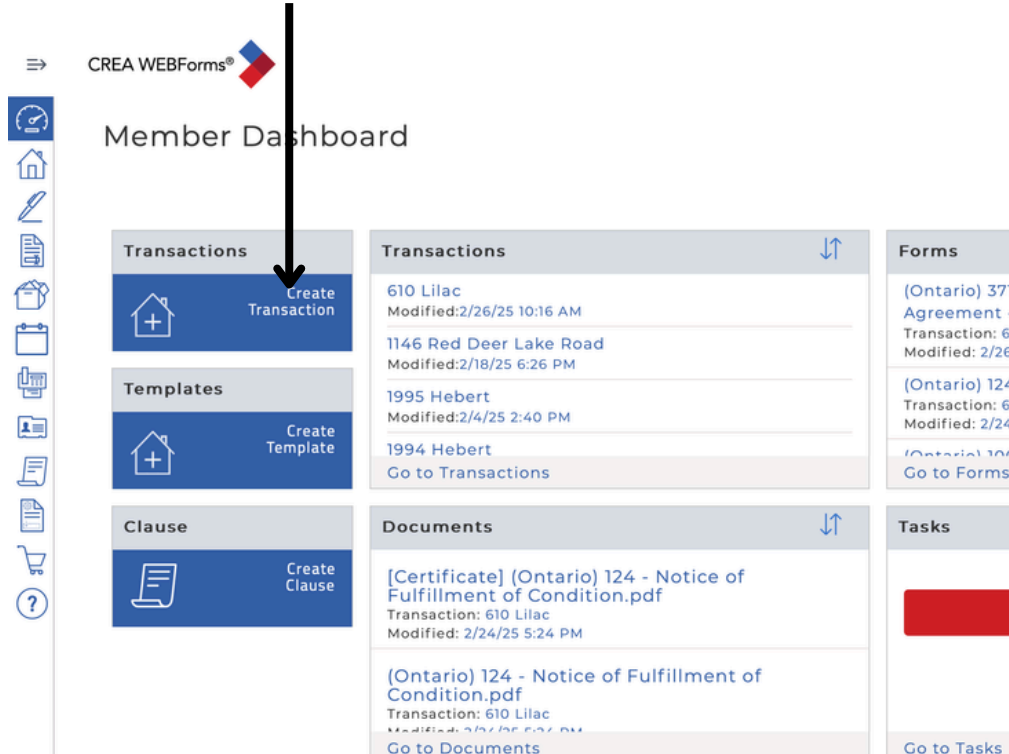


# Webforms Deal Walkthrough

**Step 1:** Click “Create Transaction”



**Step 2:** Enter Transaction info. Select a template and if available enter MLS number to help pre-populate the transaction.

The screenshot shows the 'Create Transaction' form. It has a 'Close' button on the top left and a 'Create' button on the top right. The form contains the following fields:

- Name \*: 123 Fake Street
- Template: Purchase Transaction Template
- Import Data (optional): Sudbury
- MLS Number: (empty field with a red border)
- Add me as the: Co-operating Salesperson
- Use Wizard

# Webforms Deal Walkthrough



**Step 3:** Fill out as many details as you can about the property, then select “next”

The screenshot shows a webform titled "Wizard Details Step 1 of 5". At the top left is a "Prev" button and at the top right is a "Next" button. An arrow points from the text "Step 3" to the "Next" button. The form is divided into several sections:

- Transaction Type:** Residential Sale (dropdown)
- Transaction Status:** Open (dropdown)
- Address Information:** Street Number, Street Name, Unit #, City, Province, Postal Code, Frontage Direction (text inputs)
- Property Information:** Property Type (dropdown: - None -), MLS® Number, Property Width, Property Depth, Assessment Roll Number, Lot Size Code, Legal Description, Comments (text inputs)
- Listing Information:** List Price, Present Use, Property Includes, Property Excludes, Rental Items, Additional Schedules (text inputs)
- Purchase Information:** Purchase Price, Deposit, Additional Deposit (text inputs)

Two arrows point to the "Assessment Roll Number" and "Legal Description" fields, with the text "From Geowarehouse" next to them. A "Property Detail" tooltip is visible over the "Street Number" field. At the bottom center is a "Save and exit" button.

