

# INTERIM SOLUTION INSTRUCTIONS AND FAQs

For member support, please call 8366 4300 (Option 1) or email [reisa@reisa.com](mailto:reisa@reisa.com) during business hours.

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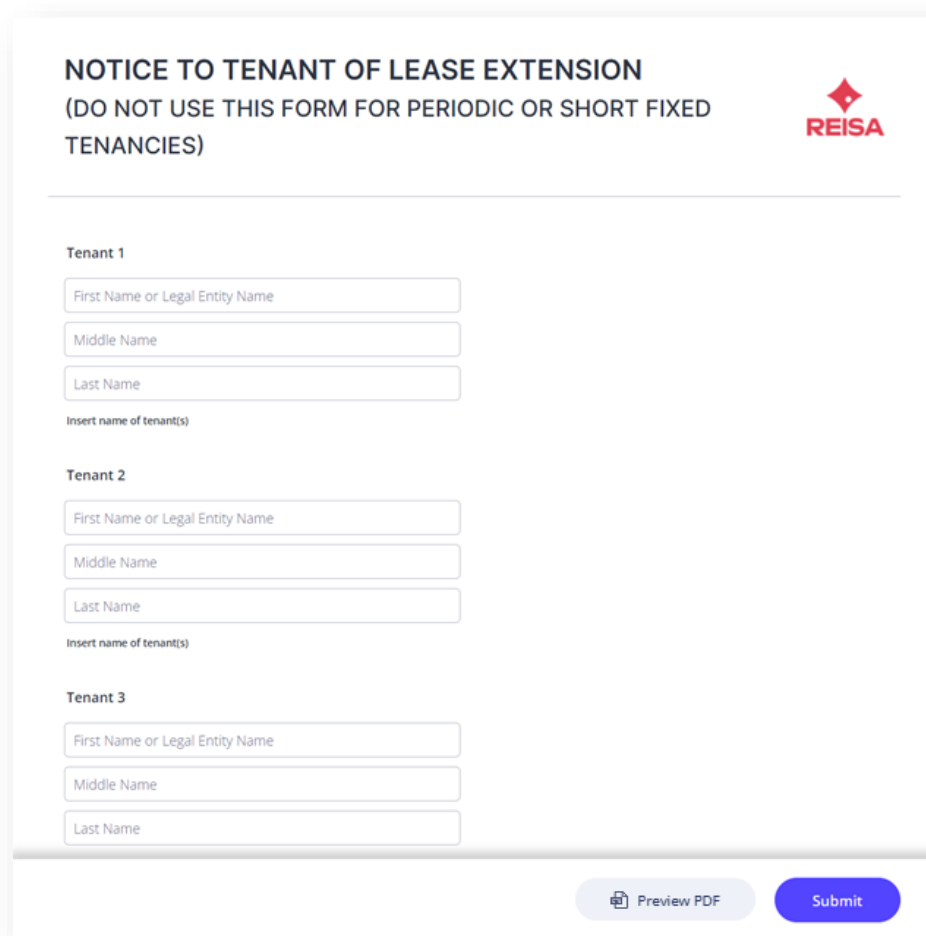
## REISA Forms portal instructions

Access the REISA website at [www.reisa.com.au](http://www.reisa.com.au) and click on REISA Forms on the home page.

### Form creation instructions

#### Creating a form using the webform

- Once a form is selected from the REISA Forms webpage, select the URL you want to use and the webform will open in your browser.



- Input all your data into the form.
- Click on the **Preview PDF** button to preview your entered data in the PDF format before submitting it.
- Once you have completed the form, select **Submit**. Note, you can select **Submit** and download a copy of the PDF with the information you have already input into the form, but you can't save the in-progress web form and return to it later.

**REISA tip:**

REISA recommends downloading the PDF and editing the form directly for more complex forms where you might need to update the draft multiple times. The webforms are ideal for shorter, less complex forms.

