



Office Manager

REI Forms \ Real Works Integration

09/10/2015



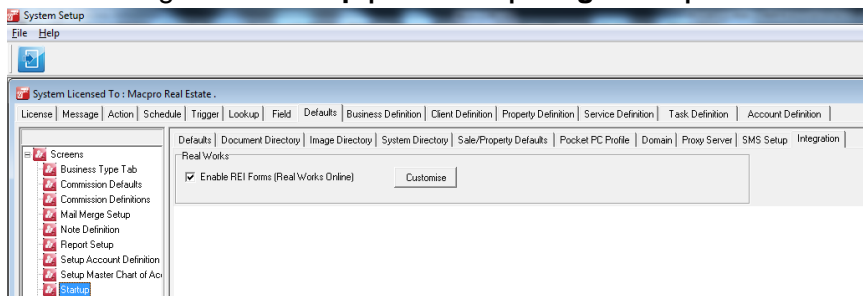
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1. Enable and Configure REI and Real Works Forms

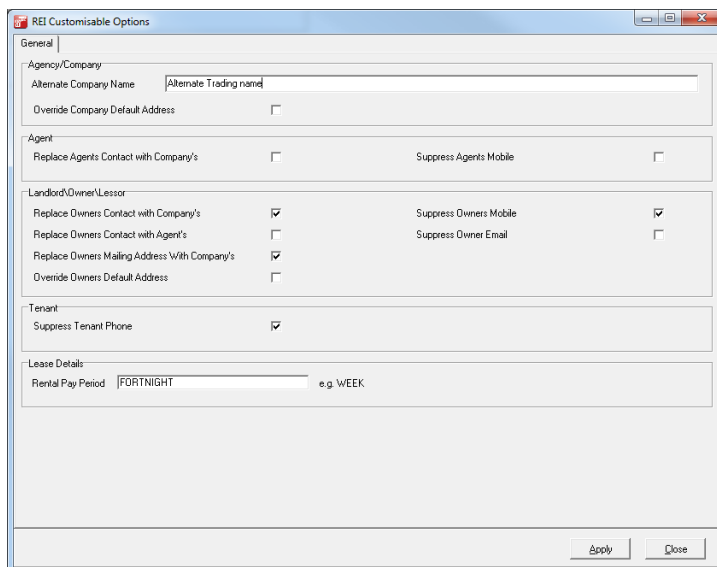
1.1. System Setup

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



1.2. Custom Settings

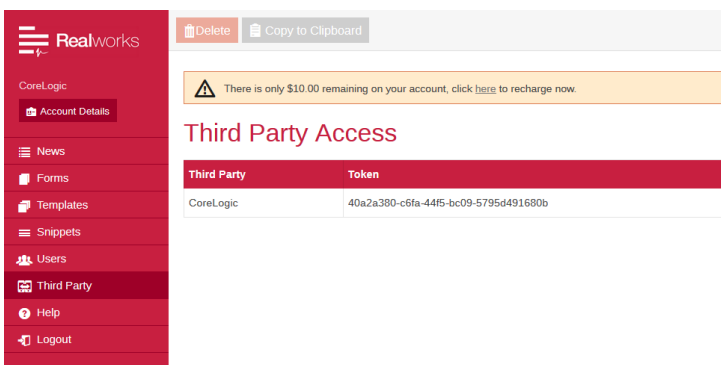
- Customisable settings are available to control the data being populated on a Form.



2. Setup User for REI Forms

2.1. Obtain the Third Party User Token

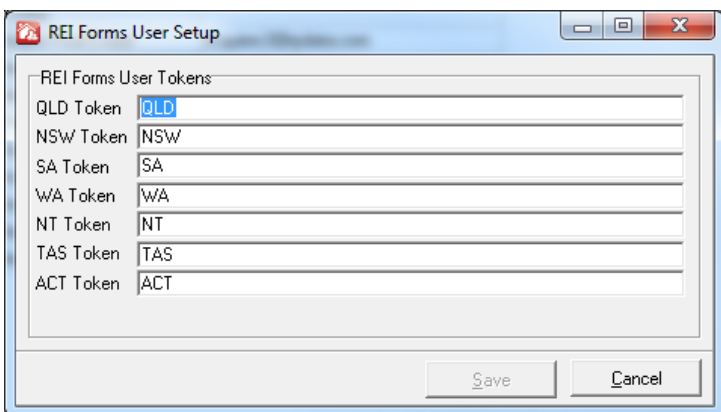
- Login to REI / Real Works for the appropriate state and setup a User Token in the Third Party section
- Example of REIQ setup below:



