



# Realworks / REI Forms Live Setup Guide

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Console GatewayLive now integrates with **Realworks** (in QLD) / **REI Forms Live** (in all supported states), allowing users the ability to create and pre-populate online forms with information stored in the Owner, Tenant, Rental/Sale Property and Inspection files.

The Real Estate Institutes in the following states are now supported:

- Queensland (Realworks)
- New South Wales
- Western Australia
- South Australia
- Northern Territory
- Tasmania

In order to use this feature, you must have an internet connection and an existing account with the relevant REI authority in your state. Queensland customers will require an existing account with Realworks.

**NOTE:** This feature uses a 3rd party application that is not compatible with Windows XP and Server 2003. To be able to use this feature you must be using Windows Vista or a more recent operating system.

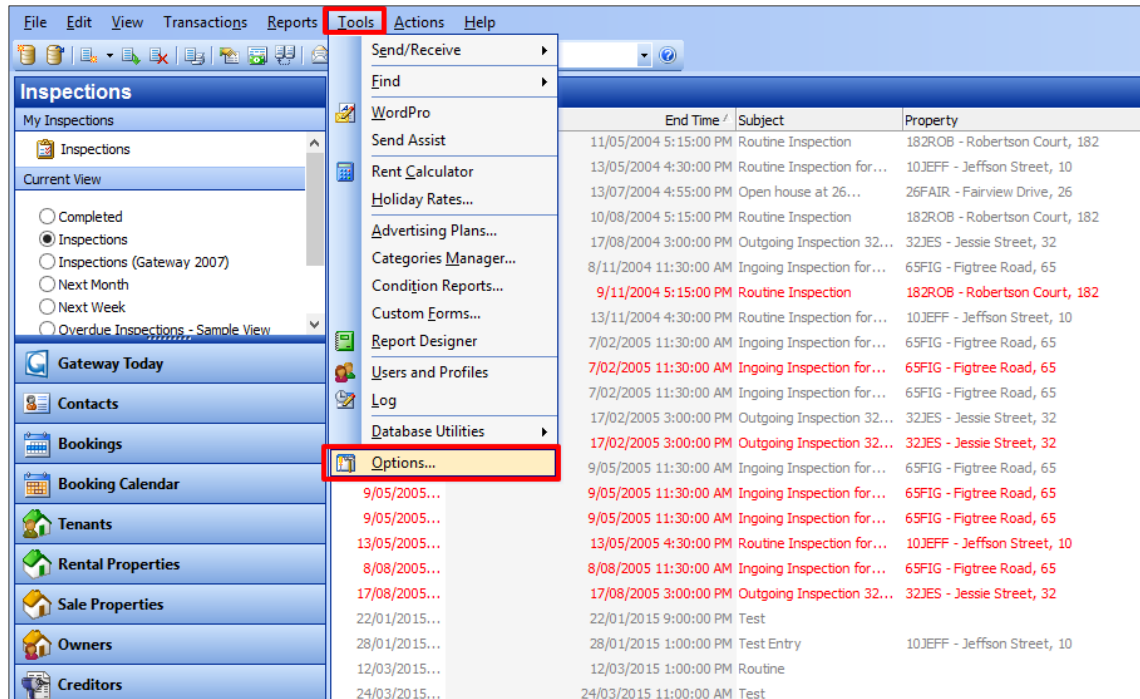
Please contact your local REI or go to <https://www.reiformslive.com.au/> to register for a REI Forms Live account if you do not already have one. QLD customers can go to <http://www.realworks.com.au/> to register for a Realworks account.

# Configuration

The following steps must be carried out on each workstation that has GatewayLive installed.