# Webforms Deal Walkthrough

**Step 4:** Enter the closing date, irrevocable date and the title search date of the offer, then select “next”

The screenshot shows the 'Transaction Dates' step (Step 2 of 5) in the wizard. At the top, there is a header with the address '123 Fake Street', listing type 'Open', and agent information 'Buyer: ADAM HAIGHT' and 'Seller:'. Below this, a 'Wizard' bar contains 'Prev' and 'Next' buttons. The main form area has several date input fields: 'Date', 'Acceptance Date', 'Additional Deposit Date', 'Closing Date', 'Title Search Date', and 'Possession Date'. Two black arrows point from the 'Closing Date' and 'Title Search Date' fields to a 'Transaction Dates' label on the right. An 'Add Photo' button is visible on the left.

**Step 5:** Add your client(s) to the transaction by selecting the “+” button, then select if they are new or have already been entered (previous deal). It’s best to fill out all of their personal info as well.

The screenshot shows the 'Contacts' step (Step 3 of 5) in the wizard. It features a 'Wizard' bar with 'Prev' and 'Next' buttons. Below, there is a 'Contacts' section with an 'Add' button. A pop-up menu is open over the 'Add' button, showing options: 'Create new transaction contact', 'Add existing contact', 'Add yourself', and 'Add contact from Google'. Two arrows point to these options: one labeled 'If new client' points to 'Create new transaction contact', and another labeled 'If existing client' points to 'Add existing contact'. The background shows the same header information as Step 4.

Two screenshots of the 'Create Transaction Contact' form are shown. The top one shows the 'General' tab with fields for 'Type', 'First Name', 'Middle Name', 'Last Name', 'Email', 'Legal Name', 'Preferred Signature', 'Preferred Initials', 'Company', and 'Add to address'. The bottom one shows the 'Address' tab with fields for 'Street Number', 'Street Name', 'City', 'Province', 'Postal Code', 'Cell', 'Phone', and 'Fax'. Both forms have 'Close' and 'Save' buttons.

# Webforms Deal Walkthrough

**Step 6:** Ensure all of the forms you need are populated from your template. If not, add additional forms by using the “+” button, then when ready, select “next”

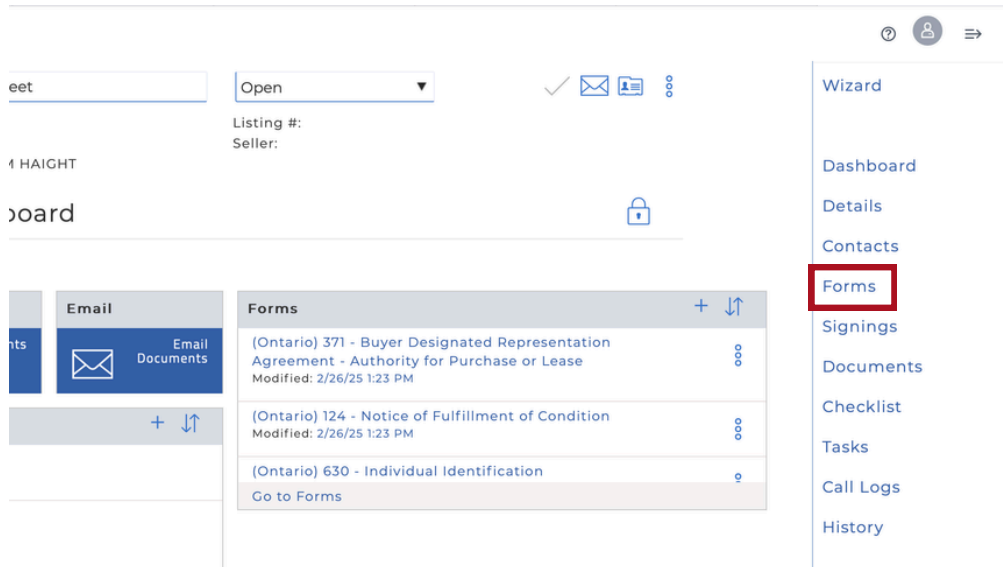
If you add a form you will get a popup like this:

From here you can either browse the OREA forms, or use the search bar to quickly find the form you want to add.

