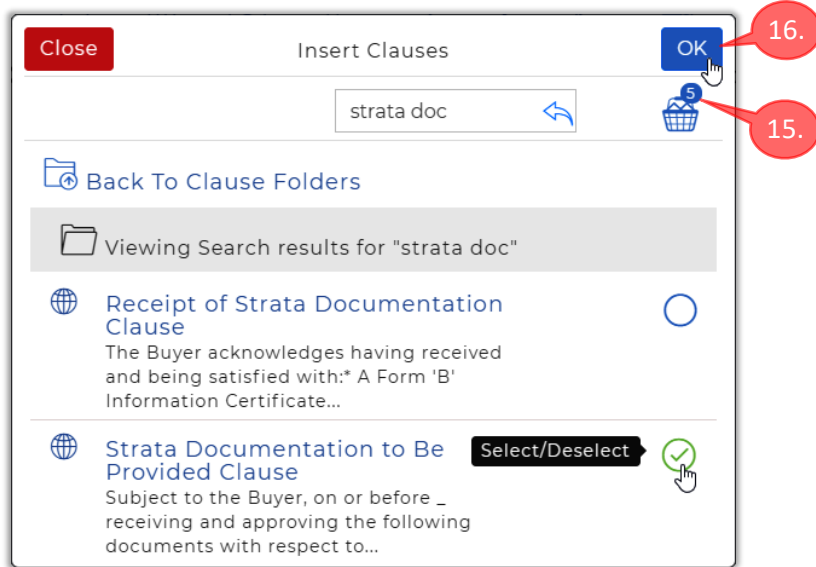
12. Click  to clear the **Search** field and start to type "inspection of property".



13. Select the **Inspection of Property Clause **REVISED**** when it appears in the list of matching clauses.
14. Add the following clauses, using the techniques described above:
 - **Buyer Approving the Property Disclosure Statement Clause**
 - **Buyer's Approval of Title Search to be Incorporated into Contract**
 - **Strata Documentation to be Provided Clause**

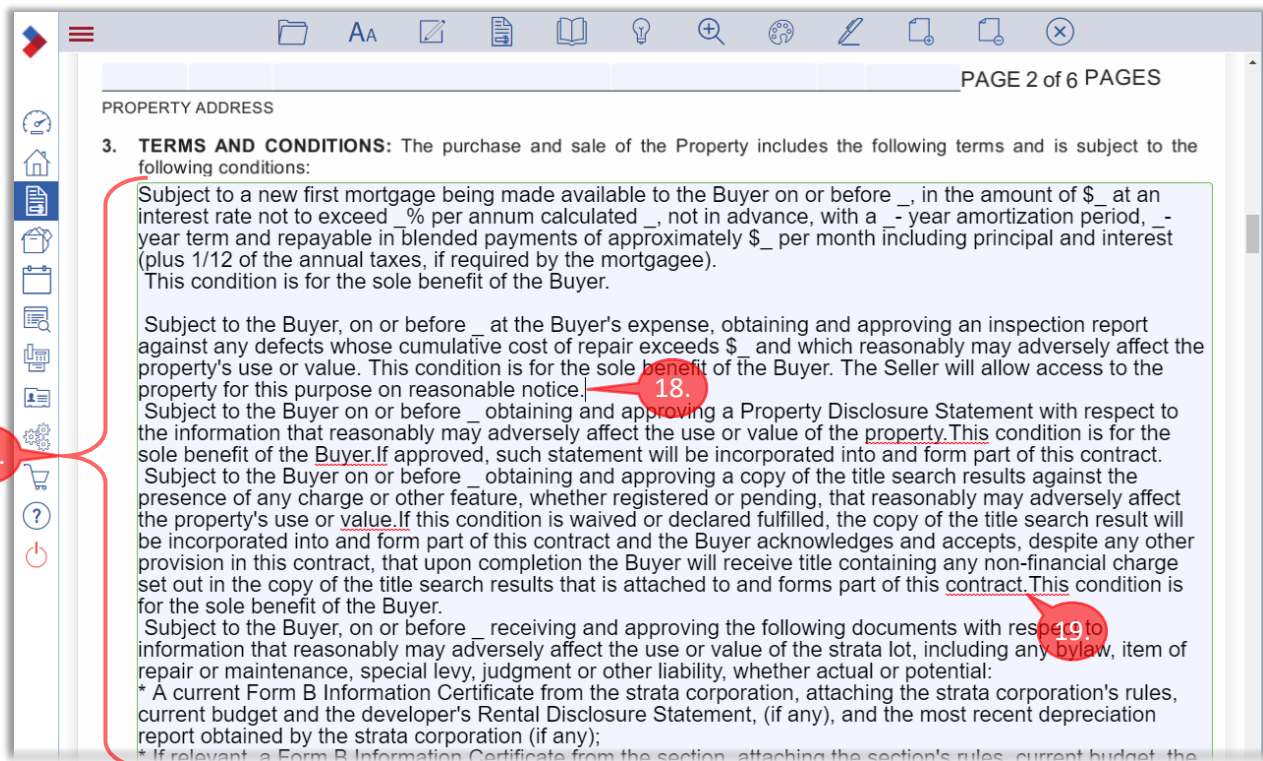


15. The Basket icon should now indicate that it contains five clauses.



16. Click **OK** to add the five clauses to the form.

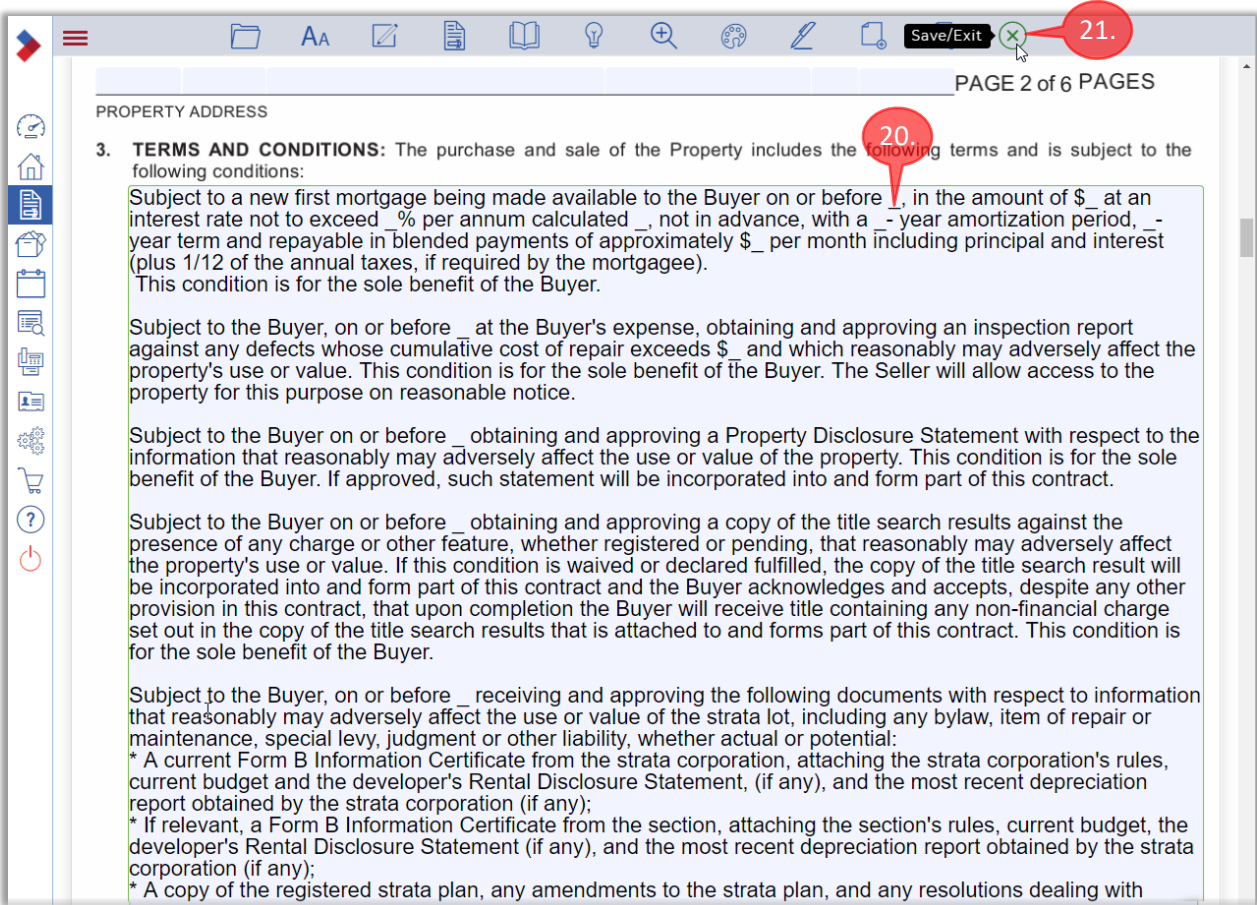
17. The selected clauses will now appear in the clause field within the form.




18. Note that WEBForms might not insert blank lines between your clauses, making it hard to tell where one clause ends and the next one begins. In that case, you are advised to manually insert blank lines by placing your text cursor at the end of a clause and pressing *Enter/Return*.



19. You are also advised to insert spaces that are missing in the clauses (e.g. between sentences, as shown above, and as indicated by the red underlines, which will appear if you have Spellcheck enabled in your browser).
20. Also note that some clauses include underscore characters “_” , which indicate where additional information will need to be entered when you create a transaction from the template. You can ignore these characters for the time being.



The TERMS AND CONDITIONS section has been cleaned up by adding blank lines between clauses, and spaces between sentences.

21. Once all the required clauses have been entered, click  **Save/Exit** to continue. Your form will be saved and you will exit the Form Editor.

You will be returned to the **Transaction Template** page.

That concludes the creation of the *Attached Sales Template*. In the following activities, you will copy this template to create one for detached sales.




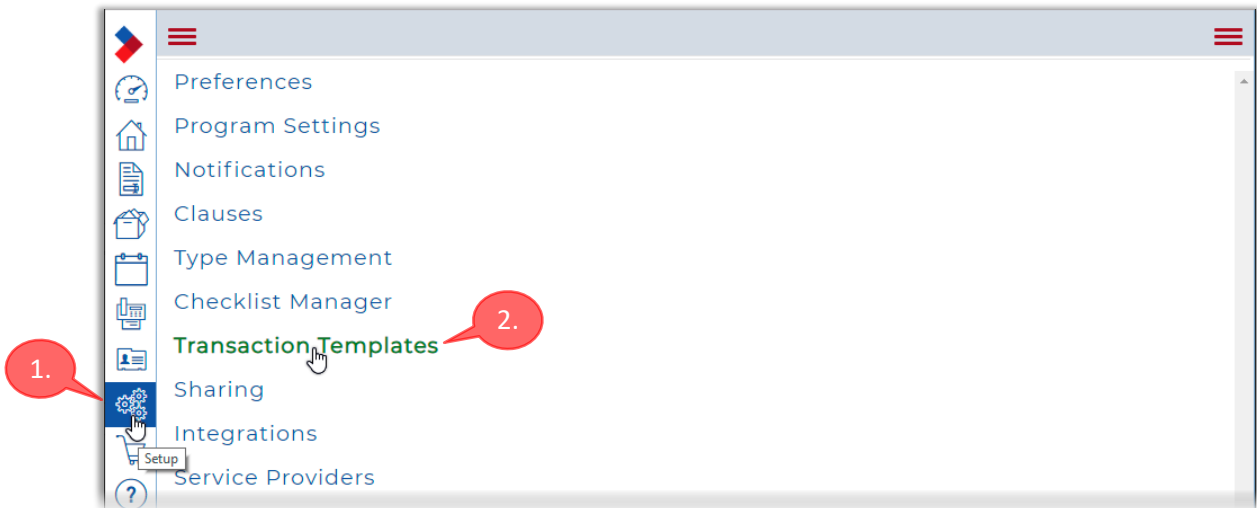
Creating a Template for a Detached Sale

You will now create a second template, for the buyer of a detached property. Instead of starting from scratch, you will begin by making a copy of the attached sales template that you just created. This will simplify the creation of the new template, as you can use the existing one as a starting point.



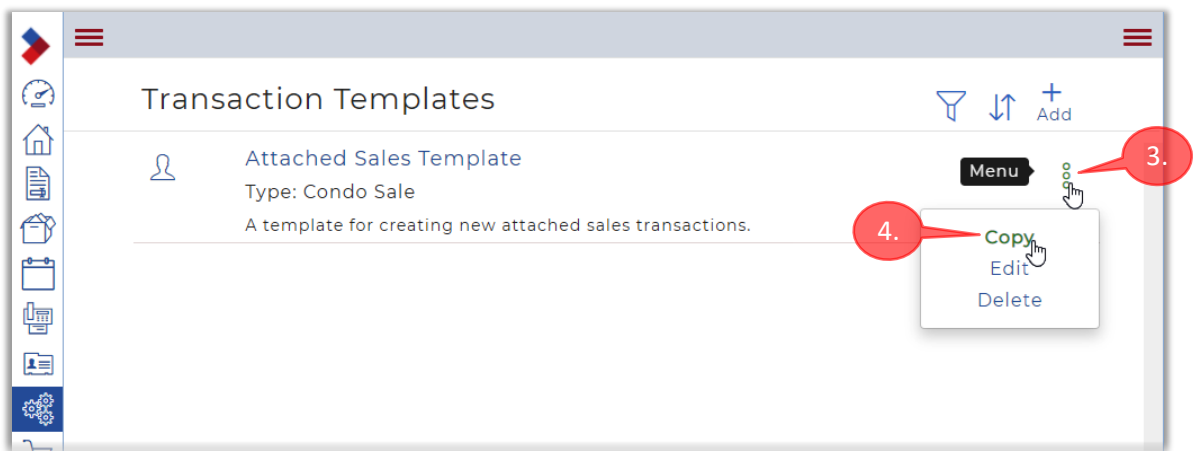
▶ To create a template for the buyer of an detached property:


1. Click  **Setup** in the Sidebar on the left.



2. Click **Transaction Templates** to continue.

The **Transaction Templates** page opens, listing your existing templates.

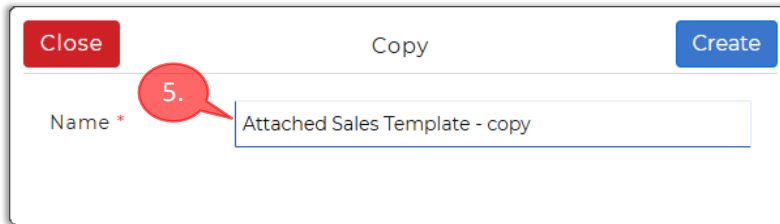


3. Click  **Menu** at the right of the Detached Sales Template you just created.
4. Then click **Copy** in the pop-up menu that appears.
Note that the menu also allows you to **Edit** or **Delete** the template.

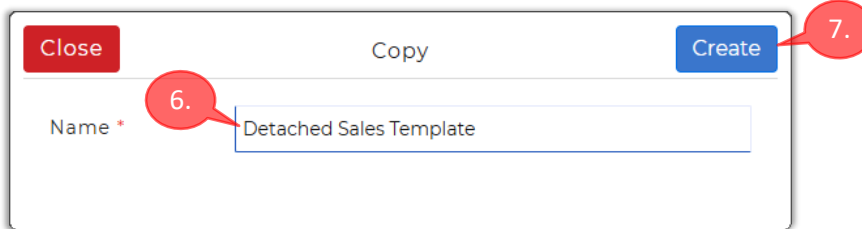


The **Copy** dialog box opens.

5. The copy of the template is assigned a default **Name**, as shown below.



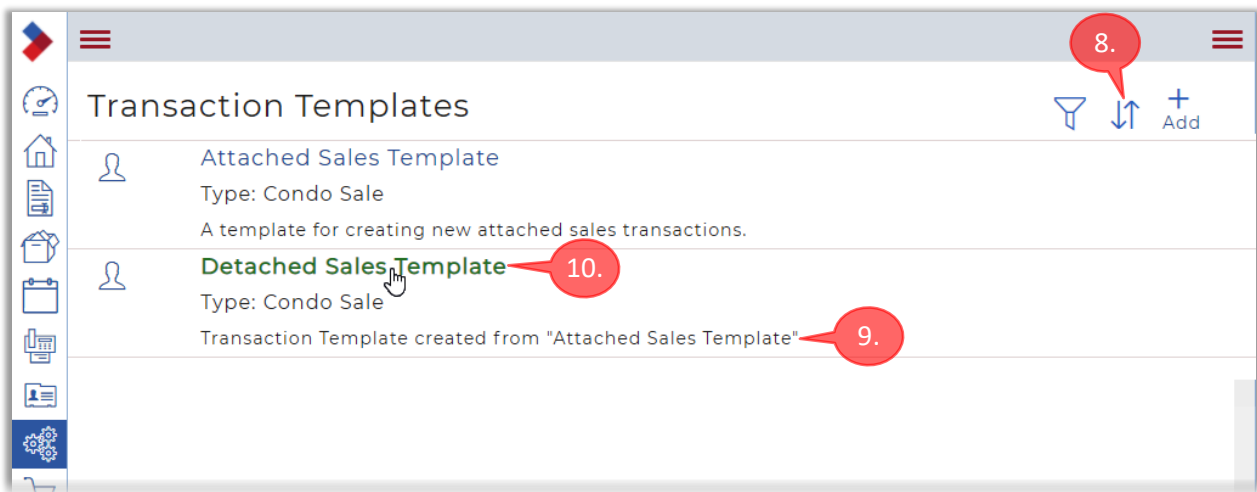
6. Edit the default **Name** so that it reflects the purpose of the new template.




7. Then click **Create** to continue.

You are returned to the **Transaction Templates** page.

The newly-created template will now appear in the list of templates.



8. Note that the templates are sorted alphabetically, by name. You can switch the sort order between *ascending* and *descending* by clicking .
9. Note that the **Description** field for the newly-created template was added automatically. You can change this, as explained below. Also note that the **Type** field was copied and should be changed to reflect that this is not a “Condo Sale”.
10. Click on the name of the new template to edit it.



The **Transaction Template** page opens, with the **Detail** section expanded.

11. Edit the **Type** and/or **Description** fields to reflect that this template is meant for detached sales transactions.

12. Make sure to click **Update** after making any changes.

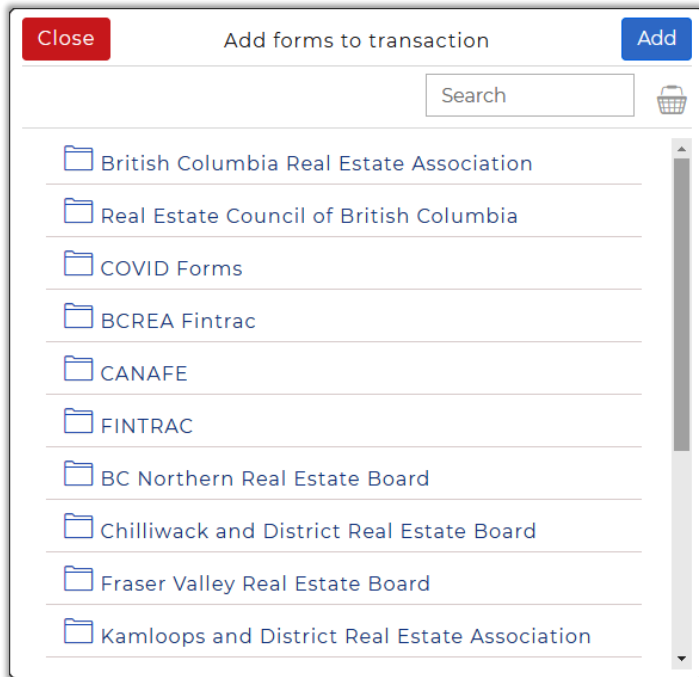


13. Scroll down to display the **Forms** section, and then click **Forms** to expand that section.
You should see that the same six forms from the original template are present in this copy.



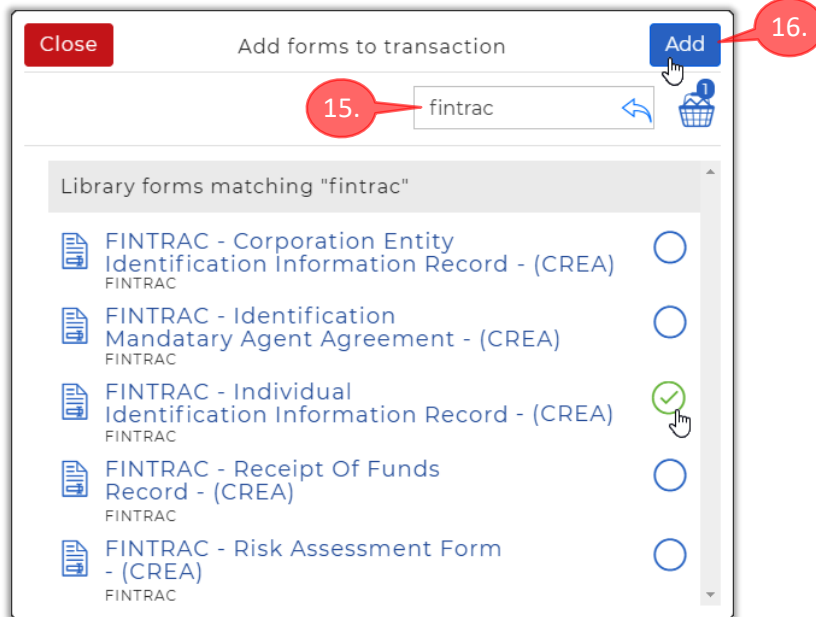
For this template, you will add a second FINTRAC form, to accommodate two buyers in a transaction.

14. Click **+ Add Forms** to start to add another form to the template.
The **Add forms to a transaction** dialog box appears.



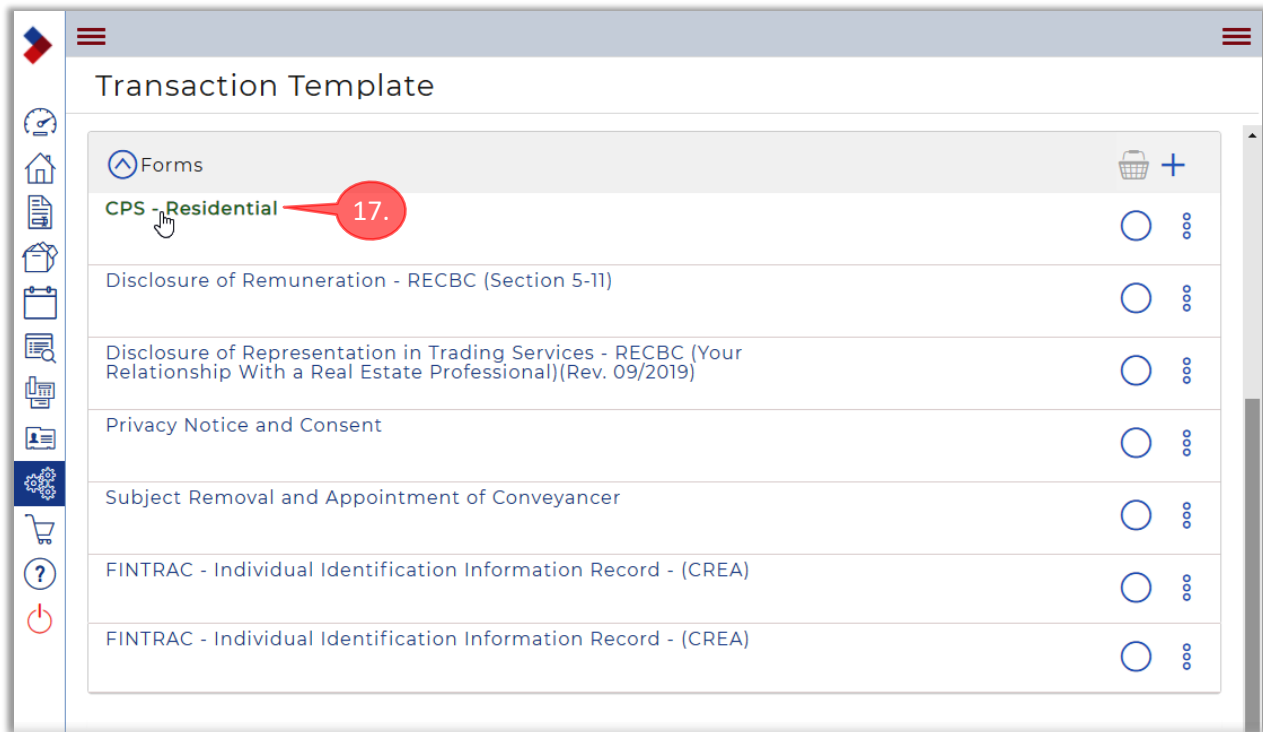


15. Search for the **FINTRAC - Individual Identification Information Record** form.



16. Select the FINTRAC form and then click **Add** to add it to the template.

You are returned to the **Transaction Template** page, which now displays the seven forms in the template, as a shown below.



Because this template is for a detached sale, you will need to delete the *Strata Documentation to be Provided Clause* from the CPS form.

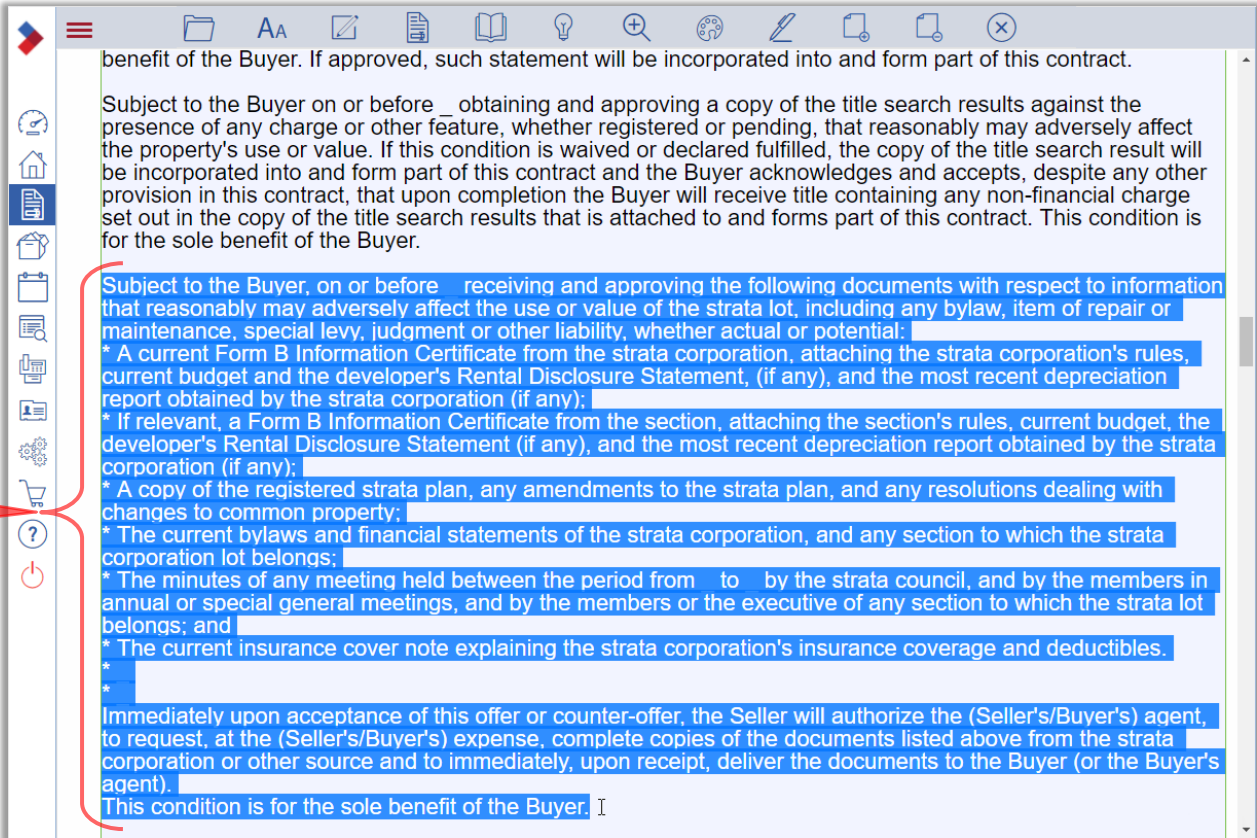
17. Click on the **CPS - Residential** form to open it in the Form Editor.



18. When the Form Editor opens, scroll down to the **TERMS AND CONDITIONS** section on the third page of the form (**PAGE 2 of 6 PAGES**).

You should see the five clauses that you added to the original template.

19. Scroll down to display the last clause (the *Strata Documentation to be Provided Clause*).



20. Select the entire last clause by dragging across it with your mouse. The blue highlight indicates that the text is selected.

21. Press *Delete* or *Backspace* on your keyboard to delete the selected text.



Since this is a template for a detached sale, you decide to add an oil tank clause to the form. WEBForms does not include such a clause, so you'll need to enter it yourself. Because it's a short clause, you can just type it in, as described below.

Alternatively, you could create a *Personal Clause*, as explained in [Creating Personal Clauses](#) on page 85, which would allow you to save the clause for use in other templates or transactions.

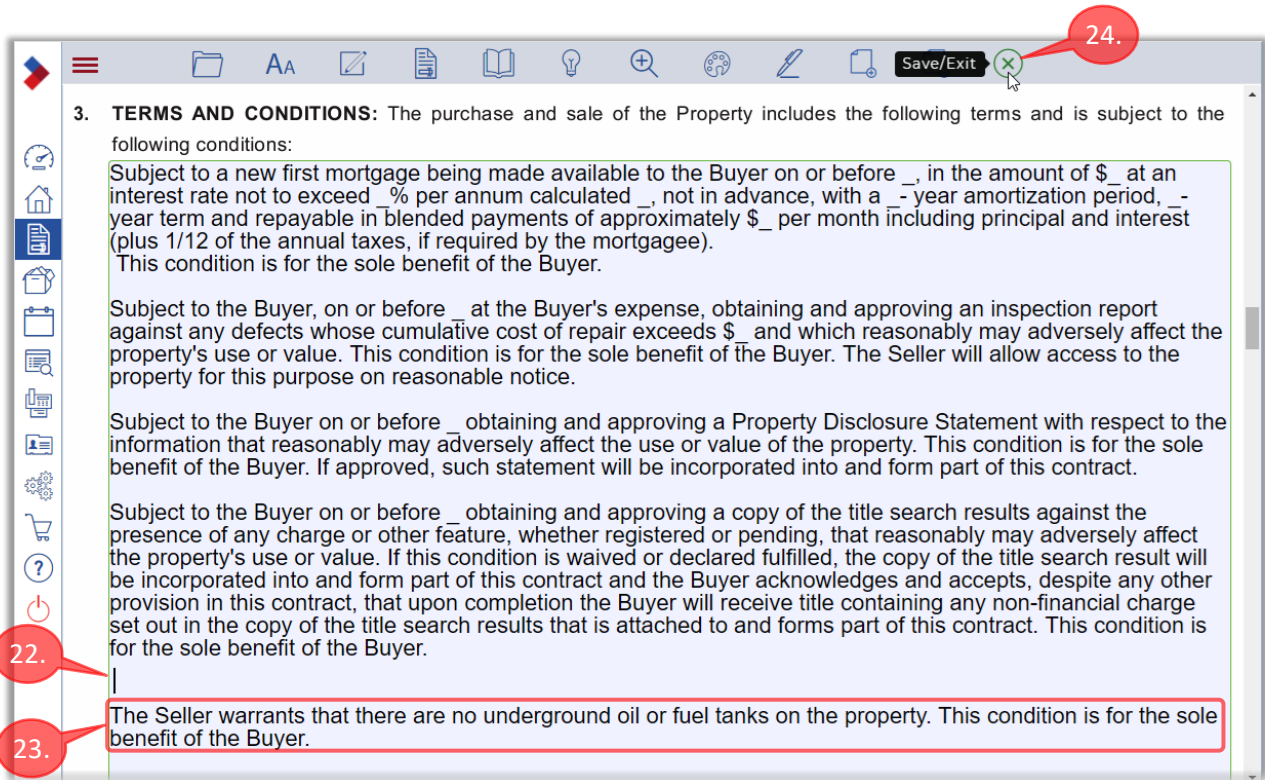
- 22. Position your text cursor just below the last clause.
Press *Enter/Return* to insert a blank line.

- 23. Then enter the following:

The Seller warrants that there are no underground oil or fuel tanks on the property. This condition is for the sole benefit of the Buyer.



Note that this example is for training purposes only . Make sure to check with your manager to ensure you are using an appropriately-worded clause.



- 24. Click **Save/Exit** to save the form and exit the Form Editor.
That concludes the creation of the Detached Sales Template.




Creating a Template for a Detached Listing

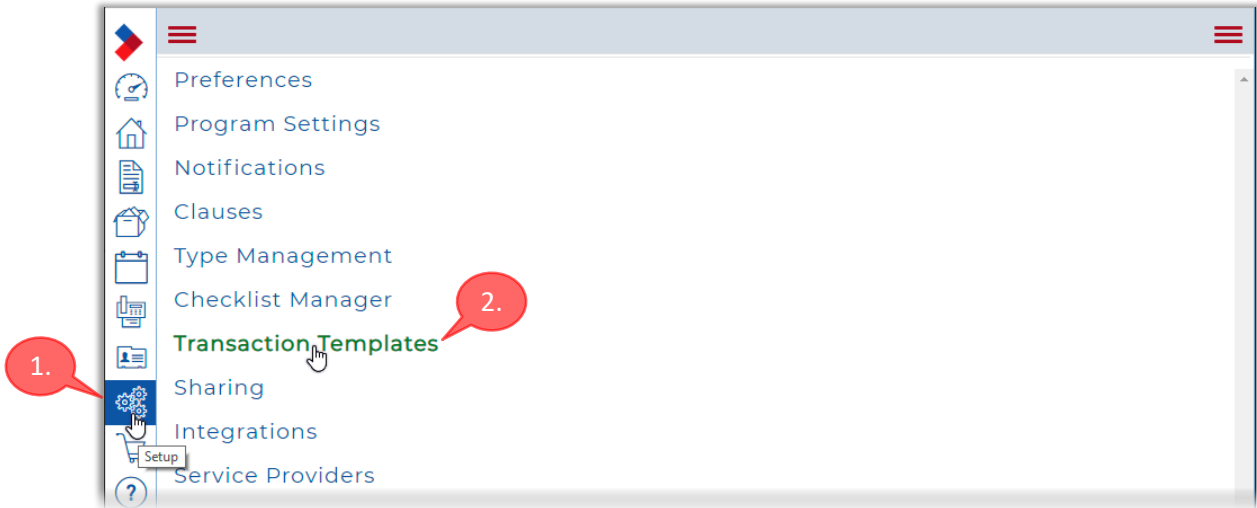
You will now create a third template; for the *Seller* of a detached property. The process is much the same as for the two previous templates you created.