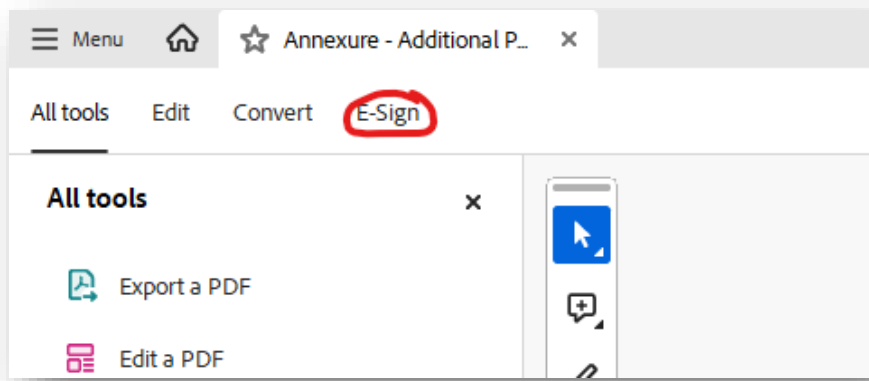
- Once you have selected **Submit** you will be presented with a screen where you can download the PDF.



- Select 'Download PDF' and the PDF will be downloaded to your device. It is now ready for electronic signing (if the *Livesign* logo is present on the front page of the form), or it can be printed for wet signatures.

## Creating a form using the PDF

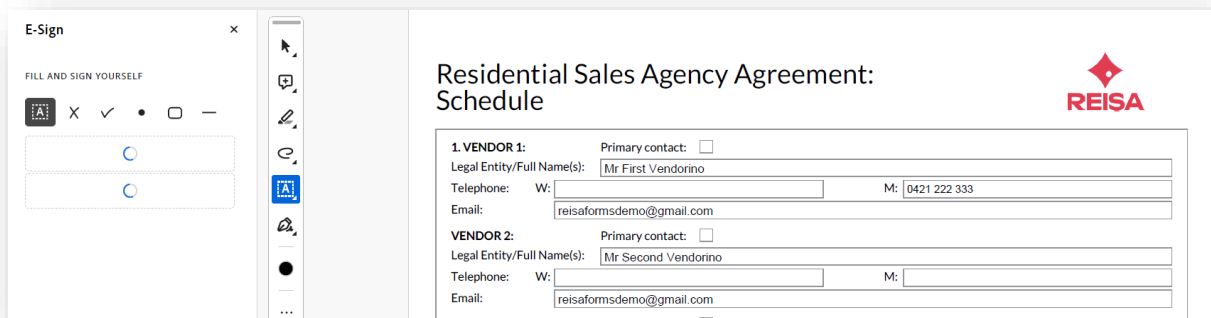
- When you have located the form you want to use, select **Download PDF** option.
- The PDF will be downloaded to your device.
- Locate the PDF on your device and open it with Adobe Acrobat Reader.
- Once the file is opened in Adobe Acrobat Reader, select **E-Sign**. This enables a set of tools to fill out the PDF.



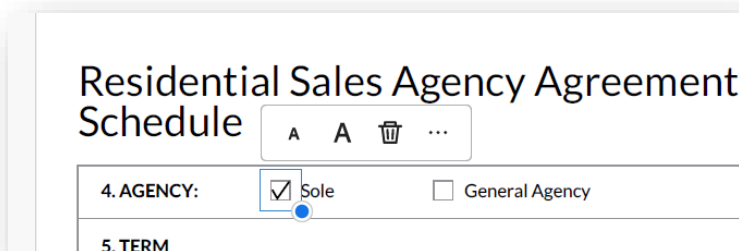
**REISA tip:**  
 Adobe Acrobat Reader is available for free for Windows and Mac. Visit <https://get.adobe.com/uk/reader/>