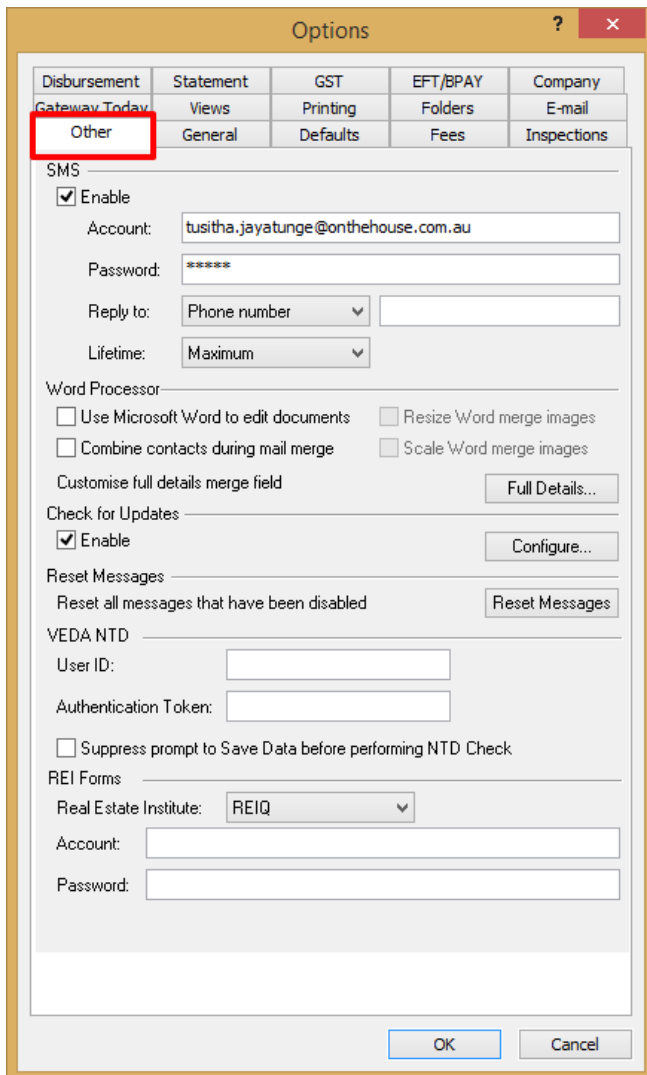
**NOTE:** To configure Realworks / REI Forms Live, you must be logged in as a user with access to the Tools, Options menu.

1. Select **Tools** from the main menu and then **Options**.



If Options is greyed out and not available, try logging in with a user account that has higher privileges in GatewayLive.

2. Select the **Other** tab from within the Options screen.



The screenshot shows the 'Options' dialog box with the 'Other' tab selected. The dialog has a title bar with a question mark and a close button. Below the title bar is a tabbed interface with the following tabs: Disbursement, Statement, GST, EFT/BPAY, Company, Gateway Today, Views, Printing, Folders, E-mail, **Other** (highlighted with a red box), General, Defaults, Fees, and Inspections. The 'Other' tab contains the following sections:

- SMS**:
  - Enable
  - Account: tusitha.jayatunge@onthehouse.com.au
  - Password: \*\*\*\*\*
  - Reply to: Phone number (dropdown) [ ]
  - Lifetime: Maximum (dropdown)
- Word Processor**:
  - Use Microsoft Word to edit documents
  - Combine contacts during mail merge
  - Resize Word merge images
  - Scale Word merge images
  - Customise full details merge field [ Full Details... ]
- Check for Updates**:
  - Enable [ Configure... ]
- Reset Messages**:
  - Reset all messages that have been disabled [ Reset Messages ]
- VEDA NTD**:
  - User ID: [ ]
  - Authentication Token: [ ]
  - Suppress prompt to Save Data before performing NTD Check
- REI Forms**:
  - Real Estate Institute: REIQ (dropdown)
  - Account: [ ]
  - Password: [ ]

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

3. In the **REI Forms** section, select your local Real Estate Institute from the drop down and enter your **Account** login and **Password**.

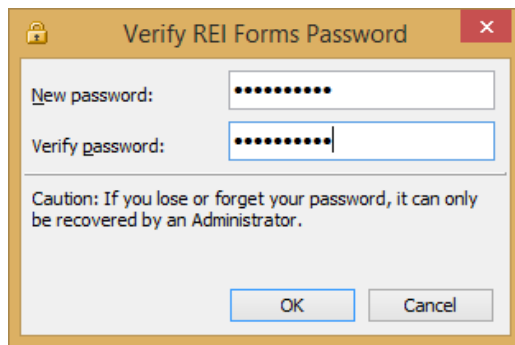


This is a close-up of the 'REI Forms' section from the previous screenshot. It shows:

- REI Forms** section header.
- Real Estate Institute: REIQ (dropdown menu, highlighted with a red box)
- Account: tusitha.jayatunge@onthehouse.com.au
- Password: \*\*\*\*\*

- Note for **Realworks** users: Select **REIQ** from the list above
  - Note for **REIWA Forms** users: Enter your **REIWA** login credentials
4. Click **OK** at the bottom of the form to save the details.