▶ To create a template for the Seller of a detached property:

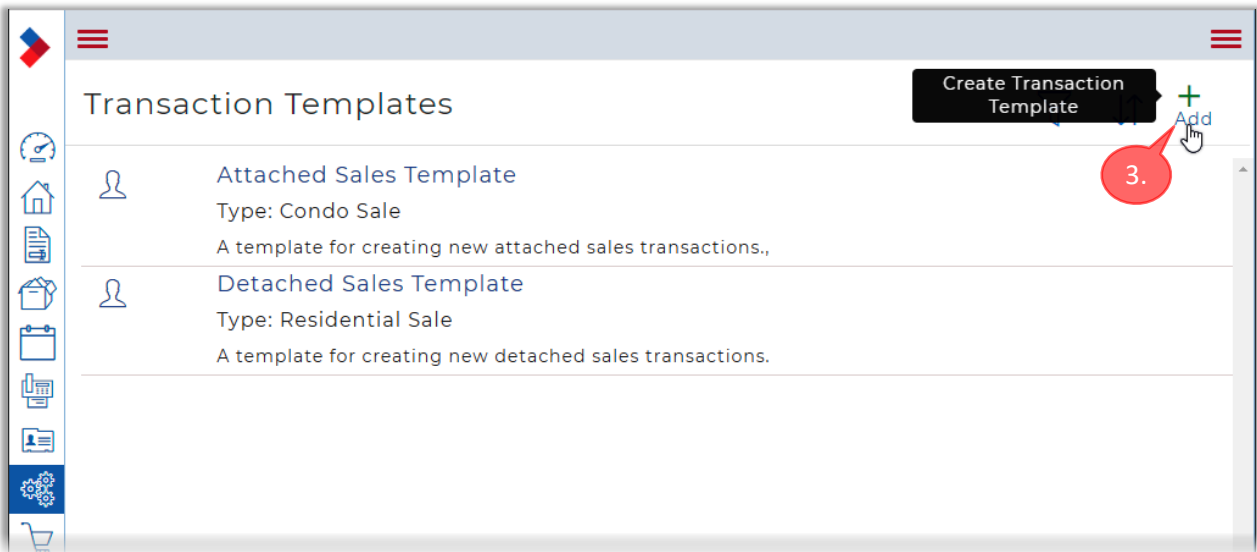
1. Click  **Setup** in the Sidebar on the left.


The **Setup** options page opens, as shown below.



2. Click **Transaction Templates** to continue.

The **Transaction Templates** page opens, listing your existing templates.



3. Click  **Add** to start to create a new template.



The **Create** dialog box appears.

4. Enter a descriptive name into the **Name** field.
Select a name that will help you identify the template in the future.
Optional: select a **Type** for the transaction.
Optional: enter a **Description** to help you identify the template in the future.
5. Click **Save** to continue.

The template is created and a new **Transaction Template** page opens.

6. Scroll down to **Forms** and expand that section. It will currently be empty.



Adding Forms to a Template

The following forms will be added to this *Detached Listing Template*:

- **Multiple Listing Contract**
- **Privacy Notice and Consent**
- **Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional) (Rev. 09/2019)**
- **Disclosure to Sellers of Expected Remuneration - RECBC (Paying for Real Estate Services: What Sellers Need to Know) (Rev. 09/2019)**
- **FINTRAC - Individual Identification Information Record - (CREA)**
- **MLSLink - Residential Data Input Form**
- **Property Disclosure Statement - Residential**



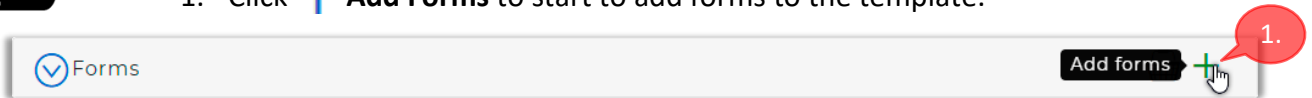
Templates Summary

See the *Templates Summary* on page 118 for a list of the forms and clauses that you will add to the templates you create during these hands-on activities.

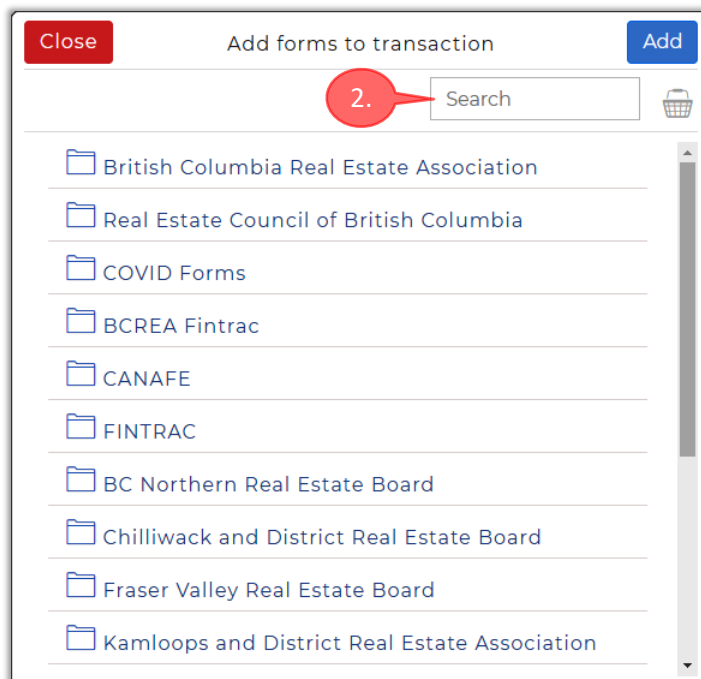


► To add forms to the template:

1. Click **+** **Add Forms** to start to add forms to the template.



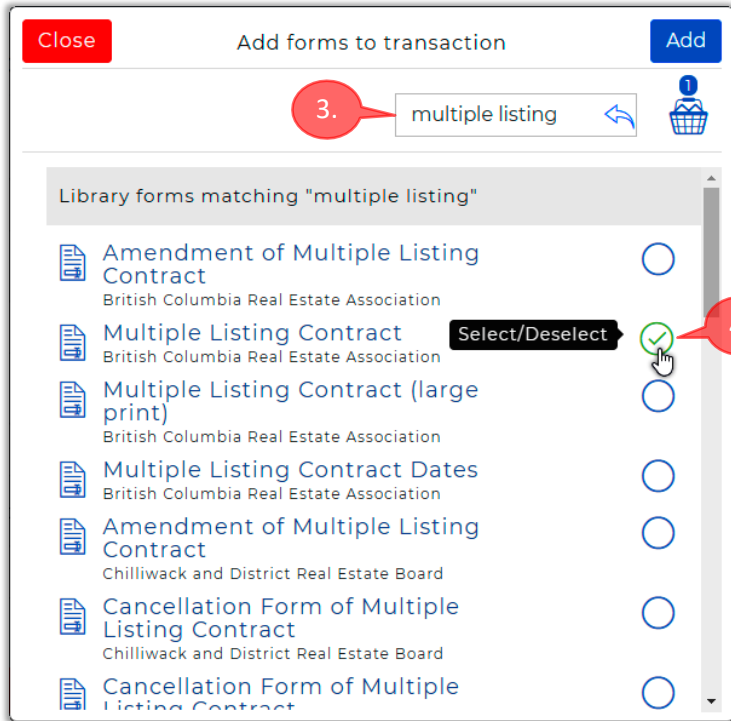
The **Add forms to a transaction** dialog box appears.




2. As previously explained, you are encouraged to use the **Search** field to locate the desired form instead of browsing the list of folders.



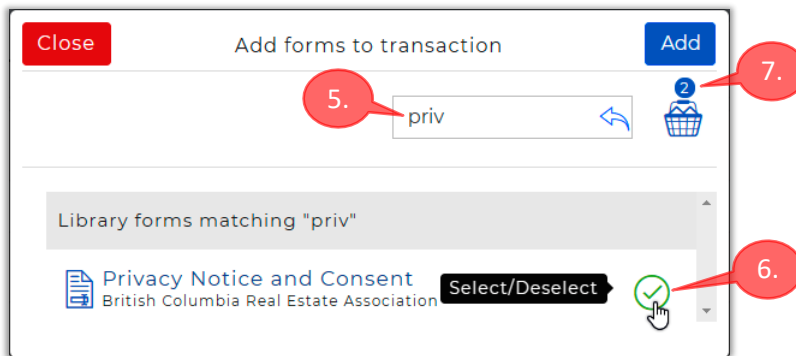
3. Click in the **Search** field and start to type “multiple listing contract”.



4. When the desired form appears in the list, click the form name or the circle at the right to select the form.

The green checkmark  indicates that the form is selected.

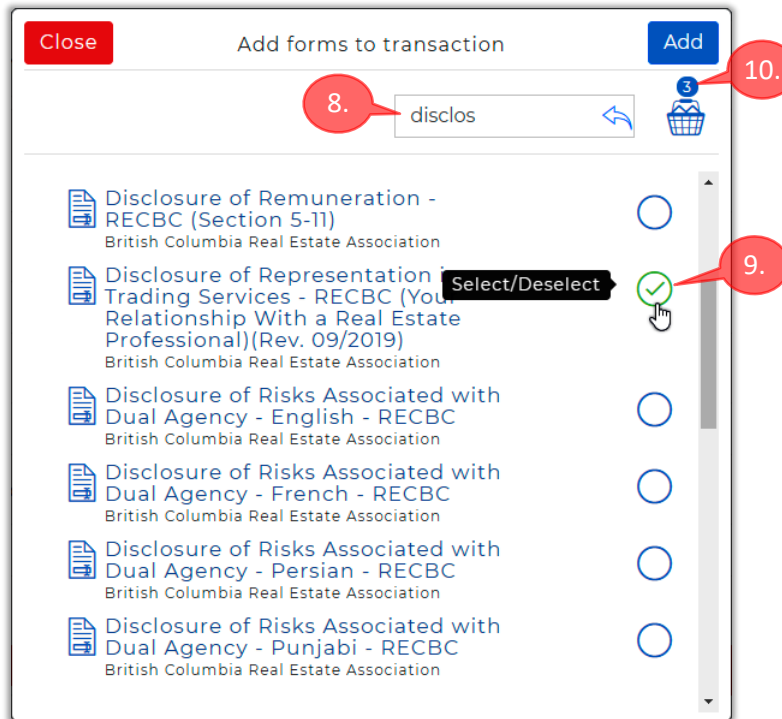
5. Click  to clear the **Search** field, and then start to type “privacy”.



6. Select the **Privacy Notice and Consent** form when it appears in the list.
7. The basket icon will now indicate that two forms are selected.



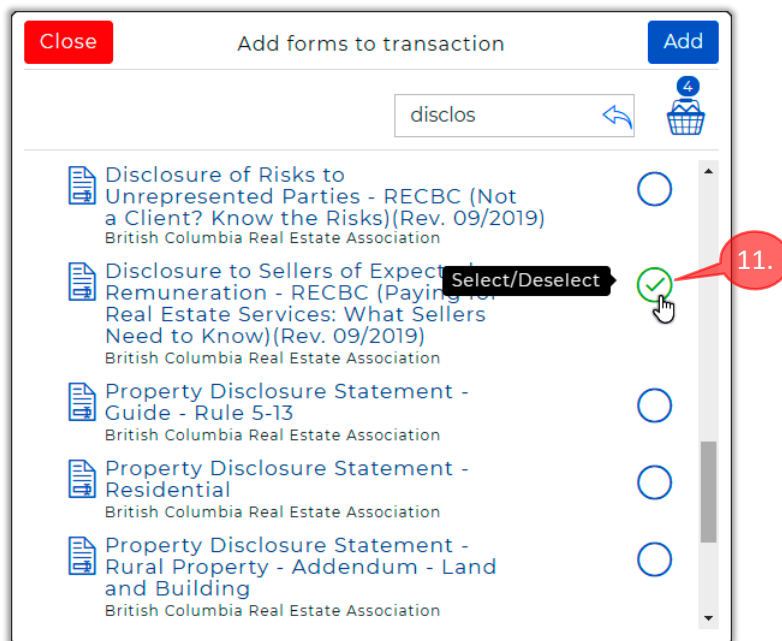
8. Next, clear the **Search** field and start to type “disclosure” into the field.



9. Select **Disclosure of Representation in Trading Services - RECBC...** when it appears in the list.

10. The basket icon now indicates that three forms have been selected so far.

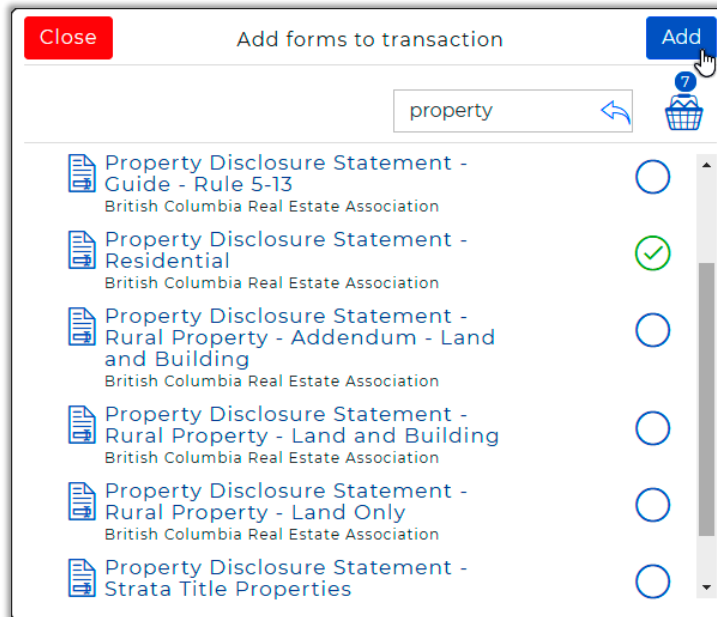
11. Scroll down to the **Disclosure to Sellers of Expected Remuneration - RECBC...** form and select it.



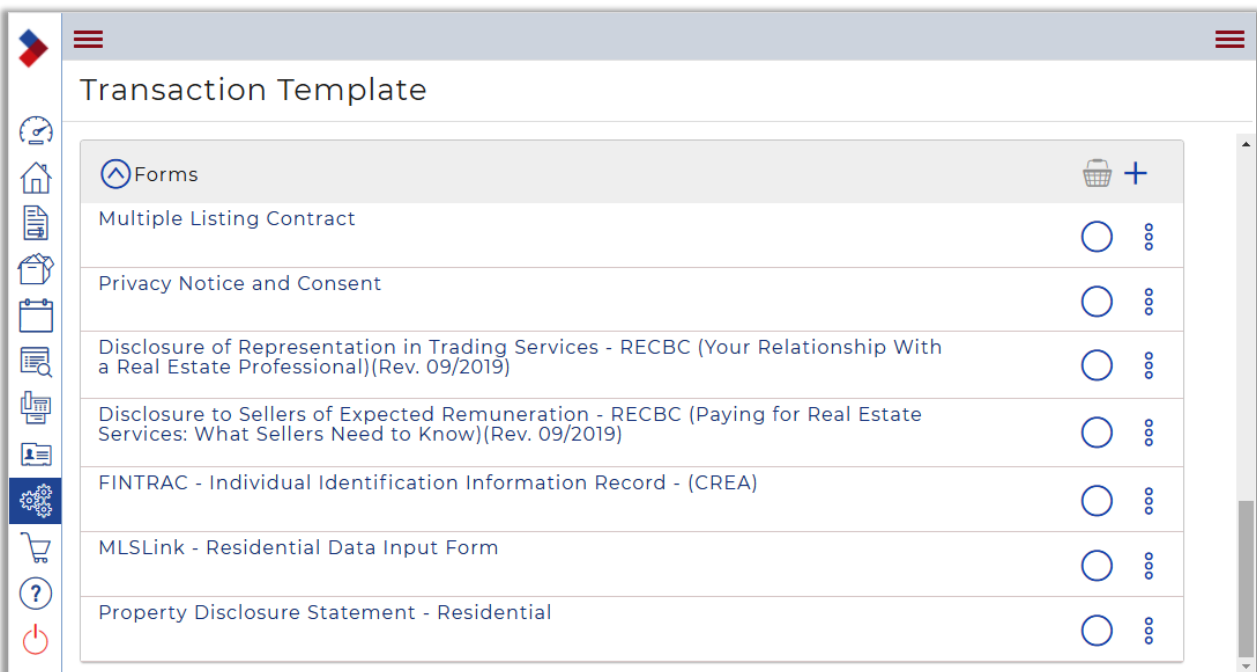


12. Search for the three following forms, and add them to your template using the techniques described above:

- ***FINTRAC - Individual Identification Information Record - (CREA)***
- ***MLSLink - Residential Data Input Form*** (Real Estate Board of Greater Vancouver)
- ***Property Disclosure Statement - Residential***



13. Click **Add** to add the seven forms to the template.
You are returned to the **Transaction Template** page.



That concludes the creation of the *Detached Listing Template*.




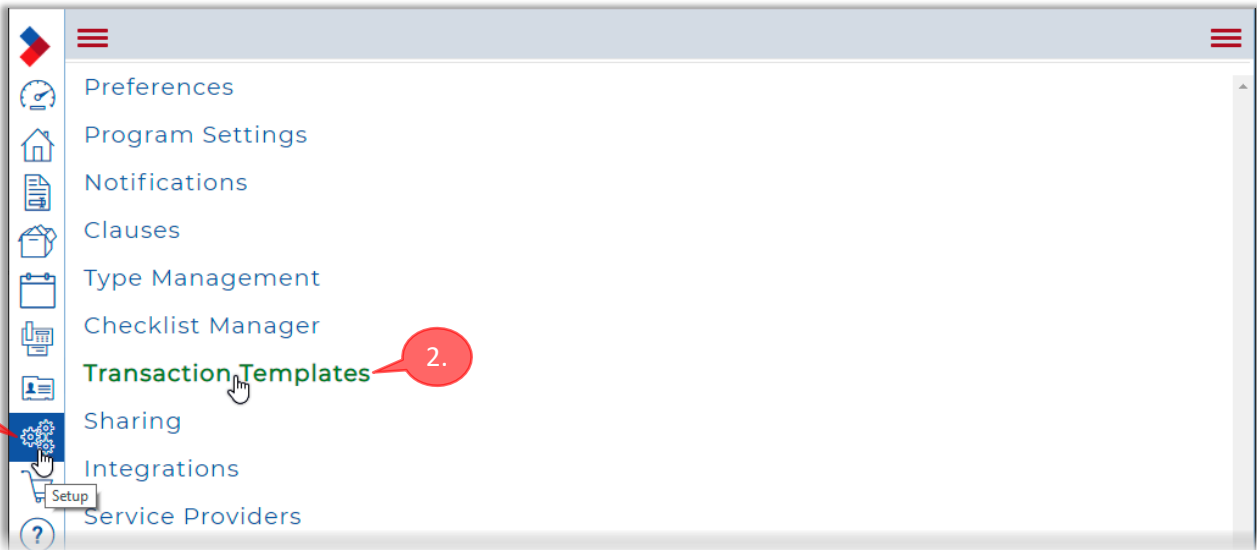
Creating a Template for an Attached (Strata) Listing

You will now create another template, for the seller of an attached property. Instead of starting from scratch, you will begin by making a copy of the detached listing template that you just created. This will simplify the creation of the new template, as you can use the existing one as a starting point.



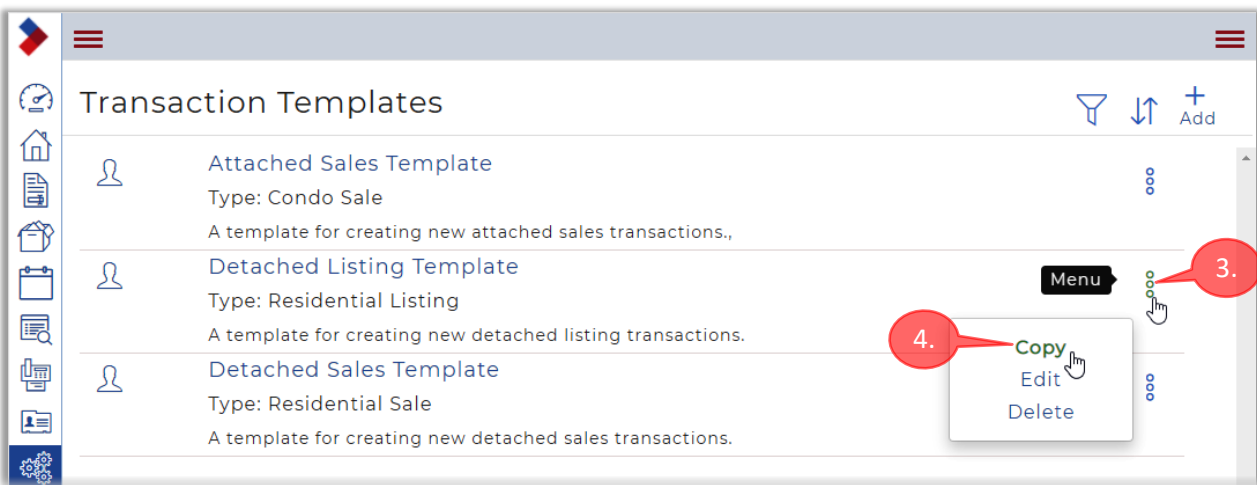
► To create a template for the seller of an attached property:


1. Click  **Setup** in the Sidebar on the left.



2. Click **Transaction Templates** to continue.

The **Transaction Templates** page opens, listing your existing templates.



3. Click  **Menu** at the right of the Detached Listing Template you just created.
4. Then click **Copy** in the pop-up menu that appears.



The **Copy** dialog box opens.

The image shows a 'Copy' dialog box with a red 'Close' button on the left and a blue 'Create' button on the right. The title is 'Copy'. Below the title is a text input field labeled 'Name *' containing the text 'Detached Listing Template - copy'.

5. Edit the default name so that it reflects the purpose of the new template.

The image shows the 'Copy' dialog box with the name field now containing 'Attached Listing Template'. A red callout bubble with the number '5.' points to the name field. Another red callout bubble with the number '6.' points to the blue 'Create' button.

6. Then click **Create** to continue.

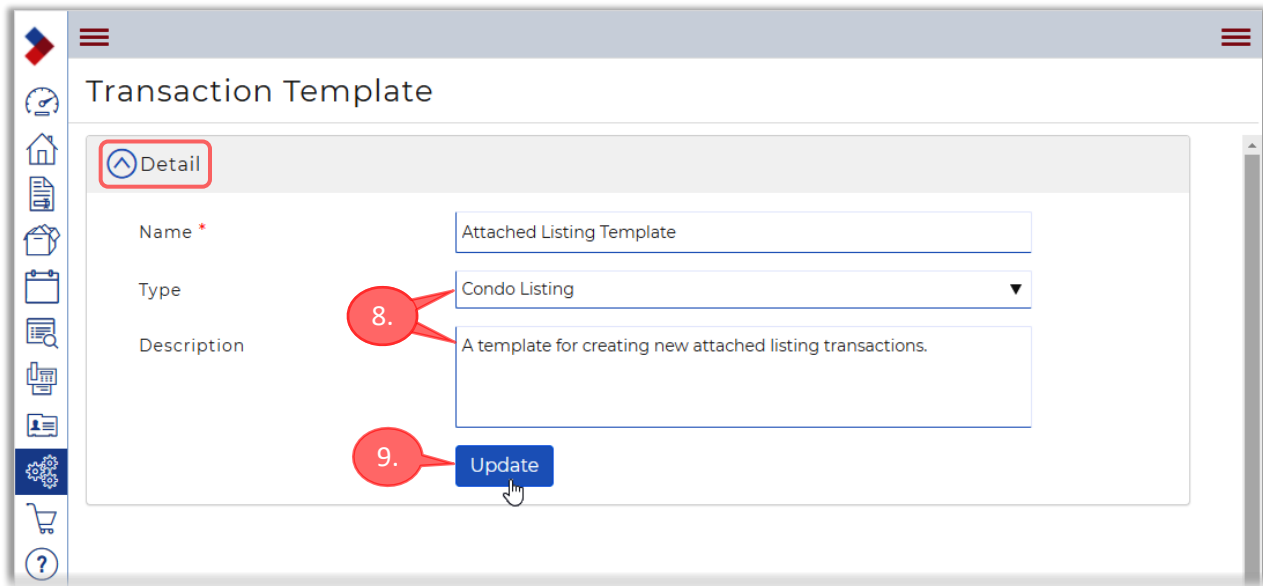
You are returned to the **Transaction Templates** page. The newly-created template should now appear in the list of templates.

The image is a screenshot of a web application interface titled 'Transaction Templates'. It features a sidebar on the left with various icons. The main content area shows a list of templates. The first item, 'Attached Listing Template', is highlighted in green and has a red callout bubble with the number '7.' pointing to its name. Below it are 'Attached Sales Template', 'Detached Listing Template', and 'Detached Sales Template'. Each item includes its type and a brief description. On the right side of the list, there are icons for filtering, sorting, and adding new items.

7. Click on the name of the new *Attached Listing Template* to edit it.



The **Transaction Template** page opens, with the **Detail** section expanded.



8. Edit the **Type** and **Description** fields to show that this is for attached listings.

9. Make sure to click **Update** after making any changes.

10. Click **Forms** to expand that section. You should see that the same seven forms from the original template are present in this copy.

Because this template is meant for attached listings, you need to replace one of the forms and then add some other forms that pertain to strata properties.

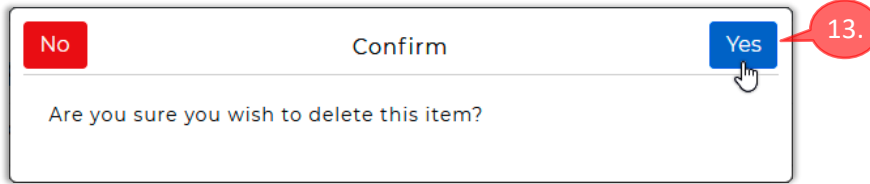


11. Click **Menu** at the right of **Property Disclosure Statement - Residential**.

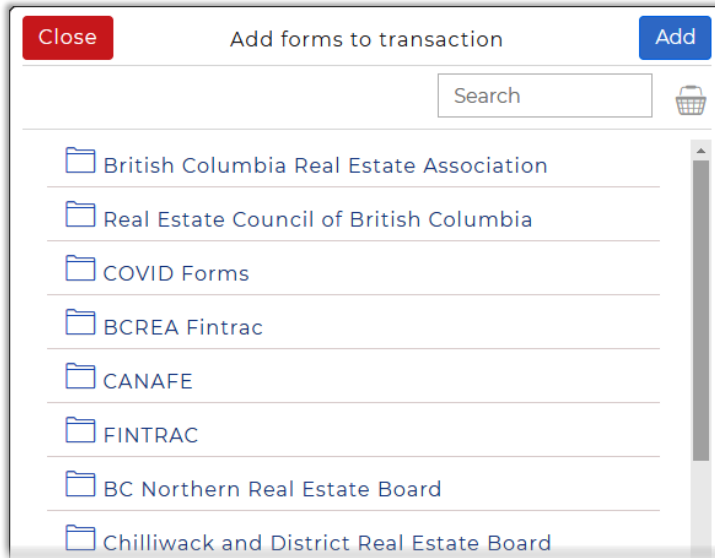
12. Then click **Delete** in the pop-up menu that appears.



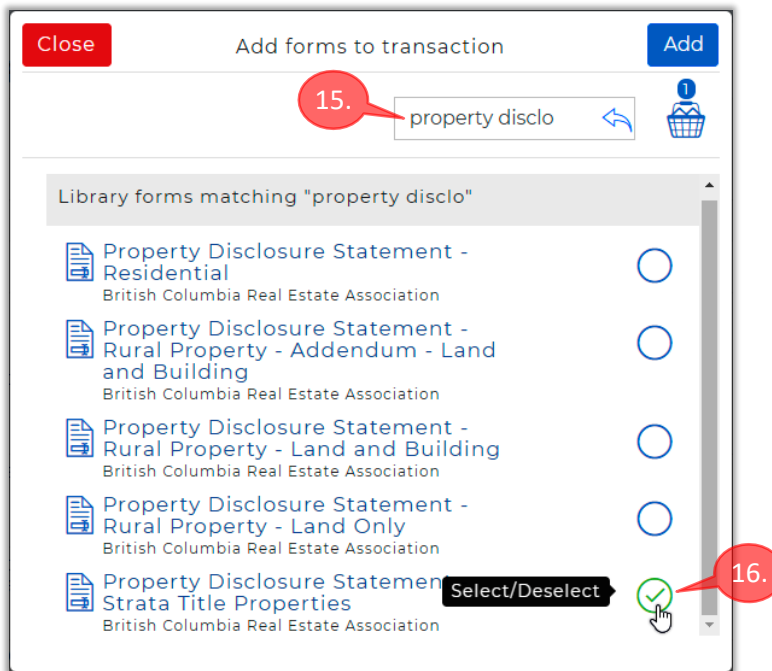
13. Then click **Yes** when the **Confirm** dialog box appears.



14. Click **+ Add Forms** to replace the deleted form and to add more forms.
The **Add forms to a transaction** dialog box appears.



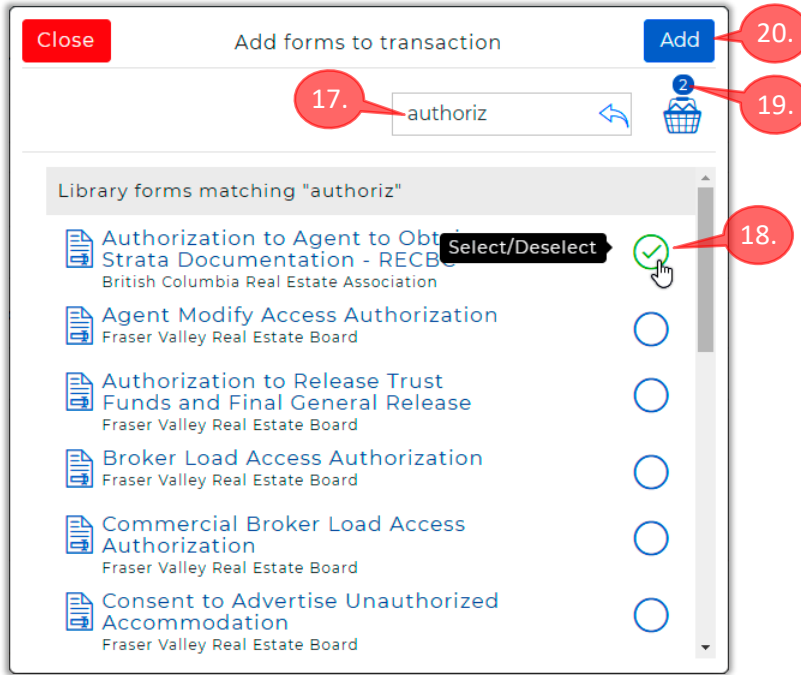
15. Click in the **Search** field and start to type "property disclosure".



16. Select the **Property Disclosure Statement - Strata Title Properties** form.



17. Next, start to type “authorization to agent” into the **Search** field.



18. Select the **Authorization to Agent to Obtain Strata Documentation - RECBC** form when it appears in the list of matching forms.

19. The basket will indicate that you have selected two forms.

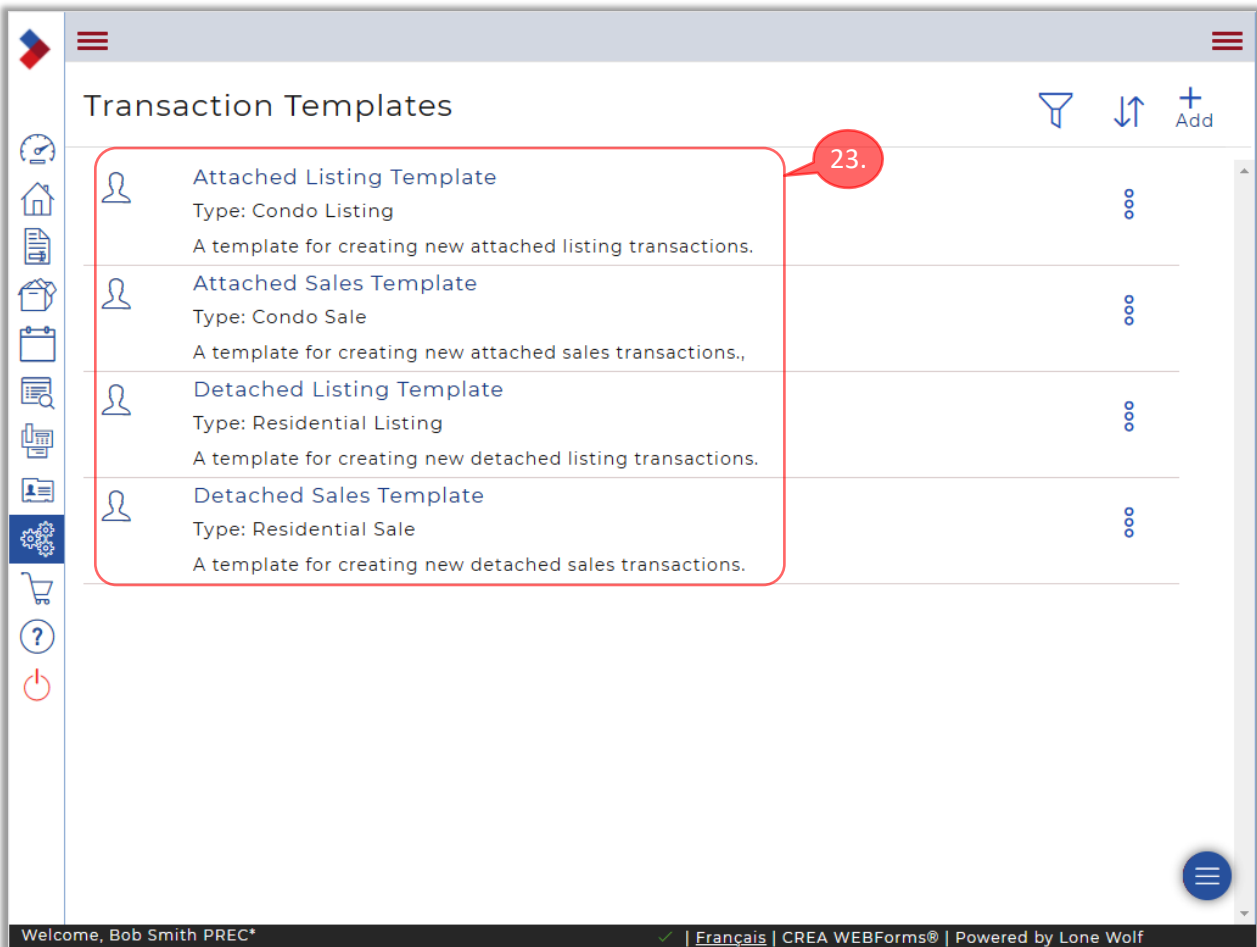
20. Click **Add** to add the forms to the template.

You are returned to the **Transaction Template** page.