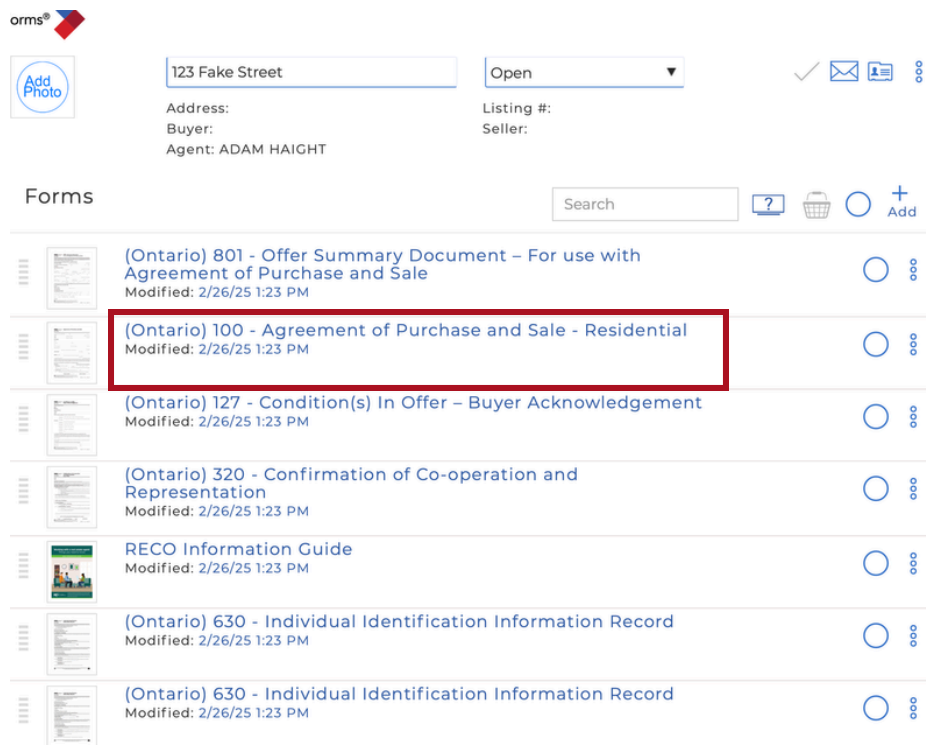
**Step 7:** The final page of the Wizard will show documents. This is rarely used. When ready select “done” to close the wizard.

# Webforms Deal Walkthrough

**Step 8:** You will now be at your transaction dashboard. From here you can fill out your forms. Start by selecting “forms” on the right side menu.

