Forms Manual

Welcome to AREA Forms on repree™. This manual will go through a step-by-step process on how to access, and use AREA Forms on repree™.
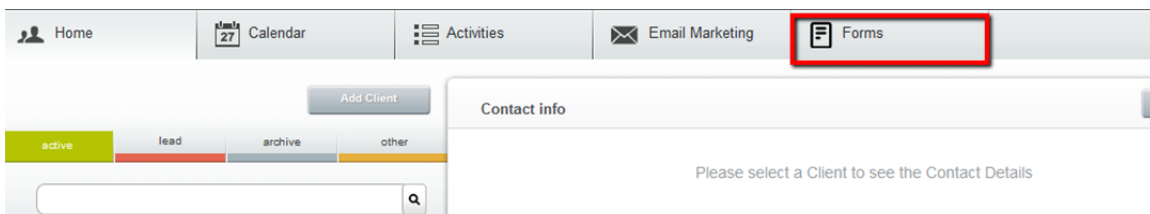
1. Login to repree™ and access AREA Forms

   a. Login to repree by using your REALTORLink® username and password by visiting http://www.areahub.ca and selecting AREA Forms and Repree from the menu bar (See Fig 1.1). Alternately, you can visit https://app.repree.com/Account/naflogon/830BE4B8-0082-4DF7-993F-281016780D8A

   b. Once logged in to Repree, click on the 'Forms' tab in the top menu bar *(See fig 1.1)*

Fig 1.1

2. Searching AREA Forms

    a. There are 2 ways to search through forms: through filters, and the search bar

    b. Filters

        i. By clicking on a filter, your search is automatically narrowed down to only include forms that relate to that keyword.

        ii. Select your desired forms by clicking on the form. Multiple forms can be selected in one search, by simply clicking on all the forms you need. Your selected forms will appear in a box on the left hand side titled "Selected Forms". (See Fig 2.1)

    c. Search Bar

        i. In the search bar, you can insert a keyword, and forms will automatically narrowed to only include those that match.

        ii. These forms can be further narrowed down by clicking on a filter.

        iii. Select your desired forms by clicking on the form. Multiple forms can be selected in one search, by simply clicking on all the forms you need. Your selected forms will appear in a box on the left hand side titled "Selected Forms". (See Fig 2.1)

    d. You can now review all selected forms in the box on the left hand side titled "Selected Forms". (See Fig 2.1)

Fig 2.1
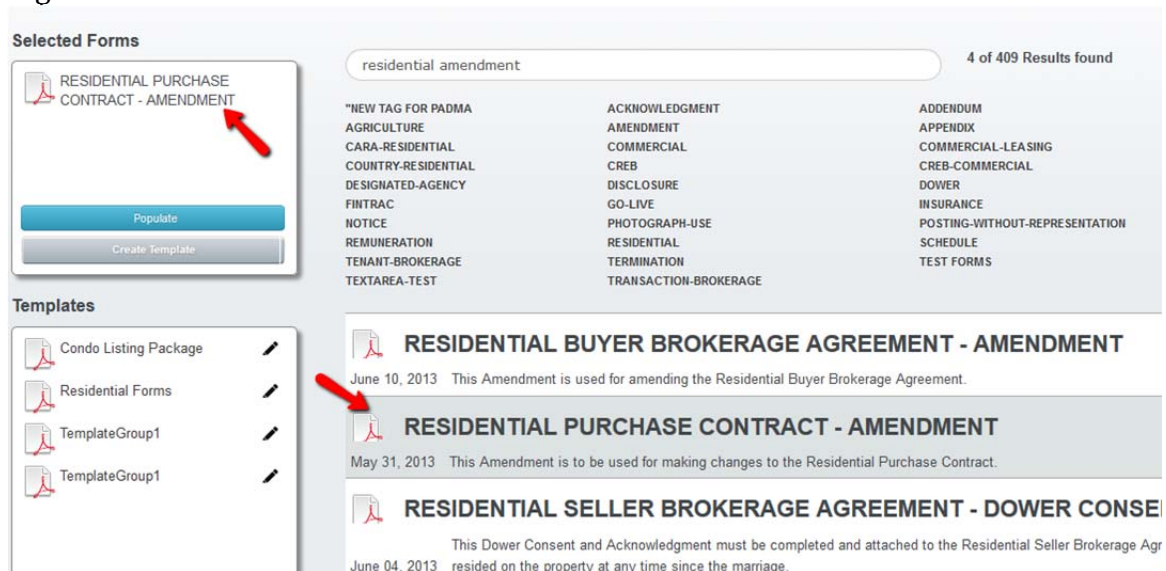
3. Building Templates

    a. Once you have selected your forms, you have the option to create a template or populate selected forms.

    b. Templates

i. A template is a package of forms you can save for future use (ie. Listing Forms).
ii. Create your template by clicking 'Create Template'
iii. Give your template a name, and click 'Create'. Your form template will now be visible in the box on the left hand side titled "Templates". (See Fig 3.1)
iv. When accessing forms in the future, you will be able to select your template which will load the forms you saved.

