How to Create Templates on WebForms

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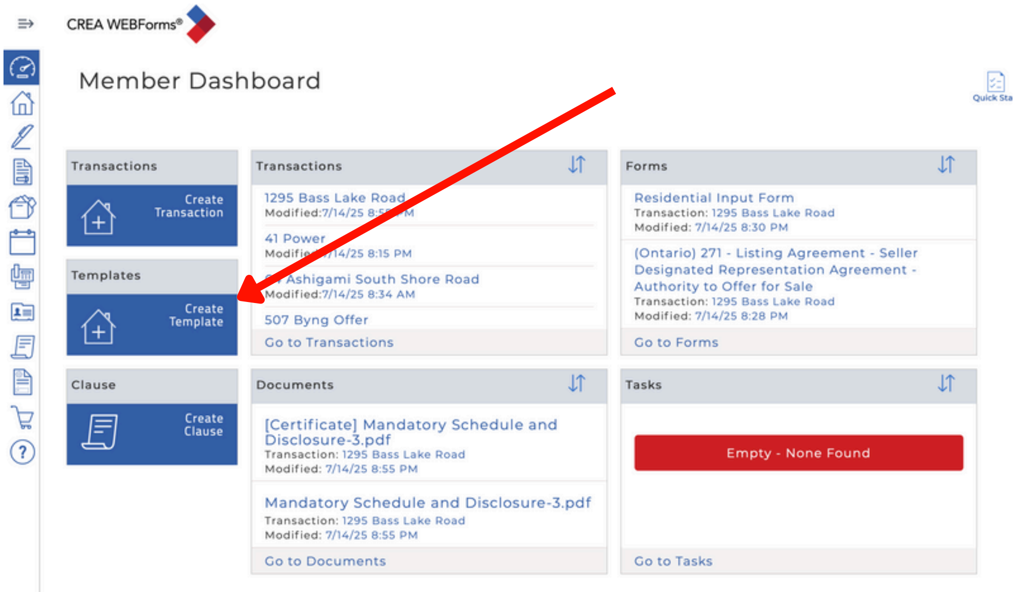
What are Transaction Templates?

Transaction templates give you the ability to save a selection of forms commonly used in certain transaction types. For example, a purchase transaction would have OREA forms 100, 320, etc.

The transaction templates also allow you to enter text or items into fields ***within*** the form that will automatically populate every time you create that type of transaction. It's a huge time-saver!

Step 1 : Login to Webforms

- Visit pr.transactiondesk.com ***or*** click on the WebForms link in the "External Links" section of your home page on Matrix.
- Once there, click on "Create Template" from your main dashboard.



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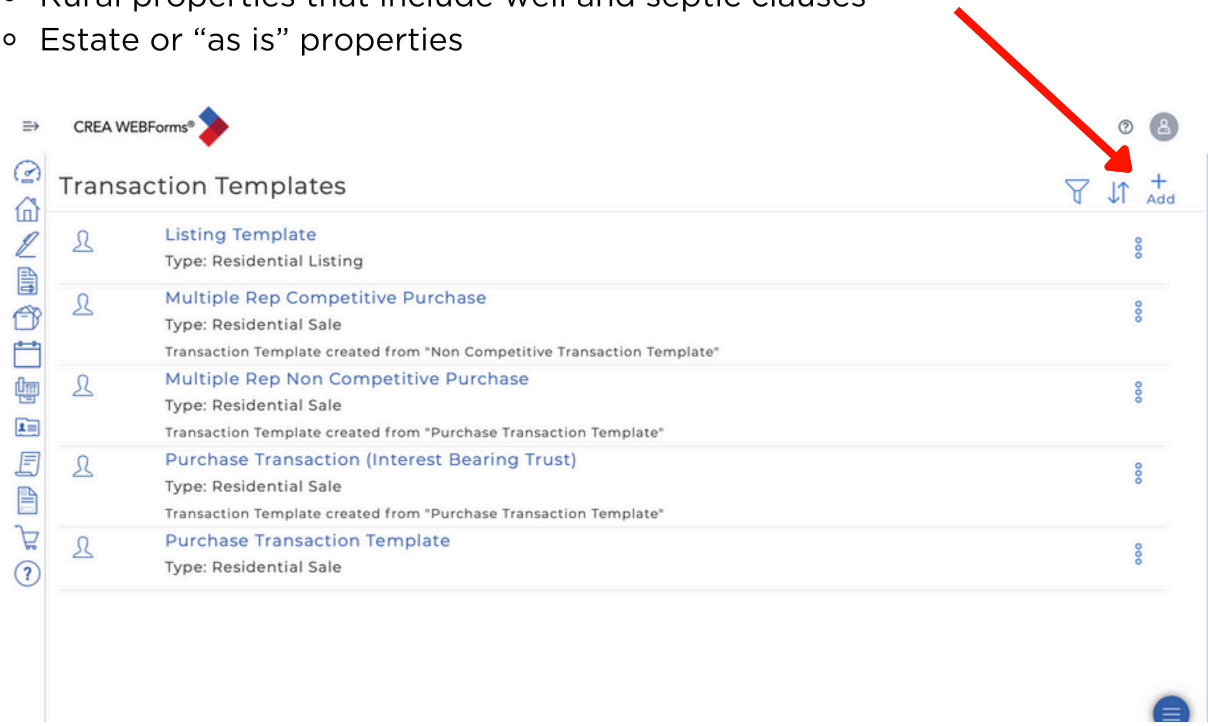
Step 2 : Add a New Template

