# Forms Live User Guide

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## How do I link my Forms Live Account?

1. Open Staff Card
2. Click on Connections Tab
3. Select REI Forms Live from the Connection drop down
4. Enter Forms Live Username and Password
   *(Note: each Agentbox user needs to have their own Forms Live account)*
5. Click Login
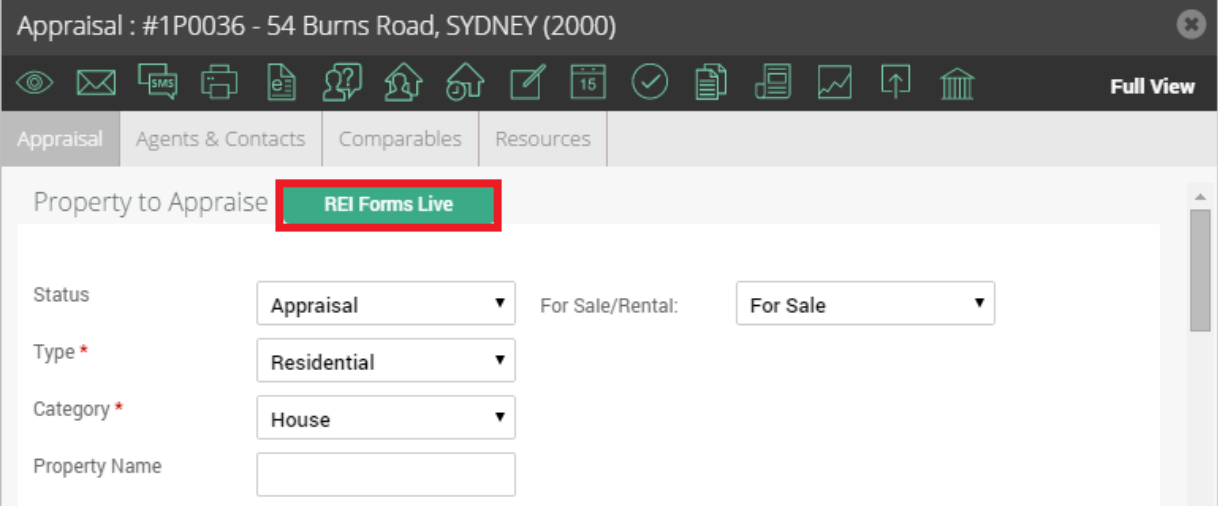
# How do I create a new form?

1. Open Appraisal or Listing
2. Click on green REI Forms Live button
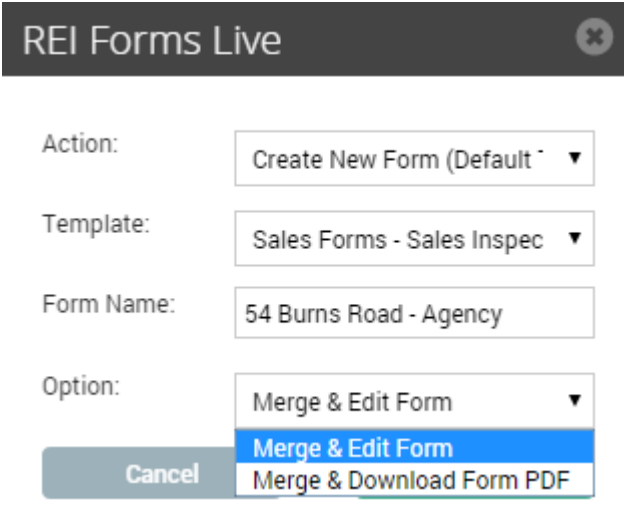


3. ACTION: Select from the dropdown
   a. Create New Form (Default Template) – Standard REI forms
   b. Create New Form (Custom Template) – Your custom REI forms
4. TEMPLATE: Select the required template from the Template dropdown
5. FORM NAME: Enter a name to save the form you are creating.
6. OPTION: Select to Merge & Edit form or to Download form to PDF