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

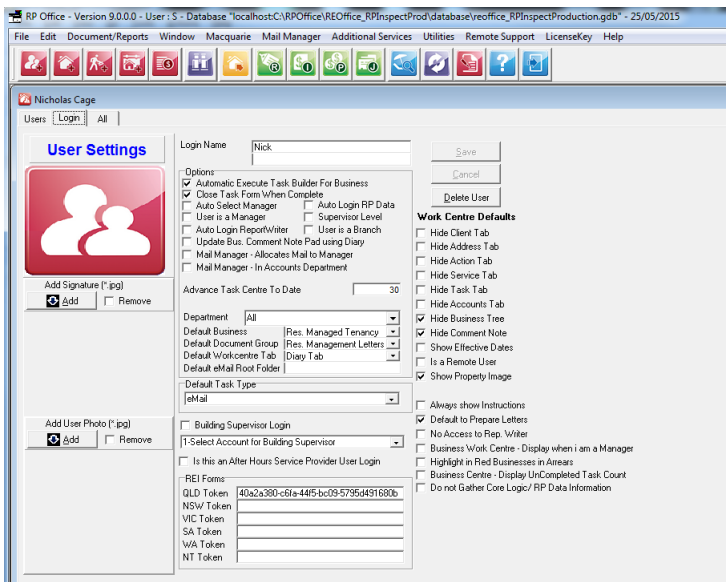


2.2.2. Option 2 (Older versions of V9)

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

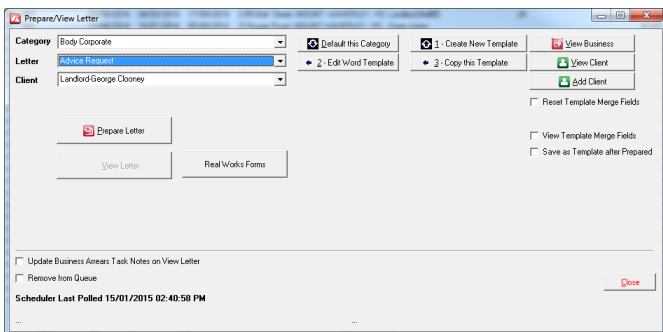
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- Select the appropriate user on the “All” tab
- Enter the users 3rd Party REI Form tokens for the appropriate states on the “Login” Tab



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

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- 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

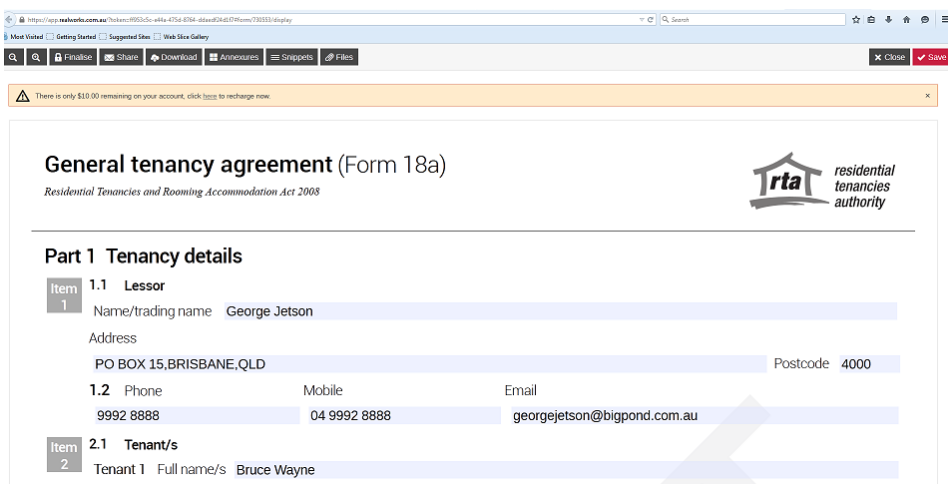
4.1.2. Favourite Templates

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.