**Overview of PDF editing tools**

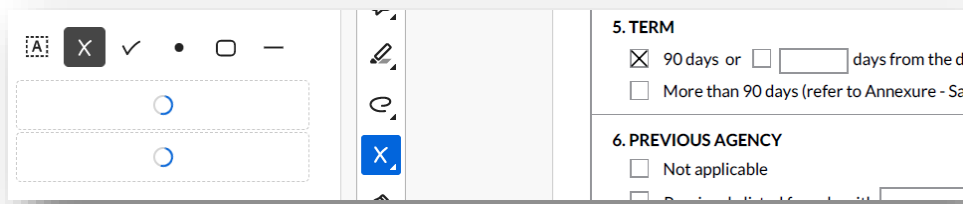
Hovering over a text field enables you to enter text into text fields.



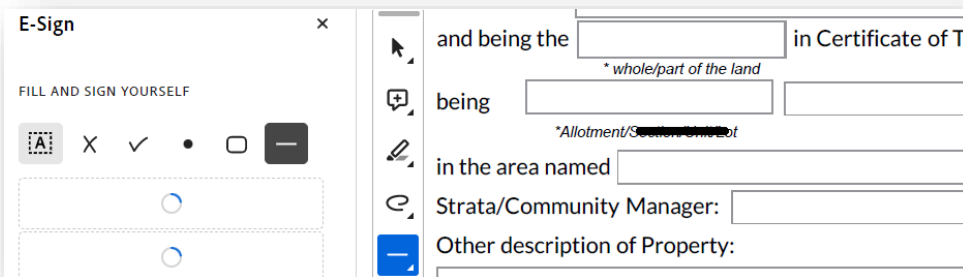
Hovering over a checkbox enables it to be ticked.



You can also put an X in a checkbox if that is preferred, by clicking the X tool.



Items can be crossed out by selecting the horizontal line tool.



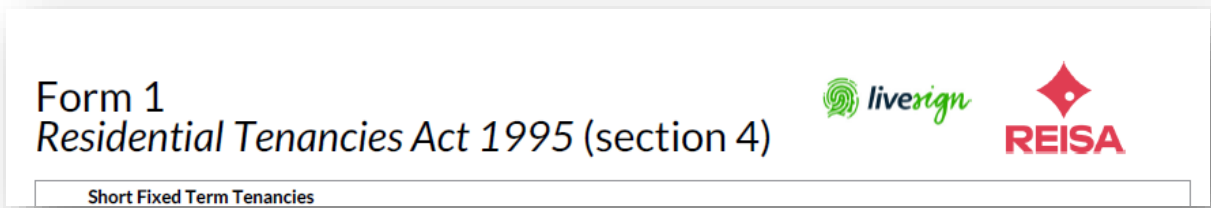
**REISA tip:**

It is important to note that if you plan to use Livesign for electronic signing, you **must not** enter any information into the signing fields when editing the PDF, including the date or vendor name. Livesign will fill out this information for you when you send the document for signing.

Signed by or on behalf of Vendor 1	Date:
Vendor Name	<input type="text"/>
Signed by or on behalf of Vendor 2	Date:
Vendor Name	<input type="text"/>
Signed by or on behalf of Vendor 3	Date:
Vendor Name	<input type="text"/>
Signed by or on behalf of Vendor 4	Date:
Vendor Name	<input type="text"/>
Signed by or on behalf of the Agent	Date:
	<input type="text"/>

Once the PDF is complete and ready to be signed, you can save the updated PDF to your device and proceed to wet signatures or *Livesign* if the form is *Livesign* compatible.