- You will be asked to verify your password. Enter it again and click **OK** to save.



Verify REI Forms Password

New password: [password field]

Verify password: [password field]

Caution: If you lose or forget your password, it can only be recovered by an Administrator.

OK Cancel

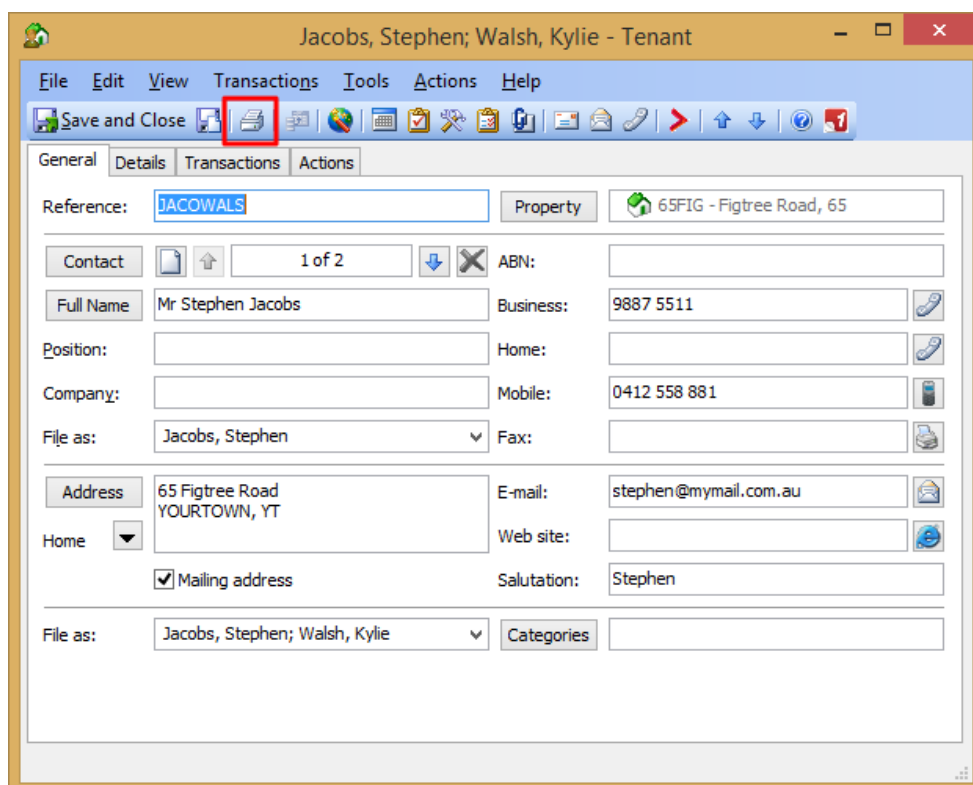
## Printing Forms

Realworks / REI Forms Live forms can now be printed from the following areas in GatewayLive:

- Owner files
- Tenant files
- Property files (Rental & Sales)
- Inspection files

### To Print:

- Open an Owner, Tenant, Property or Inspection file
- Click the **Print** button on the toolbar or select **Print** from the **File** menu



Jacobs, Stephen; Walsh, Kylie - Tenant

File Edit View Transactions Tools Actions Help

Save and Close [Print icon] [Other icons]

General Details Transactions Actions

Reference: JACOWALS Property 65FIG - Figtree Road, 65

Contact 1 of 2 ABN: [field]

Full Name: Mr Stephen Jacobs Business: 9887 5511

Position: [field] Home: [field]

Company: [field] Mobile: 0412 558 881

File as: Jacobs, Stephen Fax: [field]