- Once in the template section, click the “+” Add button at the top right of the screen.
- There’s no limit on the number of templates you can create. Some ideas of templates that might be worth creating include:
    - Competitive offers that don’t feature any conditions but have basic coverage statements (for both you and the buyer)
    - Rural properties that include well and septic clauses
    - Estate or “as is” properties



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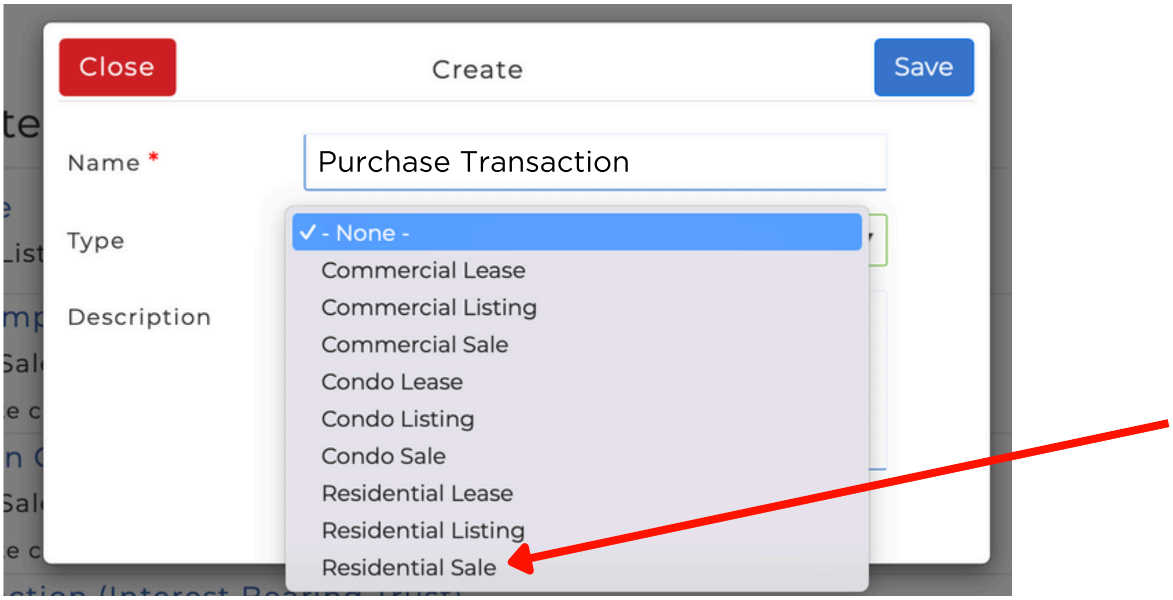
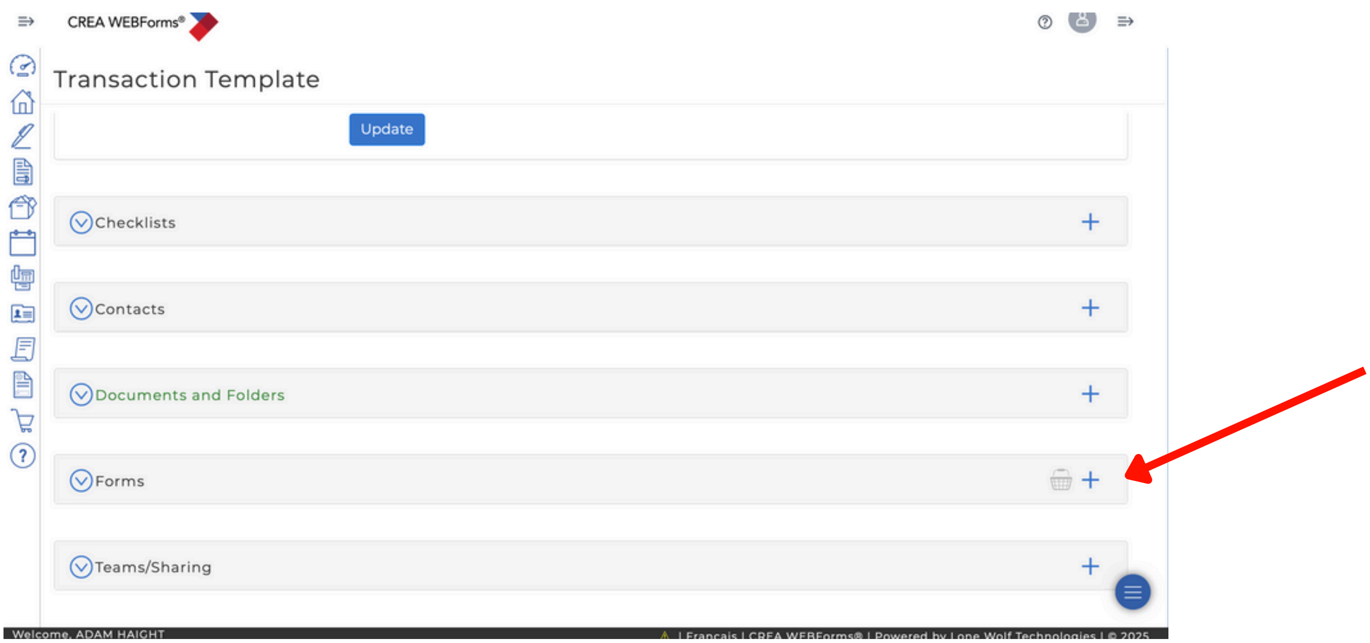
Step 3 : Name and Define