21. The two forms you just added should appear at the bottom of the list.
You should now have a total of eight forms in the template.
Note that you can change the position of a form in the list by dragging it to its preferred location, as previously explained.
22. Browse back to the **Transaction Templates** page.
23. You should now have four Transaction Templates, as shown below.
You can now use these templates to facilitate the creation of *Transactions* for your sales and listings, as explained on the following pages.



That concludes the creation of the *Attached Listing Template*.



Transactions

What is a Transaction?

A transaction is like a binder that contains all the forms, contracts, clauses, and associated files that pertain to a particular real estate transaction.



The simplest and best way to create a transaction is from a template. Because the template already contains the forms and clauses needed for the transaction, it is estimated to save you about 80% of the time it would take to create a transaction without a template.

You start to create a transaction by giving it a descriptive name. Next, you specify the template that it will be created from. You can optionally associate the transaction with an MLS® number, allowing many of the transaction's details to be filled-in with information from the listing.

Next, you can add *Contacts* to the transaction, which allows WEBForms to auto-populate certain form fields with the contacts' information. It also facilitates communicating with contacts, via the email addresses and phone numbers contained in their contact records. It can also simplify the process of sending documents to your contacts for e-signatures.

Next, you edit the forms in the transaction, entering details that are specific to that transaction. You can optionally add any required forms or clauses that are not included in the template. And you can remove any forms or clauses that are not relevant to the transaction.

Once you have finished creating the transaction, you can download it, print it or email it to your clients. You can also send the transaction to your e-signature application for signing.

Transactions are saved in the "cloud", allowing you to recall and revise them at a later date. This also permits you to access your transactions from anywhere, using a computer or mobile device with a suitable web browser. Also note that WEBForms now includes unlimited cloud storage, so you don't need to worry about exceeding the available storage capacity.




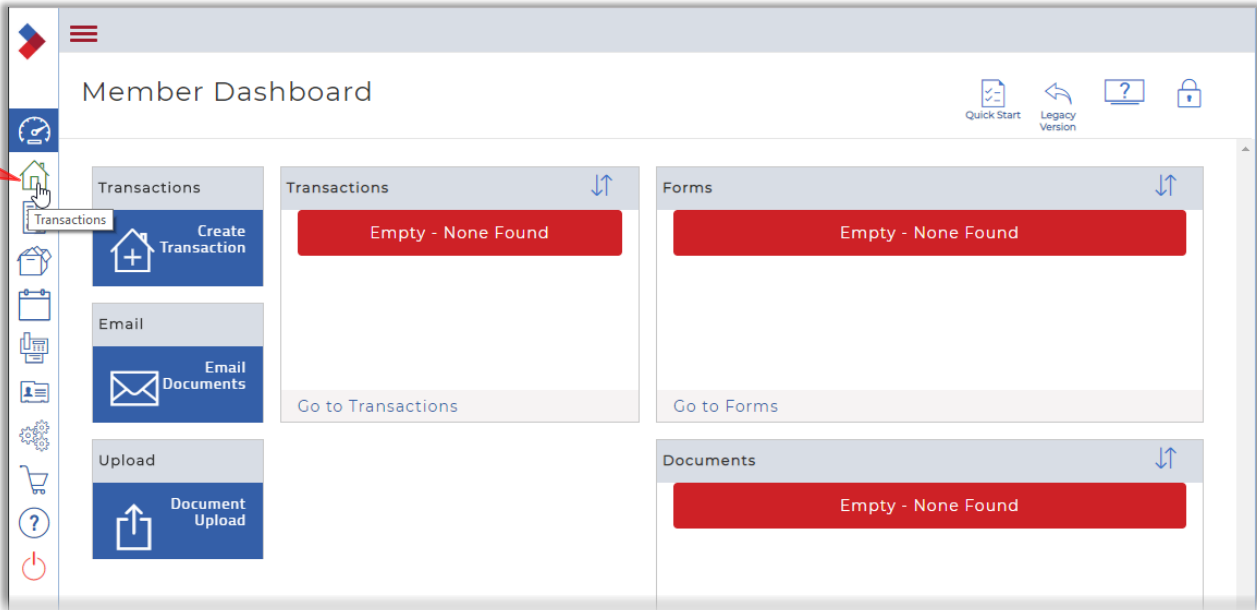
Creating a Sales Transaction from a Template

In this activity, you will create a new Transaction based on the *Attached Sales Template* that you previously created.

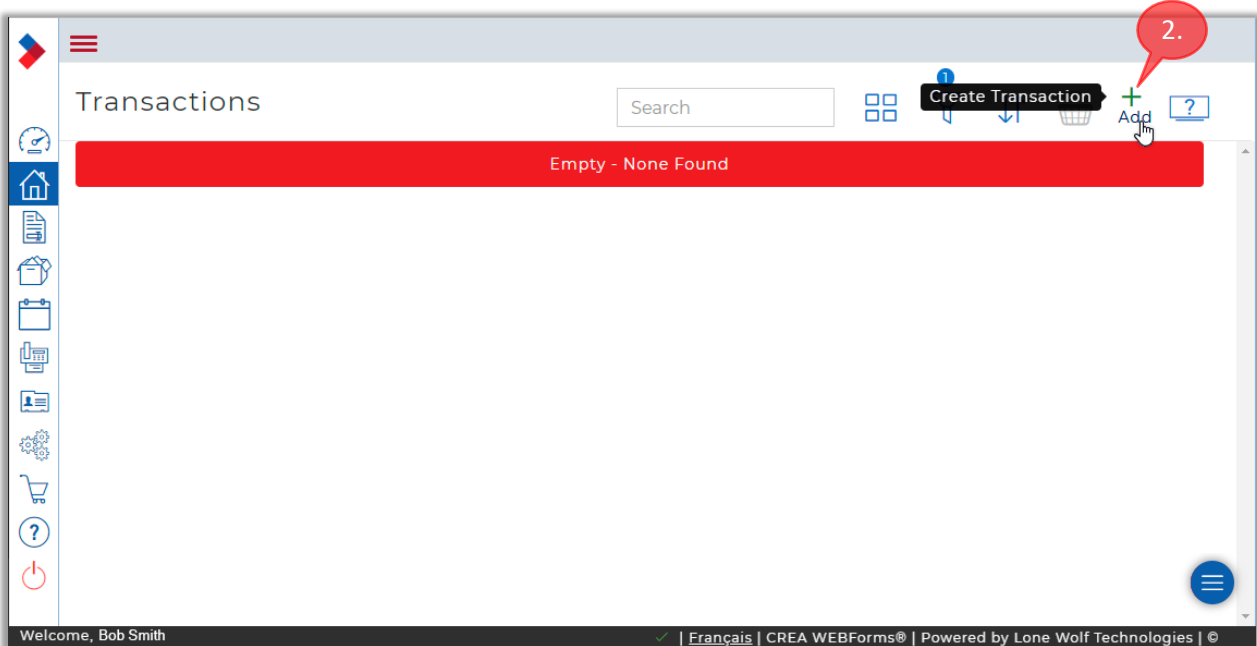



► To create a Sales Transaction from the Attached Sales Template:

1. Click  **Transactions** in the Sidebar menu on the left.



The **Transactions** page opens.



2. Click  to create a new transaction.



The **Create Transaction** dialog box appears.

3. Enter a name for the transaction into the **Name** field. Make sure to use a descriptive name, so that you can easily find the transaction at a later date. For example, you could include the client's name and the property address, as shown in the example below.

4. Click in the **Template** field to display a drop-down list of the available templates. Then click **Attached Sales Template** in the list that appears.



5. Next, click in the **Import Data** field to display a drop-down menu.

The screenshot shows the 'Create Transaction' form with the following fields: 'Name' (Bobby Buyer - 0000 Fake Street), 'Template' (Attached Sales Template), and 'Import Data (optional)' (- Select Source -). The dropdown menu is open, listing various boards. 'Greater Vancouver - Residential' is highlighted in blue. A red circle with the number '5.' points to the dropdown arrow, and another red circle with '6.' points to the selected item.

6. Select **Greater Vancouver - Residential** in the list of boards that appears.

7. Now that you have selected a board, the **- Select Type -** field appears. Click that field to display a list of property types.

The screenshot shows the 'Create Transaction' form with the 'Import Data' field now set to 'Greater Vancouver - Residential'. A new dropdown menu, '- Select Type -', is open below it, listing property types. 'Residential - Attached' is highlighted in blue. A red circle with the number '7.' points to the dropdown arrow, and another red circle with '8.' points to the selected item. At the bottom, there is a checkbox labeled 'Use Wizard'.

8. Select **Residential - Attached** in the list that appears.



- An **MLS Number** field now becomes available. Click in the field and then enter the MLS® number of the relevant listing.

The screenshot shows the 'Create Transaction' form with the following fields and callouts:

- Close** (red button)
- Create** (blue button, callout 12)
- Name ***: Bobby Buyer - 0000 Fake Street
- Template**: Attached Sales Template
- Import Data (optional)**: Greater Vancouver - Residential
- Residential - Attached**: Residential - Attached
- 9.** (callout) V1021683 (MLS Number field)
- 10.** (callout) Selling Agent (Add me as the field)
- 11.** (callout) Use Wizard (checkbox)



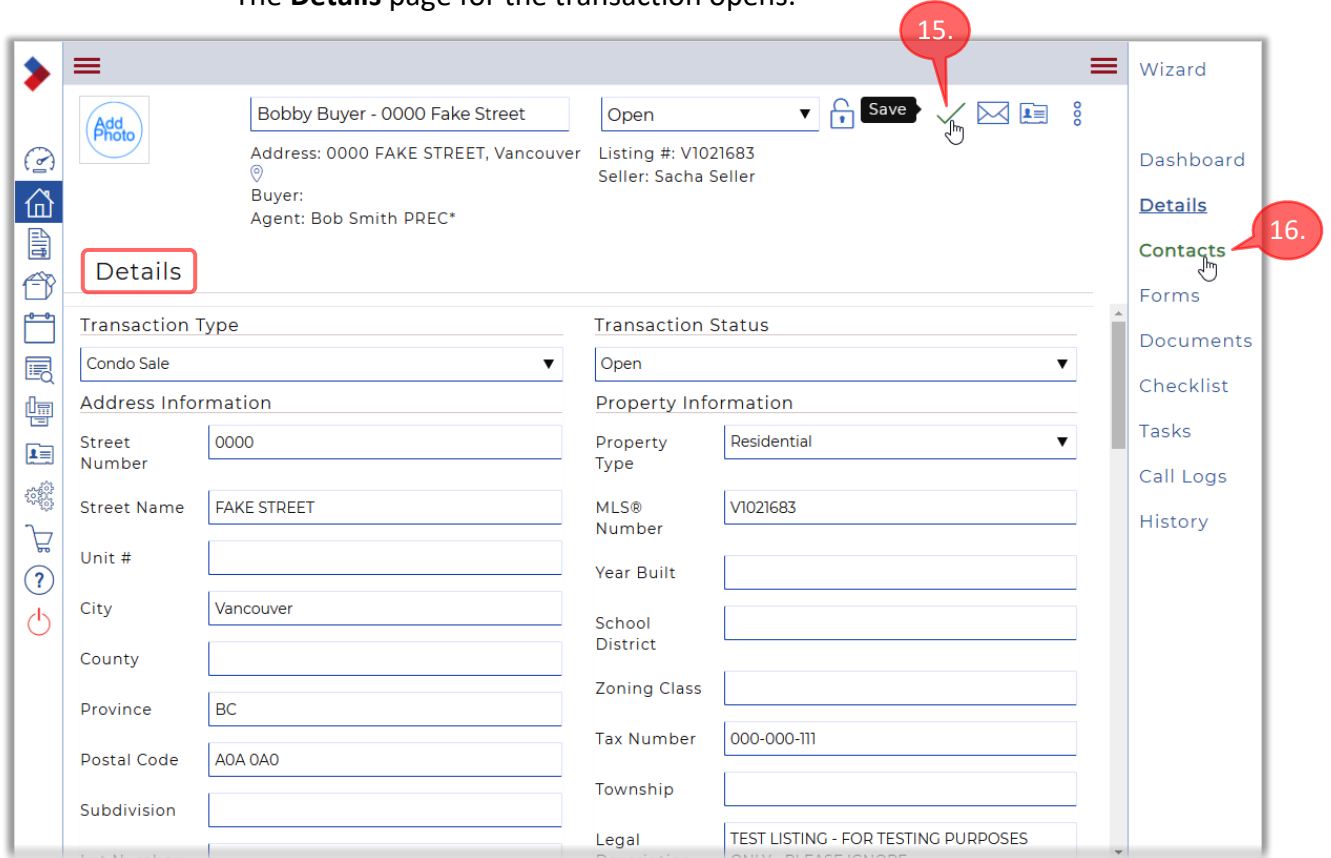
Make sure that the property **Type** field is consistent with the specified **MLS Number**. Otherwise an error message will appear when you try to create the transaction.

Note: for this example we are using an old, fake listing that starts with “V”. All current listings will instead start with “R”, indicating *Residential*.

- The **Add me as the** field will fill-in automatically with “Selling Agent”, because the selected template is for a sale.
- You are advised to make sure the **Use Wizard** checkbox is unchecked.
- Click **Create** to continue.



The **Details** page for the transaction opens.



13. Note that some of the fields have already been populated from the listing information.

14. Enter any additional details that you have available. Note that you will need to scroll down to see all the available fields.

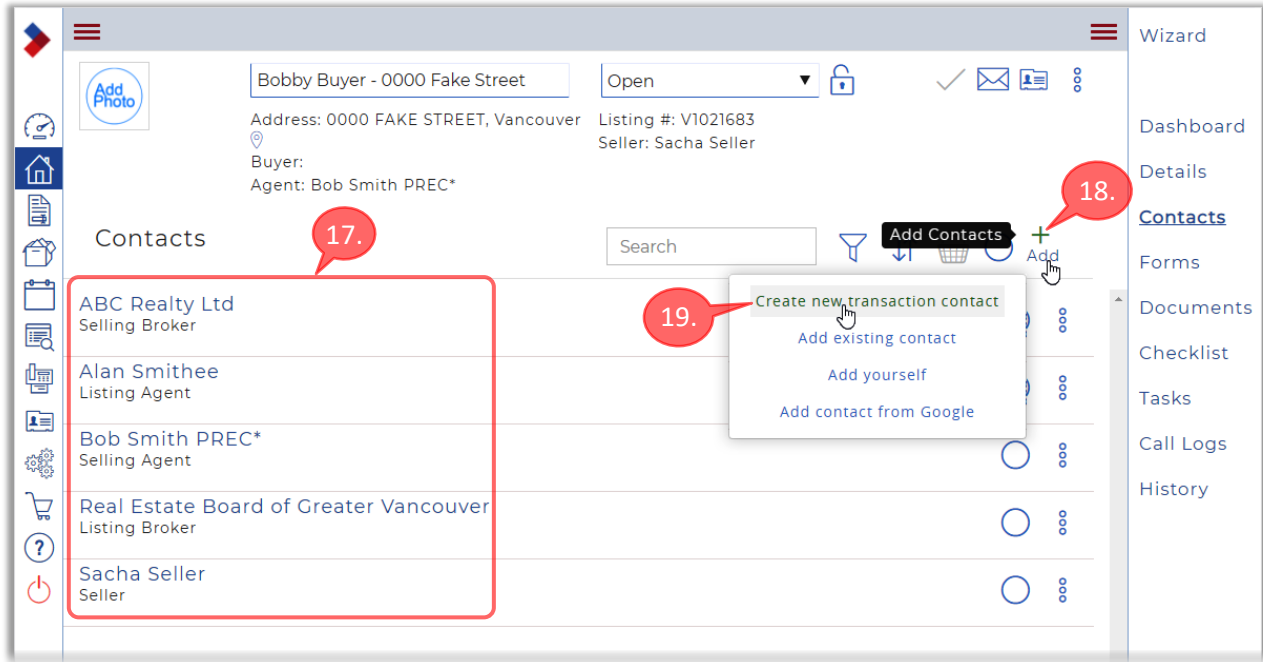
15. If you make any changes to the *Details* page, make sure to click ✓ (Save) before continuing.

16. Click **Contacts** in the menu on the right to continue.



The **Contacts** page opens.

This page is used to specify the participants in a transaction, which provides a number of benefits, as described below.



17. Both you and the Listing Agent, as well as your brokerages, will automatically be included as participants (contacts) in this transaction. The Seller(s) may also be included in the Contacts list for the transaction.



Note that once a contact has been entered into the system, their details can automatically populate the relevant fields in a transaction. And because the contact record contains a contact's email address and phone numbers, it can facilitate communicating with them. In fact, you can email your contacts directly from within WEBForms, as an added convenience.

18. Click **+ Add** to add your buyer as a participant in this transaction.

19. Then click **Create new transaction contact** in the pop-up menu that appears.

The **Create Transaction Contact** dialog box opens.

20. Click the **Type** field and select a suitable option from the drop-down list; e.g. *Buyer*.
21. Enter the contact's **First Name** and **Last Name**.
22. Make sure to enter an **Email** address for your contact.
23. Optionally fill-in the **Legal Name**, **Preferred Signature**, and **Preferred Initials** fields. Filling in these fields can facilitate the use of e-signature applications with this contact.
24. You are advised to make sure the **Add to address book?** checkbox is checked. This will make it easier to add the contact to future transactions, and will also facilitate communicating with the contact by phone or email.
25. Click the **Address** tab to enter address and phone information for the contact.



26. Enter the contact's address and phone numbers, as available

The screenshot shows a 'Create Transaction Contact' form with a 'Close' button on the top left and a 'Save' button on the top right. The 'Address' tab is selected. Fields include: Street Number (123), Street Name (4th Street), City (Vancouver), Province (BC), Postal Code (V1W2X3), Cell (604-555-5555), Phone (604-555-6666), and Fax. A red circle with the number 27 points to the 'Save' button.

27. Click **Save** when you have entered all the contact's information.

28. A **Success** message is briefly displayed at the upper-right corner of the page.

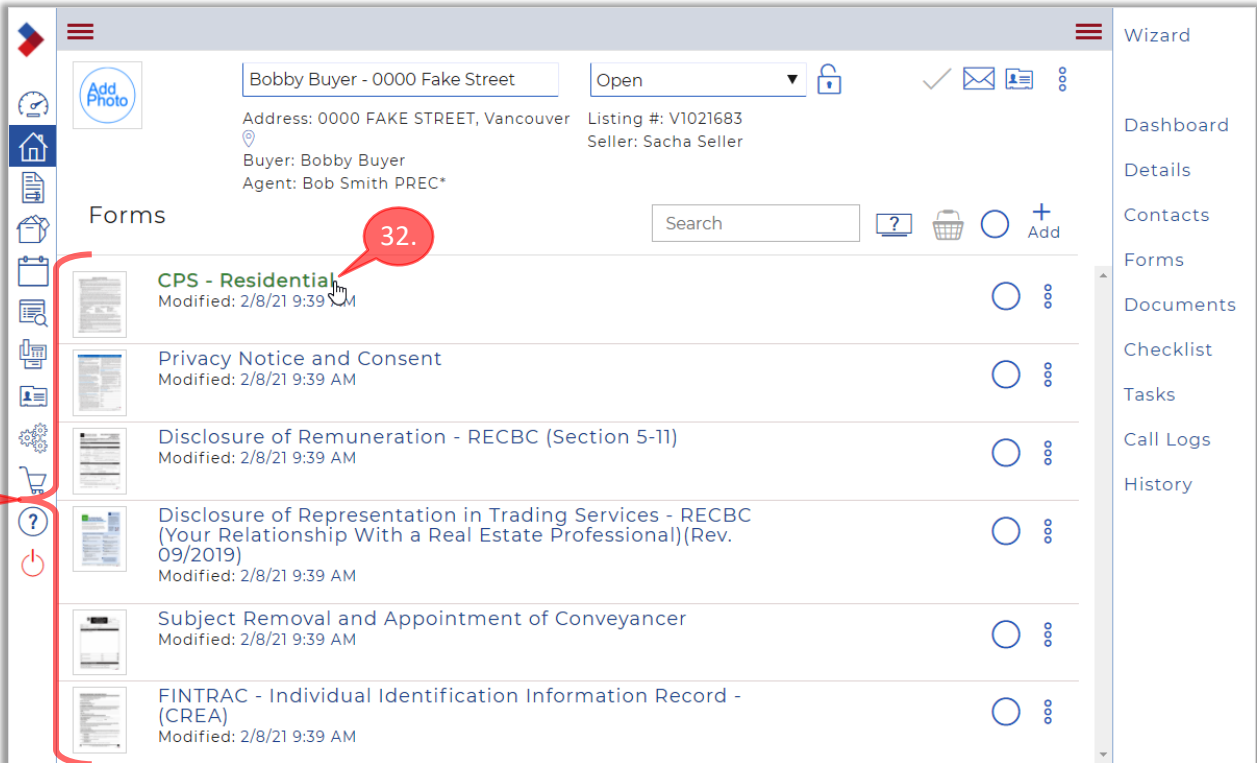
The screenshot shows the main application interface. At the top, there's a header with a search bar containing 'Bobby Buyer - 0000 Fake Street' and a dropdown menu set to 'Open'. A green success message 'Success Save Successful' is displayed in the top right corner. Below the header is a 'Contacts' section with a search bar and a list of contacts. The contact 'Bobby Buyer' is highlighted with a red circle and the number 29. On the right side, there's a 'Wizard' menu with items: Dashboard, Details, **Forms** (highlighted with a red circle and the number 30), Document, Checklist, Tasks, Call Logs, and History.

29. Your client now appears in the list of participants for the transaction.

30. Click **Forms** in the menu at the right to continue.



31. The **Forms** page opens. Note that this transaction has “inherited” the six forms that were included in the template.



32. Click on the **CPS - Residential** form to open it in the Form Editor.

33. When the Form Editor opens, scroll down to the second page of the form.



34. Note that the many of the fields have been auto-populated with information from your contacts and from the MLS® listing.

Working with the Form Editor



► To edit forms with the Form Editor:

You can recognize the *Form Editor* by its menu bar at the top of the page.



The menu bar provides the following options:

- **File** – *Start* a new form, *Open* a form, *Save* the form, *Copy* the form, *Erase* pages, add a *Watermark*, *Remove* the form, *Print* the form, *Send* the form, *Exit* the editor.
- **Font** – choose the font *Style*, *Color*, *Size* and *Case* for the editable fields. Note that your Font selections will apply to all the editable fields in the form.
- **Clauses** – select clauses to insert into the form. Note that you must first select a “multiline” text field before you can add a clause.
- **Transaction Forms** – select a form in the transaction for editing. Also lets you select one or more forms to copy, download, print, save as PDF, email or fax (via the Basket icon).
- **Pages** – select which page in the form to edit. Available only in multi-page forms. Note that you can also scroll to access pages.
- **Help** – access help resources provided by BCREA, including the *BCREA Standard Forms Resource Index* and the *BCREA Guides*, which explain recently-updated forms.
- **Zoom** – zoom in or out of the current form.
- **Markups** – markup the form: *Strike-out* text, draw *Lines*, *Highlight*, *Redact*, *Annotate* and *Clear All* markup.
- **Send to...** – this icon will appear if you have linked your e-signature account to WEBForms.
- **Add Page** – add a “clauses page” to the form, if applicable.
- **Remove Page** – remove a previously added “clauses page” from the form, if applicable.
- **Save/Exit** – save the current form and exit the Form Editor.



Note that certain menu items will not be present on some forms. For example, the *Pages* option will not be present on forms that consist of only one page.

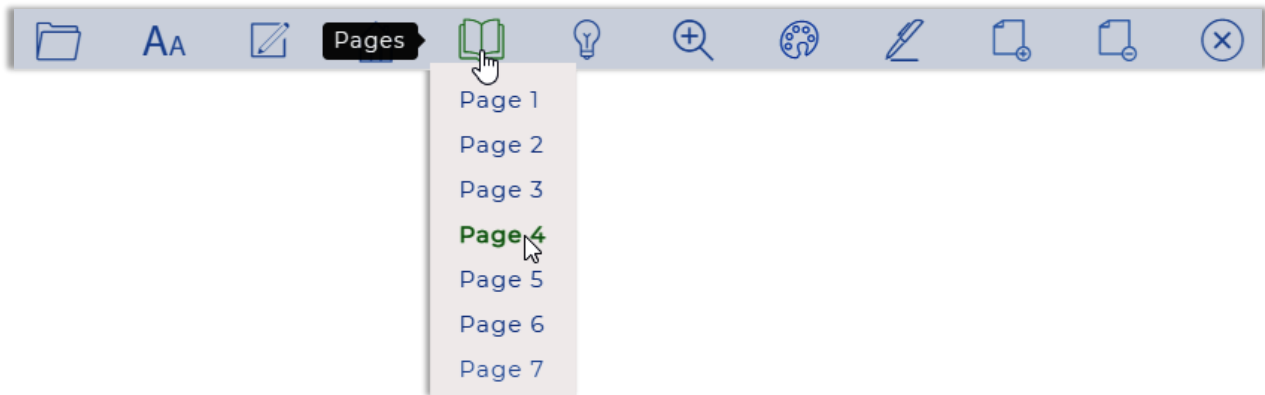


The form's editable fields are shaded with a pale blue colour, as shown below.

SELLER: Sacha Seller	BUYER: Bobby Buyer
SELLER:	BUYER:
ADDRESS: 0000 FAKE	ADDRESS: 123 4th Street
Vancouver BC	Vancouver BC
PC: A0A 0A0	PC: V1W2X3
PHONE: 604-555-0000	PHONE: 604-555-6666
	OCCUPATION:

1.

1. Click within a field to select it for editing. The field will be highlighted with pale green, to indicate that it is selected.
2. Practice filling in some of the fields in the *CPS - Residential* form. Note that you don't need to be too thorough when filling in the fields, as this is just a practice exercise, and not an actual transaction.
3. To access other pages in the form, you can simply scroll down. Or click **Pages** in the menu bar to display a menu of the pages in the form.



4. Scroll down to the **TERMS AND CONDITIONS** section to display the clauses.
5. Note that the clauses include "blanks", which are indicated by a single (underscore character), as shown in the image below.

4.

3. TERMS AND CONDITIONS: The purchase and sale of the Property includes the following terms and is subject to the following conditions:

Subject to a new first mortgage being made available to the Buyer on or before in the amount of \$ at an interest rate not to exceed % per annum calculated not in advance, with a year amortization period, year term and repayable in blended payments of approximately \$ per month including principal and interest (plus 1/12 of the annual taxes, if required by the mortgagee). This condition is for the sole benefit of the Buyer.

Subject to the Buyer, on or before at the Buyer's expense, obtaining and approving an inspection report against any defects whose cumulative cost of repair exceeds \$ and which reasonably may adversely affect the property's use or value. This condition is for the sole benefit of the Buyer. The Seller will allow access to the property for this purpose on reasonable notice.

Subject to the Buyer on or before obtaining and approving a Property Disclosure Statement with respect to the information that reasonably may adversely affect the use or value of the property. This condition is for the sole benefit of the Buyer. If approved, such statement will be incorporated into and form part of this contract.




- 6. You will need to replace each underscore with transaction-specific information, such as a date or dollar amount.
- 7. Click to the place the cursor within the clause, then use normal editing techniques to replace the underscore with the appropriate information. Note that you can usually press **Ctrl+Z** (Windows) or **Cmd+Z** (Mac) to undo your most recent changes if you make an error. In the image below, all the blanks in the first three clauses have been replaced with suitable values, as shown.

3. **TERMS AND CONDITIONS:** The purchase and sale of the Property includes the following terms and is subject to the following conditions:

Subject to a new first mortgage being made available to the Buyer on or before April 1, 2021, in the amount of \$800,000 at an interest rate not to exceed 3.0% per annum calculated monthly, not in advance, with a 1-year amortization period, 25-year term and repayable in blended payments of approximately \$4000 per month including principal and interest (plus 1/12 of the annual taxes, if required by the mortgagee). This condition is for the sole benefit of the Buyer.

Subject to the Buyer, on or before March 15, 2021 at the Buyer's expense, obtaining and approving an inspection report against any defects whose cumulative cost of repair exceeds \$500 and which reasonably may adversely affect the property's use or value. This condition is for the sole benefit of the Buyer. The Seller will allow access to the property for this purpose on reasonable notice.

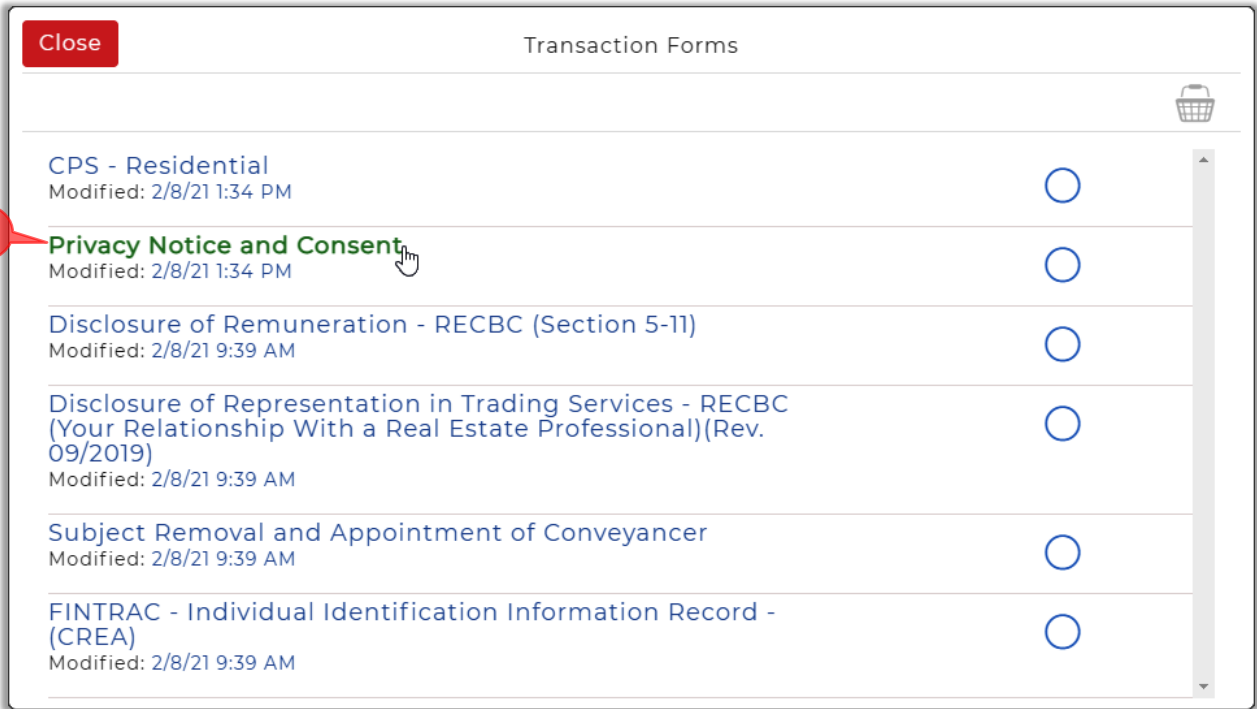
Subject to the Buyer on or before March 15, 2021 obtaining and approving a Property Disclosure Statement with respect to the information that reasonably may adversely affect the use or value of the property. This condition is for the sole benefit of the Buyer. If approved, such statement will be incorporated into and form part of this contract.

- 8. Practice replacing the blanks in the clauses, as time permits.
- 9. To edit a different form, click  **Transaction Forms** in the menu bar.





The **Transaction Forms** dialog box opens, listing the forms in the transaction.




10. Click on the name of the desired form to open it in the Form Editor.

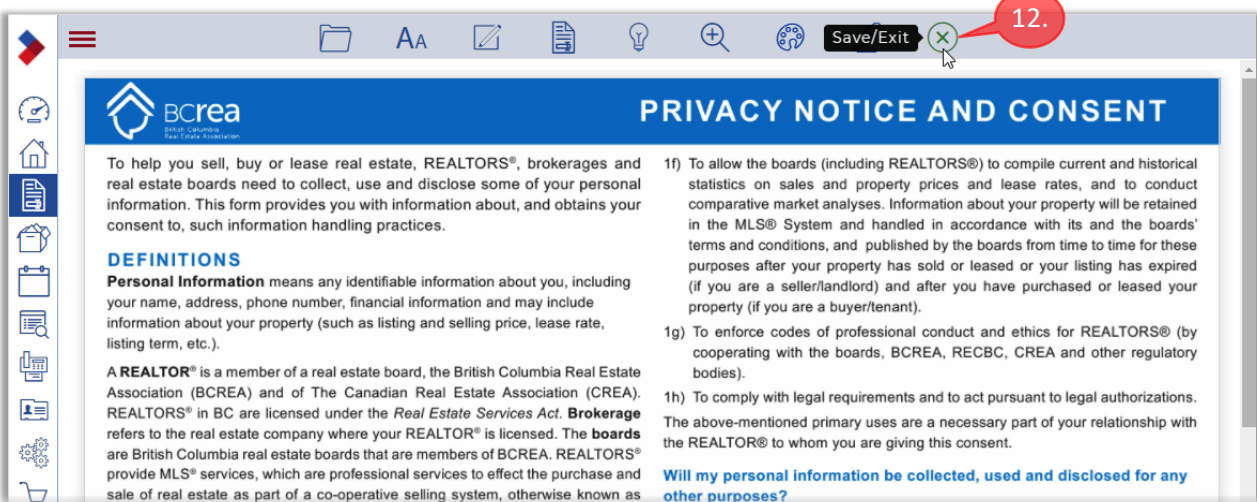
Note that you click on the name of the form you wish to edit, not the circle on the right. The circle on the right is used to select one or more forms to print, save, download, email, etc. See page 66 for more details.



Also note that an edited form will be saved automatically when you open another form or exit the Form Editor.

11. Practice switching between the forms and filling in some relevant fields.

12. Click  **Save/Exit** when you have finished practicing with the forms.



You will be returned to the **Forms** page for the transaction.



Working with Forms in a Transaction

Once you've created a transaction, you can perform various actions with its forms.