Fig 3.1
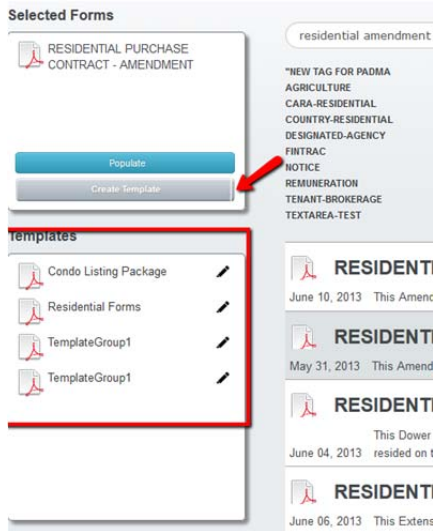
Helpful Hint: Templates are useful for creating a package of forms that are used together and/or regularly. This allows you to save time by not needing to search through the forms library for each individual form needed.

c. **Populate Selected Forms**
  i. To populate your form click on the populate button located under the Selected Forms box on the left hand side. (See Fig 3.2)

Fig 3.2

4. **Inserting Data**

   a. Select your forms using the search or, by clicking on one of your templates.
   b. You will be prompted to insert a listing number for form pre-population from listing data. To do this, enter an MLS® number and select the "Populate form with data button". If you do not want to prepopulate the form select the "Continue without data" button. (See Fig 4.1)

Fig 4.1

   c. The next screen is where we will actually fill out our form. It will list all fields you are able to enter data into on a specific form. (see Fig 4.2)

Fig 4.2

d. Enter your form data into the available fields. To advance to your second form (if more than one selected) you can click the name of that form on the left hand side under "Selected Forms" (See fig 4.2 above).

e. Help icons appear next to some fields and are identified by the black circle to the right. Moving your mouse over an icon will provide helpful information for that specific field. (see Fig 4.3)

Fig 4.3

Helpful Hint: By entering an MLS® number, the forms will be prepopulated with any MLS® information available

5. **Inserting Clauses and Phrases**

a. Some forms may have fields within where you need to include clauses and phrases (ie. Additional terms fields). These fields will have the option to include predefined clauses and phrases. (see Fig 5.1)

Fig 5.1

b. Click 'Clauses and Phrases' and search the library for the clause and phrase you are looking for. Once you have located the clause and phrase you would like to use click the insert button.(see Fig 5.2)

Fig 5.2

6. **Saving**

   a. Once you have completed filling in your form, you can preview it by clicking the "Preview" tab located at the top. (see fig 6.1)

Fig 6.1

   b. Your form(s) will be displayed with all entered data. You can also continue inserting or editing your form from preview by clicking on the field and typing. (see fig 6.2)

Fig 6.2

   c. Once your form(s) are completed, you can save them in 2 ways or, if you form is not yet complete, you can save it and come back later.
   d. **Save as PDF**
      i. Click 'Save as PDF' in the top left corner to save completed forms to your device. (see fig 6.2)
      ii. The PDF version is a print ready version for your client to sign.
   e. **Save to Transaction**

i. Click 'Save to Transaction' to save the completed forms to a transaction folder within repree. (see fig 6.2)
ii. A new window will appear, asking you to select the client and transaction that the forms are to be saved to. (see fig 6.3)
iii. You will also have the option to create a new client and/or transaction from this dialogue box as well.
iv. Your saved forms can be found in PDF form under your client and transaction.
v. If you are using repree's full service* you will be able to initiate the electronic signing process.
vi. Forms can be emailed to all signing parties required.

Fig 6.2

Fig 6.3

Helpful Hint: Saving your forms to a transaction is incredibly beneficial to both you and your client. Saving to a transaction allows you to be able to access forms from anywhere, at any time, and from any device**. By no longer being bound to hard copies and traditional storage, you are now able to save time and money.

      f.   Save Partial Form
   i. Click 'Save Partial Form' to save an incomplete form(s) to a client and transaction
   ii. To access a saved partial form, simply click on your client and transaction.
   iii. Incomplete forms will appear in blue in the right hand column. Select your form, and continue inserting data

Helpful Hint: This option allows you to save your incomplete form(s) to a client and transaction, to complete at a later date

*Please note that eSignatures are only available to those who upgrade to our Basic or Premium plans. Visit us at http://repree.com/pricing to learn more about our plans.
**Some functionality may not work when accessing Repree from a mobile device.