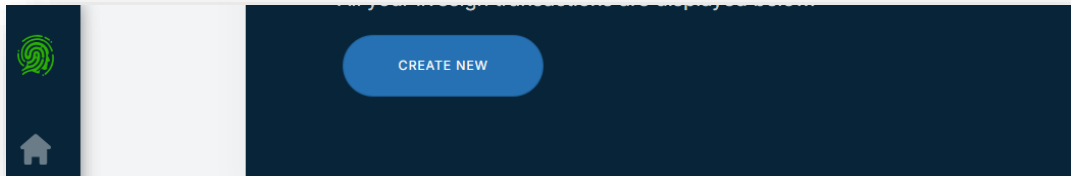
Forms that are *Livesign* compatible will have the *Livesign* logo on the first page of the form:



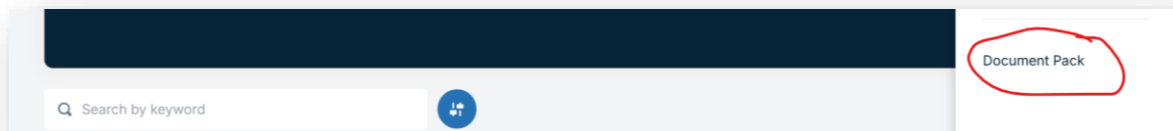
## Livesign instructions

### Start a new document pack

- Log in to *Livesign* and select **Create New**.



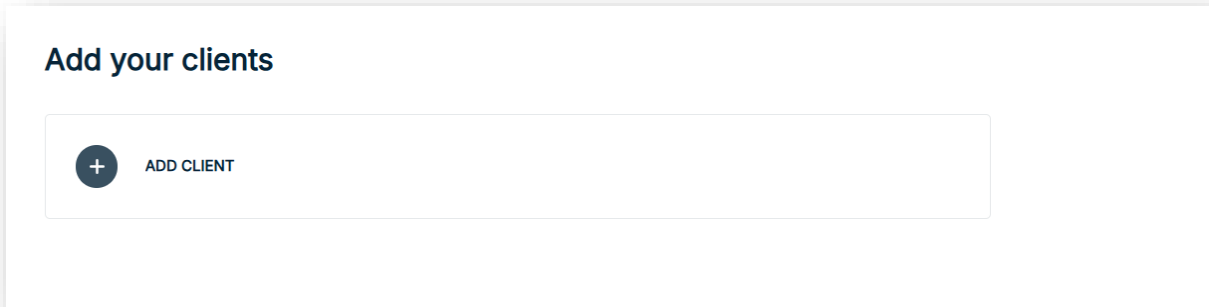
- Then select **Document Pack** from the right-hand menu.



- Enter a document pack title (this is for your reference only) and add a welcome note.

A screenshot of the 'Document Pack' creation form. The form has a dark blue header with 'CREATE NEW' in green and 'Document Pack' in white. Below the header, there are two sections: 'DOCUMENT PACK TITLE' and 'WELCOME NOTE'. The 'DOCUMENT PACK TITLE' section has a text input field containing 'REISA demo Sales Agency Agreement' and a sub-note: 'This title will inform clients of the document they need to sign.' The 'WELCOME NOTE' section has a larger text area containing 'Hi, please review this Sales Agency Agreement and sign when you are ready.' and a sub-note: 'This text will be used on the landing page your client sees when they first come to livesign.'

- Select **Add client**.

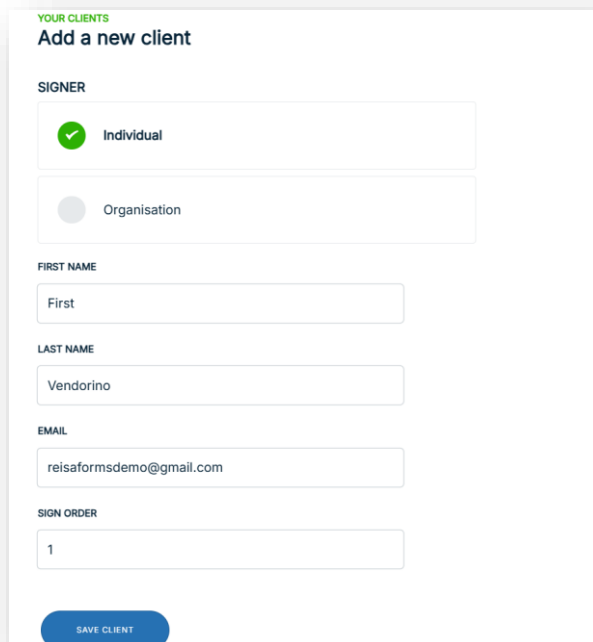


A white rectangular button with rounded corners. On the left side, there is a dark grey circle containing a white plus sign. To the right of the circle, the text "ADD CLIENT" is written in a dark grey, uppercase font.