- You'll now have a popup dialogue in front of you. Name the template whatever you'd like!
  - If you want to follow along, with the tutorial, let's create one called "Purchase Transaction"
- From the dropdown, select the transaction type, in this case "Residential Sale"



Step 4 : Add Forms

- As you can see, there's many categories you can add to a template including documents, checklists, etc. For the purpose of this tutorial, we are going to focus only on adding forms.
- Next to "Forms" click the "+" Button



- You will now have your forms library popup (this should be familiar to you from when you create a transaction manually).
- You can select any forms that you find to be relevant for this particular template.
  - I have included a list of forms to create the two most common templates: Purchase Transaction, and Listing Transaction.

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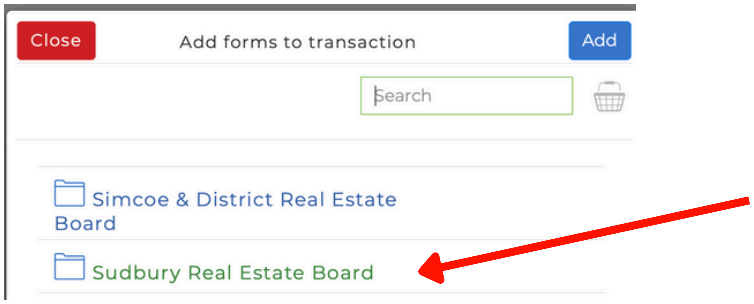
Purchase Transaction Forms to Add

- 801 - Offer Summary Document
- 100 - Agreement of Purchase and Sale
- 127 - Conditions in Offer
- 320 - Confirmation of Co-Operation and Representation
- RECO Information Guide
- 630 - Individual Identification Information Record (I usually add 2 of these forms for multiple buyers in the same transaction)
- 124 - Notice of Fulfillment of Conditions
- 371 - Buyer Designated Representation Agreement

Listing Transaction Forms to Add

- Residential Input Form (You'll have to find this one under the Sudbury Real Estate Board folder)



- 271 - Listing Agreement - Seller Designated Representative
- 630 Individual Identification (again usually add 2 of these)
- RECO Information Guide
- 244 - Seller Direction Re: Property/Offers
- 224 - Seller Direction Re: Property/Offers - Important Seller Information
- 199 - Latent Defect
- 602 - Disclosure

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Step 5: Add Pre-populated fields (optional)

One of the great things about having properly set up templates is that not only will you not "forget" a form, but you can also populate those forms with common statements, filled fields, etc. and they will show up upon creating the transaction!