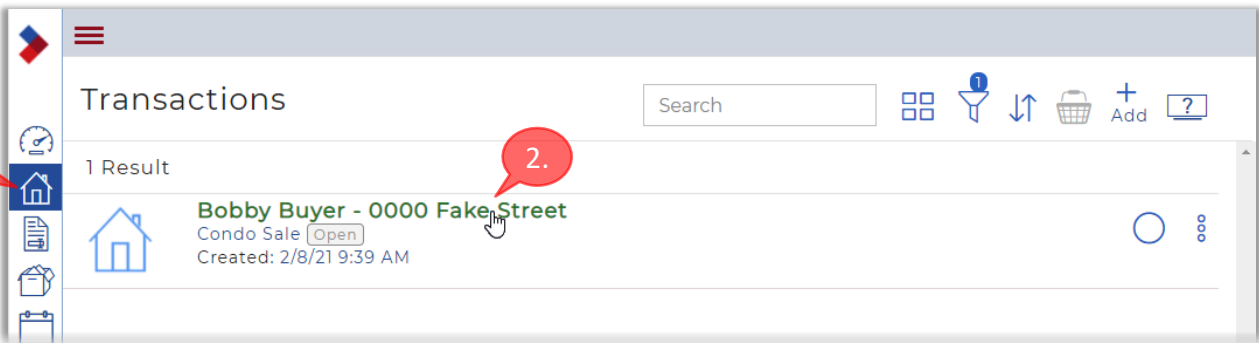
Selecting Forms for Emailing, Printing or Downloading



▶ To select forms for emailing, printing or downloading:

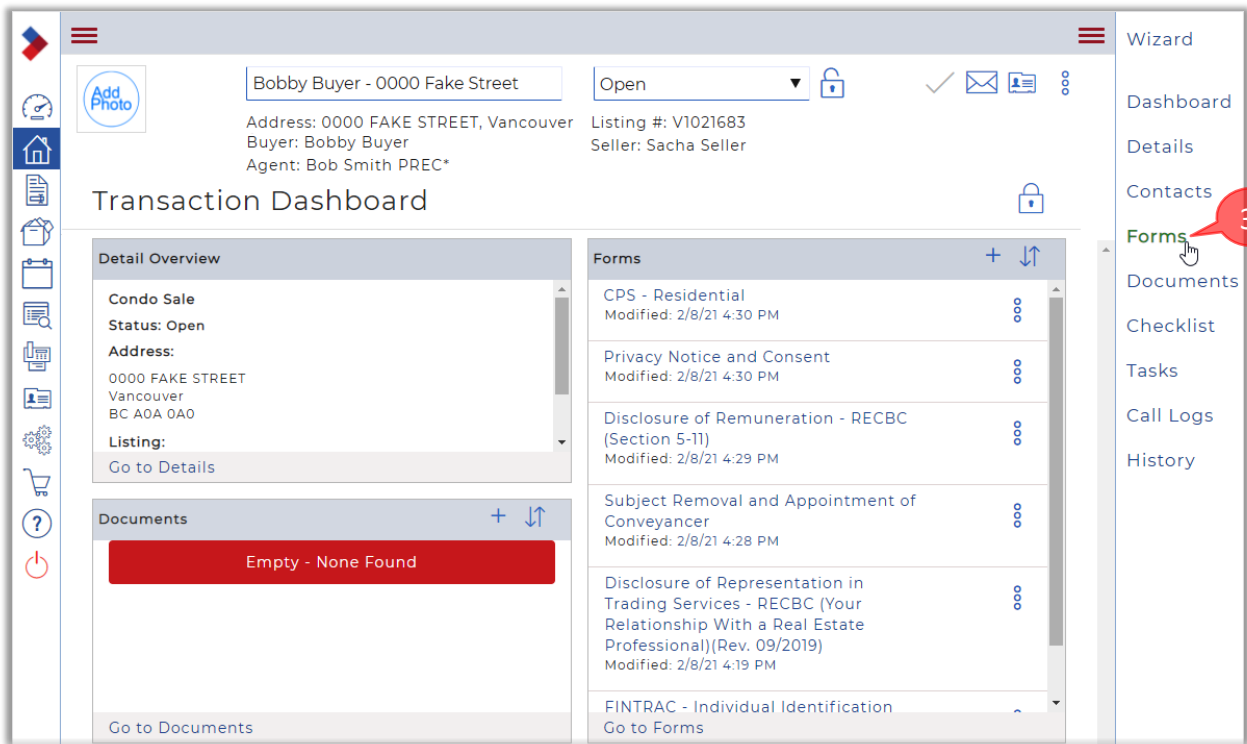
1. Click  **Transactions** in the Sidebar menu.

The **Transactions** page opens, listing all of your transactions.



2. Click on the name of the desired transaction; in this case, the attached listing transaction that you just created.

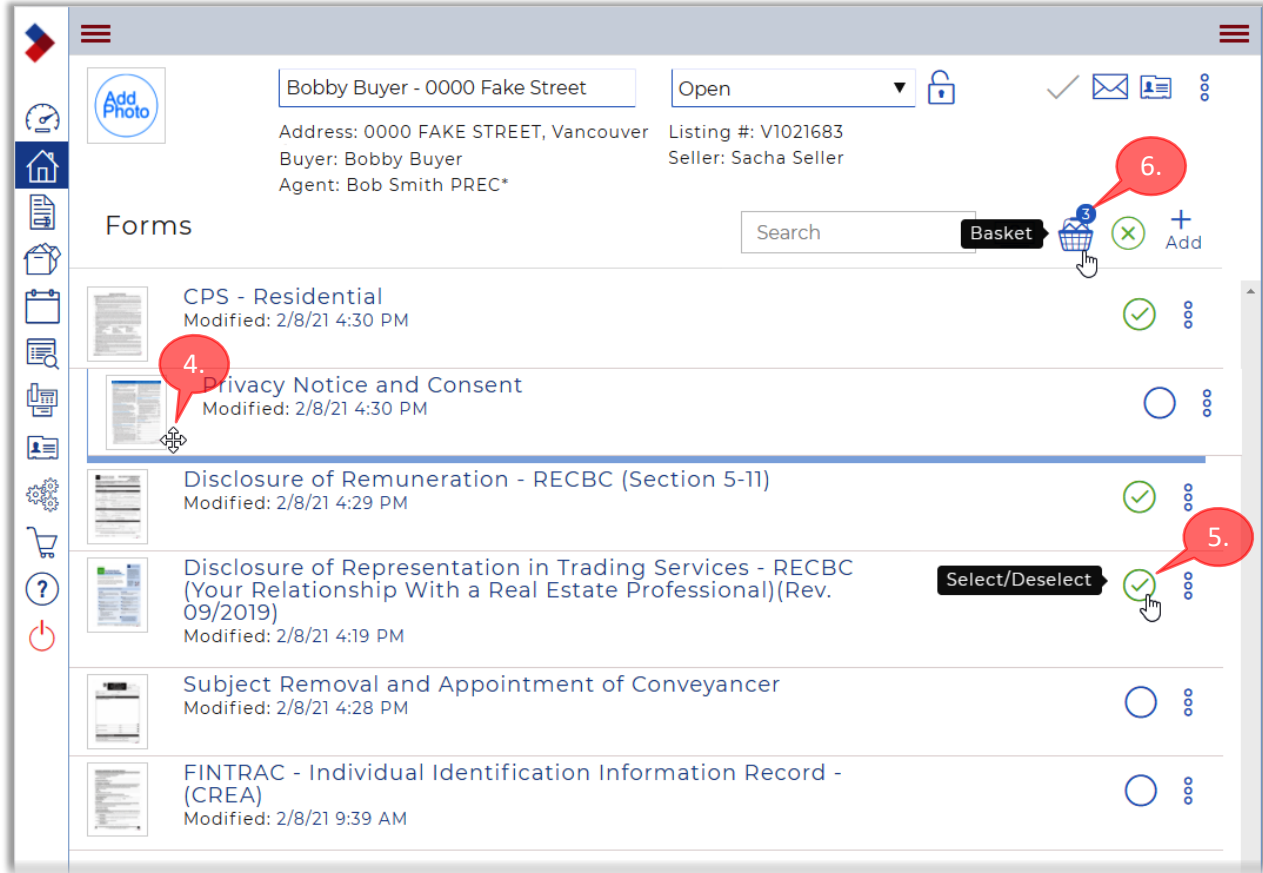
The **Transaction Dashboard** opens for the selected transaction.



3. Click **Forms** in the menu at the right to display the list of transaction forms.



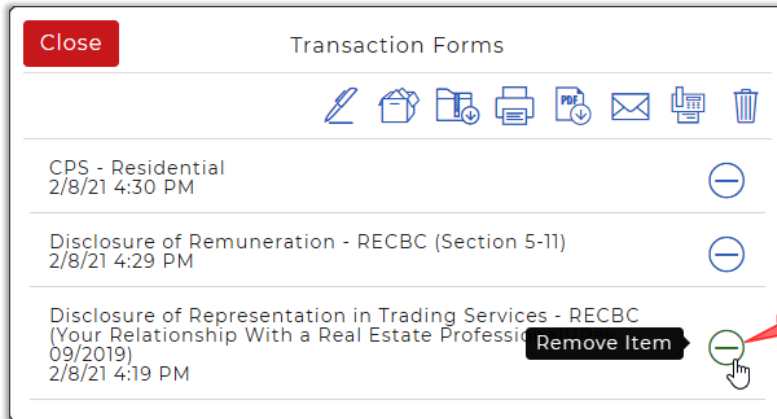
The **Forms** page opens, displaying all the forms in the selected transaction. The forms are listed in the same order as in the original template.



4. You can change the sequence of the forms by dragging the thumbnail images at the left.
5. Select the forms you want to work with by clicking their circles at the right. As usual, the Basket displays a count of the forms you have selected.
6. Click the **Basket** icon to work with the forms that you just selected.



The **Transaction Forms** dialog box appears.



A group of icons offers various options for working with the selected forms:

- **Send to ...** – icon appears if you have linked an e-signature account
- **Copy** – copy the forms to the transaction’s *Documents* folder
- **Download Zip** – download a zip file containing the forms
- **Print** – open the forms for printing
- **Save as PDF** – download and open a PDF containing the forms
- **Send via email** – send the forms as a link or attachment to an email
- **Send via Fax** – send the forms to the recipient via Fax
- **Delete** – delete the selected forms

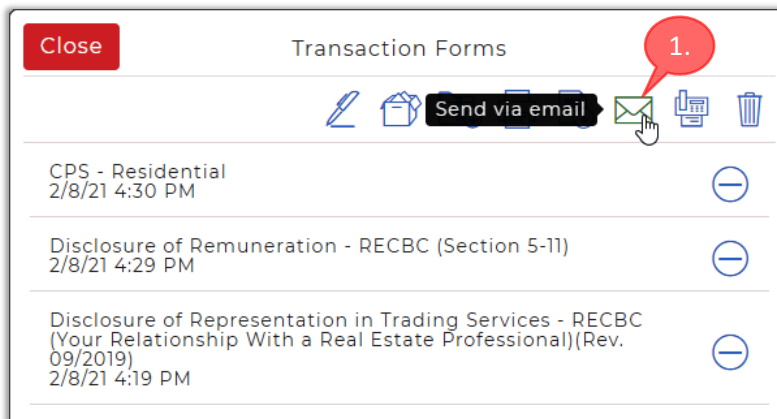
7. Note that these options will act upon *all* of the selected forms, as listed in the dialog box. If you don’t want to include a form, remove it by clicking .

Emailing Forms




► To email the selected forms:

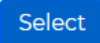
1. Click **Send via email** in the **Transaction Forms** dialog box.



The **Email** dialog box opens.

2. Enter the **Recipient Name** and **Recipient Email** address.
3. Alternatively, click  to select the recipient from your Contacts list. (This illustrates an advantage of having your contacts in the Contacts list.)

The **Select contact(s)** dialog box appears.

- a. By default, the *Transaction Contacts* are offered as options. You can use the drop-down menu to select which of the three Contact lists you wish to access. Or you could use the *Search* field to find the contact.
- b. Select the desired contact(s) by clicking their circles on the right.
- c. Then click  to continue.

- d. The **Recipient Name** and **Recipient Email** address will be filled in automatically, based on your contact selection.

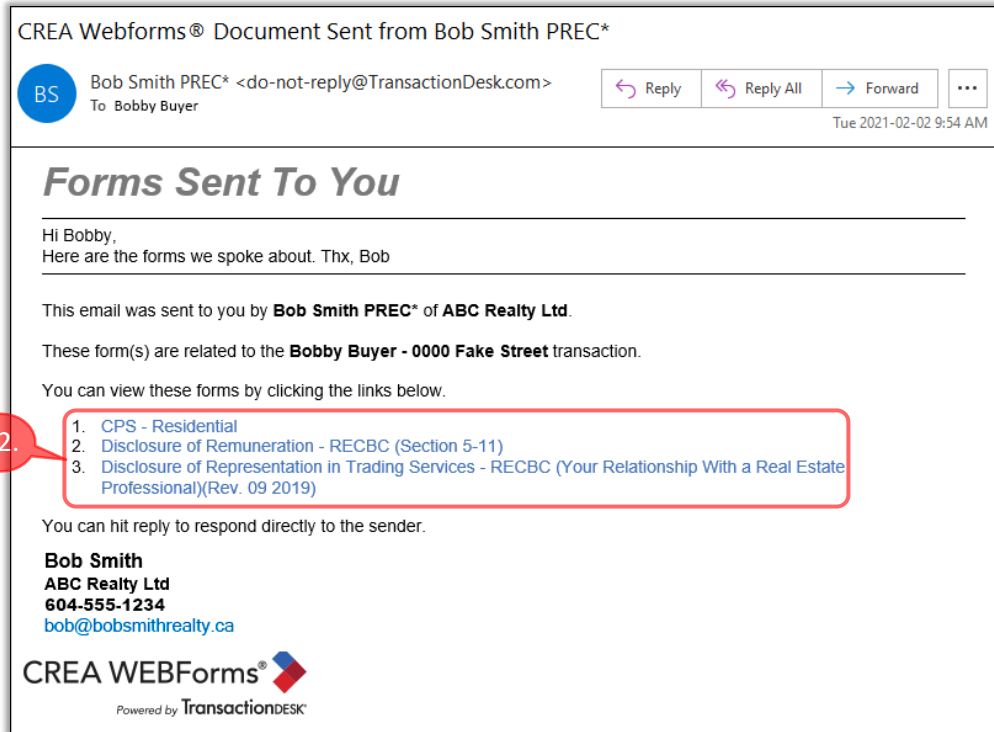
The screenshot shows an 'Email' form with the following fields and callouts:

- 9.** Recipient Name: Bobby Buyer
- 10.** Recipient Email: bobbybuyer@fictitious.com
- 4.** Subject: CREA Webforms® Document Sent from Bob
- 5.** Message: Hi Bobby, Here are the forms we spoke about. Thx, Bob
- 6.** Send as a link (selected)
- 7.** Allow editing of forms? (unchecked)
- 8.** Expiration Date: mm/dd/yyyy
- 11.** Send button

4. You can optionally modify the **Subject** field.
5. And you can add a **Message** body, allowing you to include instructions or additional information for your contact.
6. Select **Send as a link** to include links to the forms in your email message. Your recipients would click the links to access the forms.
Or select **Send as attachment** to attach the forms to your email message.
7. You are advised to leave the **Allow editing of Forms?** checkbox unchecked, unless there's a reason for your recipient to edit the forms.
8. The **Expiration Date** field lets you set the date at which the link will cease to be available, if applicable.
9. The **Items** tab allows you to view a list of the forms to be sent. It also allows you to change the order of the forms, if desired.
10. The **Fax-Back** tab provides an option to include a *Fax-Back Cover Sheet* with your email.
11. Click **Send** to send the email message to your recipient(s).

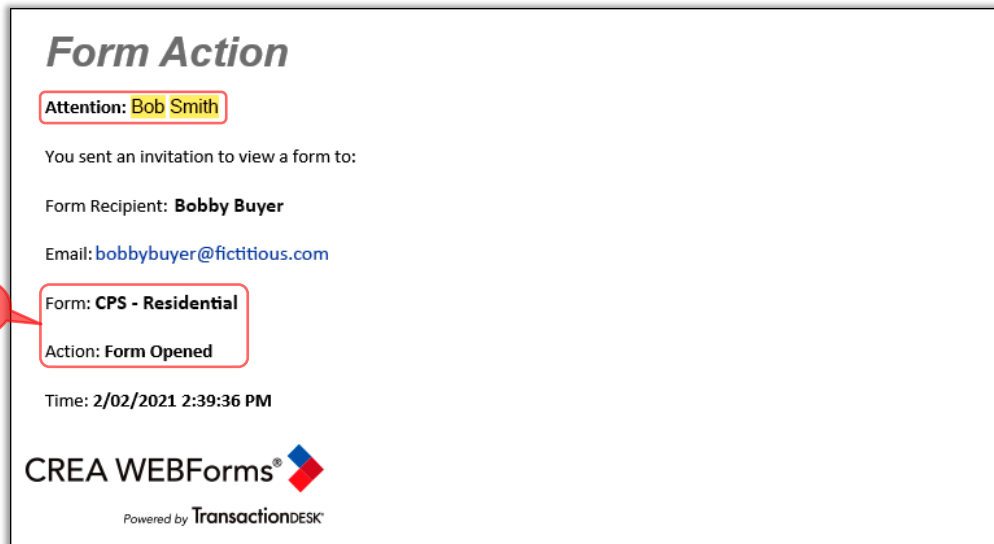


The recipient(s) will receive an email resembling the one shown below.



12. In the example above, the three forms would be accessible using the links in the email, because the **Send as a link** option was selected in the **Email** dialog box, as shown on the preceding page.

13. As the agent, you will receive an email notification when an email recipient accesses a form in the transaction, as shown below.



14. Note that you can optionally disable these notifications via the *Notifications* section of the **Setup** page. See page 113 for more information on notifications.

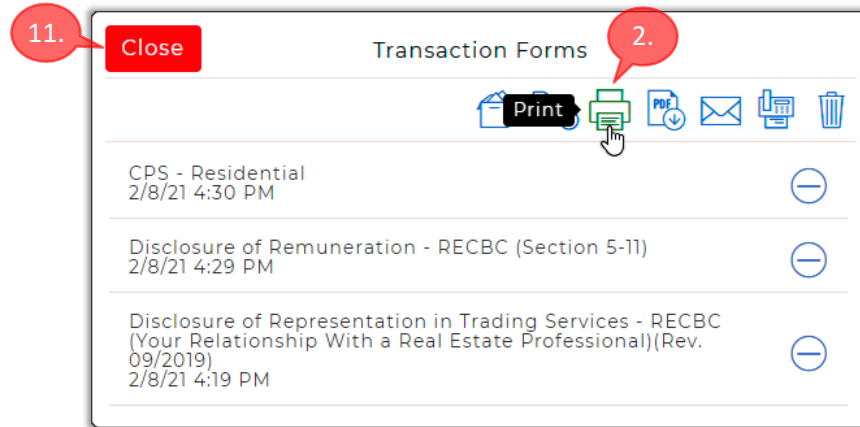


Printing and Downloading Forms

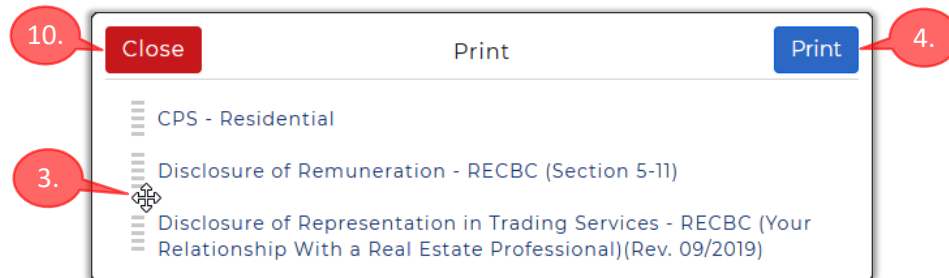



► To print or download the selected forms:

1. As explained on the preceding pages, you first select the desired forms, and then click the **Basket** icon to display the **Transaction Forms** dialog box, as shown below.



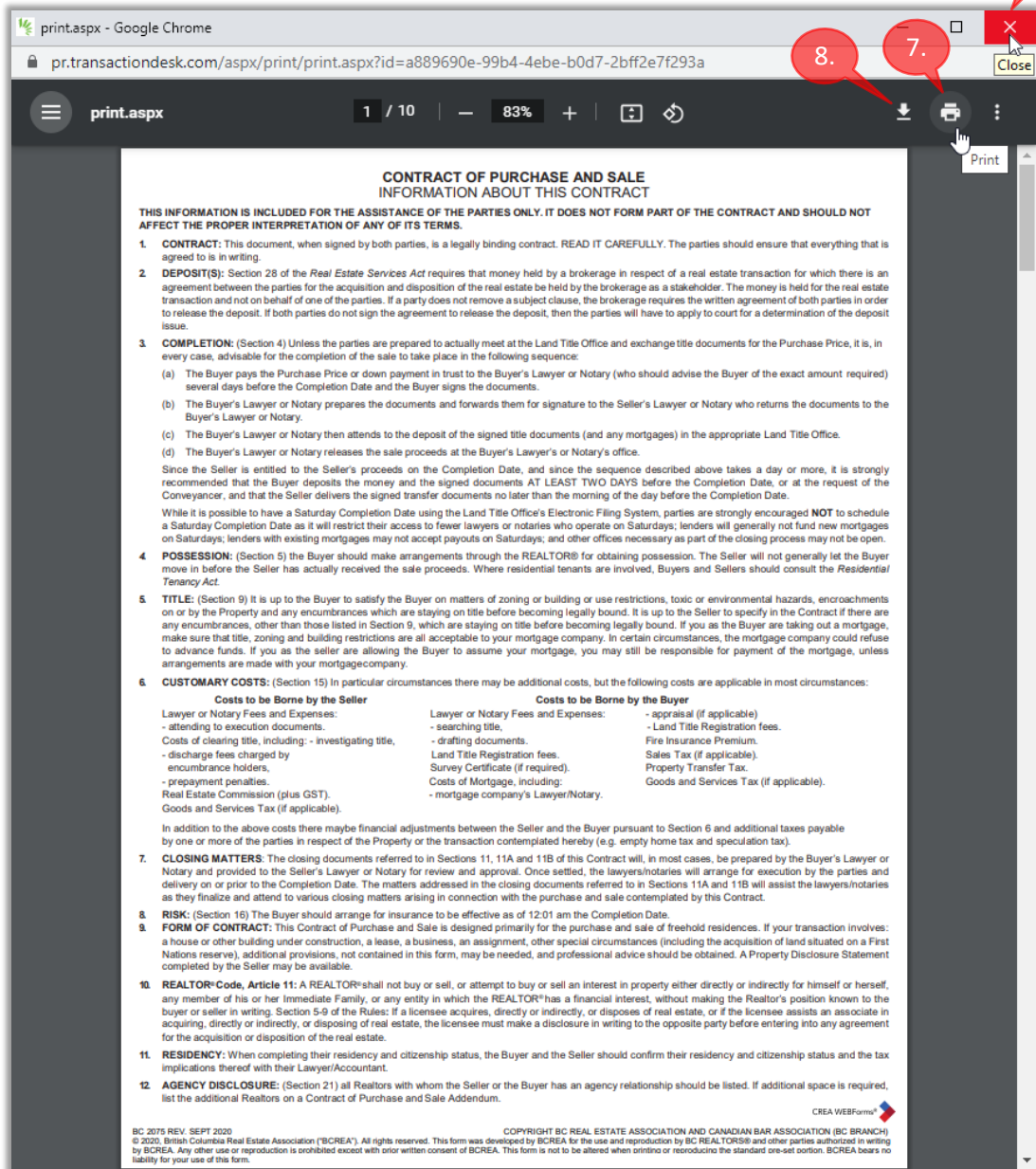
2. Click  **Print** to proceed.
The **Print** dialog box opens.



3. If desired, you can change the order of the forms by dragging them, as previously explained
4. Click  to continue.



- All the selected forms will open as a single document in your browser's PDF reader. The PDF reader will open in a new, separate browser window.



- You are advised check over the document for accuracy before printing or downloading it.
- Click in the PDF reader's toolbar to send the document to your printer.
- Or click to download the document.
- Click to close the PDF reader window and return to WEBForms.
- Back in WEBForms, click to close the **Print** dialog box.
- Then click to close the **Transaction Forms** dialog box.

You can close the transaction, as desired.




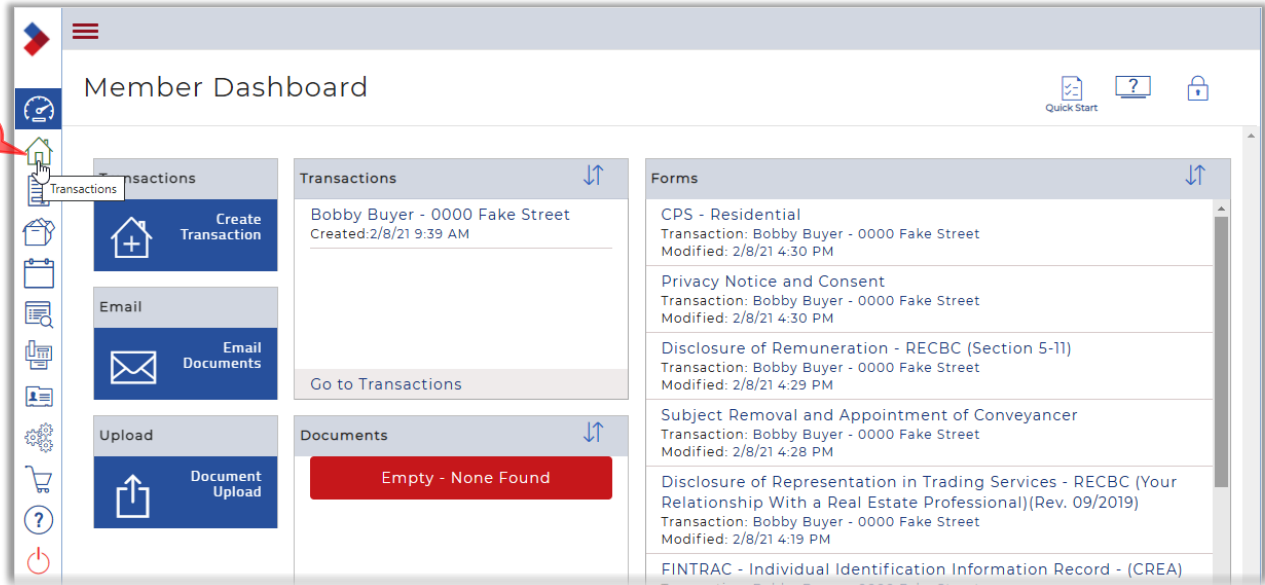
Creating a Listing Transaction from a Template

In this activity, you will create a new transaction based on the *Detached Listing Template* that you previously created.

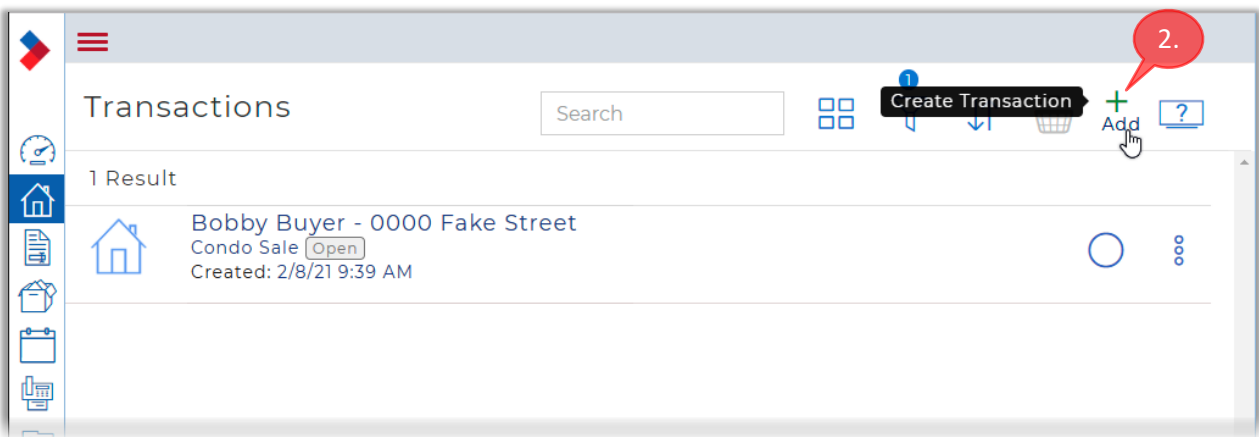



▶ To create a transaction from the Detached Listing Template:

1. Click  **Transactions** in the Sidebar menu on the left.



The **Transactions** page opens, listing any existing transactions.



2. Click  to create a new transaction.



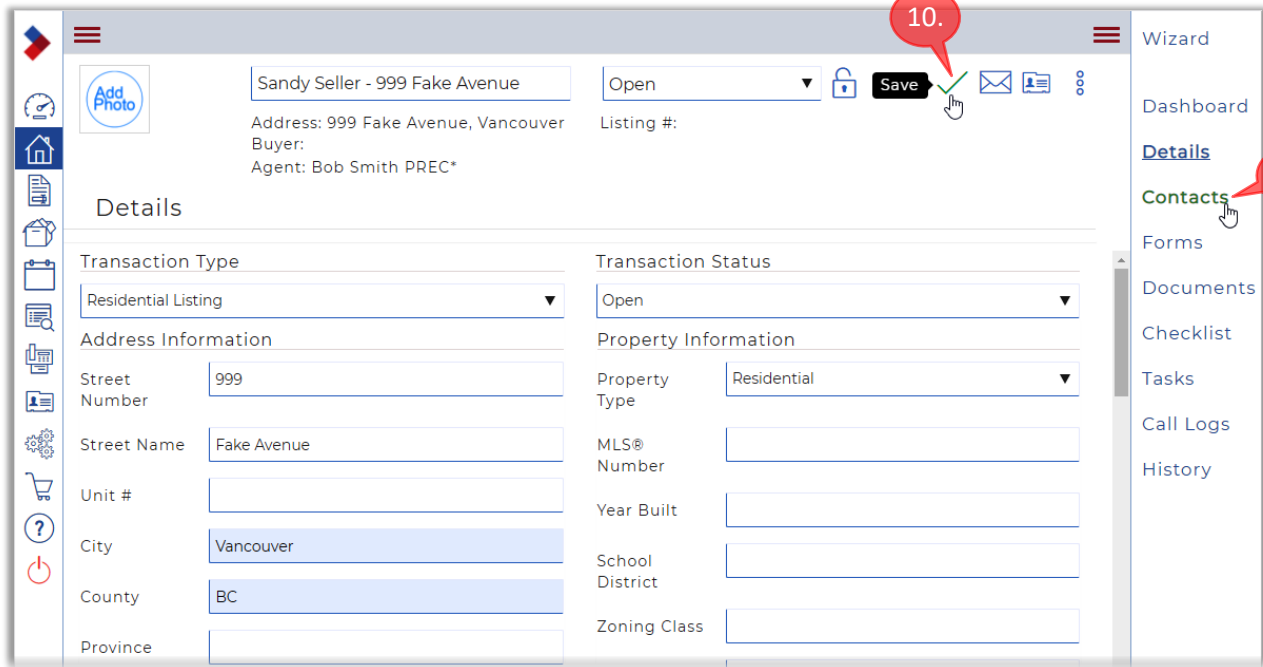
The **Create Transaction** dialog box appears.

3. Enter a descriptive name for the transaction into the **Name** field.
4. Click in the **Template** field to display a list of the available templates. Then click **Detached Sales Template** in the list that appears.
5. Since this transaction is for a new listing, you will not yet have an MLS® number, so make sure to leave the **Import Data** field blank.

6. Note that you are automatically specified as the *Listing Agent* in the **Add me as the** field because the selected template is for a listing.
7. You are advised to make sure the **Use Wizard** checkbox is unchecked.
8. Click **Create** to continue.



The **Details** page for the transaction opens.

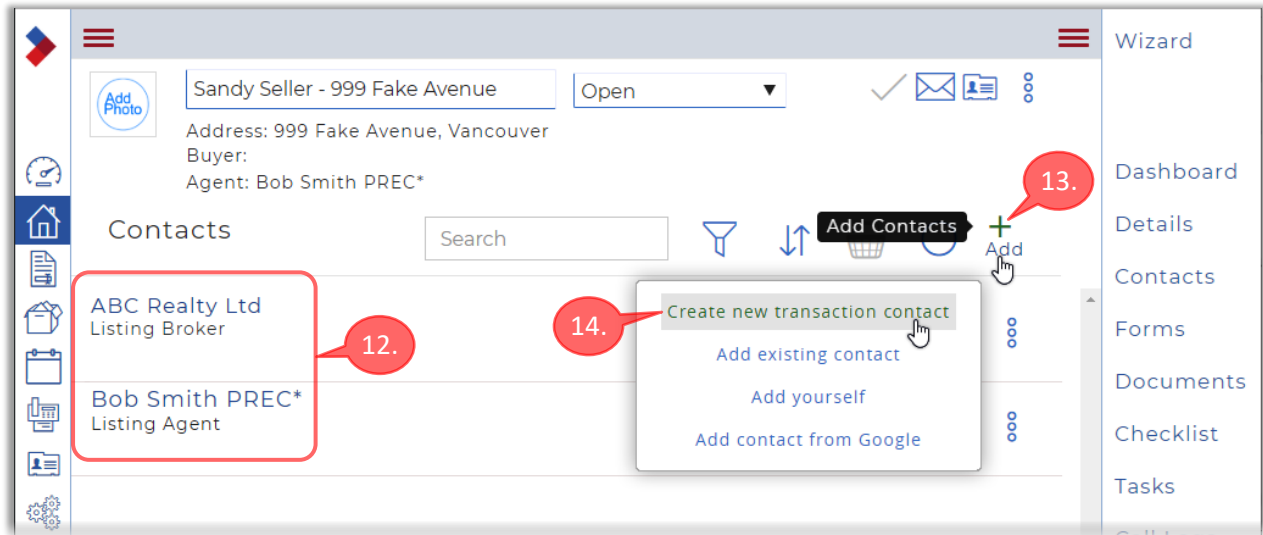


9. Fill-in any fields for which you have the information available.

10. Make sure to click ✓ (**Save**) if you make any changes.

11. Click **Contacts** in the menu on the right to continue.

The **Contacts** page opens.



12. As previously explained, this page is used to specify the participants in a transaction. You and your brokerage will automatically be included.

13. Click **+ Add** to add your Seller to the Contacts for the transaction.

14. Click **Create new transaction contact** in the pop-up menu that appears.

The **Create Transaction Contact** dialog box opens.

15. Click the **Type** field and select a suitable option from the drop-down list; e.g. *Seller*.
16. Enter the contact's **First Name** and **Last Name**.
17. Make sure to enter an **Email** address for your client.
18. Optionally fill-in the **Legal Name**, **Preferred Signature**, and **Preferred Initials** fields. Filling in these fields can facilitate the use of e-signature applications with this contact.
19. You are advised to make sure the **Add to address book?** checkbox is checked. This will make it easier to add the contact to future transactions, and will also facilitate communicating with the contact by phone or email.
20. Click the **Address** tab to optionally enter address and phone information for the contact.