## Add clients

All signing parties (except for the agent) will need to be added as clients.

- Enter client details and select **Save Client**. You may select a signing order if you choose.



A screenshot of a web form titled "YOUR CLIENTS" and "Add a new client". The form contains the following fields and options:

- SIGNER:** Two radio button options. "Individual" is selected with a green checkmark. "Organisation" is unselected.
- FIRST NAME:** A text input field containing the word "First".
- LAST NAME:** A text input field containing the word "Vendorino".
- EMAIL:** A text input field containing the email address "reisaformsdemo@gmail.com".
- SIGN ORDER:** A text input field containing the number "1".

At the bottom of the form is a blue button with white text that says "SAVE CLIENT".

- The page will refresh and the client will be added to the list of Your Clients. Agents can proceed to enter remaining clients.
- When all clients have been added, click **Next**.

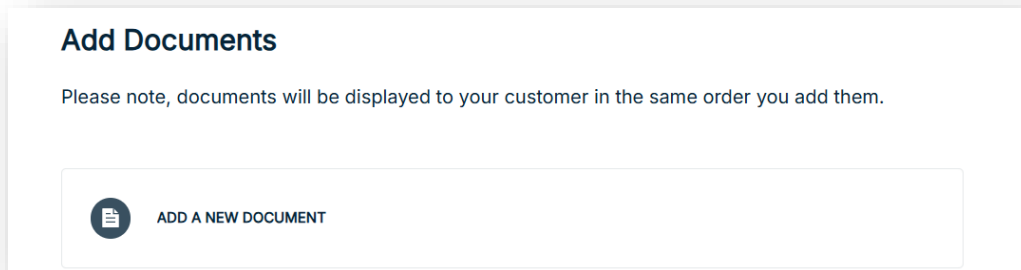
### REISA tip:

Add all signatories in this section, including vendors and purchasers, or landlords and tenants. Livesign will automatically detect if you have different types of signatories when you upload your document, and will ask you to assign their role before you send the pack for signing.



## Add forms, annexures, and attachments.

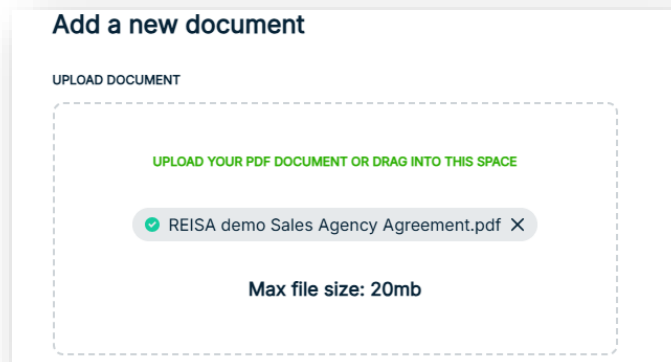
- Upload forms, annexures, and attachments to be included in the pack by selecting **Add a new document**.



### REISA tip:

LiveSign supports multiple documents and you can assign different signatories for each document.

- You can drag and drop documents into *Livesign* from your device or select **Upload** to open a file browser on your device. Only one document can be added at a time.



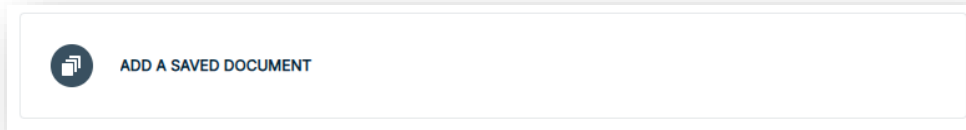
- You can rename the document if required, by editing the Document Name.
- Select what action your client needs to take – either Read and Acknowledge, or Read and Sign.
  - Select Read and Sign for any Forms and Annexures that require signatures.
  - Select Read and Acknowledge for any Forms and Annexures that don't require signatures.
- When ready, select **Save Document**. This will add the document to the document pack. And it will appear in the list of Documents.