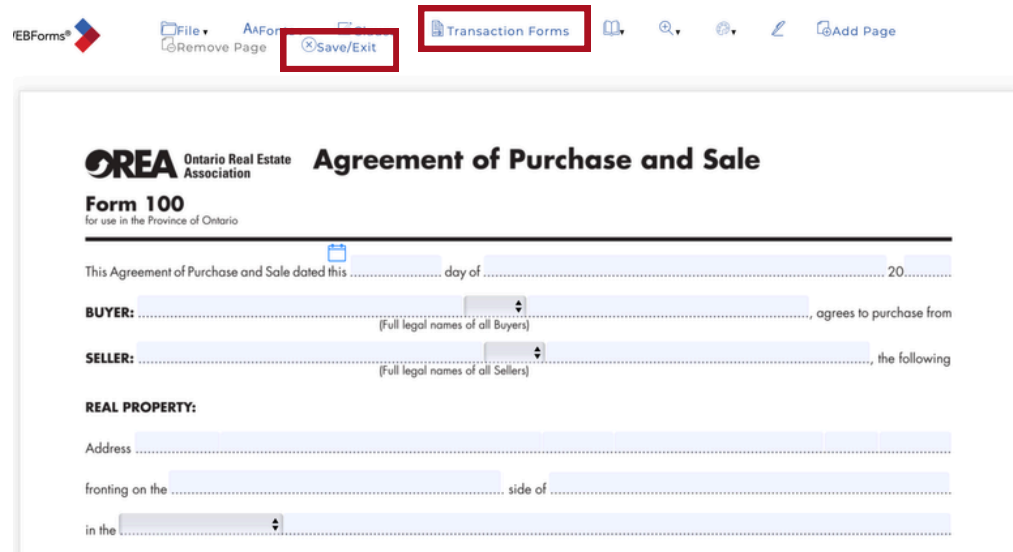


**Step 8:** You should now have all your forms in front of you. Click on the name of one of them to start populating.



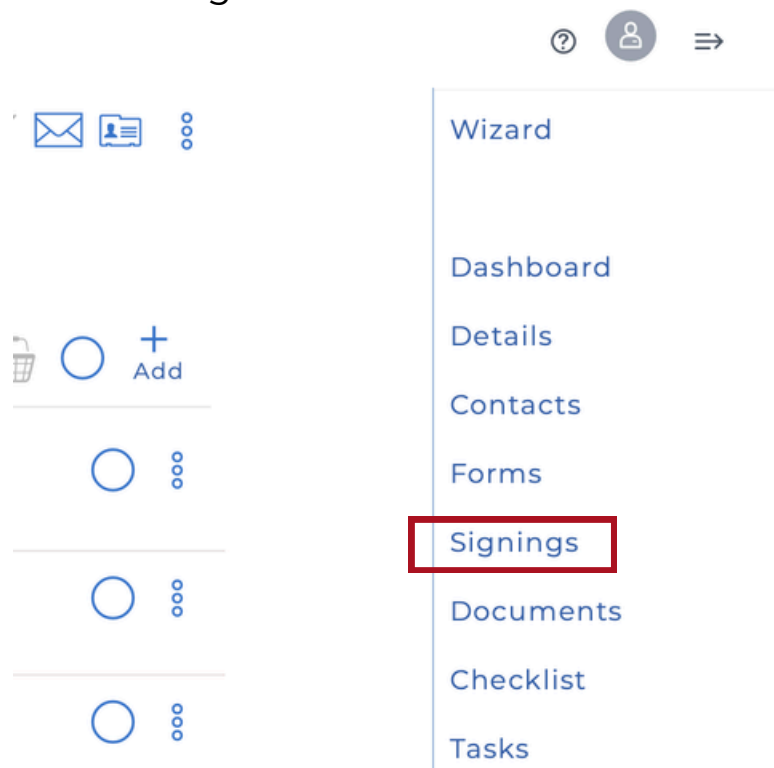
# Webforms Deal Walkthrough

**Step 9:** Navigate through each form, making sure all are filled out properly. You can select another form to edit by clicking on “Transaction Forms” at the top. When done all forms, click “save/exit”



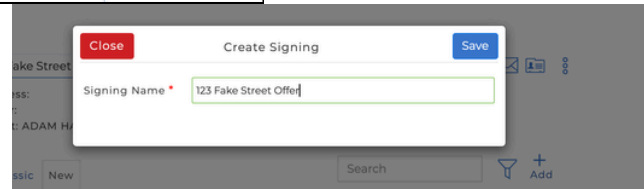
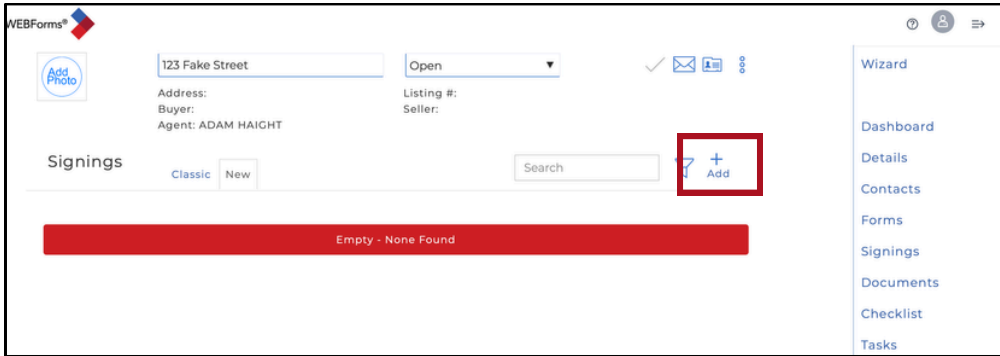
The screenshot shows the IEBForms web application interface. At the top, there is a navigation bar with several icons and labels. The 'Transaction Forms' icon is highlighted with a red box. Below the navigation bar, the main content area displays a form titled 'OREA Ontario Real Estate Association Agreement of Purchase and Sale Form 100'. The form includes fields for the date of the agreement, the buyer's name, the seller's name, and the real property address. The 'Save/Exit' button is also highlighted with a red box.

