

Overview

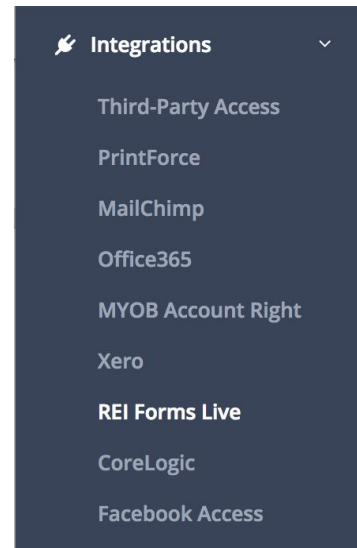
This fact sheet details how to set up and use the REI Forms Live / Realworks integration for VaultRE.

Getting started

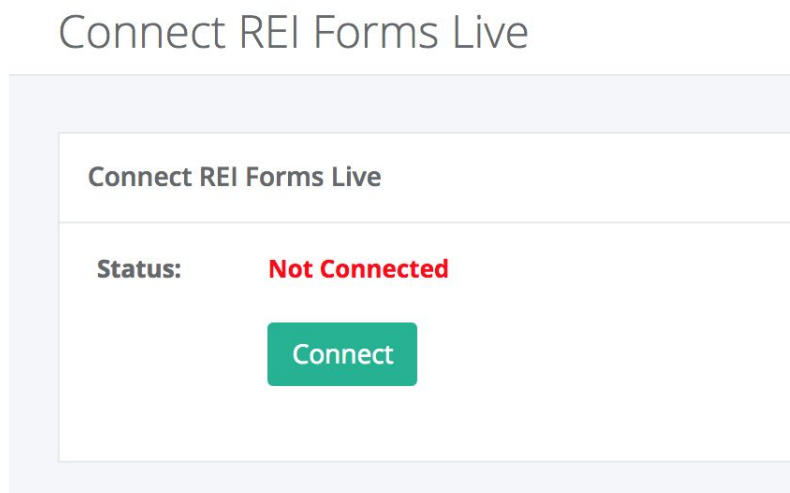
Before you can start creating forms from within VaultRE, you must link up your VaultRE account with your existing REI Forms Live account. This is a “one time only” step.

From within your VaultRE account, access the Integrations menu on the left hand sidebar menu and click on “REI Forms Live” (Realworks for QLD).

If this step has already been completed (i.e. your VaultRE account and REI Forms Live account are already linked) you can go straight to [creating a form](#).

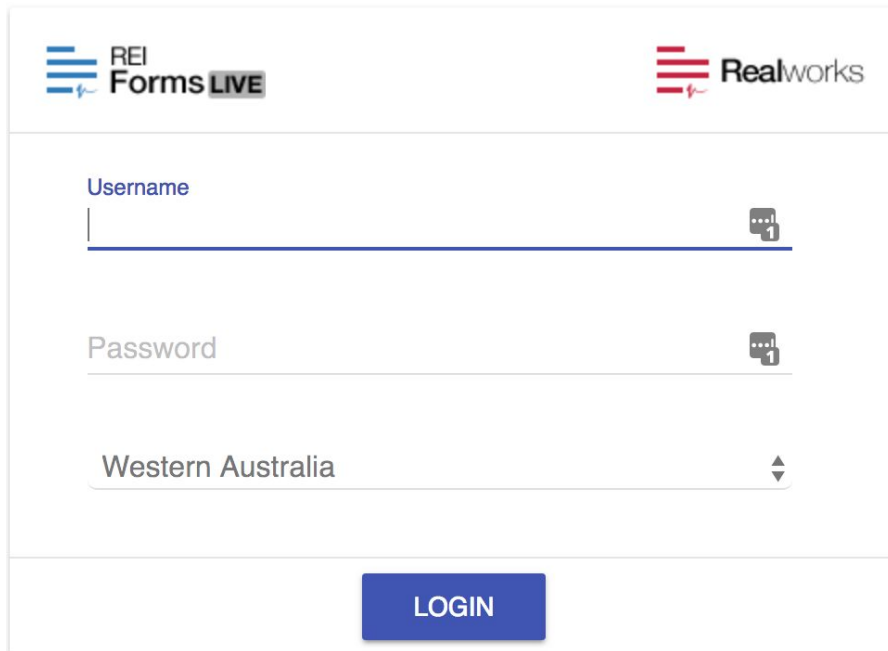


On the following screen, click “Connect”. You will be taken to a secure REI Forms Live login page:



Enter your REI Forms Live credentials on this screen.

Note that your REI Forms Live credentials are never seen or stored by VaultRE.