- Repeat for any documents that need to be added to the pack and select **Next**.

## Saving annexures and attachments to be used again.

Frequently used documents, like Annexures, can be saved to be used again.

- To do this, Add a new Document and select the **Save this document to be used again** option.
- To view and add previously used documents, select the 'Add a Saved Document option'.





## Assigning recipients



You might have different types of clients who need to sign your documents, for example a mix of Vendors and Purchasers. When you have uploaded your forms, *Livesign* will automatically recognize this and ask you to assign each recipient a type. To do this, simply drag and drop your recipient names into the right section, according to their role in the transaction.



**ASSIGN RECIPIENTS**



### FM2100 Contract



Your document has multiple roles please assign all clients as either a Purchaser or Vendor



 ONE PURCHASOR




 TWO PURCHASER




 THREE PURCHASER


 FOUR PURCHASER




 ONE VENDOR


 TWO VENDOR




 THREE VENDOR


 FOUR VENDOR


**PURCHASER**

 \_\_\_\_\_


**VENDOR**

 \_\_\_\_\_


## Review and send document pack

- Review all details and edit client details if required.
- Select **Send**.

**Please review all details before sending**

Please review the following details

**First Vendorino & Second Vendorino** CANCEL

---

**Client details** EDIT

FULL NAME First Vendorino	PHONE NUMBER
EMAIL reisaformsdemo@gmail.com	ADDRESS

FULL NAME Second Vendorino	PHONE NUMBER
EMAIL reisaformsdemo@gmail.com	ADDRESS

REISA demo Sales Agency Agreement ▼

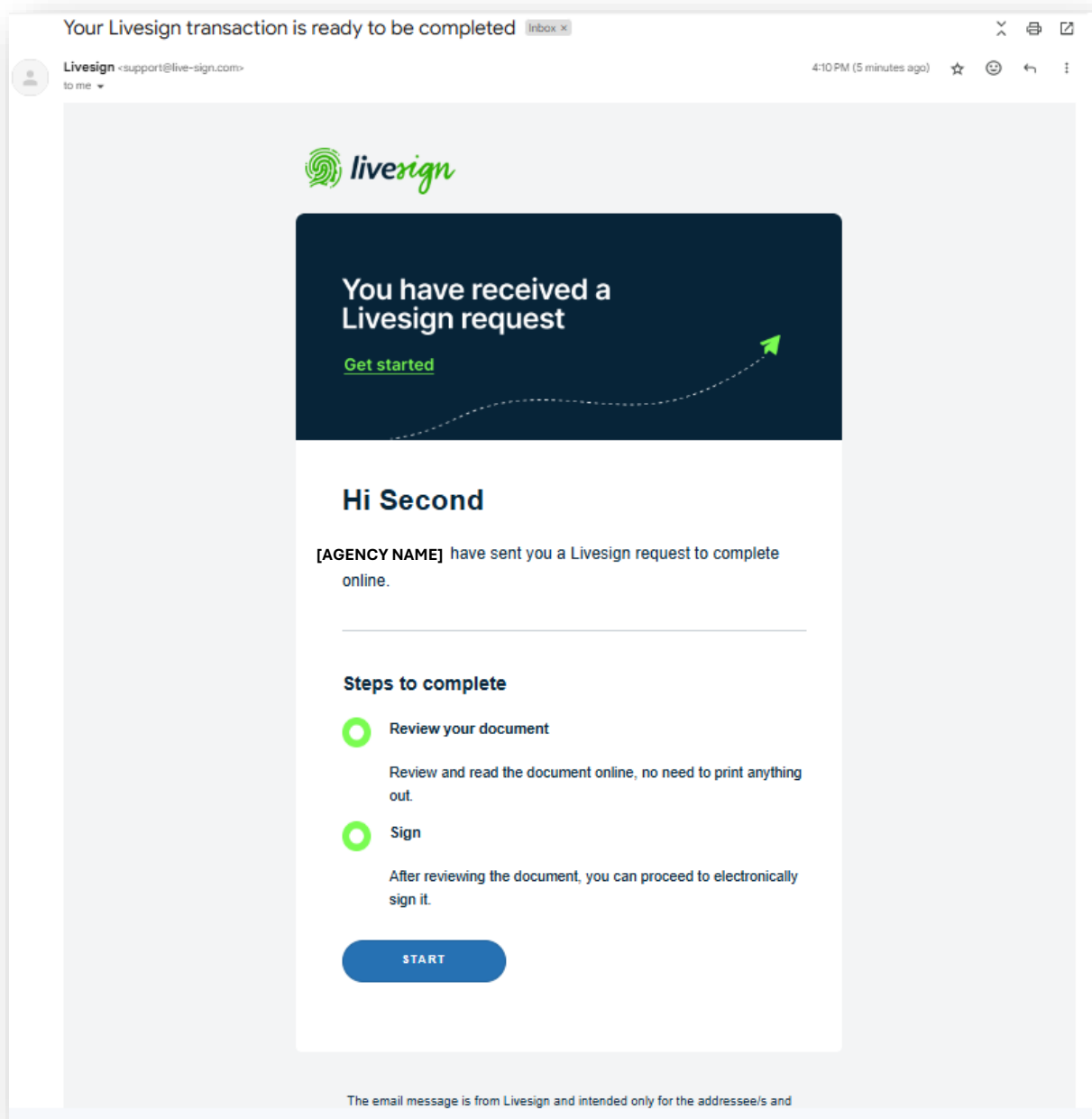