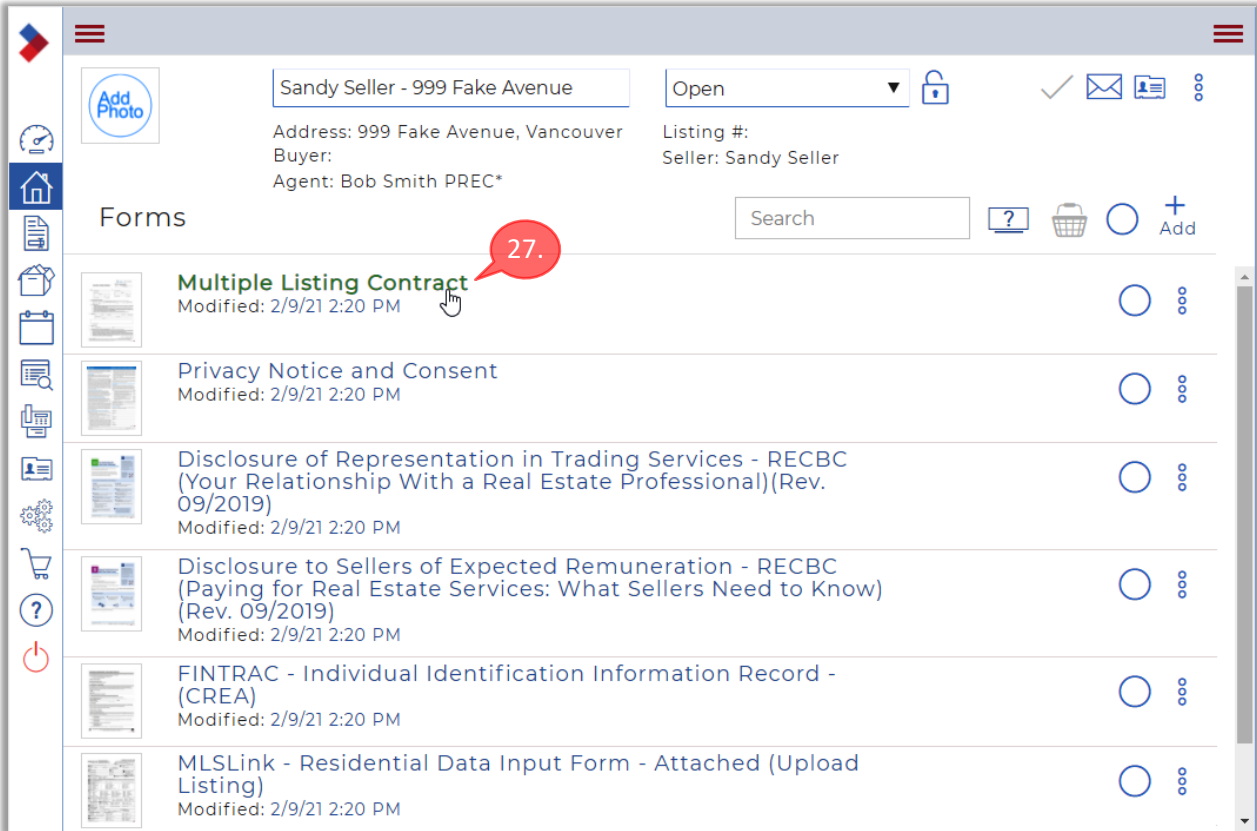
The **Create Transaction Contact** dialog box opens.

- 21. Click the **Same as Property Address** checkbox, assuming that the seller resides at the property that’s being listed. The property address information will automatically be populated into the contact’s information record.
- 22. Enter the relevant phone numbers for the contact.
- 23. Click **Save** when you have entered all the contact’s information.
- 24. A **Success** message is briefly displayed at the upper-right corner of the page.

- 25. Your client now appears in the list of contacts for the transaction.
- 26. Click **Forms** in the menu on the right to continue.

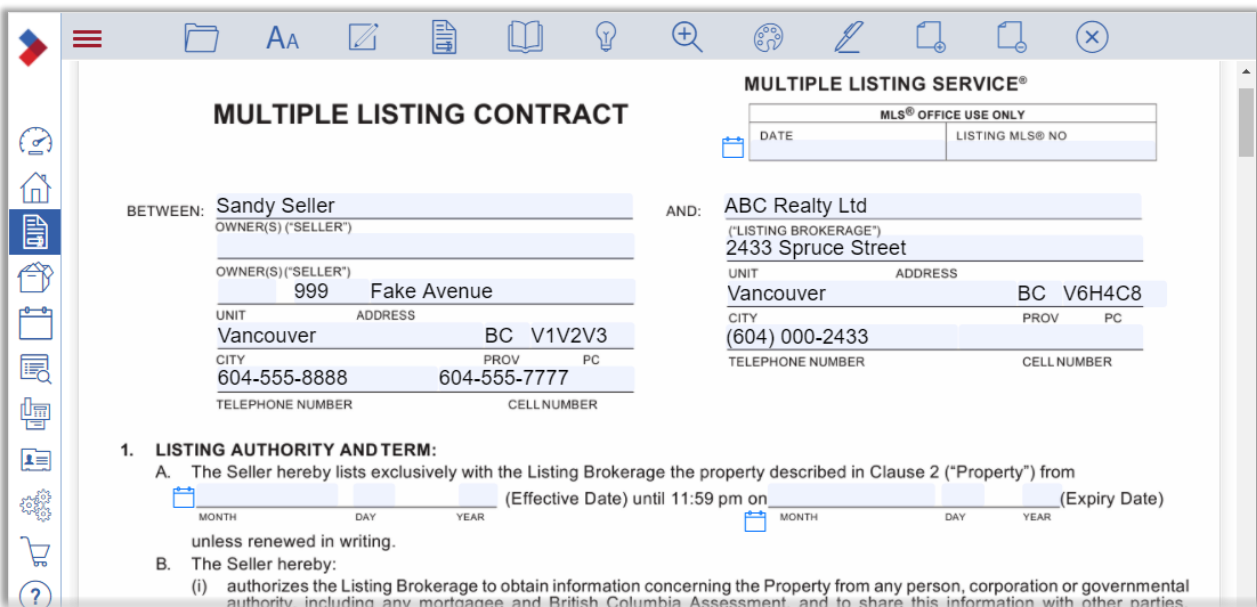


The **Forms** page opens. Note that the transaction has “inherited” the seven forms that were included in the template.



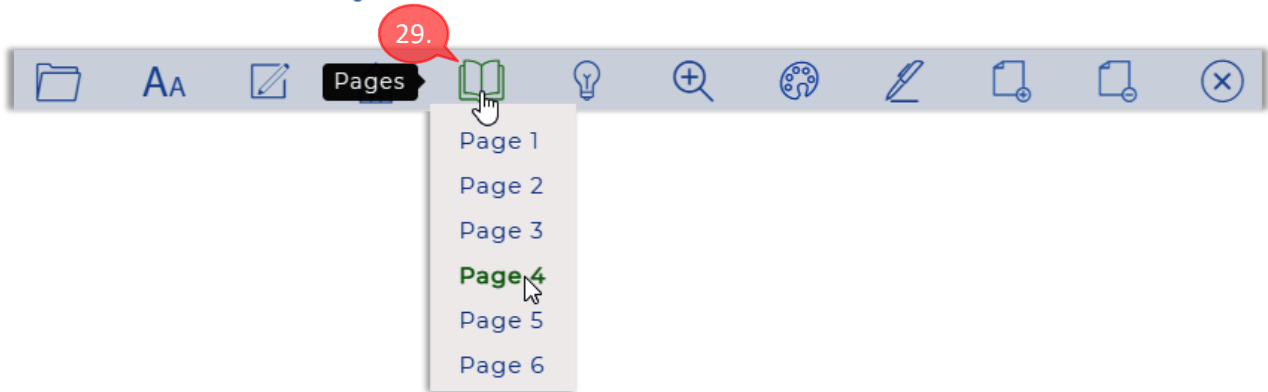
27. Click on the **Multiple Listing Contract** form to open it in the Form Editor, as shown below.

Note that some fields have been auto-populated with information about you and your brokerage, plus the information you just entered about your Seller.





- 28. Practice filling in some of the fields in the *Multiple Listing Contract*, entering some transaction-specific information that was omitted in the template. Note that you don't need to be too thorough when filling in the fields, as this is just a practice exercise, and not an actual transaction.
- 29. To access other pages in the form, you can simply scroll down. Or click **Pages** in the menu bar to display a menu of the pages in the form.



- 30. To edit a different form, click **Transaction Forms** in the menu bar.



- 31. Then click on the name of the desired form in the **Transaction Forms** dialog box that appears. (Reminder: to edit the form, click the name, not the circle.)





32. Practice switching to and editing the other forms in the transaction, as time permits.

RESIDENTIAL DATA INPUT FORM
 TO BE USED FOR DETACHED, ATTACHED, APARTMENT, MULTI-FAMILY (MAX 4 UNITS) & LEASEHOLD. PLEASE PRINT CLEARLY.
 NOTE THAT STRATA INFORMATION MUST BE COMPLETED ON PAGE 6.

BC Northern Real Estate Board
 Chilliwack & District Real Estate Board
 Fraser Valley Real Estate Board
 Real Estate Board of Greater Vancouver

MLS@ NUMBER: [] PAGE 1 OF 7

IN REFERENCE TO THE MULTIPLE LISTING CONTRACT DATED ___ OF ___ yr. FOR THE SALE OF PROPERTY LOCATED AT

065 ADDRESS: 999 Fake Avenue V1V2V3 066 CITY/TOWN: Vancouver

080 AREA: [] 084 SUB-AREA/COMMUNITY: []

100 DESIGNATED AGENT: Bob Smith PREC* 102 USER ID: V0000000

106 DESIGNATED AGENT: [] 108 USER ID: []

112 DESIGNATED AGENT: [] 114 USER ID: []

118 SHOWINGS / APPOINTMENTS: [] PHTE Phone Tenant First, [] PHOT Phone Other, [] TOUCH Touchbase, [] SHOW Showing Time (BCNREB Members only)

120 APPOINTMENT PHONE NUMBER (One Only): [] 122 FOR APPOINTMENT CALL (Name): []

124 PHOTO - ONE PHOTO IS REQUIRED OR THE LISTING WILL BE CONSIDERED INCOMPLETE. PHOTOS CAN BE UPLOADED THROUGH PARAGON.

126 DWELLING CLASSIFICATION (One Only): [] DETD Detached, [x] ATTD Attached, [] MULTF Multifamily (Max. 4 Units)

128 TYPE OF DWELLING (One Only):

DETACHED OPTIONS:	ATTACHED OPTIONS:	MULTIFAMILY OPTIONS:
<input type="checkbox"/> HOUSE House/Single Family	<input type="checkbox"/> APTU Apartment/Condo	<input type="checkbox"/> DUPLX Duplex
<input type="checkbox"/> HACR House with Acreage	<input type="checkbox"/> DUPXH 1/2 Duplex	<input type="checkbox"/> 3PLEX Tri-Plex
<input type="checkbox"/> TWNHS Townhouse	<input type="checkbox"/> RECRE Recreational	<input type="checkbox"/> 4PLEX Four-Plex
<input type="checkbox"/> MANUF Manufactured	<input type="checkbox"/> TWNHS Townhouse	<input type="checkbox"/> RECRE Recreational
<input type="checkbox"/> MNFLD Manufactured w/Land	<input type="checkbox"/> ROWHS Row House (non-strata)	<input type="checkbox"/> OTHER Other
<input type="checkbox"/> RECRE Recreational	<input type="checkbox"/> OTHER Other	
<input type="checkbox"/> OTHER Other		

33. Click Save/Exit to return to the Forms page for the transaction.

You can close the transaction when you have finished practicing.




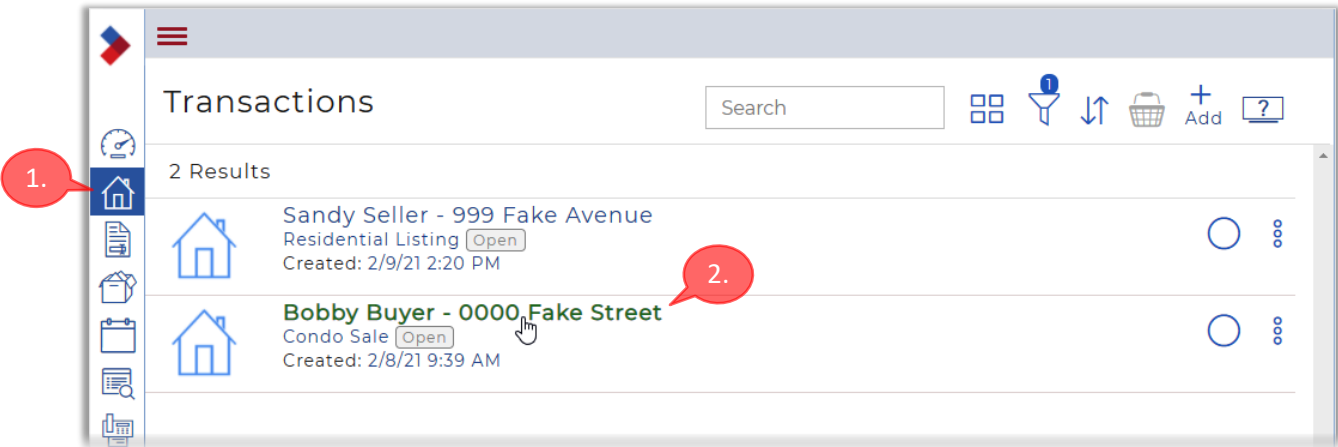
Managing Your Transactions

If a transaction has not yet completed, you can modify it, as required. For example, you can update the *Details* page, rename the transaction, change its status, delete it, duplicate it, etc. You can also add, remove and edit the transaction's *Contacts*. And you can manage the forms: add forms, edit forms and clauses, delete forms, etc.

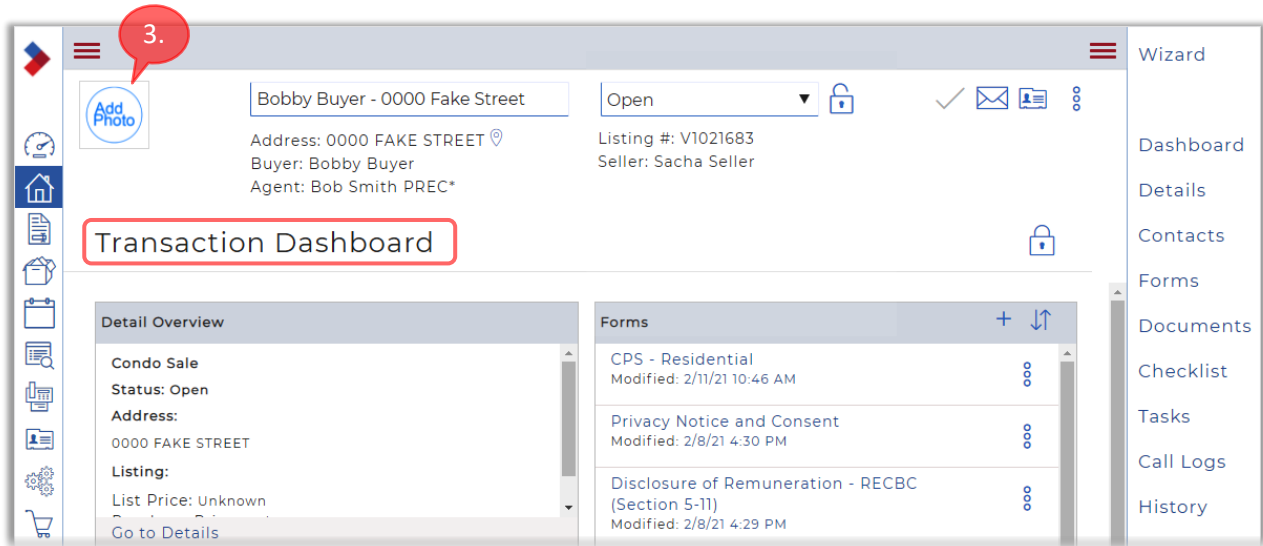



▶ To manage a transaction using the Transaction Dashboard:


1. Click  **Transactions** in the Sidebar menu to display your transactions.
2. Then click on the transaction that you want to work with.

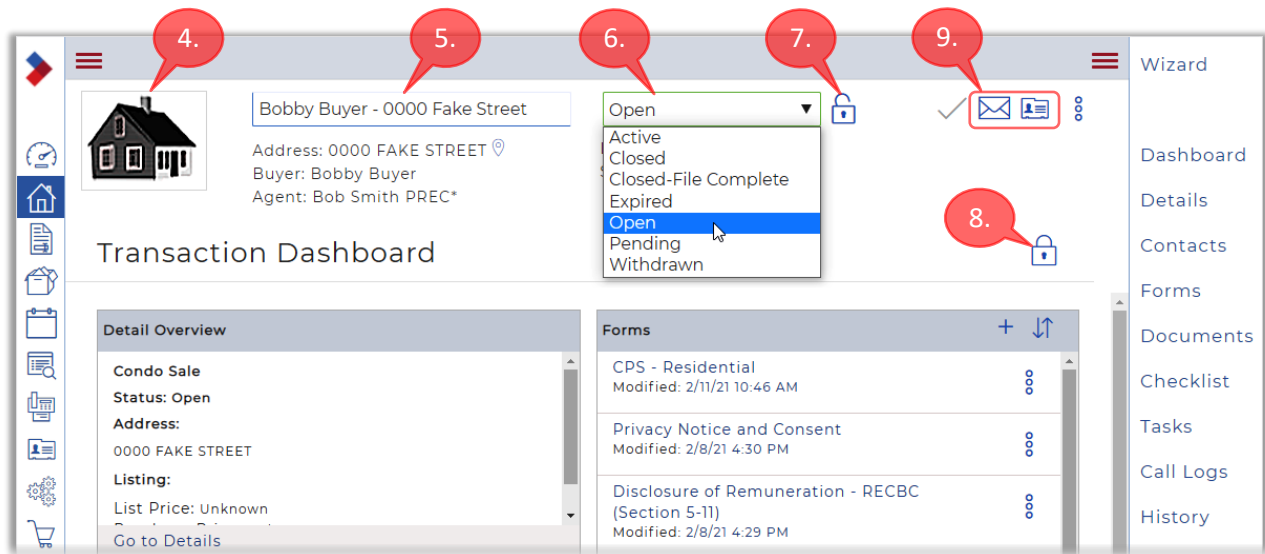



The **Transaction Dashboard** page will open for the selected transaction.




3. You can add a thumbnail image to represent the transaction by clicking  near the upper-left corner of the page, and then browsing to a suitable image on your computer.



4. The selected image will replace the usual transaction icon .



5. To rename the transaction, you would click its name in the box at the top of the page and edit the name.
6. You can change the **Status** of the transaction via the drop-down list near the top of the page.
7. You can prevent the Status from being changed by clicking the  lock icon to the right of the Status field. Click the icon again to unlock the Status.




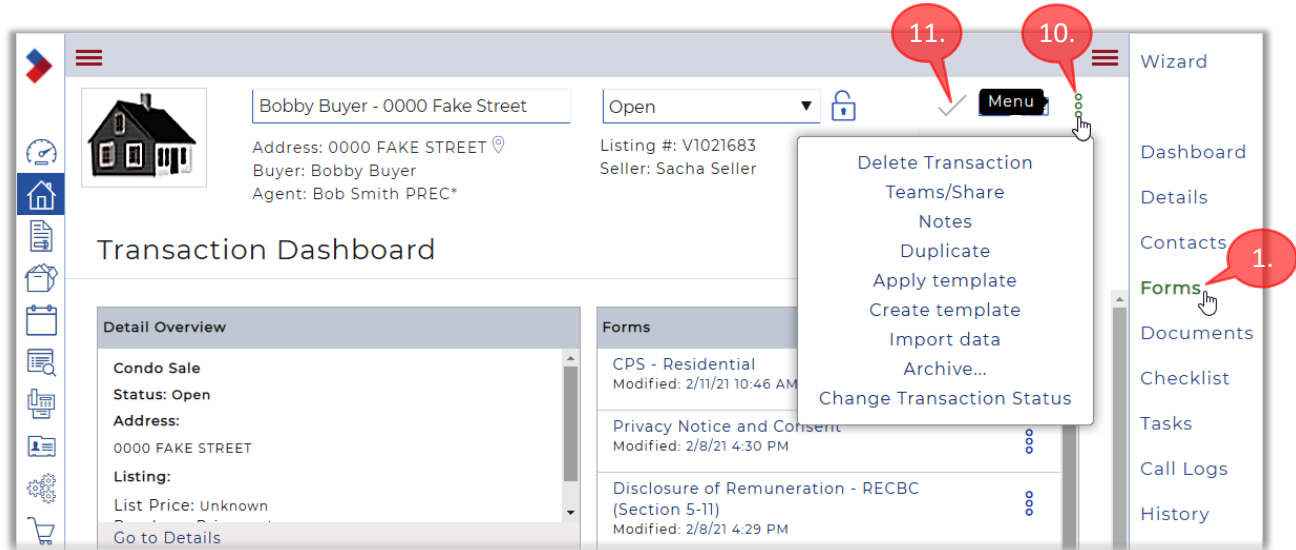
Note that WEBForms ignores the *Status* field—it's only meant to help you to organize and categorize your transactions. If you are consistent in your use of the Status field, you can then use the  Filter icon to display only transactions of a certain Status.

8. The other lock icon is used to unlock the Transaction Dashboard, to permit you to customize it. See page [116](#) for more details.
9. The **Email Upload**  and the **Download Contact Card**  allow you to send documents directly into the transaction via email attachments, without needing to sign in to WEBForms.


Please refer to the online help for more information on this topic.



10. Click  **Menu** near the upper-right corner to display a pop-up menu that allows you to perform various operations on the transaction.



The following options are available for the transaction using the pop-up menu:

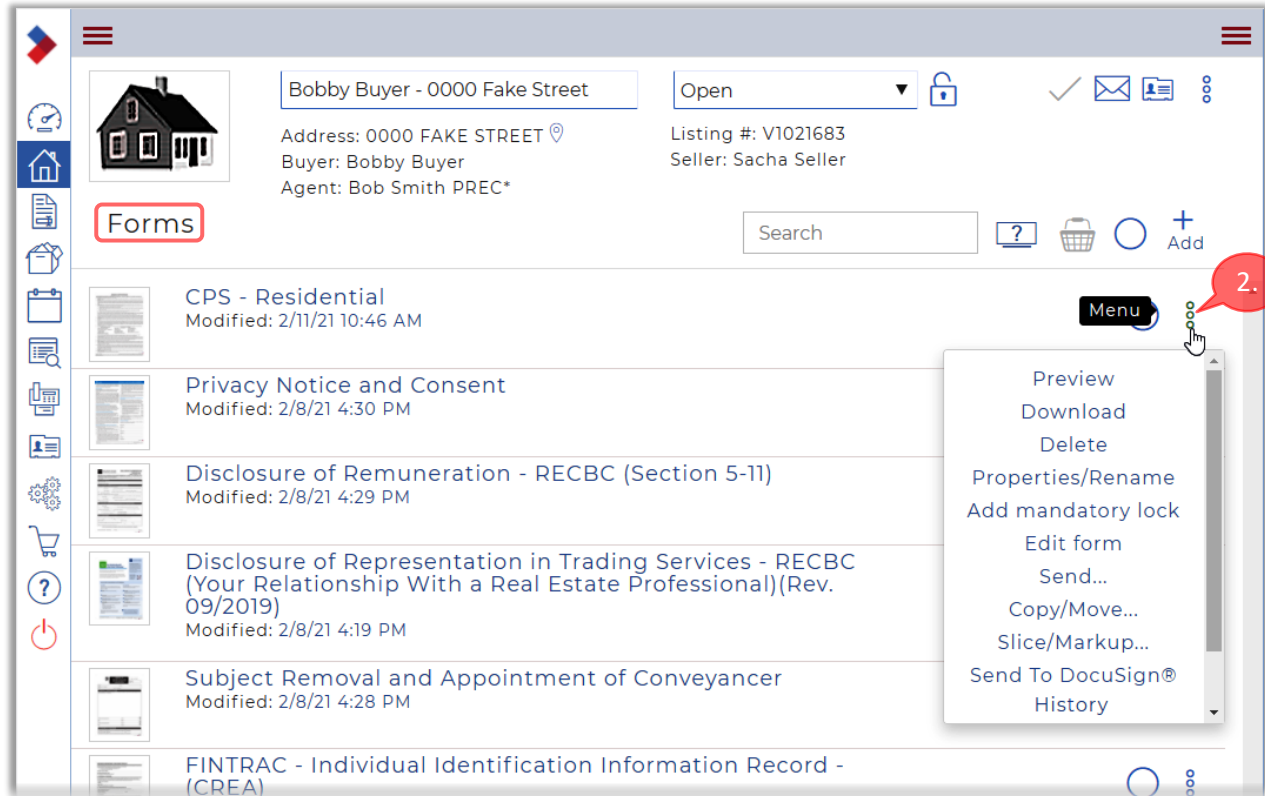
- **Delete Transaction** – deletes the current transaction. Once you delete a transaction, you won't be able to undelete it.
 - **Teams/Share** – lets you share the transaction with others in your Share Group, which must be set up ahead of time. Please refer to online help for more information on this topic.
 - **Notes** – lets you add a reference note to the transaction.
 - **Duplicate** – make a copy of the transaction. Be aware that any transaction-specific information will also be copied.
 - **Apply Template** – lets you apply a template to a transaction that was created without a template. Inserts the template's forms and clauses into the existing transaction.
 - **Create Template** – lets you create a template from the current transaction. This is not advised, as all the listing-specific information will be carried over from the transaction to the template.
 - **Import Data** – lets you import MLS® listing information to populate forms, assuming that you didn't do that when creating the transaction.
 - **Archive...** – archive the completed transaction to long-term storage.
 - **Change Transaction Status** – provides another way to change the Status.
11. If you make any changes to the transaction, make sure to click  **Save** (near the upper-right corner of the page) to preserve your changes.




► To manage the forms in a transaction:

1. Click **Forms** in the menu at the right side of the *Transaction Dashboard*.

The **Forms** page opens, listing all the forms in the transaction.

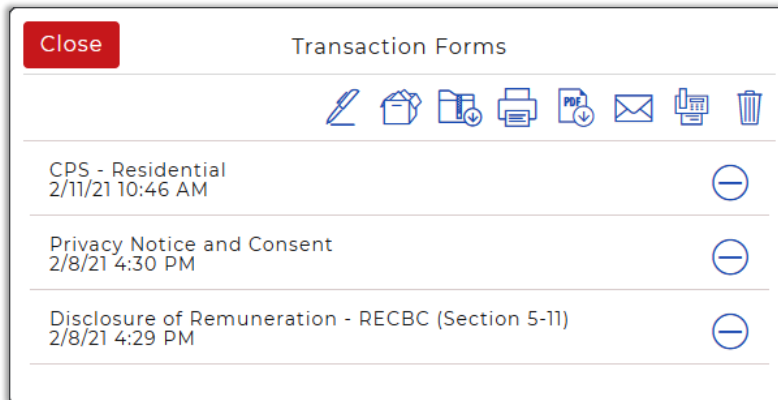


2. Note that each form includes a  **Menu** to its right, which allows you to perform various operations on the form, as explained below:
 - **Preview** – display a preview of the form. A toolbar allows you to print, download, markup, slice, rename and rotate the form.
 - **Download** – download a PDF version of the form.
 - **Delete** – delete the form from the transaction.
 - **Properties/Rename** – rename the form.
 - **Add mandatory lock** – prevent removal of the form from the transaction
 - **Edit form** – edit the form. You can also simply click the form name.
 - **Send...** – send the form by email or Fax.
 - **Copy/Move** – make a copy of the form.
 - **Slice/Markup** – lets you split (slice) the form into two or more forms, and lets you markup the form (strike-out, highlight, redact, annotate, etc.)
 - **Send to ...** – this item will appear if you have linked your e-signature account to WEBForms, allowing you to send the form for signing.
 - **History** – display a list of all actions that have taken place for the form.

3. Explore and practice with these options, as time permits.

Note that you can also work with several forms at once, by selecting them using the green circles at the right and then clicking the **Basket** icon.

That will bring up the **Transaction Forms** dialog box (shown below), which offers numerous options for working with the selected forms, as previously explained.



See page [66](#) for more information on working with this dialog box.




Clauses

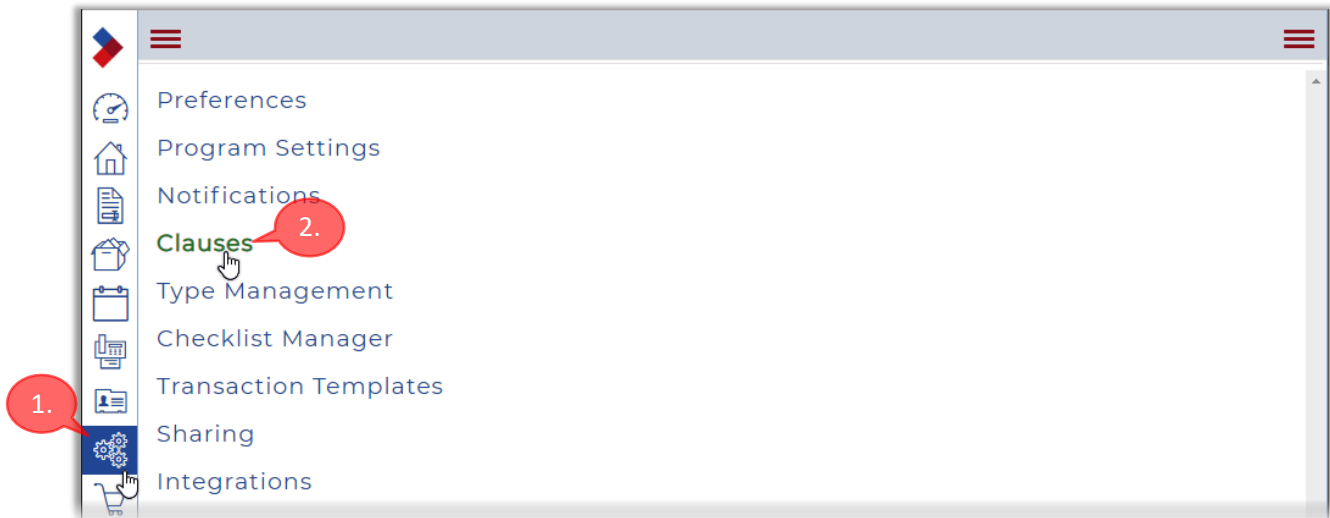
In addition to the clauses provided by your provincial association, board and brokerage, you can also create your own Personal (custom) Clauses. These will be saved within WEBForms so that you can recall them at any time. You can also create folders to help organize your Personal Clauses. Personal Clauses are created from the *Setup* page.

Creating Personal Clauses



▶ To create Personal Clauses:

1. Click  **Setup** in the Sidebar on the left.



2. Click **Clauses** to continue.
The **Clauses** page opens.



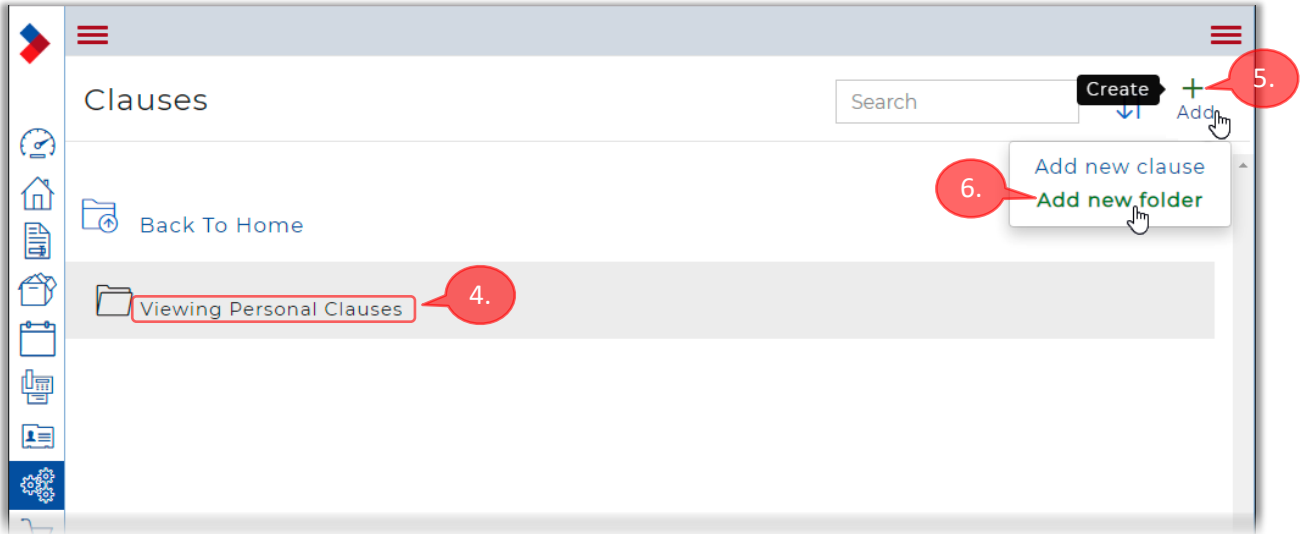
3. Click on the **Personal Clauses** folder to continue.



Note that you can also access *Office Clauses* and *System Clauses* from this page, although the only available option is to *View* the clauses in those folders. However, you can copy (and paste) the content of those clauses, to use as a starting point for your own clauses.



4. The **Clauses** page now displays the contents of your **Personal Clauses** folder, which will be empty if you have not yet created any personal clauses.

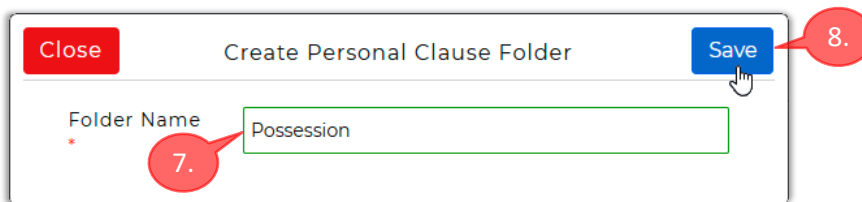


If you expect to have a lot of personal clauses, you can organize them by grouping them into folders. In the following activities, you will first create a folder, and then create your personal clauses within that folder.



Note that you don't need to create the folder first. You could instead create the clauses first, then create the folder, and then move the clauses into the folder. But creating the folder first will save you a few steps.