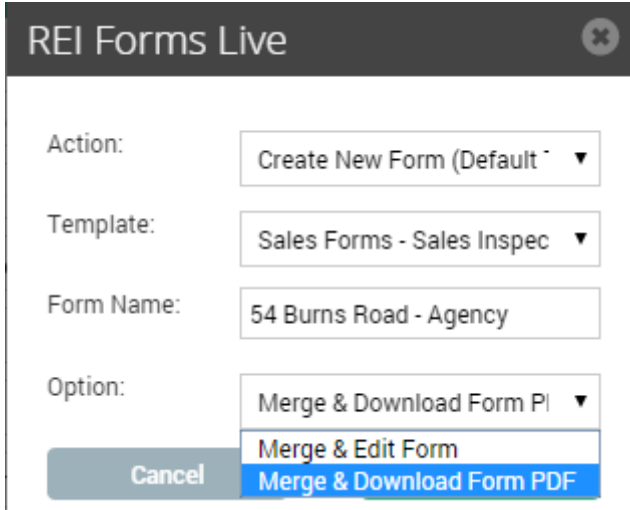If you select to Merge & Edit in the Option drop down you will be taken to REI Forms Live to make additions and changes to the form.
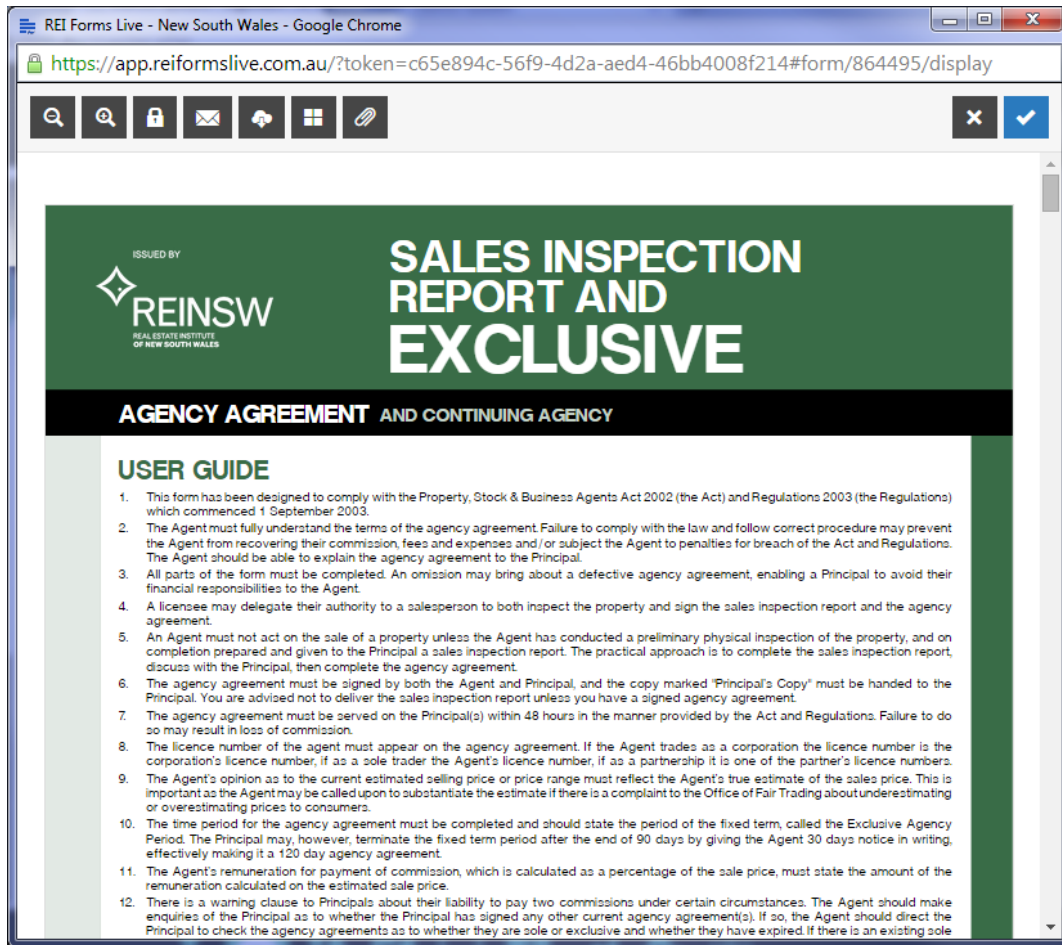
a. If you select Download Form to PDF it will automatically download a copy of the form which you will not be able to edit.