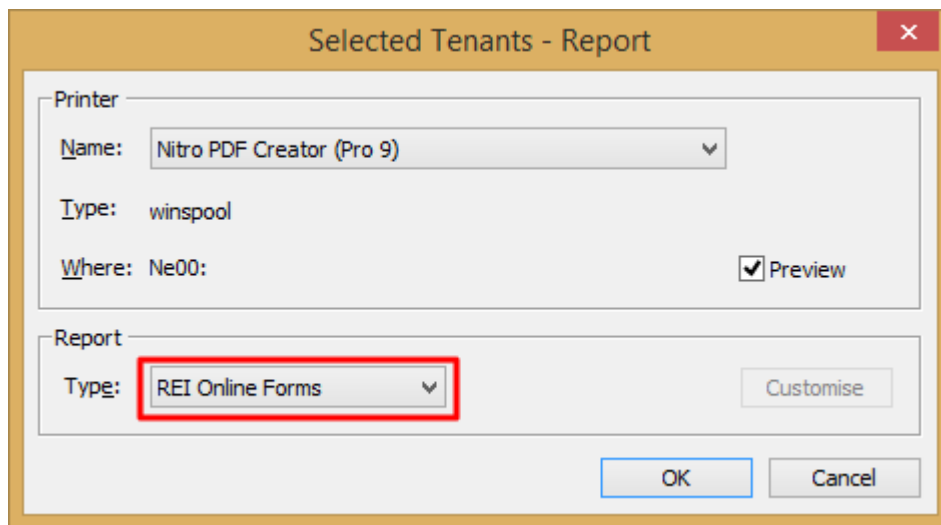
Address: 65 Figtree Road YOURTOWN, YT E-mail: stephen@mymail.com.au

Home [dropdown] Web site: [field]

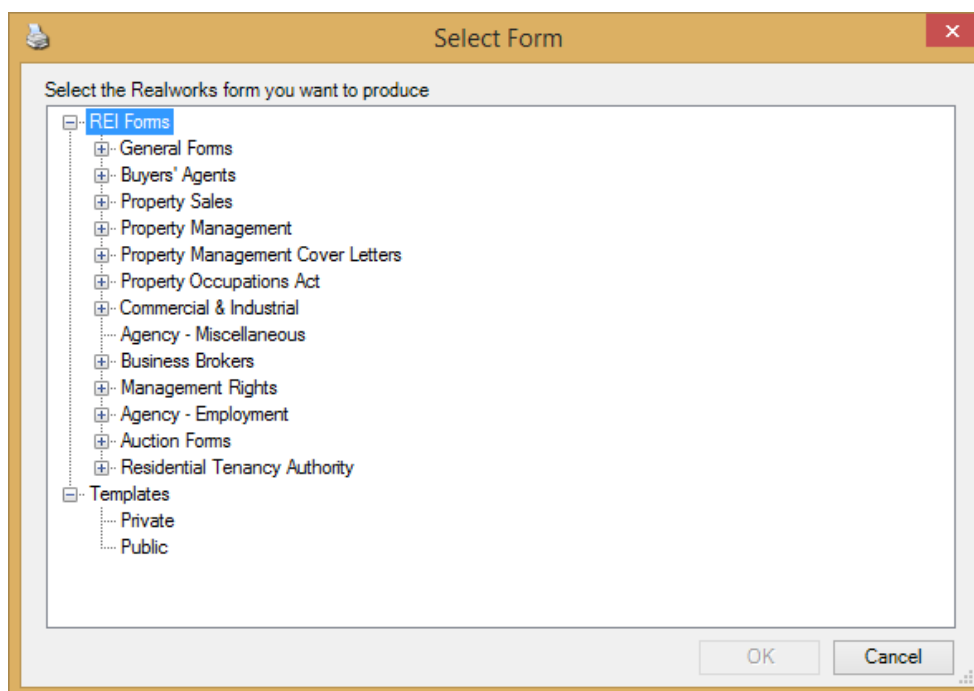
Mailing address Salutation: Stephen

File as: Jacobs, Stephen; Walsh, Kylie Categories: [field]

- When the Print dialog appears, select **REI Online Forms** from the drop down and press OK



- A new window will appear prompting you to select a form from a list of all available REI Forms. The forms are the same as those available to you when you login to the Realworks / REI Forms Live website.