**Step 10:** Now that your forms are filled, it's time to start a signing. Select “Signings” from the right menu.

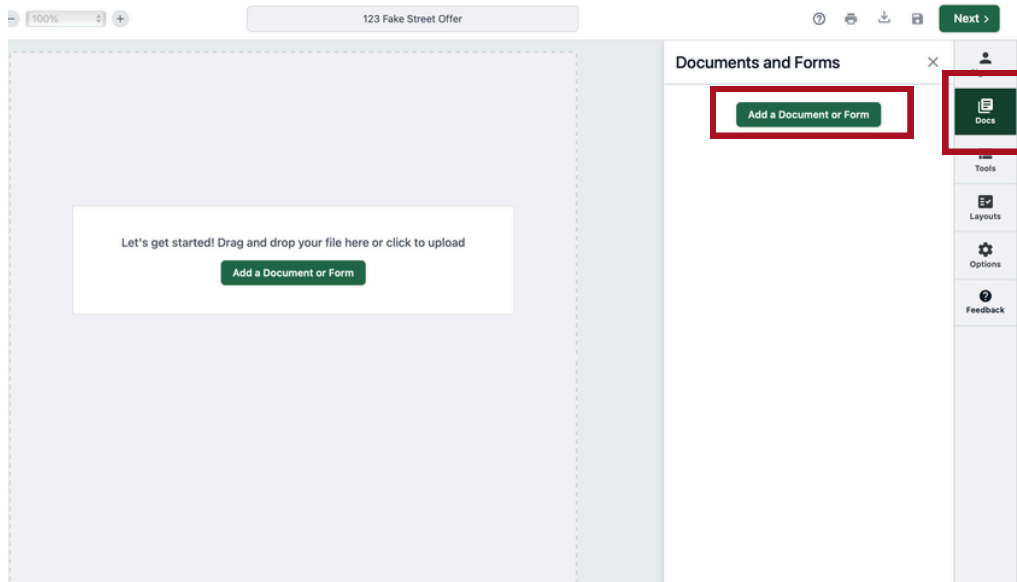


# Webforms Deal Walkthrough

**Step 11:** Click the “+” button to add a new signing, and title it what you’d like.

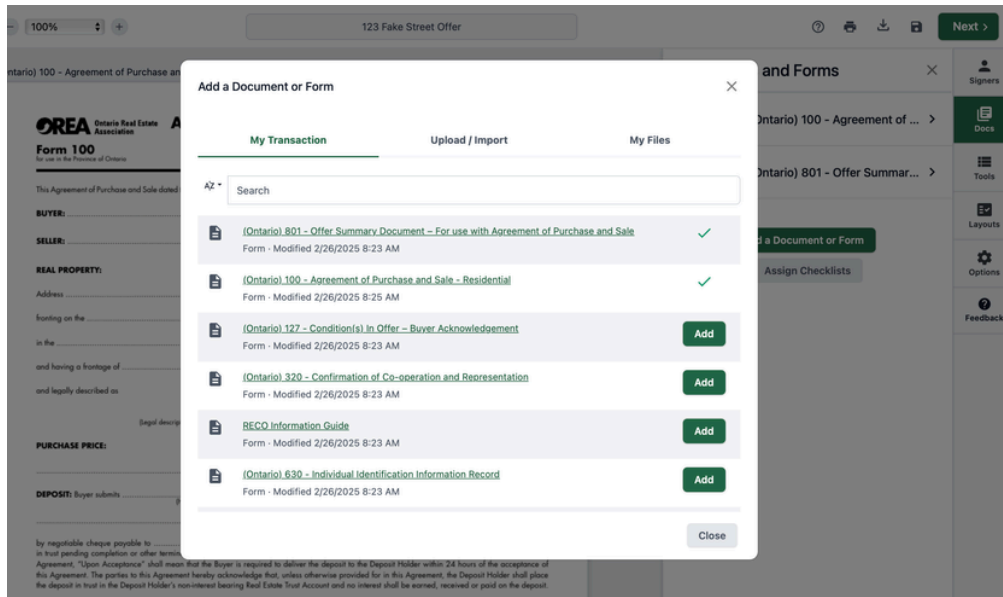


**Step 12:** You are now in your Authentisign dashboard. Start by selecting “Docs” to add the documents needing to be signed, then click “Add a Document or Form”.