# How do I open/edit an existing form?
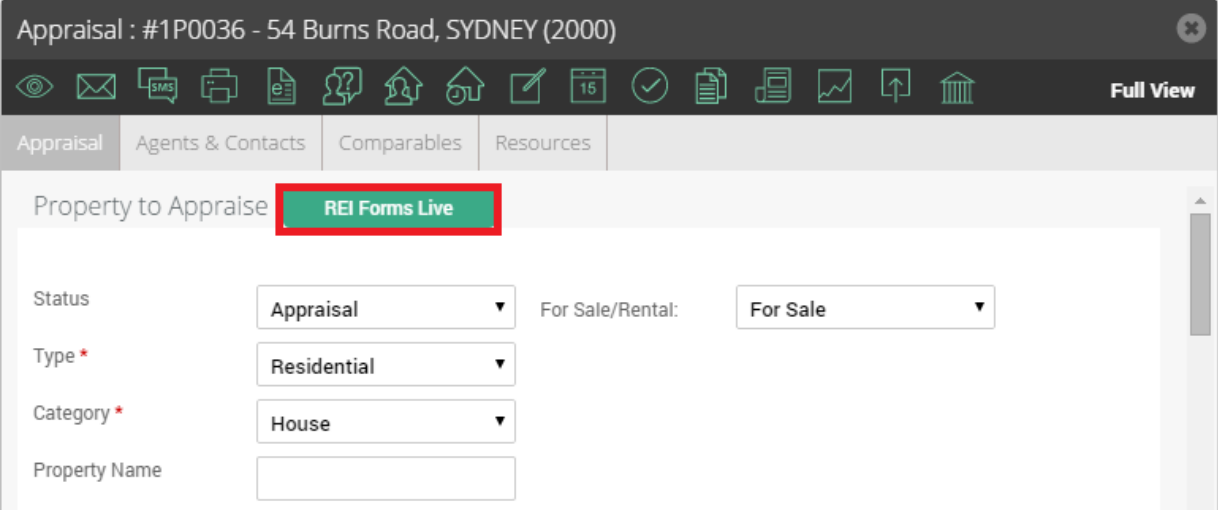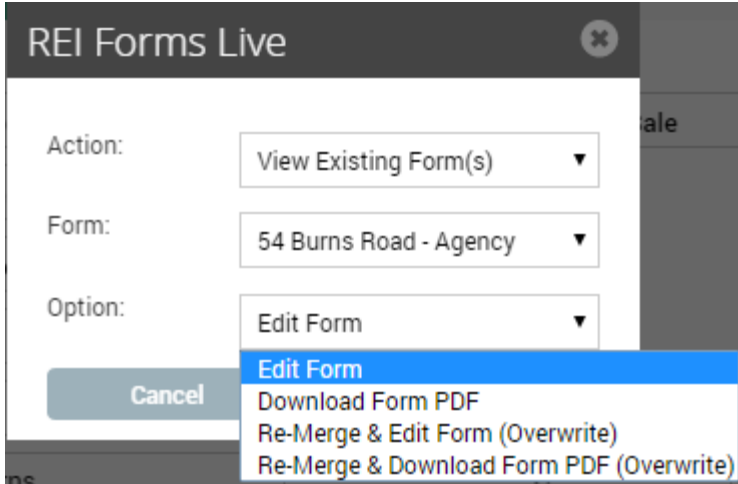
1. Open Appraisal or Listing
2. Click on green REI Forms Live button



3. ACTION: Select View Existing Form(s) from the Action dropdown
4. FORM: Select the saved form you would like to open
5. OPTION:
   a. EDIT FORM – Opens previously saved form in REI Forms Live so you can make additional edits
   b. DOWNLOAD FORM PDF – Download a copy of the previously created form direct to PDF (edits cannot be made)
   c. RE-MERGE AND EDIT FORM (OVERWRITE) – Will completely overwrite existing form and will re-merge all property and related contact information into REI Forms Live for you to make additional edits. *Note: this will not overwrite any fields which doesn't have an equivalent field in Agentbox*
   d. RE-MERGE AND DOWNLOAD FORM PDF (OVERWRITE) – Will completely overwrite existing form fields and will re-merge all property and related contact information and download direct to a PDF (edits cannot be made). *Note: this will not overwrite any fields which doesn't have an equivalent field in Agentbox*



**Note:** If your form has already been 'finalised', you will be unable to 'edit' the form. Instead, you will be provided with an option to 'clone' the finalised form and make your required changes.