Here's a few pre-filled fields that I recommend adding to make your life easier:

- **Form 371 - Buyer Designated Representation Agreement**
  - Pre-fill your name and brokerage info
  - Add in a general description of what you will do for the client (as now required) in the Schedule "A" (I've included my template of the description below if you want to copy and paste!)

- **Form 100 - Agreement of Purchase and Sale**
  - In the Schedule "A" put in some common statements and conditions that you'd want in most offers. You can always delete these in the individual transaction if not relevant (for example, I load the three main conditions into every offer via a template - financing, inspection, insurance, then delete them if not needed when it comes time to write)

- **Form 271 - Listing Agreement**
  - Add in a general description of what you will do for the client (as now required) in the Schedule "A"
  - Fill in your name and brokerage info

Really the sky is the limit here, add as much or as little as you want to these template forms, but trust me, taking the time to set up a solid set of templates will save you precious minutes when scrambling to write an offer before a deadline!

Mentor Bonus: Custom Clauses to Add

As promised, I'm opening the box to what I have pre-printed into a few of my common forms. Feel free to copy and paste into your templates.

Form 371 - Buyer Designated Representation Agreement - Schedule "A"

The designated representative agrees to do the following:

- Gather and share information about neighbourhoods and homes that meet the buyers requirements, and arrange to show homes the buyer would like to see

- Advise the buyer on the best approach in competing offer situations and how to protect your offer information

- Negotiate with sellers to achieve the best results, price, and terms, for the buyer.

- Guide the buyer through paperwork and closing the transaction successfully

- Provide referrals to other professionals the buyer may need (for example, home inspectors, lawyers, or contractors)

The buyer, and/or the designated representative may choose to forego any of these services, based on the circumstances of the property search, the offer process, and the post offer process. The buyer acknowledges that real estate transactions are unique in nature, and not every situation will call for all the above listed services.

Mentor Bonus: Custom Clauses to Add

Form 271 - Listing Agreement - Schedule “A”

For the purpose of this listing, the Realtor shall perform the services listed below. This list is not exhaustive, and more or less of these services may be completed as discussed by the Realtor and the seller throughout the process. In the event that the subject property receives an offer suitable to the seller before any or all of these services are completed, the listing agreement shall still remain in place, and the commission indicated in the above agreement shall be paid.

The services include:

- Offer guidance on market trends and optimal strategies to maximize sale price.

- Promote the home using various types of media.

- Connect the seller with essential professionals, such as lawyers or staging companies.

- Coordinate and oversee home inspections and appraisals.

- Schedule and manage showings for potential buyers.

- Provide advice on managing multiple offers and transaction details.

- Screen offers and buyers for financial viability.

- Negotiate with buyers to secure favourable terms and price.

- Assist with paperwork and ensure a smooth closing process.

The seller acknowledges that the Listing Brokerage will request the right to withhold a referral fee of 75% of the Cooperating Brokerage commission if the Listing Brokerage introduces the Buyer or their affiliates to the property through private showing.

The seller acknowledges that the listing agent will request that all showings are to be accompanied by a buyer agent.

Mentor Bonus: Custom Clauses to Add

Form 100 - Agreement of Purchase and Sale - Schedule “A”

The Buyer agrees to pay the balance of the Purchase Price, subject to adjustments, to the Seller on completion of this transaction, with funds drawn on a lawyer’s trust account in the form of a bank draft, certified cheque or wire transfer using the Lynx high value payment system as set out and prescribed by the Canadian Payments Act (R.S.C., 1985, c. C-21) as amended from time to time.
This Offer is conditional upon the following:

1. The Buyer arranging at the Buyer's own expense, a new first mortgage at current prevailing bank interest rates and terms;

2. The inspection of the Subject Property by a home inspector at the Buyer's own expense, and the obtaining of a report satisfactory to the Buyer in the Buyer's sole and absolute discretion;

Unless the Buyer gives notice delivered to the Seller by no later than 11:00 p.m. five (5) banking days after the acceptance of this offer, that the above noted conditions are fulfilled, this Offer shall become null and void and the deposit shall be returned in full without deduction. The Seller agrees to co-operate in providing access to the property for the purpose of fulfilling these conditions. These conditions are included for the benefit of the Buyer and may be waived at the Buyer's sole option by notice in writing delivered to the Seller within the time period stated herein.

The Seller agrees to allow the Buyer two additional walkthroughs at an agreed upon time prior to completion of this transaction.

The Seller represents and warrants that on completion that there is no known damage to the basement, roof, or elsewhere caused by water seepage or flooding. The Parties agree that these representations and warranties shall survive and not merge on completion of this transaction, but apply only to the state of the property at completion of this transaction.