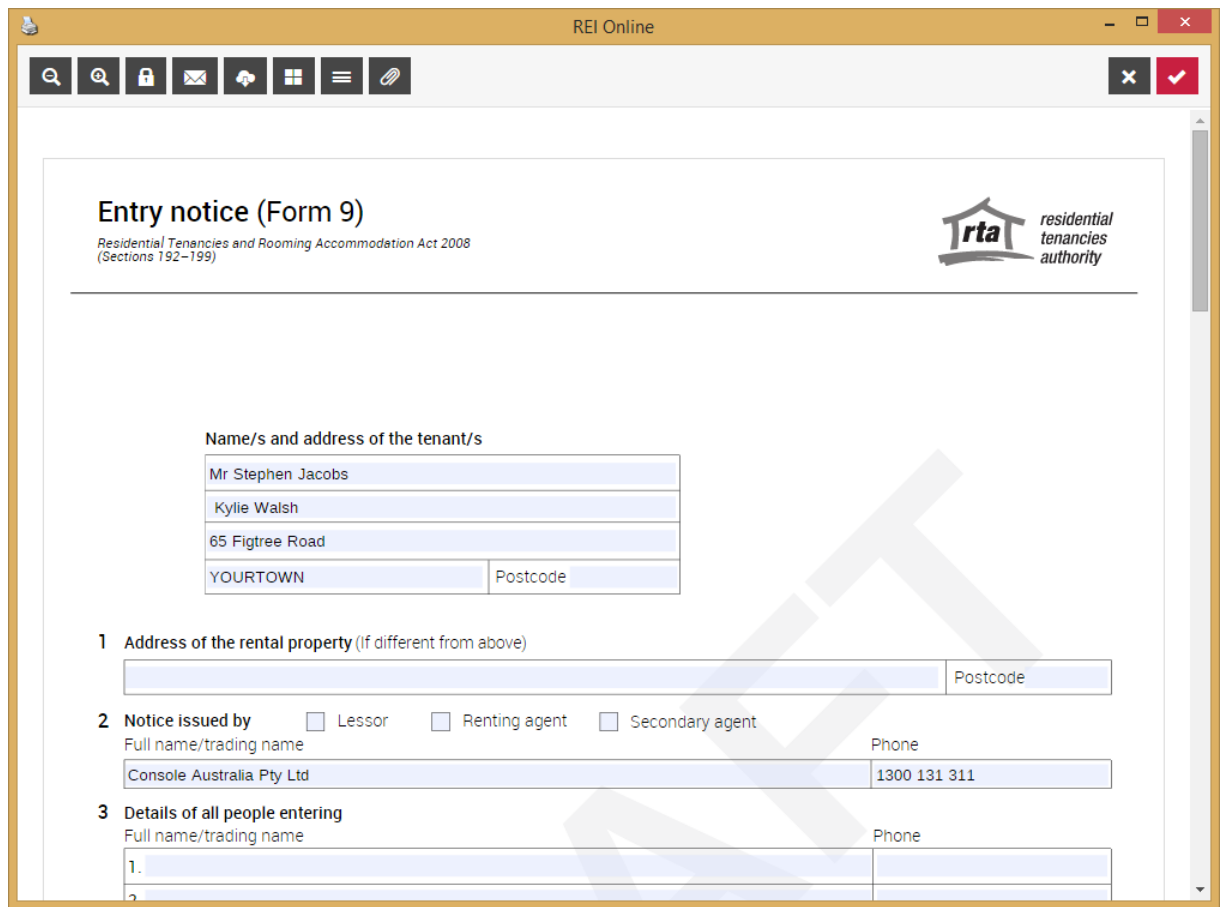


You can also select Templates at the bottom of the list that are available only to you (Private) or everyone in your agency (Public).

**NOTE:** If this window does not appear, please double-check your configuration (see page 2) and ensure you have selected the correct Real Estate Institute and entered both the account login and password.

Click **OK** after you have selected the form.

- GatewayLive will open a new window similar to the below that will display your form and pre-populate it with information from the file from where it was printed (e.g. the Tenant's full name and address).