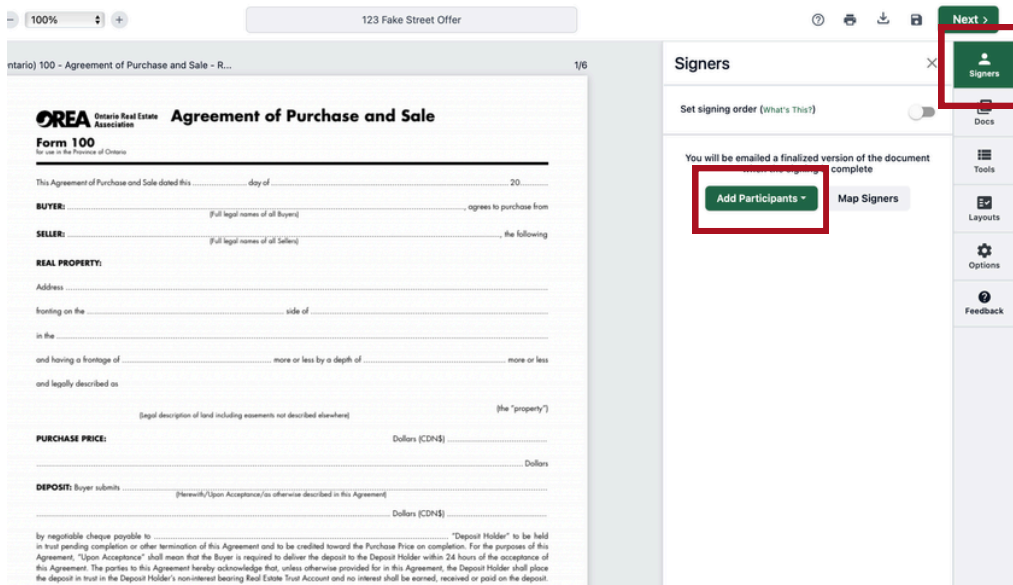


# Webforms Deal Walkthrough

**Step 13:** Add all the documents needing to be signed.

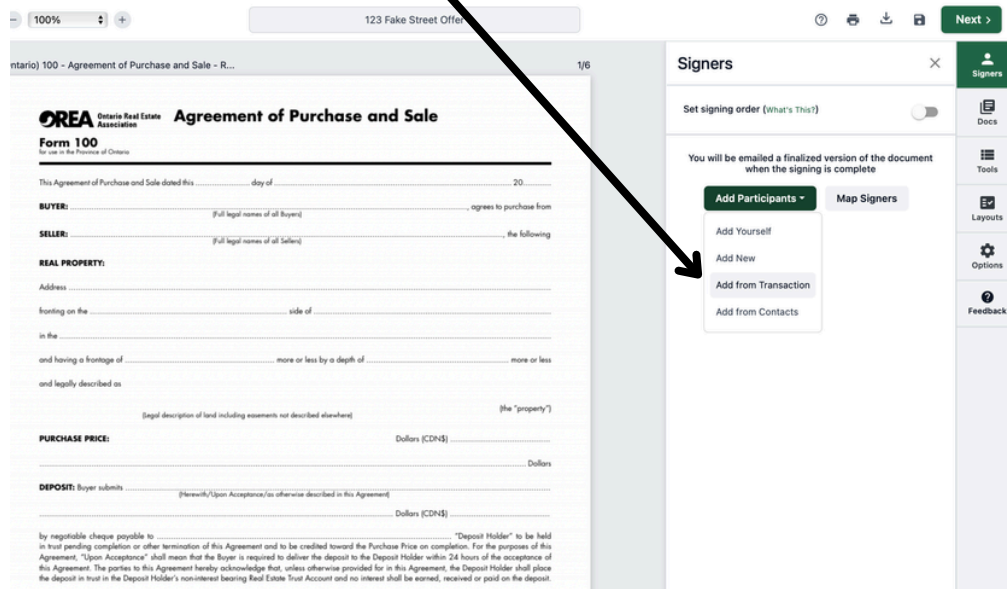


**Step 14:** After all your documents are in the signing, you'll now need to define who needs to sign, and where. Select "Signers" on the right menu, then click "Add Participants".