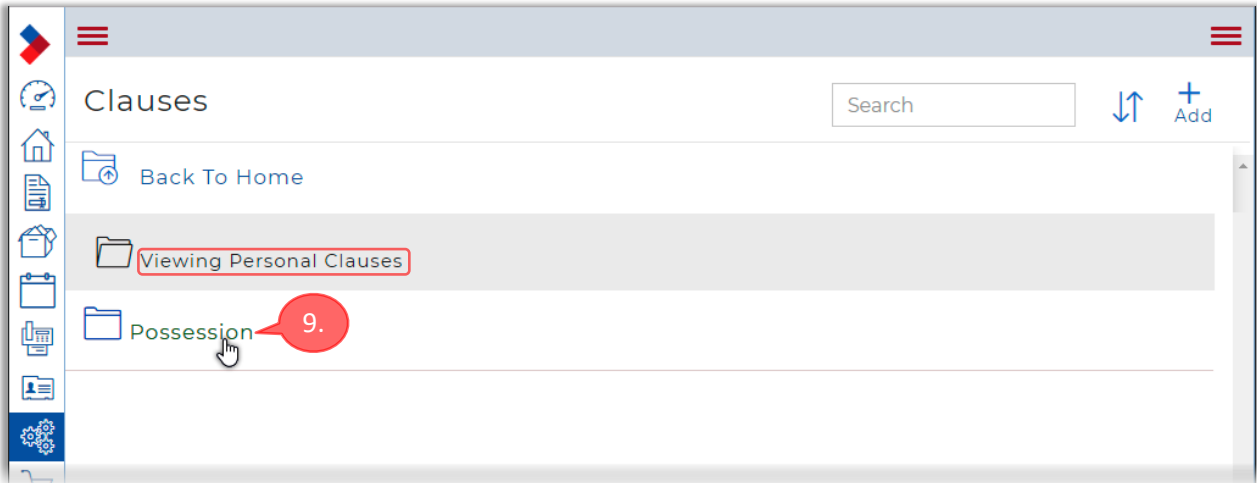
5. Click **Add** near the upper-right corner of the page.
6. Then choose **Add new folder** in the pop-up menu that appears. The **Create Personal Clause Folder** dialog box appears.



7. Enter a descriptive name for the folder into the **Folder Name** field.
8. Then click **Save** to continue.



The newly-created folder will be listed within your **Personal Clauses**.



9. Click on the folder to open it.

The folder opens and its contents are displayed, as shown below (the folder will be empty at this time).



10. Click **+** **Add** to create a new personal clause within the folder.

11. Then choose **Add new clause** in the pop-up menu that appears.

The **Create Personal Clause** dialog box appears.

12. Enter a descriptive name for the clause into the **Title** field.



Note that your Personal Clause folder will be included when you search for a clause, so assigning a descriptive name (i.e. Title) will help you find it when searching.

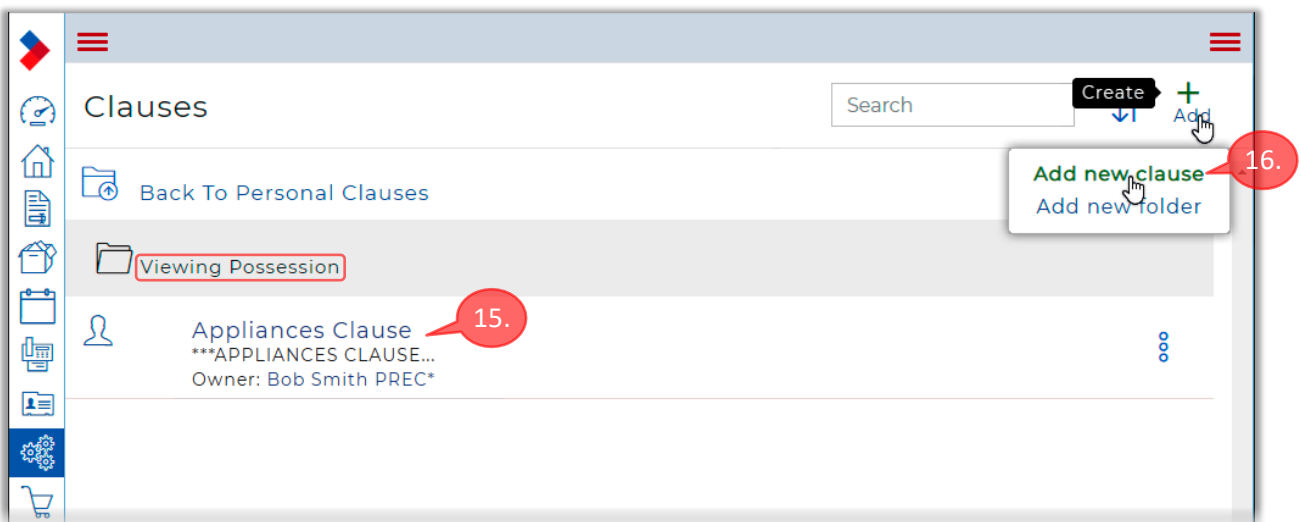
13. Enter the content of your clause into the **Content** field.



Note that it's helpful to add a "heading" to your personal clauses (e.g. *****APPLIANCES CLAUSE*****, as in the image above) to help them stand out when you are working with the Form Editor.

14. Click **Save** when you have finished entering the **Content**.

15. The newly-created clause will now appear in the list of personal clauses contained within the selected folder.



16. To add another personal clause, click **+ Add** and then choose **Add new clause** in the pop-up menu that appears.

The **Create Personal Clause** dialog box appears.

Close Create Personal Clause Save 18.

Title* Cleaning Clause

Content* Insert Date Insert Time

CLEANING CLAUSE

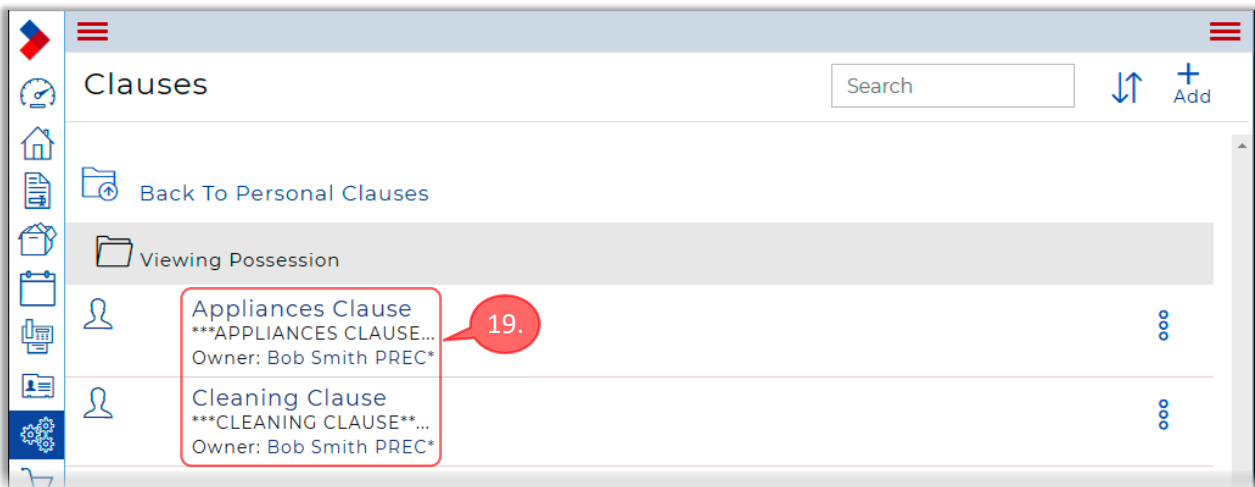
The home will be cleaned to a professional standard as of the possession date|

Max 20,000 characters

17. Fill-in the **Title** and **Content** fields, as previously explained.

18. Then click **Save** to continue.

19. Both clauses will now appear in the list of personal clauses contained within the selected folder.



That concludes the creation of the personal clauses.

Next, you'll add those personal clauses to a form in a transaction.




Adding Personal Clauses to a Form

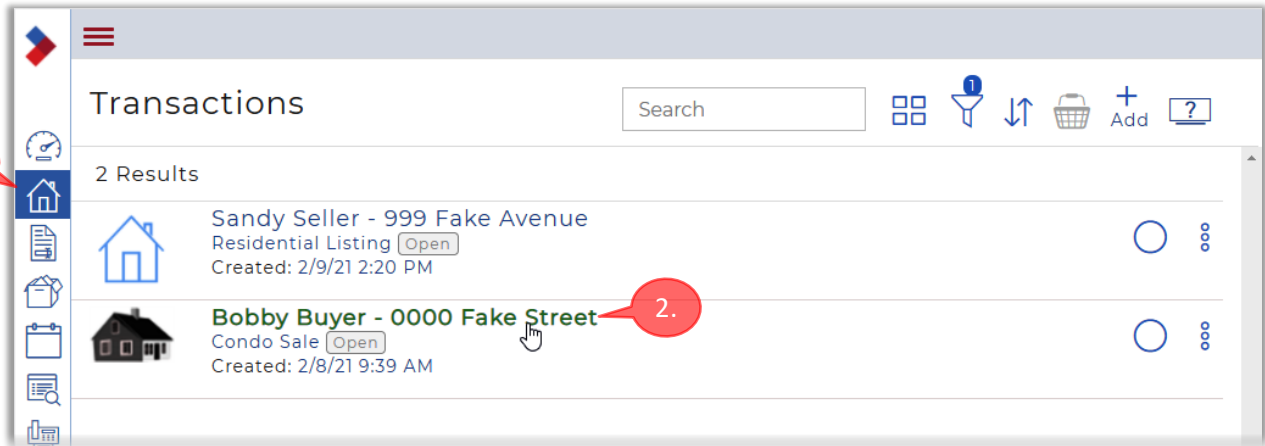
Now that you have created some personal clauses, you can add them to a form in a transaction.



▶ To add Personal Clauses to a form:

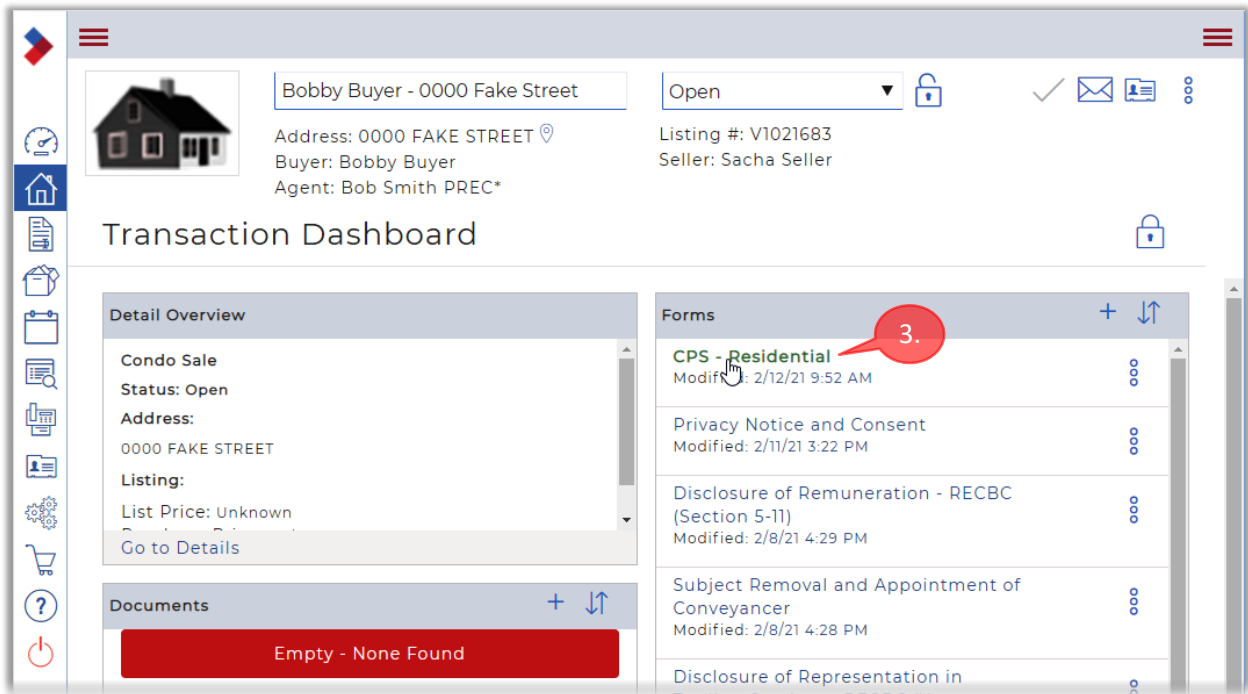
1. Click  **Transactions** in the Sidebar menu on the left.

The **Transactions** page opens, listing all your transactions.



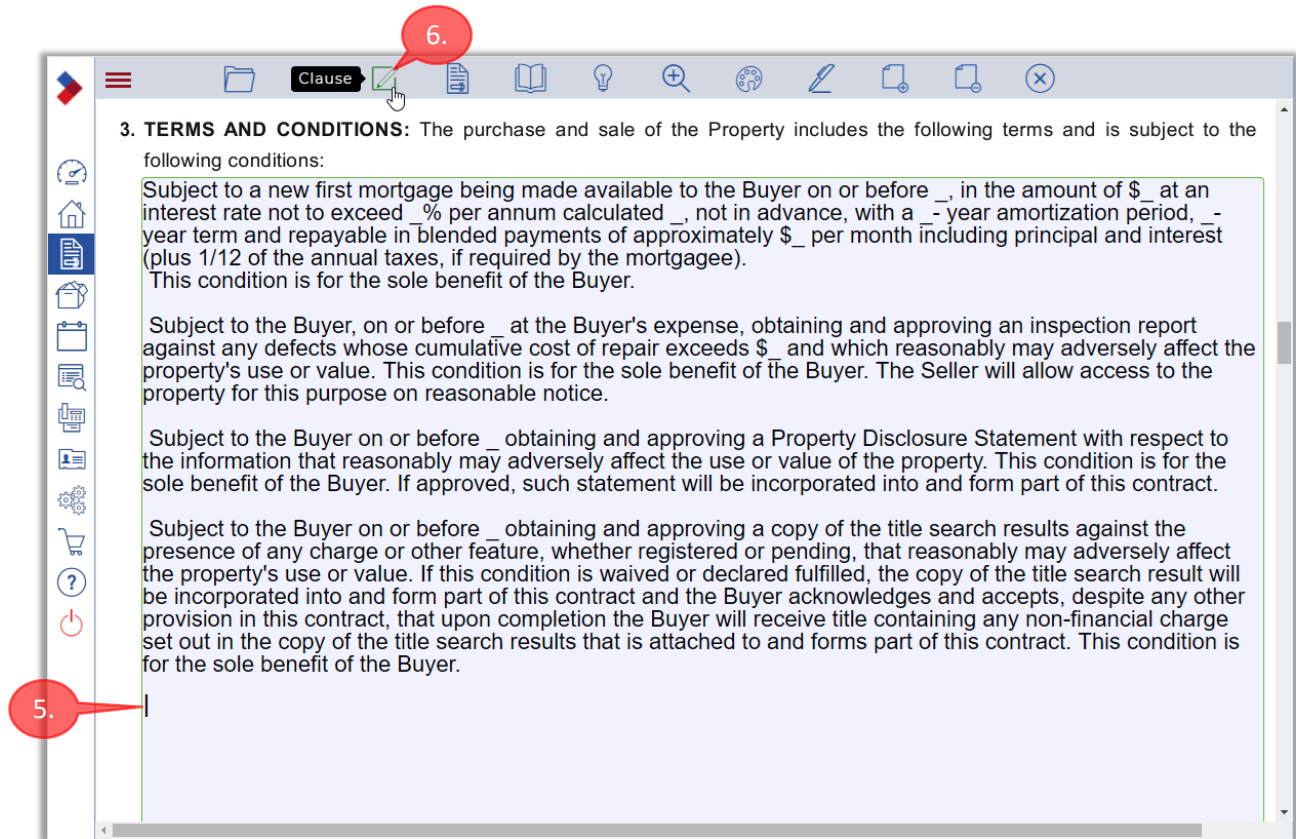
2. Click on the Detached Sales transaction that you previously created.

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

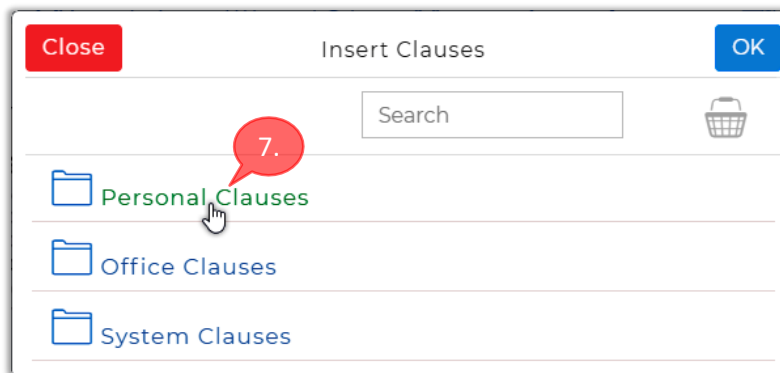


3. Click the **CPS Residential** form to open it in the Form Editor.

- When the Form Editor opens, scroll to the **TERMS AND CONDITIONS** section on the third page. The four system clauses will be displayed in the clause field, as shown in the image below.



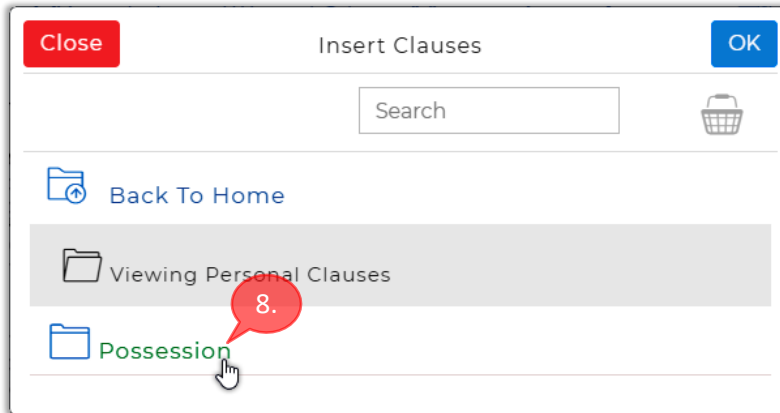
- Click inside the light-blue clause field, just after the last clause. Then press *Enter/Return* twice to move the text cursor to a blank line, as shown above.
- Click **Clause** in the Form Editor menu bar. The **Insert Clauses** dialog box opens.



- Click **Personal Clauses** to browse the clauses in that folder.
Note: you could also use the **Search** field to find the desired personal clauses.

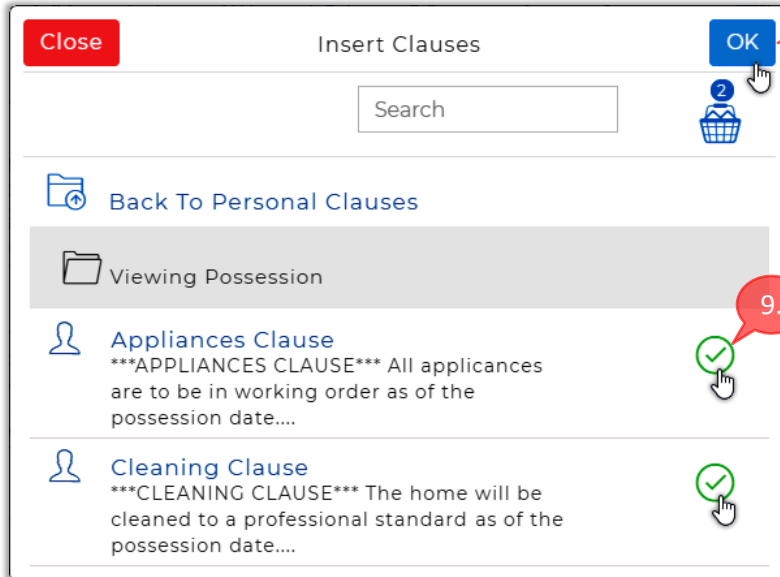


The contents of your **Personal Clauses** folder are displayed.



8. Click on the name of the folder that you just created.

The clauses contained in that folder are displayed, as shown below.

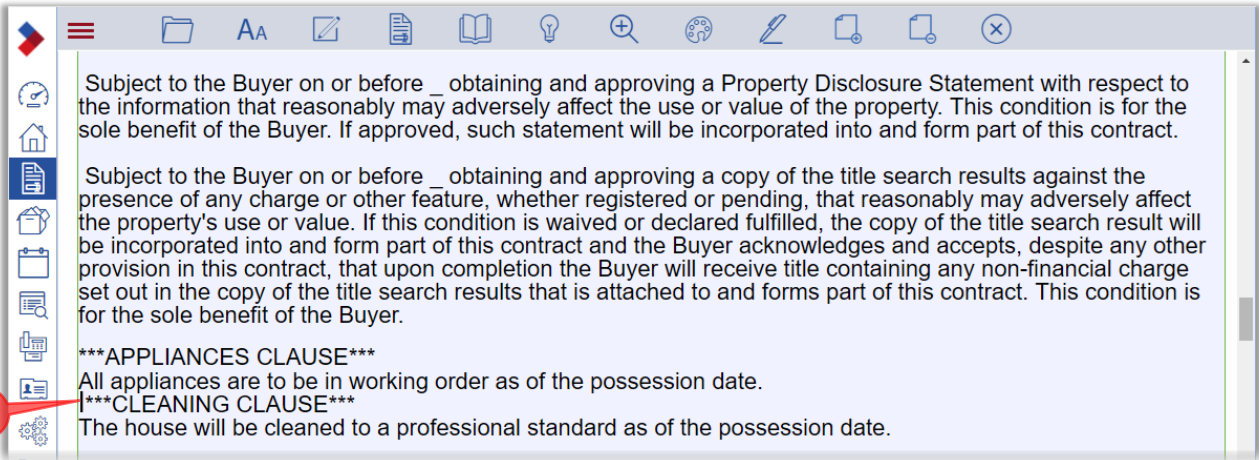


9. Select both of the clauses by clicking their green circles at the right.

10. Then click **OK** to continue.



11. The two personal clauses are added at the cursor location in the form.



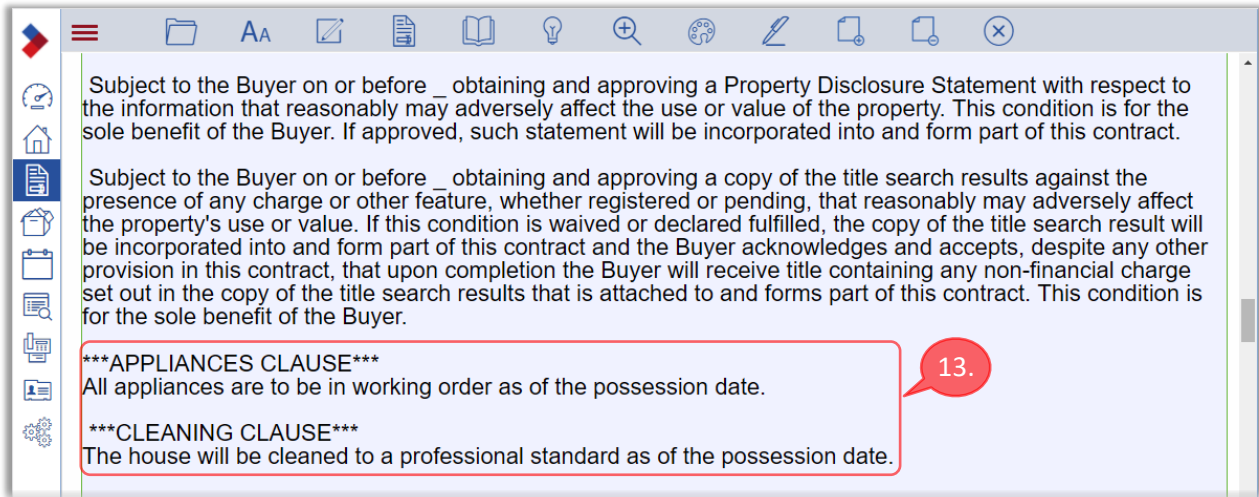
12.



Note that when you add clauses in this manner, the newly-added clauses will be inserted without any blank lines separating them, as shown above. This makes it difficult to see where one clause ends and the next one begins. You should therefore manually insert some blank lines to separate the clauses, as explained below.

12. Click just before the second personal clause (*****CLEANING** in the image above), then press *Enter/Return* to insert a blank line between the clauses.

13. The newly-added personal clauses should now resemble those shown below.



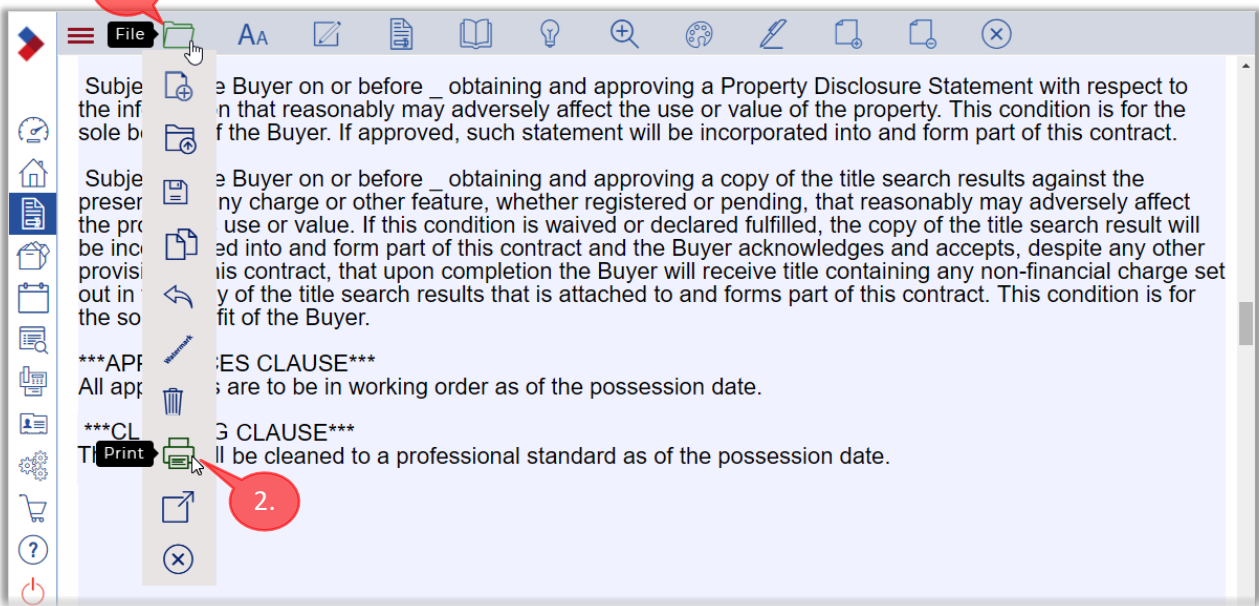
13.

14. You should preview your form, as described on the following page, to ensure that the clauses and any other content is displaying properly.



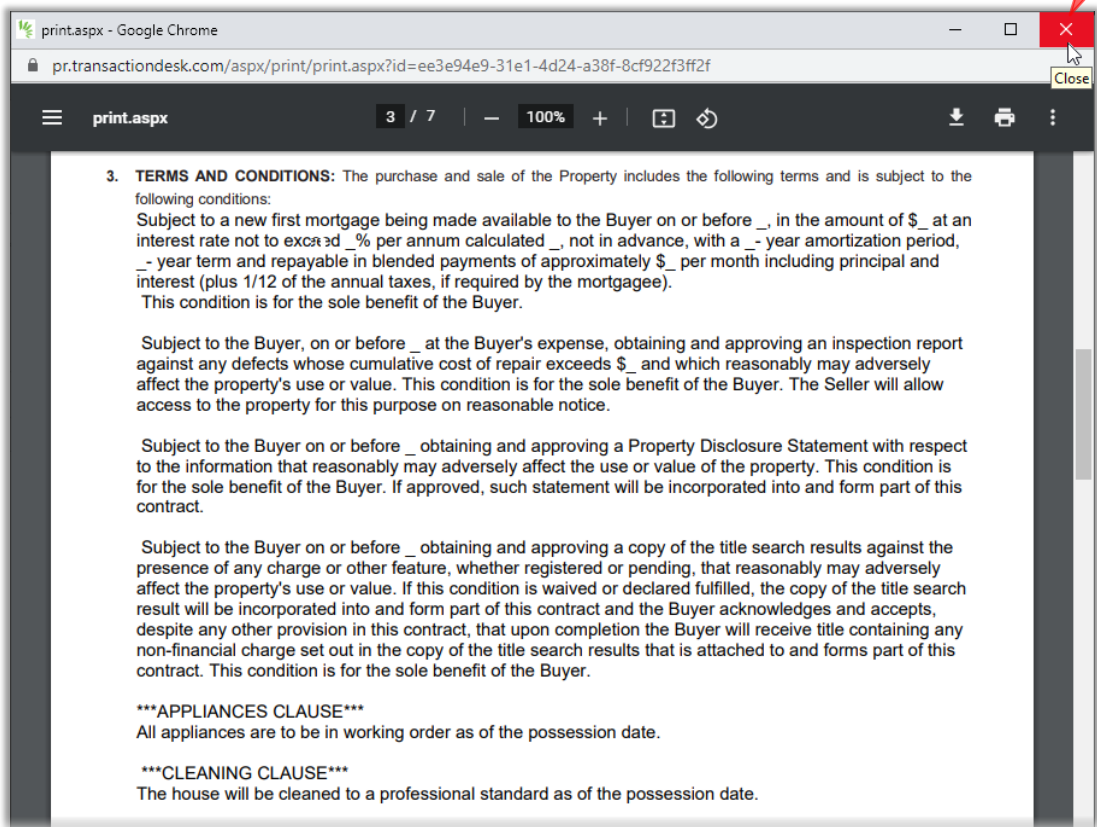
▶ To preview the form:

1. Click **File** in the menu bar.




2. Then click **Print** in the menu that appears.

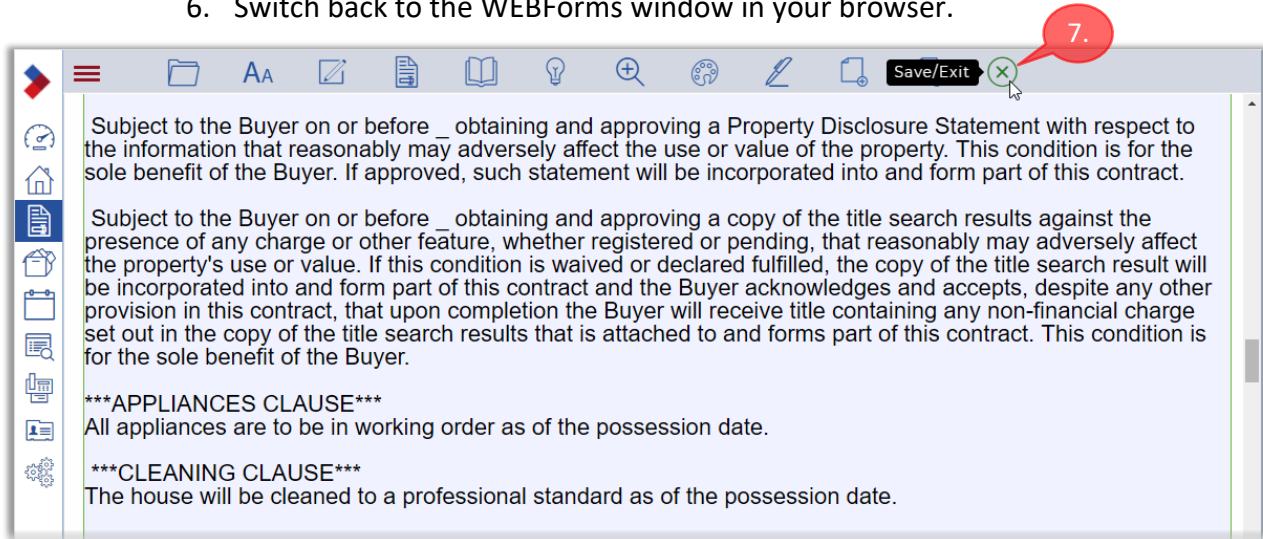
3. The form will open in your browser's PDF reader, in a new window.




4. Scroll to the clause field(s) to confirm that they are being displayed properly.



5. When you have finished reviewing the document, click  to close the PDF reader window.
6. Switch back to the WEBForms window in your browser.



7. Click  **Save/Exit** in the menu bar to exit the Form Editor.
That concludes the Personal Clauses activities.



Working with Standalone Forms

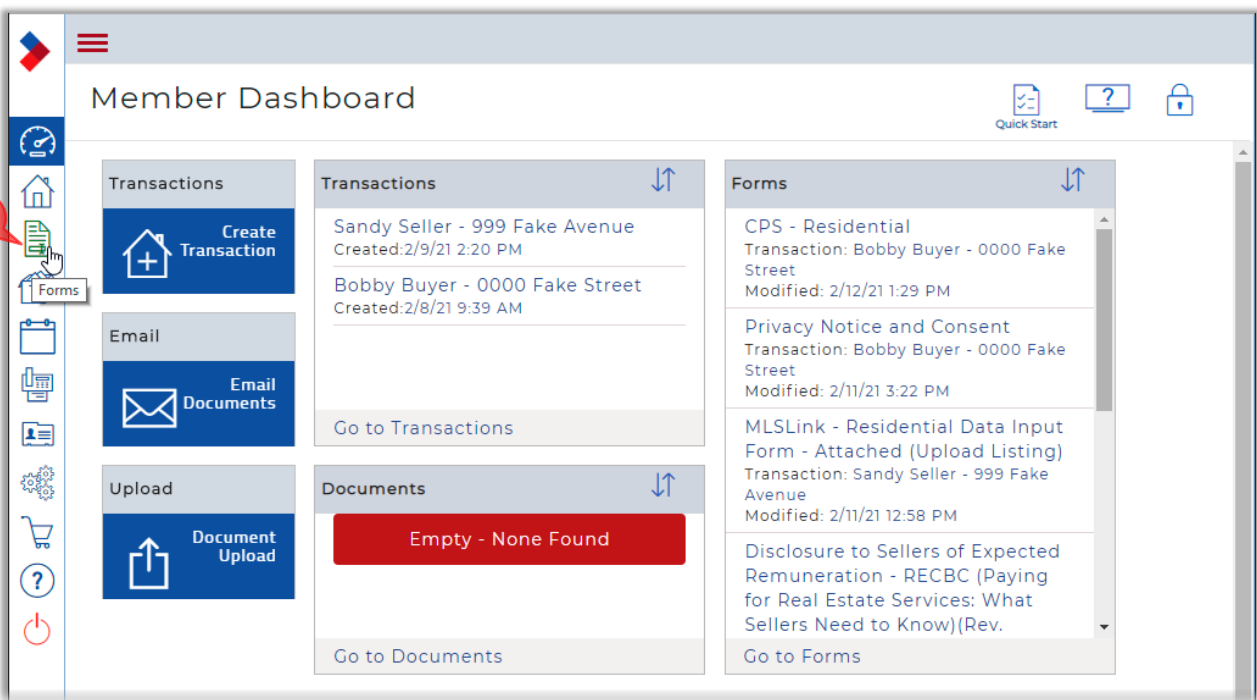
WEBForms includes a feature, called “Standalone Forms”, which lets you edit, print, download or e-sign a form without needing to add it to a transaction. You can also save your standalone forms, so that you can recall and re-use them later.