REI Forms LIVE Realworks

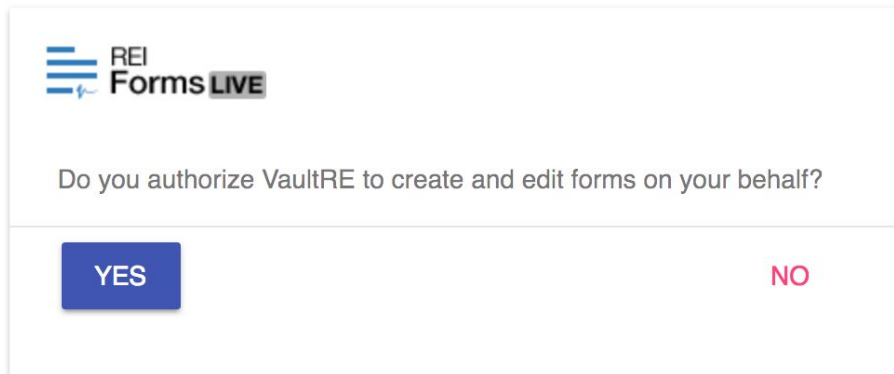
Username

Password

Western Australia

LOGIN

After you successfully authenticate with REI Forms Live, you'll be asked if you wish to grant access to VaultRE:



REI Forms LIVE

Do you authorize VaultRE to create and edit forms on your behalf?

YES NO

Click “Yes” and you will be redirected back to VaultRE:

If the connection was successful, you should see a result like the below screen:

Connect REI Forms Live

Status: **Connected**
Logged in as: **Demo Estate Agency**
Webhooks: **Active**

[Go To REI Forms Live](#) [Disconnect](#)

Your VaultRE and REI Forms Live accounts are now linked, allowing you to create forms directly from VaultRE. This connection will remain until manually disconnected on either the VaultRE or REI Forms Live side.

If desired, you can click “Go To REI Forms Live” to be seamlessly logged in to REI Forms Live from VaultRE.

How do I create a form?

From a property in VaultRE, you can access the REI Forms Live section by either:

- Clicking the “Other” menu on the property tab

The screenshot shows the VaultRE property management interface. At the top, it says 'Property' and 'Home / 2/18 Impressa Way HALLS HEAD WA'. Below this is a navigation bar with tabs: 'Property', 'Owners', 'Purchasers', 'Financials', 'Print Lab', and 'Activity'. A dropdown menu is open for 'Property', showing options: 'General', 'Features', 'Tags', 'Photos', 'Open Homes', 'Map', 'Categories', 'Buyer Match', 'Owner Feedback', 'Attach Files', 'Notes', and 'Other'. The 'Other' menu is expanded, showing 'REI Forms Live', 'Printforce', and 'CoreLogic'. Below the navigation bar, there is a 'Status' dropdown menu set to 'Listing', and buttons for 'Conditional', 'Share with Leasing Team', and 'Withdrawn'.

Or

- Clicking the “REI Forms Live” shortcut on the Financials tab.

Sale Details (2/18 Impressa Way HALLS HEAD WA)

Property
Owners
Purchasers
Financials
Print Lab
Activity

General
Advertising
Solicitors
Letters
Offer Conditions
Agent Allocation
Trust Ledger
Bank Details

Overview

Authority Start	13 Jun 2018	Authority End	02 Aug 2018
Conditional	Undefined	Unconditional	Undefined
Settlement	Undefined	Sale Price	Undefined

Shortcuts

Receipt Monies
Disburse Monies
REI Forms Live
Payout Wizard
Payout Commission
Payout Letter

The REI Forms Live page in VaultRE shows you all the previous forms created for this sale or lease deal, and allows you to create a new form.

General
Features
Tags
Photos
Open Homes
Map
Categories
Buyer Match
Owner Feedback
Attach Files
Notes
Other ▾

Existing Forms

Note: only forms created via VaultRE appear here.

Create New Form

Clear

To create a new form, start typing the name of a template in the search box:

Create New Form

Selli

Clear

- Selling Agency Agreement Non-Exclusive Agency (\$0.55)
- Selling Agency Agreement Off-the-Plan (\$0.50)
- Selling Agency Agreement Commercial and Industrial: Exclusive Agency (\$1.16)
- Selling Agency Agreement Non-Exclusive Agency (\$0.55)
- Selling Agency Agreement Vacant Land: Non Exclusive - Vacant Land (\$0.46)

Select the template you wish to use.

(Note that your own defined “User Templates” in REI Forms Live appear in this search as well).