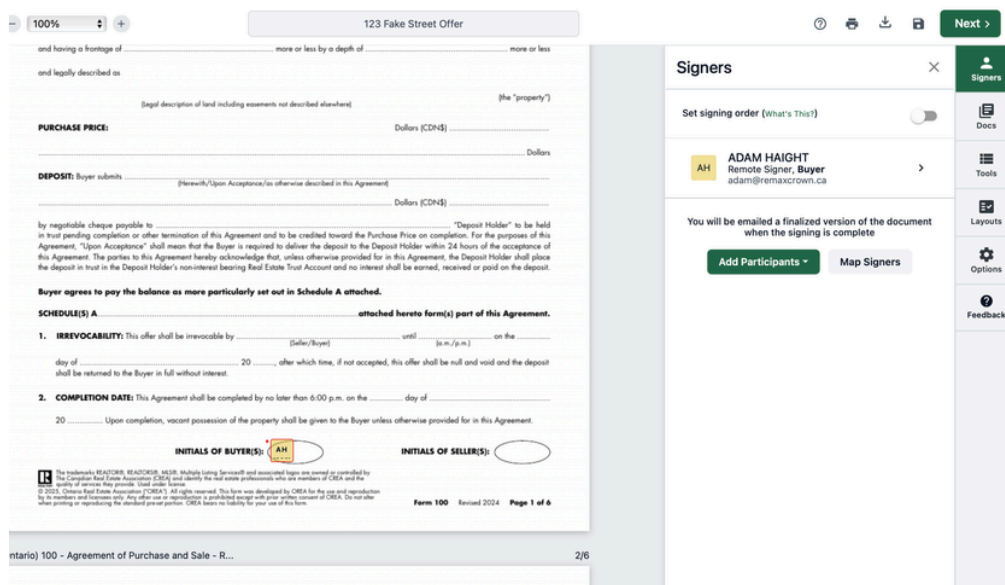


# Webforms Deal Walkthrough

**Step 15:** From the “Add Participants Menu” Select “Add from Transaction” to find the contacts you previously entered in the transaction.



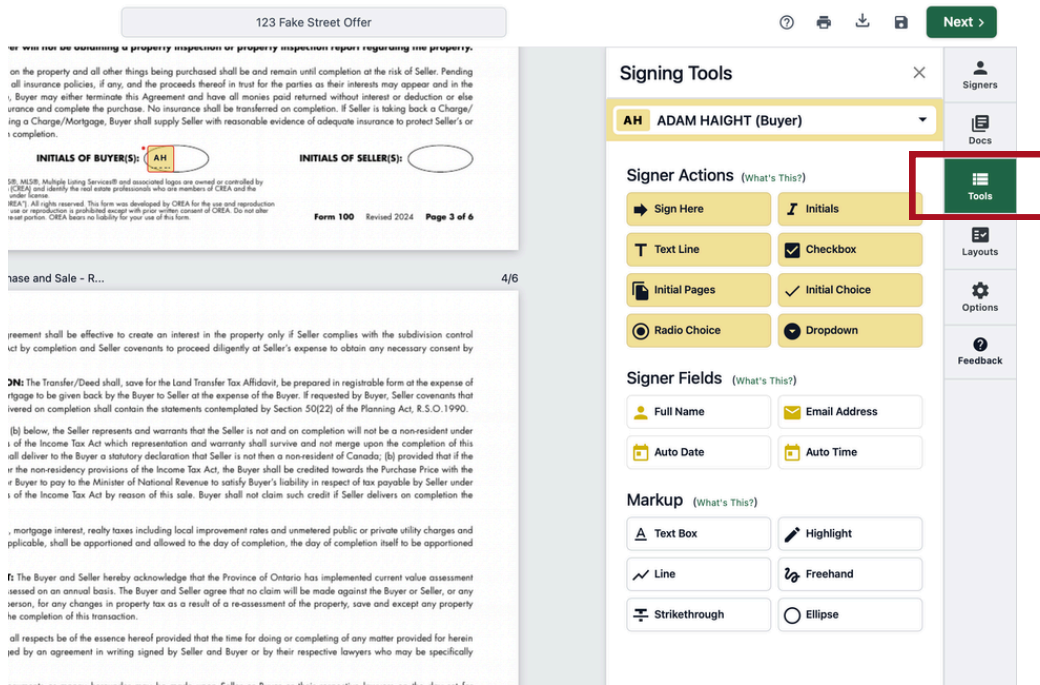
**Step 16:** The system should auto-populate the majority of where the client needs to sign, however it's important to review and ensure both your and your clients signatures are in the correct spots.