**Entry notice (Form 9)**  
Residential Tenancies and Rooming Accommodation Act 2008  
(Sections 192-199)

**Name/s and address of the tenant/s**

Mr Stephen Jacobs	
Kylie Walsh	
65 Figtree Road	
YOURTOWN	Postcode

**1 Address of the rental property (if different from above)**

	Postcode
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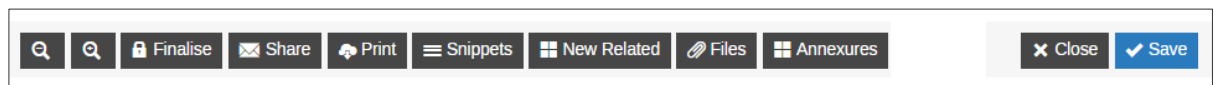
**2 Notice issued by**  Lessor  Renting agent  Secondary agent

Full name/trading name	Phone
Console Australia Pty Ltd	1300 131 311

**3 Details of all people entering**

Full name/trading name	Phone
1.	
2.	

- From here you can fill out the rest of the form, Finalise, Email (Share) or Print it using the familiar icons along the top row:



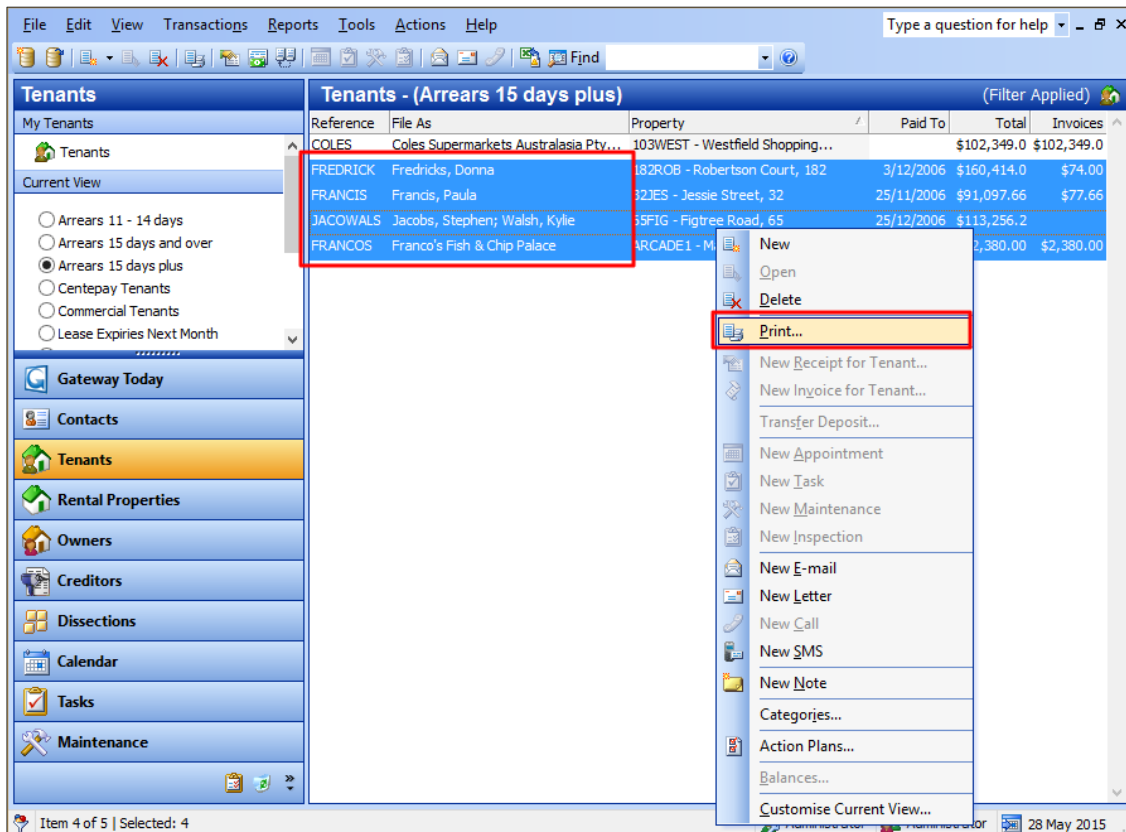
Finalise Share Print Snippets New Related Files Annexures Close Save