Creating a Standalone Form

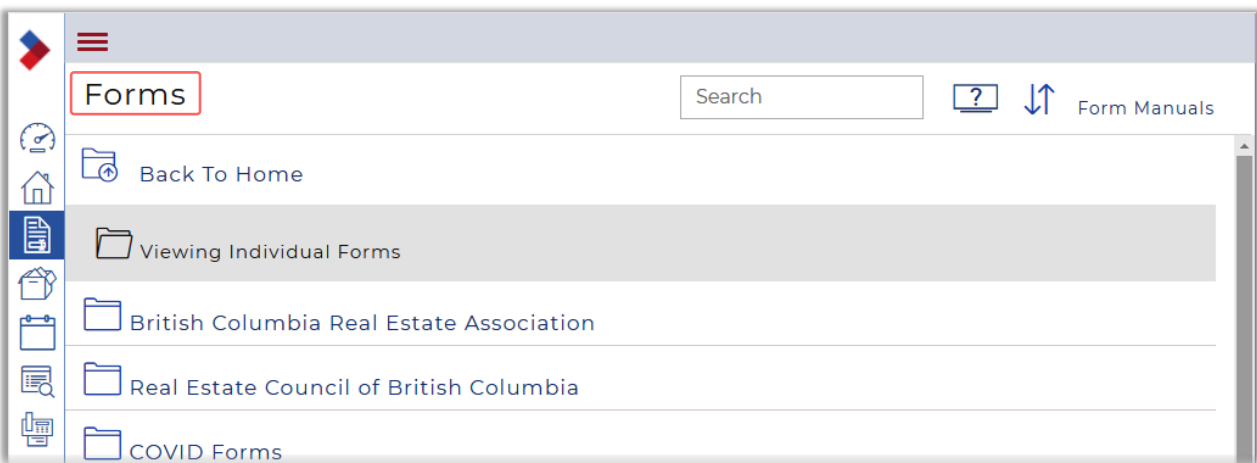


► To create a standalone *Disclosure of Representation* form:

1. Click  **Forms** in the Sidebar menu at the left.

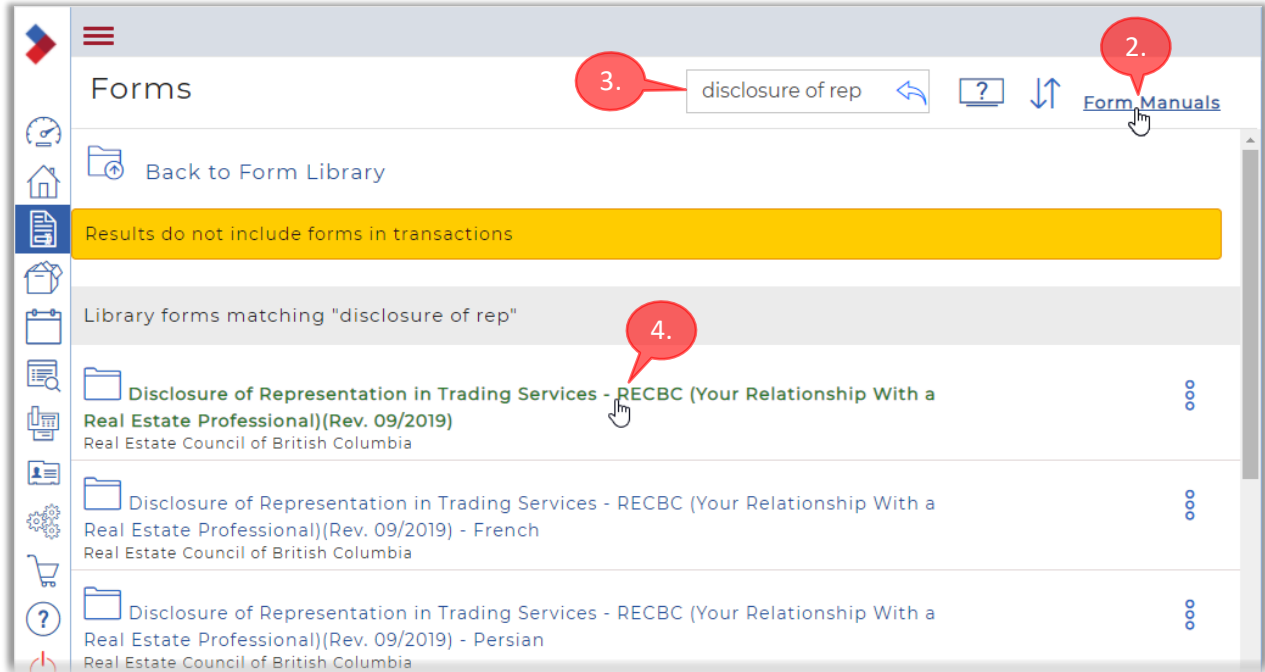


The **Forms** page opens.

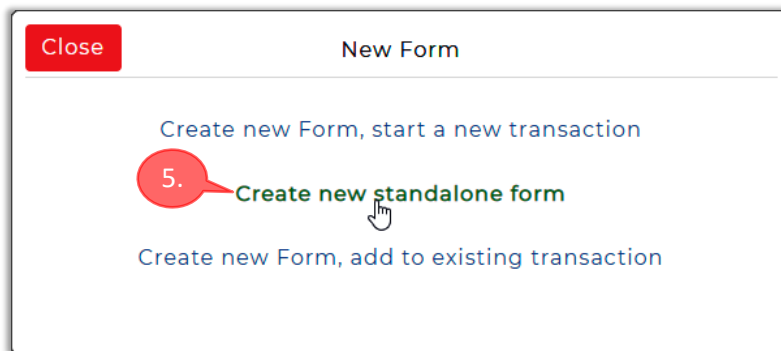




2. The *Forms* page now includes a **Form Manuals** link.
Click the link to access help resources provided by BCREA, including the *BCREA Standard Forms Resource Index* and the *BCREA Guides*. These resources provide guidance on the use of BCREA Standard Forms.



3. Locate the **Disclosure of Representation in Trading Services** form, by using the *Search* field.
4. Click on the name of the desired form to continue.
The **New Form** dialog box will appear.












5. Click **Create new standalone form** (the second option) to continue.



The Form Editor opens, allowing you to edit the form.



6. Practice filling in some fields and making any desired edits to the form.
7. The  **File** menu includes the following useful functions:
 - Click  **Print** to open the form in your browser's PDF reader, allowing you to *Print* or *Download* the form using the controls within the browser.
 - Hover over  **Send** and then click  **Email** to send the form to your recipient(s) by email.
8. The  **Transaction** menu includes the following options:
 - Click  **Add to** to add the current form to an existing transaction.
 - Click  **Start new** to start a new transaction that includes the current form.
9. Note that the pen icon  will be available if you have linked an e-signature application to WEBForms. This would allow you to conveniently send the standalone form for signing, directly from WEBForms.
10. Click  **Exit** when you have finished working with the form. It will be saved as a standalone form that you can recall at a later time.




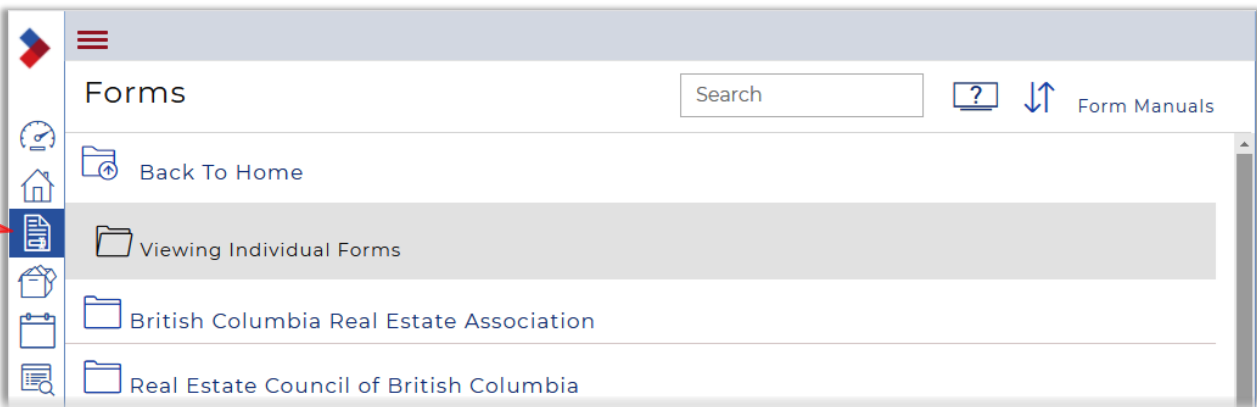
Recalling a Standalone Form (with no Address)

After you work on a standalone form, it will be saved automatically when you exit the Form Editor, allowing you to recall it at a later time. Note that if your form includes the property address, you will need to recall it using the procedure described on page 104.

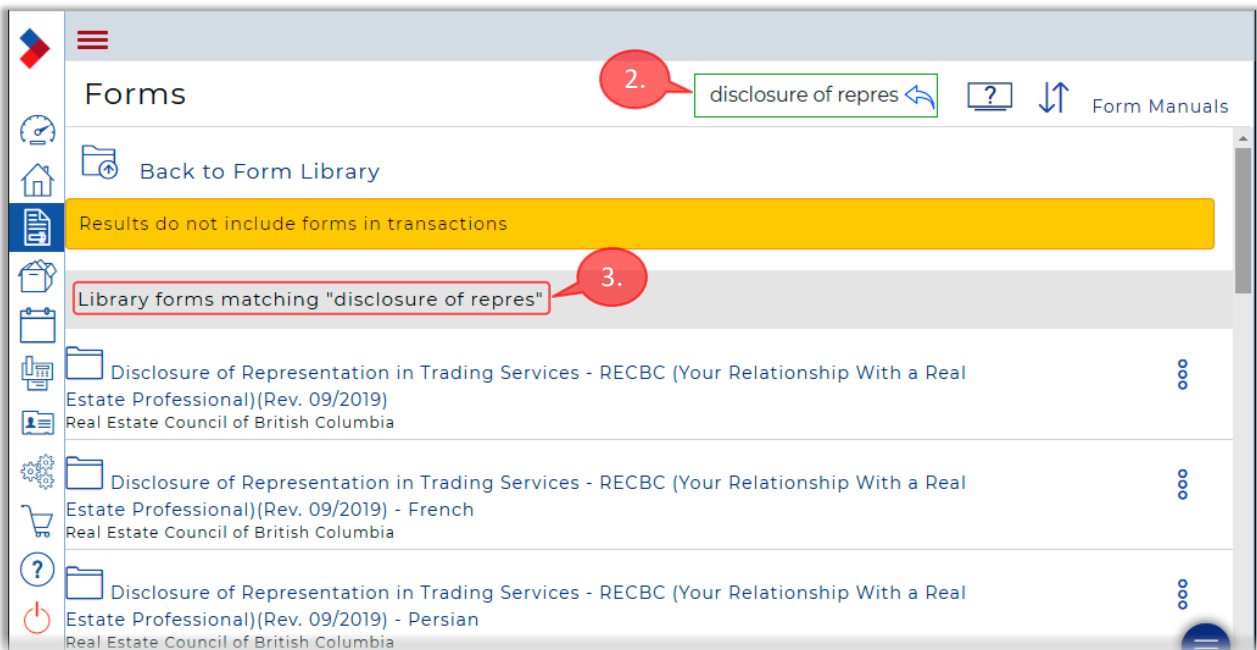


▶ To recall a saved Standalone Form:

1. Click  **Forms** in the Sidebar menu at the left.
The **Forms** page opens.



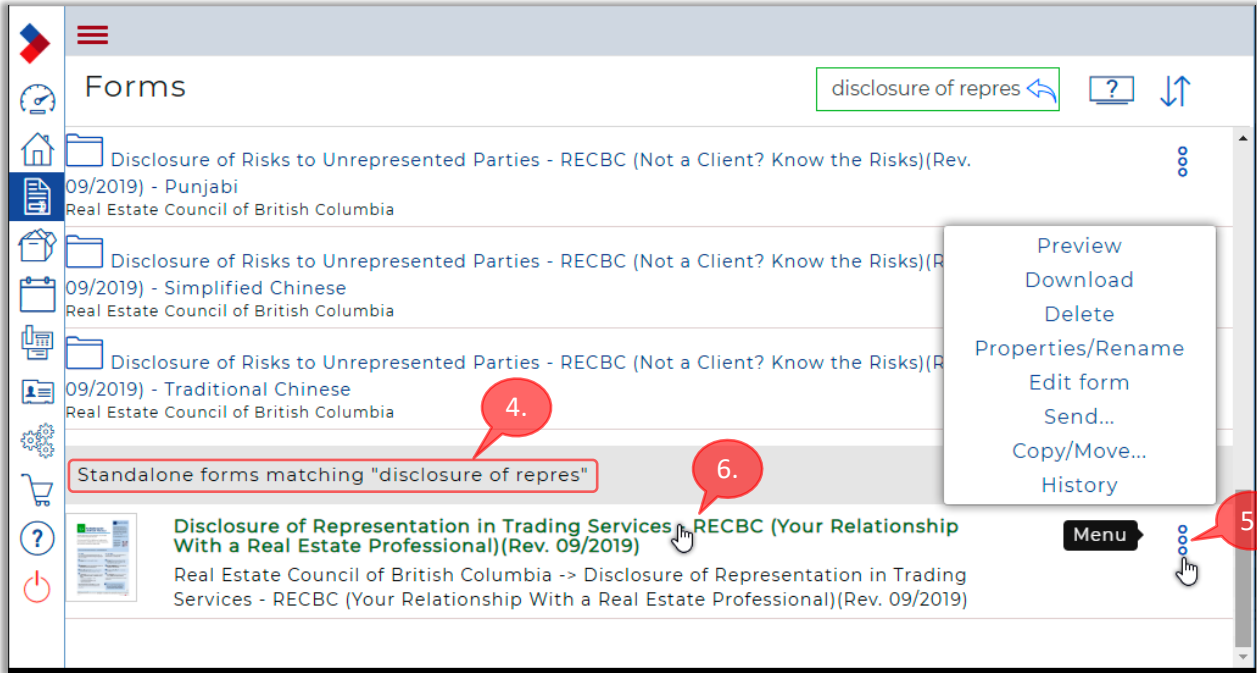
2. Click in the **Search** field and start to type “disclosure of representation”.
As you type, WEBForms displays a list of matching forms.



3. The matching **Library forms** are displayed at the top of the list. These forms can be used at the basis of a Standalone form (as was done in the preceding pages) or can be added to a transaction.



4. Scroll down to display the matching **Standalone forms**, which appear at the bottom of the list.



5. Note that you can perform various operations on the form by clicking **Menu**, and then selecting the desired option from the pop-up menu.
6. Click on the Standalone form that you just created.
The form will open in the Form Editor. Any edits you previously made to the form will be apparent in the Form Editor.
Once in the Form Editor, you can make further edits to the form, as desired. You can also send it for signing (if available), download it, print it, email it, etc., as previously explained.
You can exit the Form Editor when you have finished practicing with the form.



Standalone Forms with Address Fields

In the preceding activities, you recalled the saved Standalone form, *Disclosure of Representation*, by searching for it by name.

However, to recall a saved Standalone form that includes *Property Address* fields, the process will be somewhat different.

When you save a Standalone form, it will be given a name that is based on the *Street Number* and *Street Name* fields in the form, if present.

For example:

Suppose the *Street Number* and *Street Name* fields are **555** and **Jervis Street**, respectively.

Then the form name would be **555 Jervis Street**.

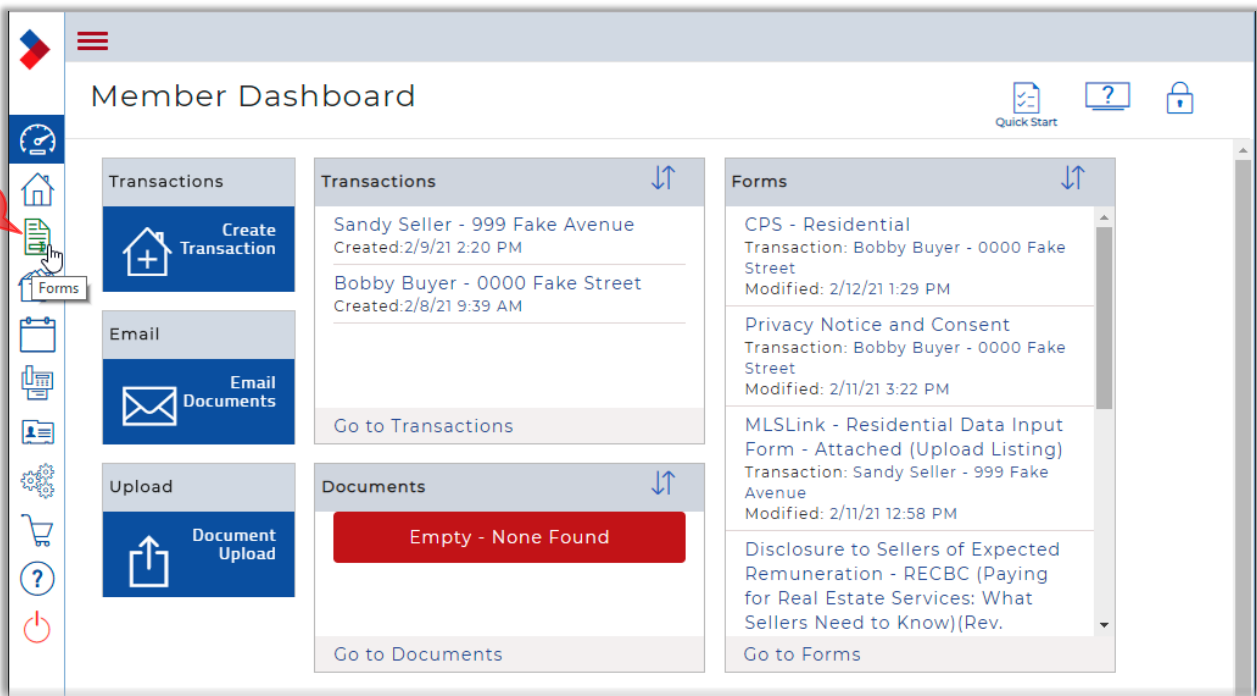
In that case, you would need to enter that name (or a part of that name) when searching for the form.

Note that if a Standalone form's *Property Address* fields are left blank, the original form name will be used, as in the preceding activity with the *Disclosure* form.



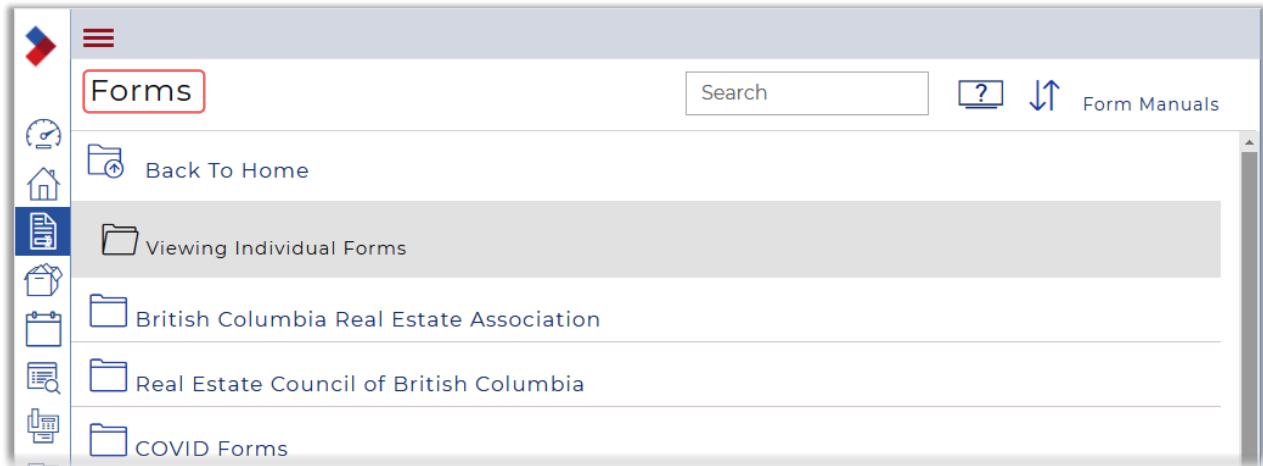
▶ To create a Standalone form that includes Property Address fields:

1. Click  **Forms** in the Sidebar menu at the left.

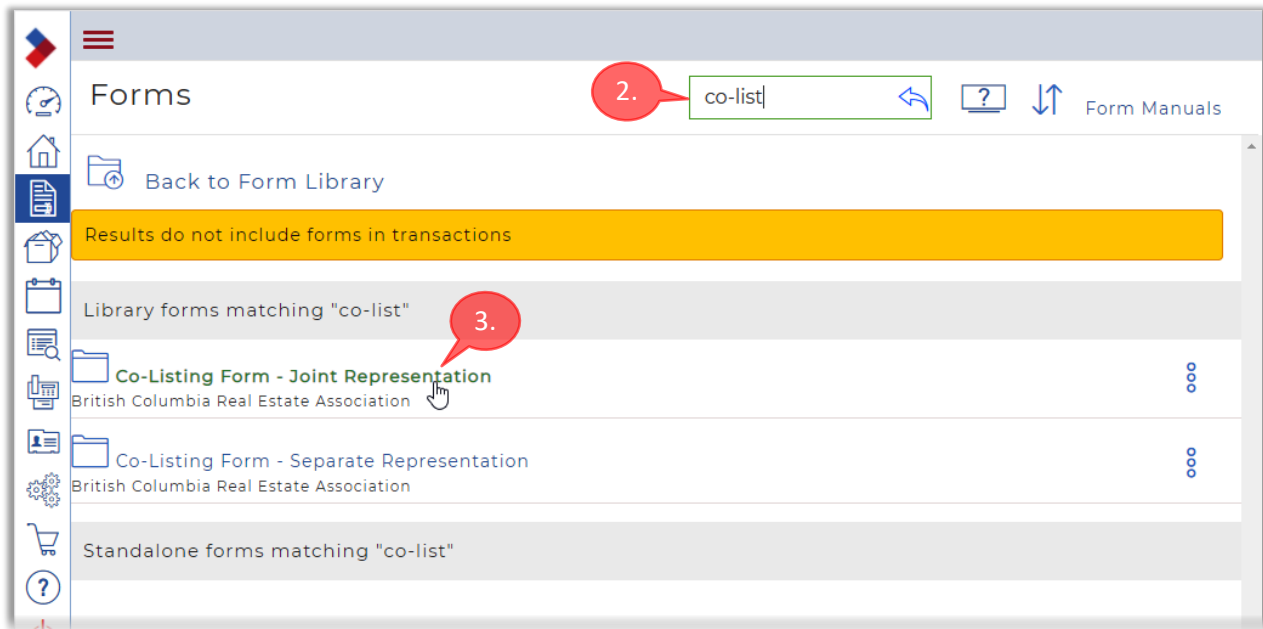




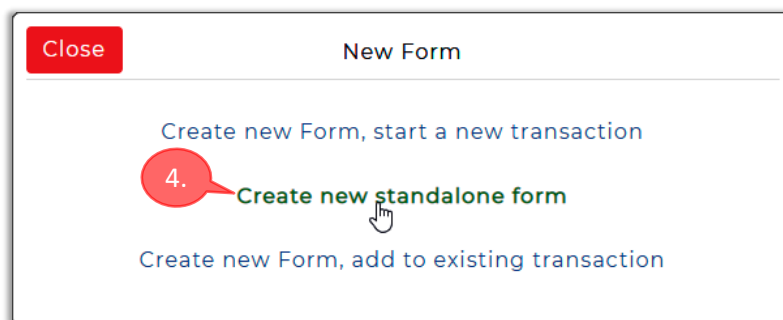
The **Forms** page opens.



2. Use the **Search** field to locate the **Co-Listing Form - Joint Representation**.



3. When the form appears in the list of matching forms, click on it to continue.
The **New Form** dialog box will appear.



4. Click **Create new standalone form** to continue.



The selected form will open in the Form Editor.

7. [Menu icon]

8. [Save/Exit button]

5. [Property Address field]

CO-LISTING FORM – JOINT REPRESENTATION

Note: This Co-Listing Form allows for two Brokerages to represent the Seller(s) jointly under a listing agreement. Unless the listing agreement is expressly amended to change the Brokerages' and the Designated Agent(s)' obligations thereunder, when two Brokerages co-list a property for sale, their Designated Agent(s) are acting in concert in marketing the property and they jointly owe fiduciary duties and other obligations to the Seller(s). It may not be appropriate if there are disputes or conflicting interests between the Sellers (e.g. each seller wants a different brokerage to protect his or her own interest). In such circumstances Sellers should be advised to obtain legal advice.

MLS® OFFICE USE ONLY	
DATE	LISTING MLS® NO

WITH RESPECT TO THE LISTING AGREEMENT (THE "LISTING") BETWEEN THE SELLER(S) AND THE LISTING BROKERAGE DATED _____

REGARDING: 555 Jervis Street Vancouver BC (THE "PROPERTY")
(Property Address)

THE PARTIES HERETO AGREE THAT THE LISTING IS HEREBY AMENDED AS SET OUT IN THIS CO-LISTING FORM:

AS AND FROM THE DATE HEREOF _____ WILL CO-LIST THE LISTING FOR THE PROPERTY WITH:
(Listing Brokerage/Company)

CO-LISTING BROKERAGE _____ BROKER ID _____

CO-LISTING BROKERAGE ADDRESS _____

DESIGNATED AGENT _____ MEMBER ID _____

DESIGNATED AGENT _____ MEMBER ID _____

UNDER THE FOLLOWING TERMS:

APPORTIONMENT OF REMUNERATION/COMMISSION AND EXPENSES:

- If the Buyer(s) is represented by an agent (a "Co-operating Brokerage"), the Seller(s), the Listing Brokerage and the Co-Listing Brokerage agree that the Listing Brokerage's Remuneration set out in the Listing will be paid as follows:
LISTING BROKERAGE: _____
CO-LISTING BROKERAGE: _____
CO-OPERATING BROKERAGE: _____
- If the Buyer is not represented by an agent (i.e. there is no Co-operating Brokerage), the Seller(s), the Listing Brokerage and the Co-Listing Brokerage agree that the entire amount of the Listing Brokerage's Remuneration pursuant to Section 5(D)(iii) of the Listing will be paid as follows:
LISTING BROKERAGE: _____
CO-LISTING BROKERAGE: _____
- The Listing Brokerage and the Co-Listing Brokerage agree that the Listing expenses below will be shared between them and payable as follows:
ADVERTISING: _____
MLS® FEE: _____

5. Edit the form, making sure to enter an address into the *Property Address* field, as shown above.
6. Practice working with the Form Editor, as time permits.
7. As previously explained, you can use the **File** menu to print, download, email the form, or exit the Form Editor.
8. Exit the Form Editor when you have finished working with the form.



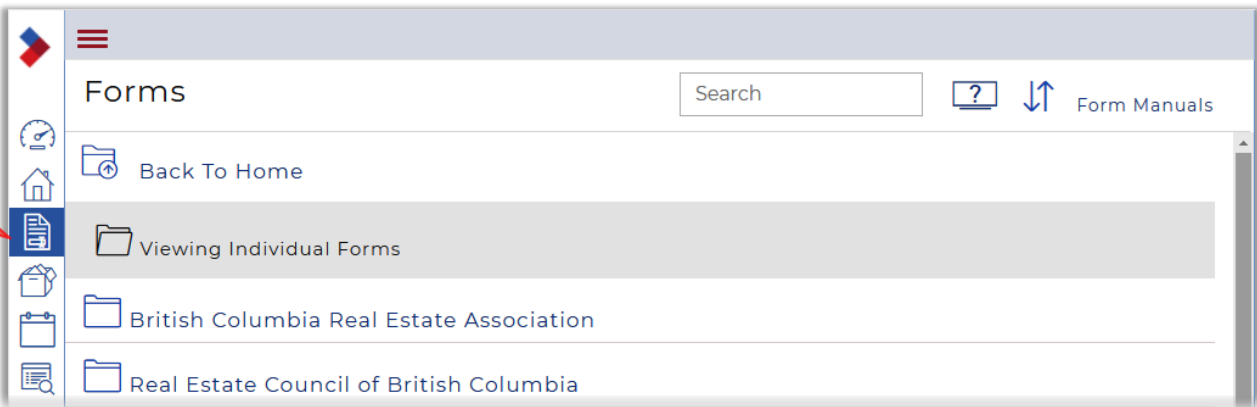
Recalling a Standalone Form via Property Address

After saving a Standalone form that includes *Property Address* fields, you can recall it a later time by searching for its address (not the original form name).

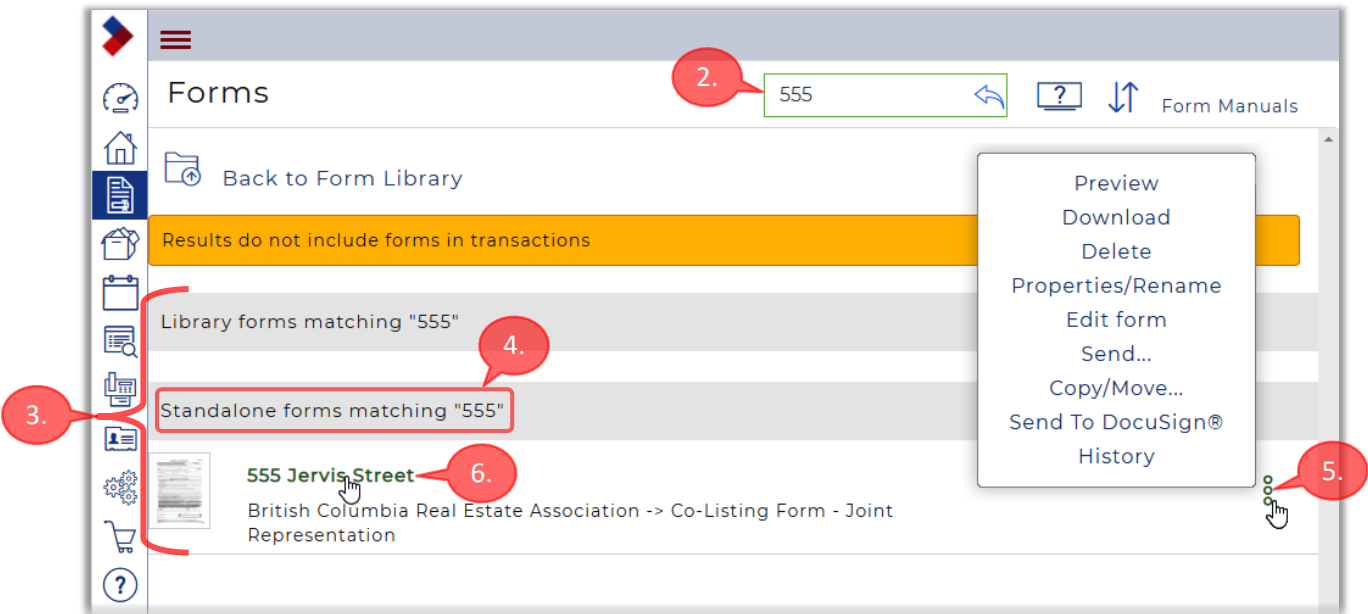


► To recall a Standalone form that includes Property Address fields:

1. Click **Forms** in the Sidebar menu at the left.



The **Forms** page opens.



2. Click in the **Search** field and start to type the *Property Address* of the previously-saved Standalone form.
3. A list of matching *Library forms* and *Standalone forms* is displayed.
4. Any matching Standalone forms are displayed at the bottom of the list.
5. Note that you can perform various operations on the form by clicking **Menu**, and then selecting the desired option from the pop-up menu.



6. Click on the form name to open it in the Form Editor.

Once in the Form Editor, any edits you previously made to the form will be apparent.

You can make further edits to the form, as desired. You can also send it for signing (if available), download it, print it, email it, etc., as previously explained.

You can exit the Form Editor when you have finished practicing with the form.



Customizing WEBForms

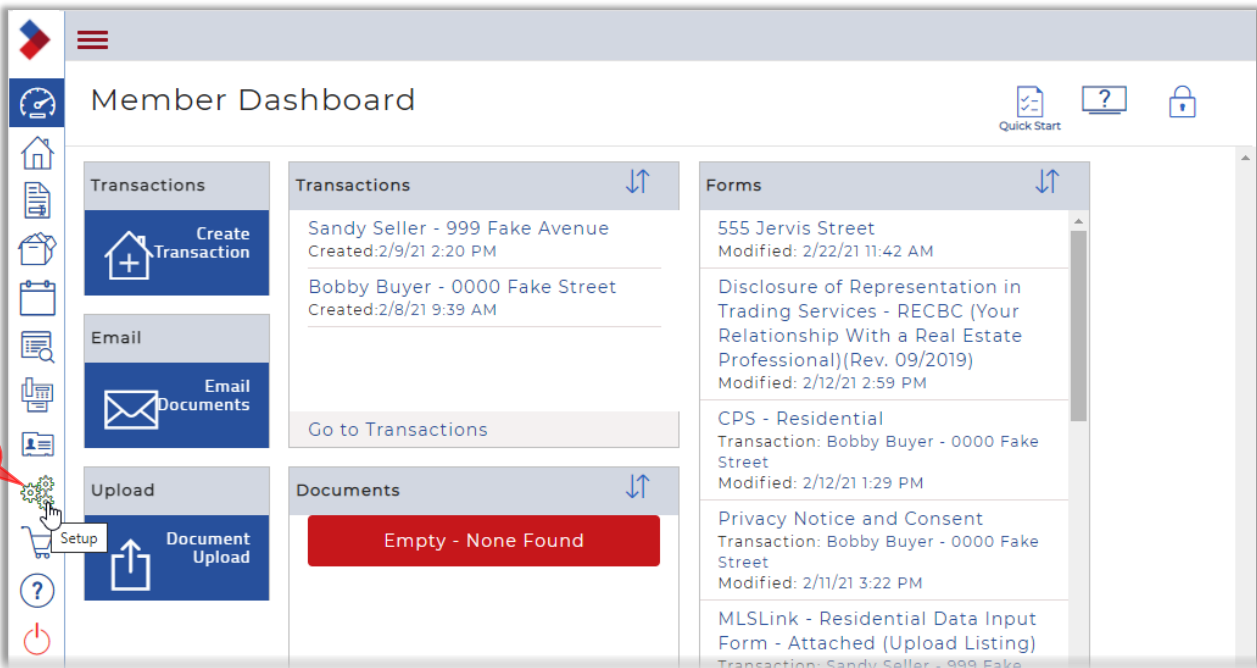
WEBForms includes a number of settings that allow you to customize it, to suit your preferences and your workflow.