Once you’ve selected your template, VaultRE will ask you to define a name for the form (pre-populated with the property address)

Create New Form

Template: Selling Agency Agreement Non-Exclusive Agency

Form Name: 2/18 Impressa Way Halls Head

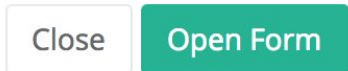
Create Form Cancel

Click “Create Form” to merge your VaultRE data across to the form:



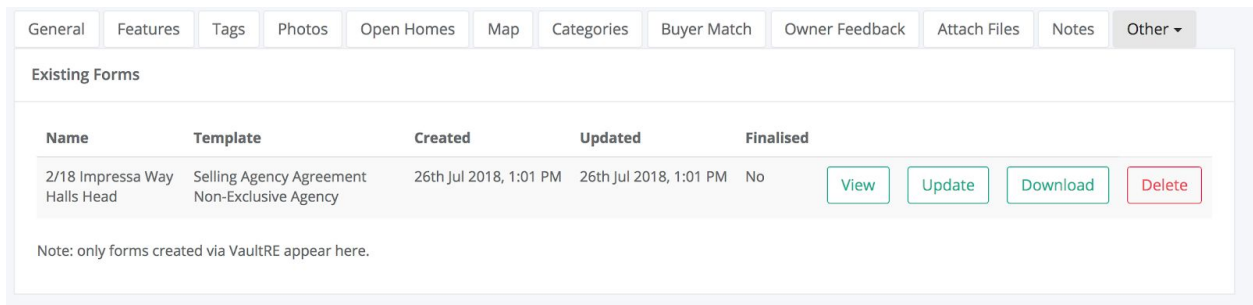
Creating form... Done (ID:11578)

Populating form fields... Done



From here you can click “Open Form” to immediately access the form in REI Forms Live, or click “Close” to continue.

The form now appears in VaultRE:



You now have the ability to View, Update, Download or Delete the form from within VaultRE.

Clicking “View” takes us directly to the form in REI Forms Live:

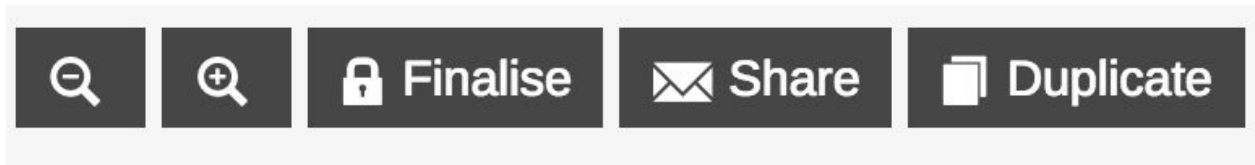
selling agency agreement non-exclusive agency

An agreement between the Agent and the Seller ("**the Agreement**")

Seller's Name

And we can now edit the form (filling in any fields that weren't able to merge across).

Once you've completed the form you can click “Finalise” within REI Forms Live:



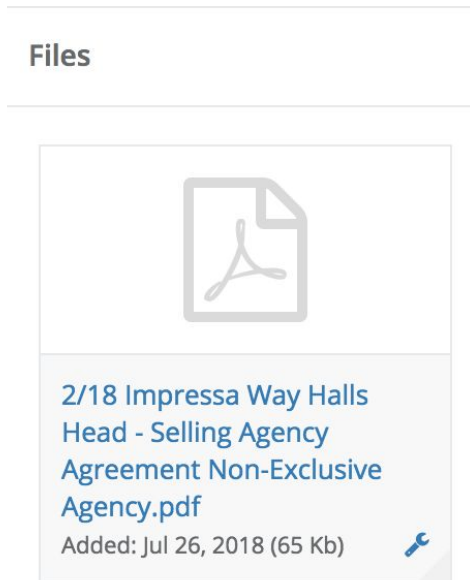
Finalising the form will automatically update the corresponding record in VaultRE as “Finalised”

Existing Forms

Name	Template	Created	Updated	Finalised	
2/18 Impressa Way Halls Head	Selling Agency Agreement Non-Exclusive Agency	26th Jul 2018, 1:01 PM	26th Jul 2018, 1:08 PM	Yes	View Finalise Download Delete

Note: only forms created via VaultRE appear here.

Additionally, finalising the form downloads a PDF copy and saves it automatically to your “Filing Cabinet” on the sale/lease record in VaultRE (under the Financials tab) - allowing you to share/send to vendors/solicitors as needed.



I need further help

If you need any further assistance connecting to REI Forms Live or creating a form, please contact us via “Support Request” in the sidebar in VaultRE

[? Support Request](#)

If you created a form and a field didn't merge across that should have, please let us know so we can update the integration.