# Webforms Deal Walkthrough

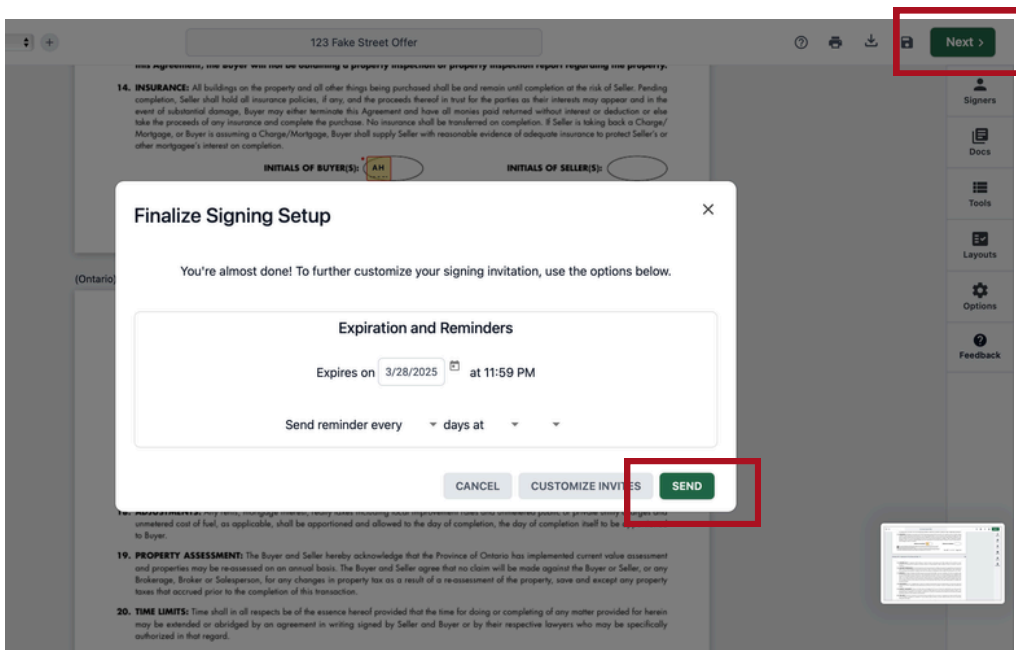
## Step 17:

In order to add a signature, initial, date, etc. Select “Tools” from the right hand menu, and simply drag and drop the appropriate field onto the document.



## Step 16:

Once you are satisfied all is correct, select the “Next” button at the top right of the screen, then hit “Send” to send for signatures



# Webforms Deal Walkthrough

## After the Signing

When the signing is done, you'll be notified via email. You can then find the signed documents in two places; "signings" and "documents".

Signings	Classic	New	Search	Filter	Add
NOF Modified: 2/24/25 5:24 PM Created: 2/24/25 5:19 PM	COMPLETED	1 of 1 completed <a href="#">Show Participants</a>			
Lilac Offer Amended Modified: 2/15/25 3:47 PM Created: 2/15/25 3:42 PM	COMPLETED	1 of 1 completed <a href="#">Show Participants</a>			
Lilac Offer Amended Modified: 2/15/25 3:29 PM Created: 2/15/25 3:00 PM	COMPLETED	1 of 1 completed <a href="#">Show Participants</a>			
610 Lilac Offer Modified: 2/15/25 1:51 PM Created: 2/15/25 12:47 PM	COMPLETED	2 of 2 completed <a href="#">Show Participants</a>			

- Details
- Contacts
- Forms
- Signings**
- Documents**
- Checklist
- Tasks
- Call Logs

From your transaction dashboard, signed documents will be available in both "signings" and "documents"

Close Signing Details

View Signed PDF View Signed Certificates Copy to Cloud More -

Authentisign ID: de0a3fe6-c4eb-ef11-88f8-002248264582

Signing Type: No Signing Order: Emails are sent out to all participants at once and participants can sign in any order.

Last Update Date: 2/15/2025 1:51 PM

Expiration Date: 3/17/2025 11:59 PM

Forward Documents

Name	Action
(Ontario) 371 - Buyer De...	Original Signed Certificate Copy to Cloud
RECO Information Guide	Original Signed Certificate Copy to Cloud
(Ontario) 320 - Confirm...	Original Signed Certificate Cop...
(Ontario) 801 - Offer Su...	Original Signed Certificate Cop...
(Ontario) 100 - Agree...	Original Signed Certificate Cop...

From "Signings" you can view the entire signed PDF or; each form individually

"Documents" gives you a different view where you can directly download the individual signed forms.

610 Lilac Open

Address: 610 Lilac, Sudbury

Listing #: 2120425

Buyer: Kristen Conroy

Seller: Christopher Harold

Agent: ADAM HAIGHT

Wizard

Dashboard

Details

Contacts

Forms

Signings

**Documents**

Checklist

Tasks

Call Logs

History

Documents

Back To Home

Viewing 610 Lilac Offer (02/15/2025 01:51 PM EST)

Certificates

- (Ontario) 100 - Agreement of Purchase and Sale - Residential.pdf
- (Ontario) 320 - Confirmation of Co-operation and Representation.pdf
- (Ontario) 371 - Buyer Designated Representation Agreement - Authority for Purchase or Lease.pdf
- (Ontario) 801 - Offer Summary Document For use with Agreement of Purchase and Sale.pdf
- RECO Information Guide.pdf

Preview

Print

Download

Delete

Properties/Rename

Send...

Copy/Move...

Slice/Markup...

Send To New Authentisign