# Printing Forms for multiple files

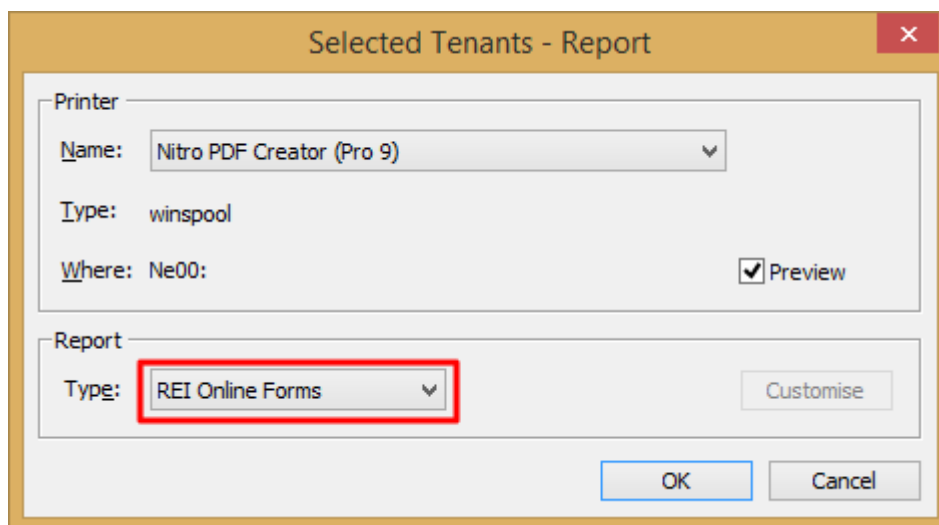
You can also print forms for multiple files from their respective screens in GatewayLive

## Example: Printing an Entry Notice for multiple tenants

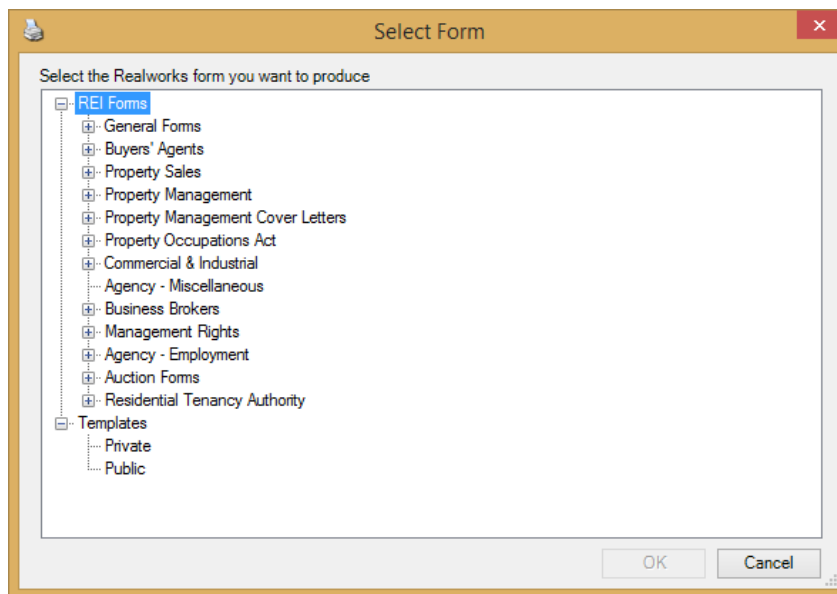
1. From the **Tenants** screen, select multiple files (using the SHIFT or CTRL keys), right-click and select **Print**.



2. When the Print dialog appears, select **REI Online Forms** from the drop down and press OK



3. Select the form you wish to use (e.g. Residential Tenancy Authority -> Entry Notice) and click **OK**.



**NOTE: Creating multiple forms in this manner can take a significant amount of time, especially if you have selected more than 20 files to print, and is highly dependent on the speed of your internet connect. If GatewayLive appears to freeze after clicking OK, please allow several minutes for the forms to be created.**

4. When the form is displayed, you will see it appear with **Tabs** (like in a Web browser) at the top that you can use to switch between the forms for each tenant:

