



RP Office

REI Forms \ Real Works Integration

24/01/2017

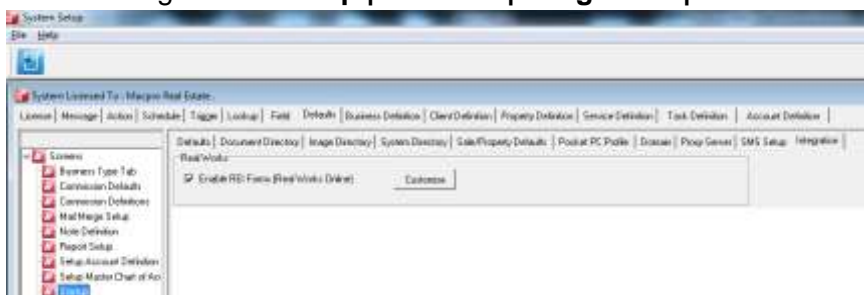
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1. Enable and Configure REI and Real Works Forms

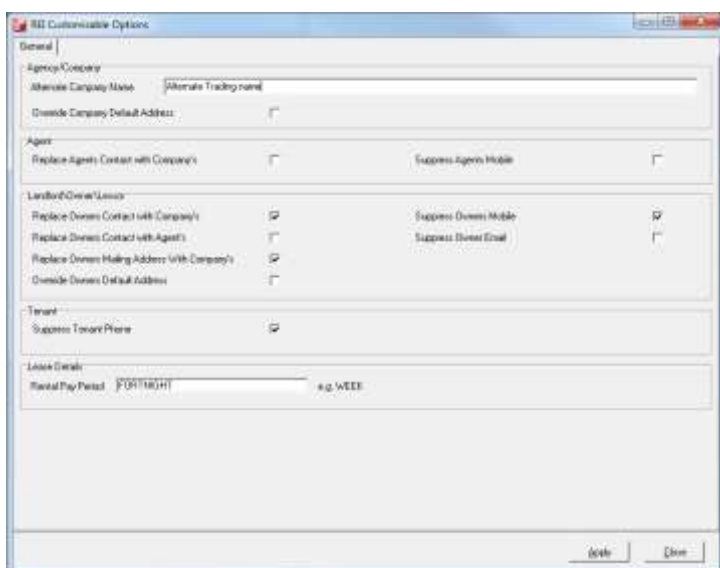
1.1. System Setup

- Open System Setup (F3)
- Navigate to **Startup | Defaults | Integration | Enable REI Forms (Real Works online)**



1.2. Custom Settings

- Customisable settings are available to control the data being populated on a Form.



2. Setup User for REI Forms

2.1. Obtain the Third Party User Token

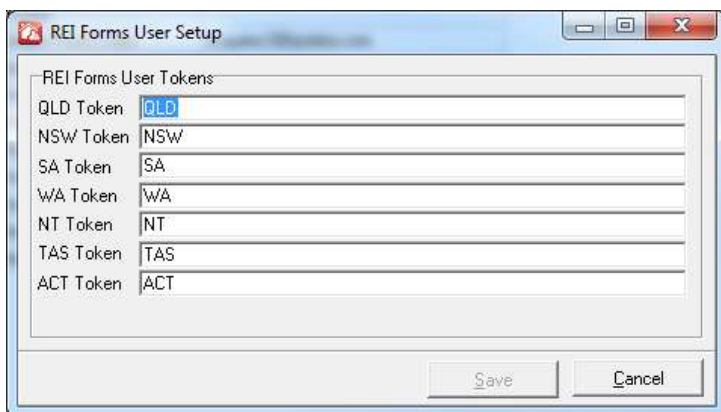
- Login to REI / Real Works for the appropriate state and setup a User Token in the Third Party section
- Example of REIQ setup below:



2.2. Setup User Token in Office Manager

2.2.1. Option 1

- Go to User Settings (F2 – User)
- Must have appropriate security level to access “UserForm”
- Select the appropriate user in the list on the “All” tab
- Select the “REIForms” button to display “REI Forms User Setup”
- Enter the users 3rd Party REI Form tokens for the appropriate states



2.2.2. Option 2 (Older versions of V9)

- Go to User Settings (F2 – User)
- Must have appropriate security level to access “UserForm”

- Select the appropriate user on the “All” tab
- Enter the users 3rd Party REI Form tokens for the appropriate states on the “Login” Tab



3. Preparing a Letter with REI Forms

- Prepare a letter
- Select button Real Works Forms



4. Create Form in Real Works

The screen for selecting from the list of templates and creating the form is displayed. By default it will load the templates appropriate to the company’s state.

To create a form:

- Select the template
 - Choose from the list of standard and user created templates

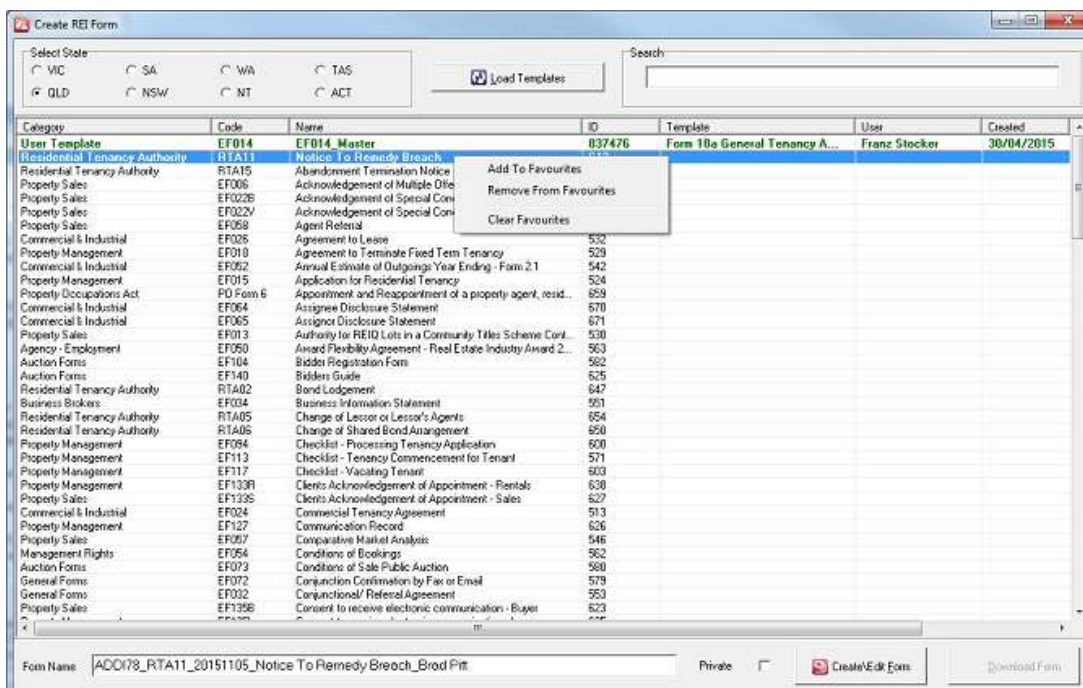
- User created templates are useful as you can setup the form with custom settings
- The list can be reduced with searching or access right click menu to add to Favourites.
- Modify the form name (will default to format Business Code, Template Code, Date, Template Name and then Lease Name)
- Click “Create Form” button
- The Form will then be created in Real Works and populated with appropriate data
- The default Web Browser will be launched and navigate to Real Works to allow further modifications to the Web Form.

4.1.1. Form Creation

- Load the Real works templates (standard and custom) for the appropriate state
- Create a new Form from the template
- Link to Real works to modify the Form online
- Download the Form from Real Works when it is completed

4.1.2. Favourite Templates

A menu is available (when right clicking on the grid) to select up to 7 favourite REI templates. The favoured templates will always appear at the top of the list and highlighted in a different colour.



5. Modify the Form Online

The screenshot shows a web browser displaying the 'General tenancy agreement (Form 18a)' form. The form is titled 'General tenancy agreement (Form 18a)' and includes the RTA logo. It is divided into 'Part 1 Tenancy details' with sections for '1.1 Lessor' and '2.1 Tenant/s'. The lessor information includes name/trading name 'George Jetson', address 'PO BOX 15, BRISBANE, QLD', and postcode '4000'. The tenant information includes full name 'Bruce Wayne'.

6. Helpful Hints

6.1. REI Templates

6.1.1. User Template

With REI in the Templates section a custom template can be created from the standard template and pre-populated with your own custom settings.

This template can then be used to create a letter in Office Manager.

6.1.2. Template from Form

With REI in the Forms section a form can be turned into a custom template by using the "Template" option.

The template can then be modified in the REI Templates section and, as above, pre-populated with your own custom settings.

The custom templates are available to all users in REI for the Agency