The screenshot shows the 'Create REI Form' window. At the top, there are radio buttons for selecting a state: VIC, SA, WA, QLD, NSW, and NT. A 'Load Templates' button is also present. Below this is a search bar. The main area is a table with columns: Category, Code, Name, ID, Template, User, and Created. A right-click context menu is open over the row for 'Notice To Remedy Breach' (Code: RTA11, ID: 642). The menu options are 'Add To Favourites', 'Remove From Favourites', and 'Clear Favourites'. The table lists various templates such as 'Abandonment Termination Notice', 'Acknowledgement of Multiple Offer', 'Acknowledgement of Special Conditions', 'Agent Referral', 'Agreement to Lease', 'Agreement to Terminate Fixed Term Tenancy', 'Annual Estimate of Outgoings Year Ending - Form 2.1', 'Application for Residential Tenancy', 'Appointment and Reappointment of a property agent, residential', 'Assignee Disclosure Statement', 'Assignor Disclosure Statement', 'Authority for REIQ Lots in a Community Titles Scheme Cont...', 'Award Flexibility Agreement - Real Estate Industry Award 2...', 'Bidder Registration Form', 'Bidders Guide', 'Bond Lodgement', 'Business Information Statement', 'Change of Lessor or Lessor's Agents', 'Change of Shared Bond Arrangement', 'Checklist - Processing Tenancy Application', 'Checklist - Tenancy Commencement for Tenant', 'Checklist - Vacating Tenant', 'Clients Acknowledgement of Appointment - Rentals', 'Clients Acknowledgement of Appointment - Sales', 'Commercial Tenancy Agreement', 'Communication Record', 'Comparative Market Analysis', 'Conditions of Bookings', 'Conditions of Sale Public Auction', 'Conjunction Confirmation by Fax or Email', 'Conjunctional/ Preletal Agreement', and 'Consent to receive electronic communication - Buyer'.

Category	Code	Name	ID	Template	User	Created
User Template	EF014	EF014 Master	837476	Form 18a General Tenancy A...	Franz Stocker	30/04/2015
Residential Tenancy Authority	RTA11	Notice To Remedy Breach	642			
Residential Tenancy Authority	RTA15	Abandonment Termination Notice	536			
Property Sales	EF006	Acknowledgement of Multiple Offer	525			
Property Sales	EF022B	Acknowledgement of Special Cor	542			
Property Sales	EF022V	Acknowledgement of Special Cor	524			
Property Sales	EF058	Agent Referral	659			
Commercial & Industrial	EF026	Agreement to Lease	670			
Property Management	EF018	Agreement to Terminate Fixed Term Tenancy	525			
Commercial & Industrial	EF052	Annual Estimate of Outgoings Year Ending - Form 2.1	542			
Property Management	EF015	Application for Residential Tenancy	524			
Property Occupations Act	PO Form 6	Appointment and Reappointment of a property agent, resid..	659			
Commercial & Industrial	EF064	Assignee Disclosure Statement	670			
Commercial & Industrial	EF065	Assignor Disclosure Statement	671			
Property Sales	EF013	Authority for REIQ Lots in a Community Titles Scheme Cont...	530			
Agency - Employment	EF050	Award Flexibility Agreement - Real Estate Industry Award 2...	563			
Auction Forms	EF104	Bidder Registration Form	582			
Auction Forms	EF140	Bidders Guide	625			
Residential Tenancy Authority	RTA02	Bond Lodgement	647			
Business Brokers	EF034	Business Information Statement	561			
Residential Tenancy Authority	RTA05	Change of Lessor or Lessor's Agents	654			
Residential Tenancy Authority	RTA06	Change of Shared Bond Arrangement	650			
Property Management	EF094	Checklist - Processing Tenancy Application	600			
Property Management	EF113	Checklist - Tenancy Commencement for Tenant	571			
Property Management	EF117	Checklist - Vacating Tenant	603			
Property Management	EF139R	Clients Acknowledgement of Appointment - Rentals	638			
Property Sales	EF133S	Clients Acknowledgement of Appointment - Sales	627			
Commercial & Industrial	EF024	Commercial Tenancy Agreement	513			
Property Management	EF127	Communication Record	626			
Property Sales	EF057	Comparative Market Analysis	546			
Management Rights	EF054	Conditions of Bookings	562			
Auction Forms	EF073	Conditions of Sale Public Auction	580			
General Forms	EF072	Conjunction Confirmation by Fax or Email	579			
General Forms	EF032	Conjunctional/ Preletal Agreement	553			
Property Sales	EF135B	Consent to receive electronic communication - Buyer	623			

5. Modify the Form Online



General tenancy agreement (Form 18a)
Residential Tenancies and Rooming Accommodation Act 2008

Part 1 Tenancy details

Item 1.1 Lessor

1 Name/trading name George Jetson

Address
PO BOX 15, BRISBANE, QLD Postcode 4000

1.2 Phone 9992 8888 Mobile 04 9992 8888 Email georgejetson@bigpond.com.au

Item 2.1 Tenant/s

2 Tenant 1 Full name/s 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