Preferences

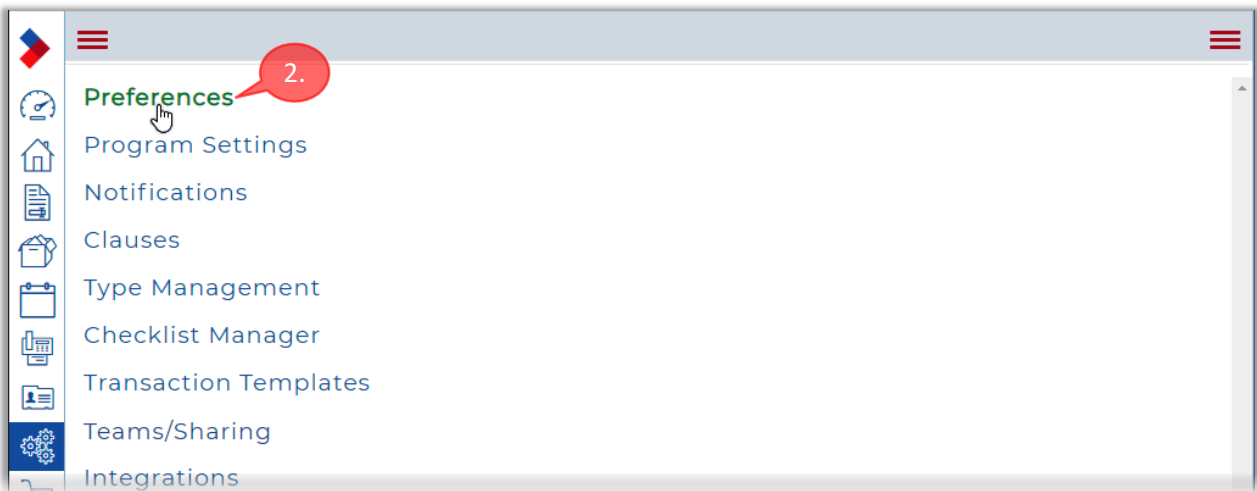


▶ To customize your Preferences settings:

1. Click  **Setup** in the Sidebar menu on the left.



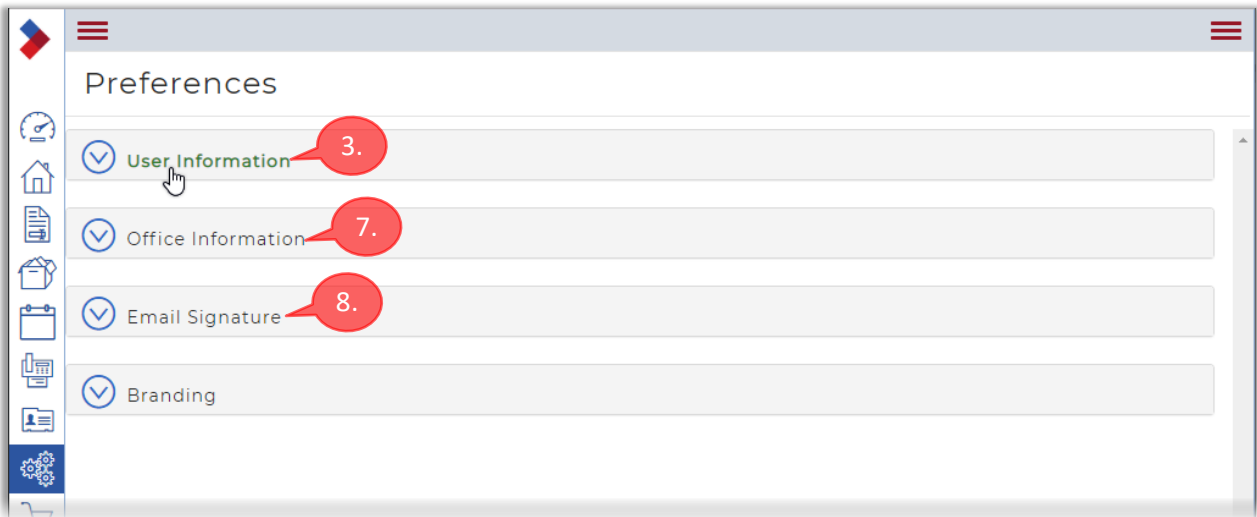
The **Settings** page opens.



2. Click **Preferences** to continue.



The **Preferences** page opens, consisting of four sections, currently collapsed.



3. Click on the **User Information** heading to expand that section.

Salutation:	- None -	Generation:	- None -
Last Name:	Smith PREC*	Middle Name:	Middle Name
First Name:	Bob	Language:	English
Timezone:	(GMT-8) Pacific Standard Time	<input checked="" type="checkbox"/> Apply 'DayLight Savings Time'	
Association/Board:	CREA British Columbia		
Agent ID:	V00000	Agent License ID:	Agent License ID
Phone:	(604) 555-1234	Phone 2:	Phone 2
Fax:	Fax	Cell:	(604) 555-1233
Email:	bob@bobsmithrealty.ca		
Website:	Website		
<input type="button" value="Update"/>			

4. You can change any of the fields that have a thin blue outline (e.g. **Phone**).

5. Make sure to click if you make any changes.

6. You can optionally collapse the **User Information** section, as desired.



7. Note that you cannot make any changes to the **Office Information** section.

8. Click the **Email Signature** heading to expand that section.

The **Email Signature** section allows you to create an email signature that will be added to all your outgoing emails that are sent from WEBForms.

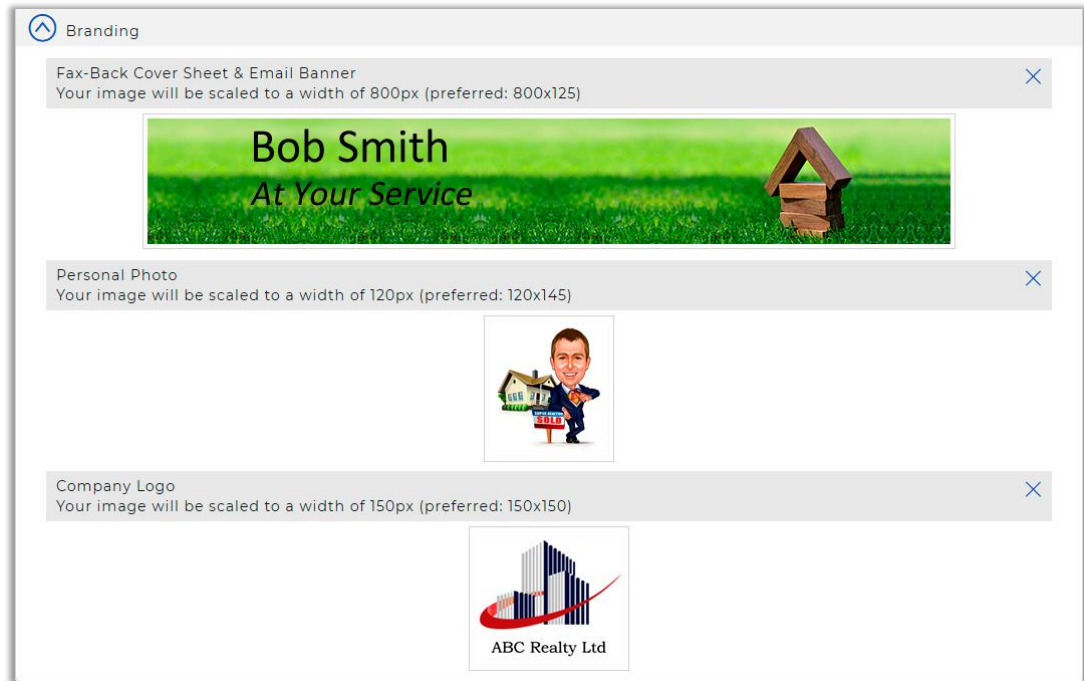
9. Enter your desired email signature into the **Signature** field.
10. Make sure to click **Update** if you make any changes.
11. Click on the **Branding** heading to expand that section.

The **Branding** section allows you to add a *Banner*, *Personal Photo* and *Company Logo* that can be added to your email messages (and to your Fax-Back Cover Sheet, if applicable).

12. To add a photo, just click on the **No Photo Available** placeholder. Then browse to the desired photo on your computer.
13. For best results, try to obtain a photo of the preferred dimensions, or at least use a photo that has a similar ratio of dimensions. For example, select a square photo for the *Company Logo*, and a wide (landscape) photo for the *Banner*.



The image below shows an example of the **Branding** section, with the three photos added.



The image below is an example of an outgoing email message, so you can see how the branding and email signature will appear to your email recipients.






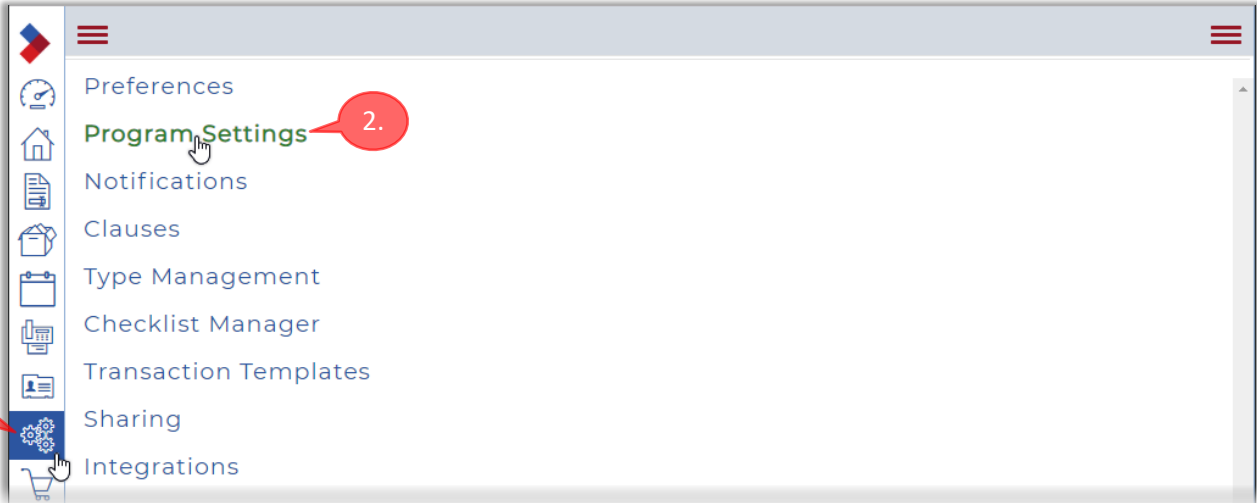
Program Settings

Most of the available Program Settings are suitable in their default state. However, you are advised to change a few settings, as explained below.

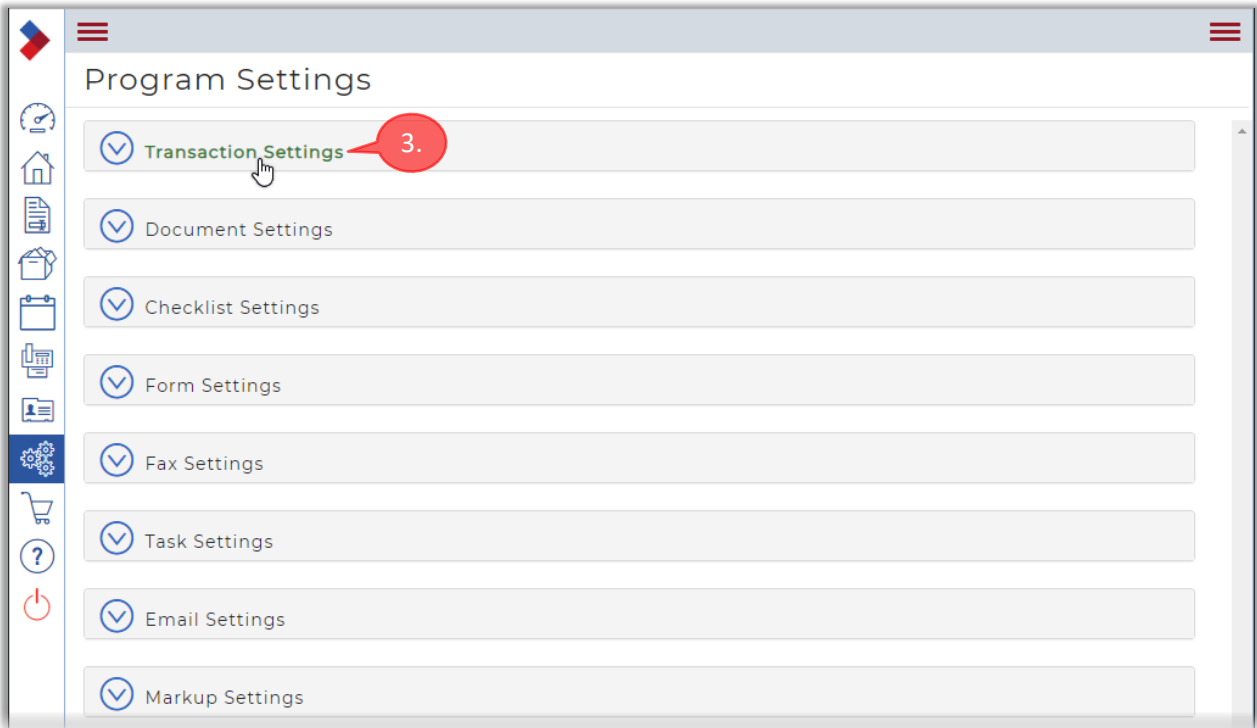


▶ To customize your Program Settings:

1. Click  **Setup** in the Sidebar menu on the left.
The **Settings** page opens.



2. Click **Program Settings** to continue.
The **Program Settings** page opens.



3. Click the **Transaction Settings** heading to expand that section.



4. You are advised to leave the first four “Default” options at their default settings, as shown below.

The screenshot shows the 'Transaction Settings' form with the following fields and callouts:

- 4.** A bracket groups the first four default settings: Default View (All), Default Sort (Last Modified, descending), Default Status (Select Status), and Default Display (List).
- 5.** Points to the 'Create Cover Sheet' checkbox, which is unchecked.
- 6.** A bracket groups the 'Use Wizard' and 'Enabled PDF Data Import' checkboxes, both of which are unchecked.
- 7.** Points to the 'Update' button.

5. Uncheck the **Create Cover Sheet** checkbox to prevent WEBForms from automatically adding a *Fax-Back Cover Sheet* to every transaction you create.
6. You are advised to uncheck the **Use Wizard** and **Enabled PDF Data Import** checkboxes, as shown in the image above.
7. Make sure to click **Update** if you make any changes.
8. You can optionally collapse the **Transaction Settings** section, as desired.



9. Click the **Form Settings** heading to expand that section.

9. Form Settings

Default Sort: Name 10.

Default Font: Helvetica 11.

Default Color:

Default Size: 11 12.

Auto-save: 13.

Create copy when emailing: 14.

Update 15.

10. The **Default Sort** field determines the sort order of the forms within a transaction or template.

You can choose to have the forms sorted by *Name*, *Date Created* or *Last Modified*. You can also select *ascending* or *descending* sort order.

11. You are advised to use *Times-Roman* or *Helvetica* as the **Default Font**.

12. You are advised to use *11* as the **Default Size**.

13. Make sure that the **Auto-save** checkbox is checked.

14. You are advised to leave the **Create copy when emailing** checkbox unchecked.

15. Make sure to click **Update** if you make any changes.



Notifications

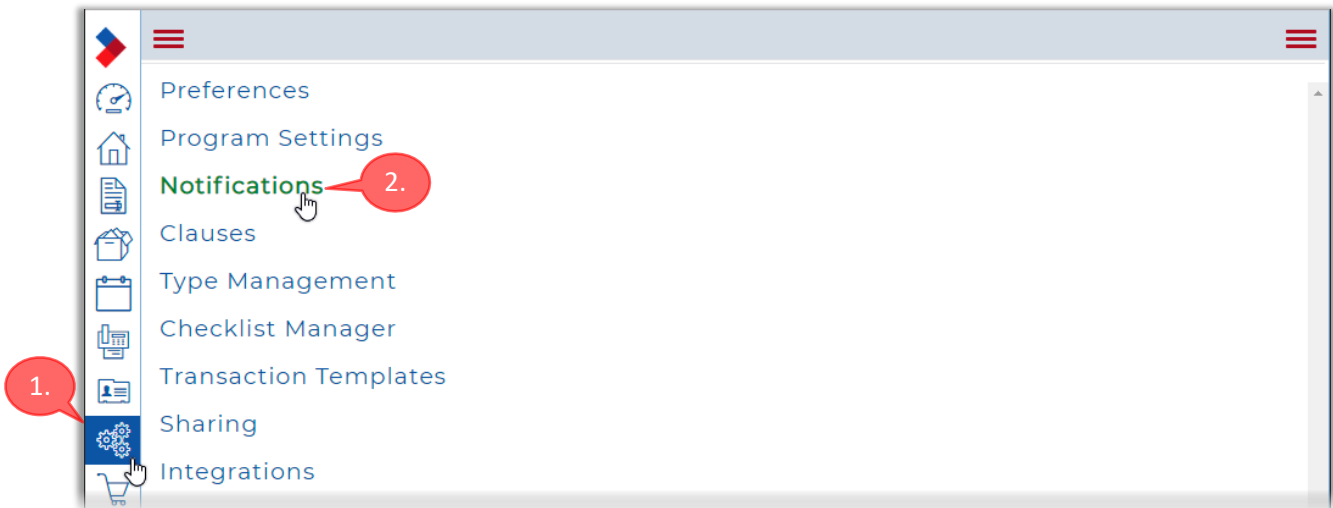
WEBForms can optionally notify you when an email recipient opens a form that was sent to them. Note that this notification will occur only if you send the form as a *link*, not as an *attachment*.



▶ To set up your agent notifications:

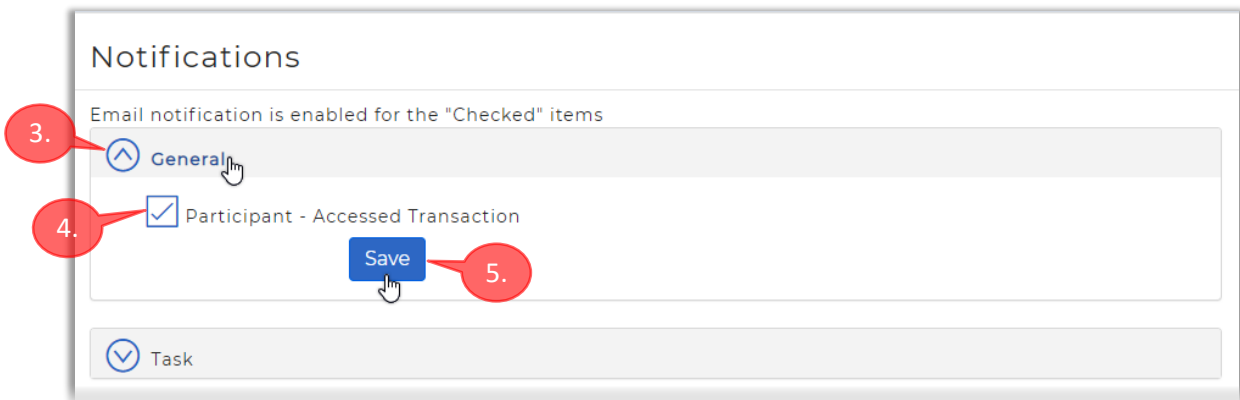
1. Click  **Setup** in the Sidebar menu on the left.

The **Settings** page opens.



2. Click **Notifications** to continue.

The **Notifications** page opens.



3. Click the **General** heading, to expand that section.
4. The **Participant - Accessed Transaction** checkbox will be checked by default. Uncheck it if you do not want to be notified when participants open a form.
5. Make sure to click **Save** if you make any changes.



Customizing Dashboards

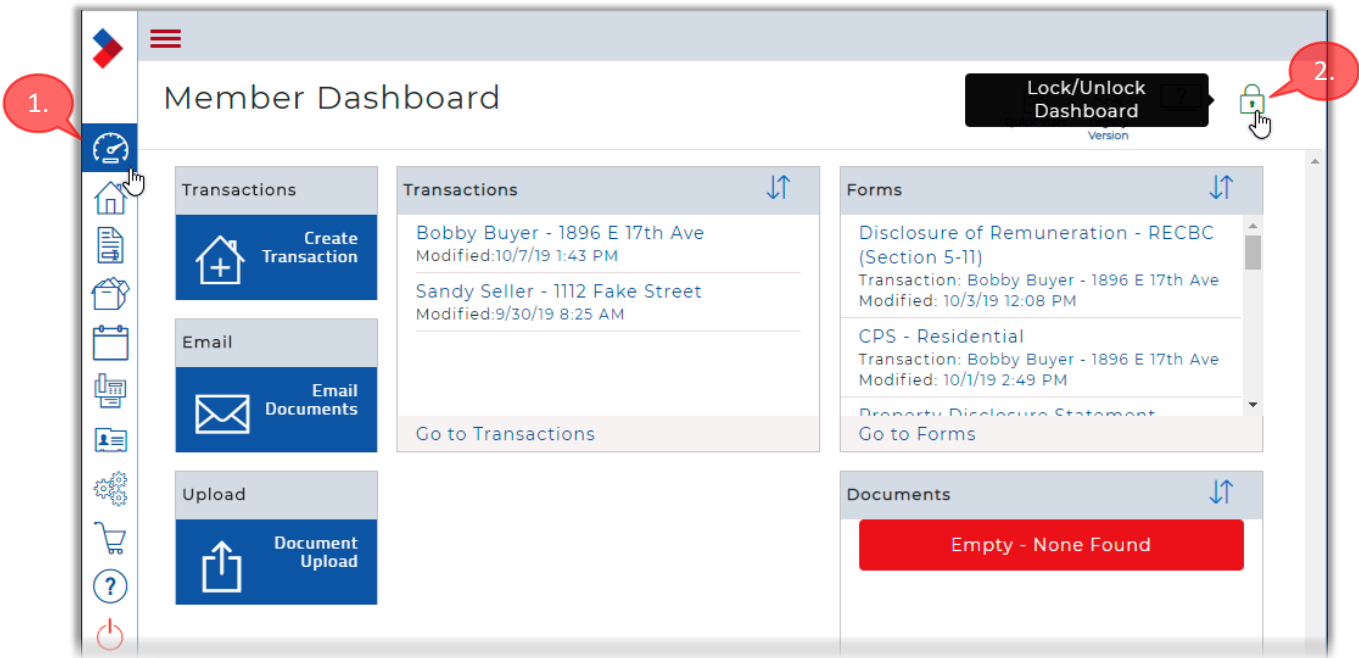
You can customize your *Member Dashboard* (i.e. the home page) and the *Transaction Dashboard* to include the information and controls that suit your preferences.

Member Dashboard




▶ To customize your Member Dashboard:

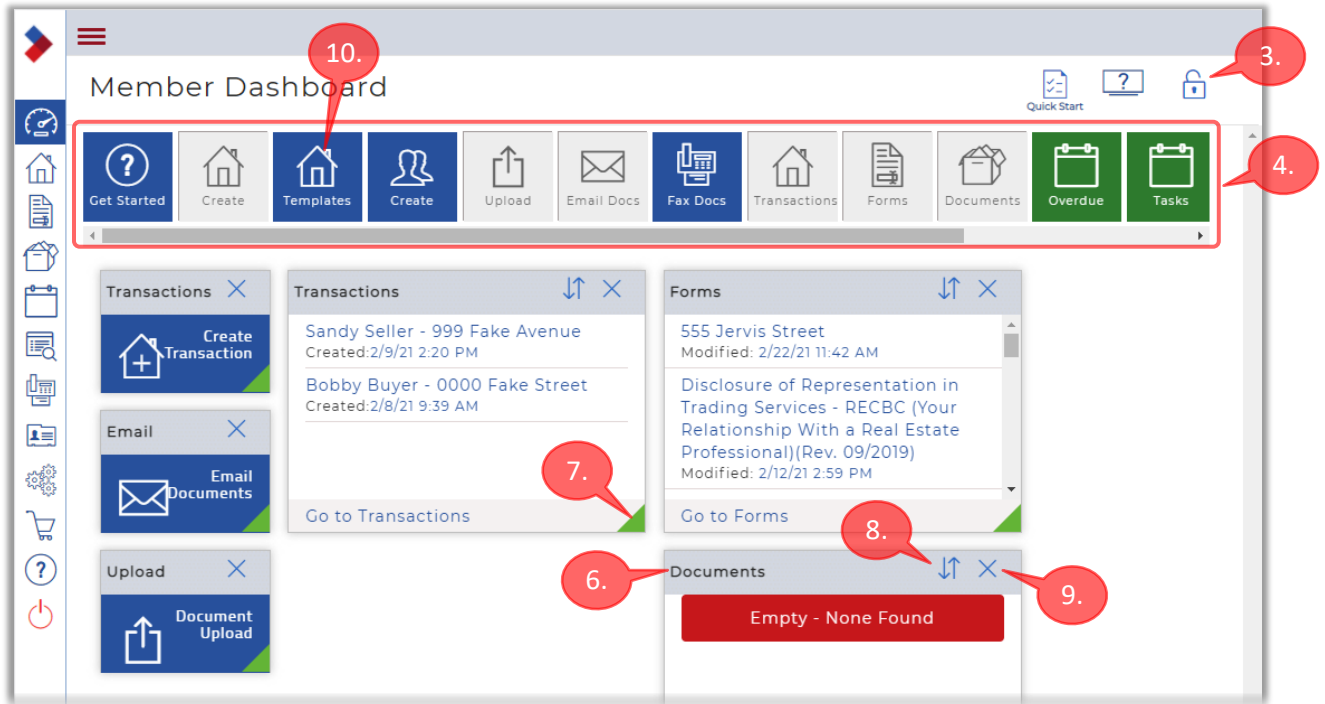
1. Click  to open the **Member Dashboard** page.



2. Then click  **Lock/Unlock Dashboard** near the upper-right corner of the page.



3. The dashboard is now unlocked, as indicated by the open lock icon .





4. Once unlocked, the **Widget Tray** will appear near the top of the page. It contains the widgets that can be added to the dashboard. Note that you may need to scroll the tray horizontally to see all the available widgets.


- Grey widgets in the tray indicate those that are already on the dashboard.
- Blue widgets are shortcuts, providing alternative ways of accessing frequently-used functions.
- Green widgets provide at-a-glance summaries of information. You can have a maximum of six green widgets on the dashboard.

5. To include a widget in your dashboard, just drag it from the Widget Tray into the dashboard.


6. To reposition a widget, drag it by its title bar.

7. To re-size a widget, drag the sizing handle  at its lower-right corner.

8. Use the  icon to change the sort order within the widget.

9. Click  to close a widget and return it to the widget tray.

10. Most of the useful widgets are already on the dashboard by default. However, you might find it convenient to include the **Templates** widget, to make it easier to start to create a template.

11. Once you are satisfied with your dashboard, click  to lock it and prevent any accidental changes. Note that you can change the Member Dashboard settings at any time.



Transaction Dashboard

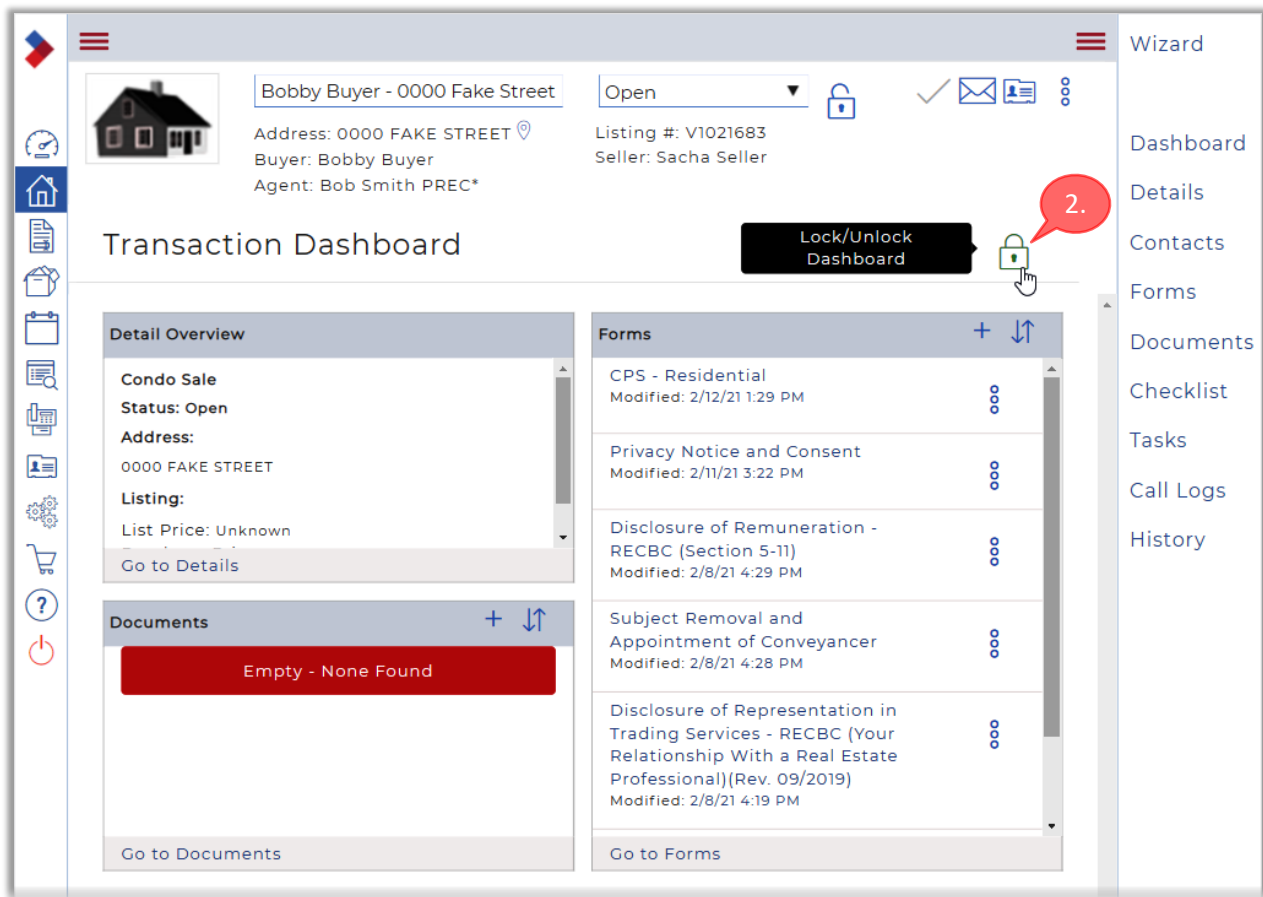
You can also customize the Transaction Dashboard, according to your preferences.




► To customize your Transaction Dashboard:

1. Open a transaction using the methods previously described. It doesn't matter which transaction, as these Transaction Dashboard settings will apply to all your transactions.

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



2. Click  **Lock/Unlock Dashboard** to unlock the Transaction Dashboard.



3. As with the Member Dashboard, a *Widget Tray* appears.
See the preceding pages for more information on using the tray.


The screenshot displays the 'Transaction Dashboard' for a property at '0000 FAKE STREET'. The interface includes a top navigation bar with a 'Wizard' menu, a search bar, and a status dropdown set to 'Open'. Below this is a 'Transaction Dashboard' header with a 'Widget Tray' containing icons for Forms, Documents, Upload, Email Docs, Fax Docs, Call Logs, Contacts, Overview, Recent, and Forms. A vertical sidebar on the left contains various utility icons, and a vertical menu on the right lists navigation options like Dashboard, Details, Contacts, Forms, Documents, Checklist, Tasks, Call Logs, and History. The main content area is divided into three sections: 'Detail Overview' (showing 'Condo Sale' status), 'Documents' (currently empty), and 'Forms' (listing various legal documents like 'CPS - Residential' and 'Privacy Notice and Consent').

3. Points to the left sidebar navigation icons.

4. Points to the 'Contacts' widget in the widget tray.

5. Points to the 'Documents' widget in the widget tray.

7. Points to the lock icon in the top right corner of the dashboard.

4. Most of the useful widgets are already on the dashboard, by default. However, you might find it convenient to add the **Contacts** widget to facilitate adding/editing contacts.
5. And if you don't use the **Documents** widget very often, you can remove it, if desired.
6. Adjust the widgets according to your preferences.
7. Once you are satisfied with your dashboard, click  to lock it and prevent any accidental changes. Note that you can change the Transaction Dashboard settings at any time.



Appendix

Templates Summary

Below is a summary of the forms and clauses that were included when creating the four templates.

Attached Sales Template

Forms

- CPS - Residential
- Privacy Notice and Consent
- Disclosure of Remuneration - RECBC (Section 5-11)
- Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional)(Rev. 09/2019)
- Subject Removal and Appointment of Conveyancer
- FINTRAC Individual Identification Record - (CREA)

Clauses for CPS

- New First Mortgage Clause
- Inspection of Property Clause ****REVISED****
- Buyer Approving the Property Disclosure Statement Clause
- Buyer's Approval of Title Search to be Incorporated into Contract
- Strata Documentation to be Provided Clause

Detached Sales Template

Forms

- CPS - Residential
- Privacy Notice and Consent
- Disclosure of Remuneration - RECBC (Section 5-11)
- Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional)(Rev. 09/2019)
- Subject Removal and Appointment of Conveyancer
- FINTRAC Individual Identification Record - (CREA)
- FINTRAC Individual Identification Record - (CREA)



Clauses for CPS

- New First Mortgage Clause
- Inspection of Property Clause ****REVISED****
- Buyer Approving the Property Disclosure Statement Clause
- Buyer's Approval of Title Search to be Incorporated into Contract
- ~~Strata Documentation to be Provided Clause (delete)~~
- *Oil Tank Clause (custom clause)*

Detached Listing Template

Forms

- Multiple Listing Contract
- Privacy Notice and Consent
- Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional)(Rev. 09/2019)
- Disclosure to Sellers of Expected Remuneration - RECBC (Paying for Real Estate Services: What Sellers Need to Know)(Rev. 09/2019)
- FINTRAC - Individual Identification Information Record - (CREA)
- MLSLink - Residential Data Input Form (*Real Estate Board of Greater Vancouver version*)
- Property Disclosure Statement - Residential

Attached Listing Template

Forms

- Multiple Listing Contract
- Privacy Notice and Consent
- Disclosure of Representation in Trading Services - RECBC (Your Relationship With a Real Estate Professional)(Rev. 09/2019)
- Disclosure to Sellers of Expected Remuneration - RECBC (Paying for Real Estate Services: What Sellers Need to Know)(Rev. 09/2019)
- FINTRAC - Individual Identification Information Record - (CREA)
- MLSLink - Residential Data Input Form
- ~~Property Disclosure Statement – Residential~~
(delete & replace with the following PDS form)
- *Property Disclosure Statement - Strata Title Properties*
- *Authorization to Agent to Obtain Strata Documentation – RECBC*



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.

BCREA Help Resources

[BCREA Standard Forms Resource Centre](#)

Includes a broad range of resources that provide guidance on the use of BCREA Standard Forms.

[BCREA Standard Forms Resource Centre - Video Tour](#)

A video tour and introduction to the BCREA Standard Forms Resource Centre.

[BCREA Standard Forms Resources Index](#)

Includes a comprehensive set of links to resources that help you work with BCREA Standard Forms.

[BCREA Standard Forms - Clause Catalogue](#)


A catalogue of BCREA clauses, including guidance about using the clauses in your transactions.

REBGV Help Resources


[REBGV Online Help Resources](#)

Access the latest version of this *Workbook*, plus *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

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