Form R1 Sales Agency Agreements ▼

- Once the pack has been sent to the clients, you will be taken to the home screen where the pack will be listed on the dashboard, with a status of **Sent to Client**.

<b>First Vendorino &amp; Second Vendorino</b> Document Pack	REISA DEMO S... 17 MINUTES AGO	<span style="background-color: #3f51b5; color: white; padding: 2px 5px; border-radius: 3px;">SENT TO CLIENT</span>
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## Client journey

- Below is a summary of what recipients will see when they have received a document pack from you to be reviewed and signed.



- When they click **Start** they will be taken to a *Livesign* page to review and sign their documents.

**Hi Second,**  
[AGENCY NAME] has sent you a Document Pack.

**TO:** Second Vendorino & First Vendorino  
**FROM:** Land Services  
**NAME:** Document Pack

**STEPS TO COMPLETION**

- REISA demo Sales Agency Agreement
- Form R1 Sales Agency Agreements

**Instructions**

Hi, please review this Sales Agency Agreement and sign when you are ready.

[GET STARTED](#)

SIGNING DOCUMENT FROM [AGENCY NAME]  
**REISA demo Sales Agency Agreement** ACTIVE

Page 1 of 11

**Residential Sales Agency Agreement:  
Schedule**

**1. VENDOR 1:** Primary contact:

Legal Entity/Full Name(s): Mr First Vendorino

Telephone: W:  M: 0421 222 333

Email: reisaformsdemo@gmail.com

**VENDOR 2:** Primary contact:

Legal Entity/Full Name(s): Mr Second Vendorino

Telephone: W:  M:


Email: reisaformsdemo@gmail.com

**VENDOR 3:** Primary contact:

Legal Entity/Full Name(s):

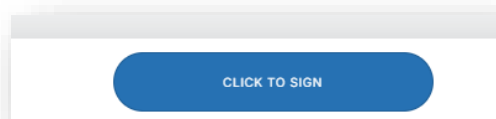
Telephone: W:  M:

Email:



[READ ALL PAGES 1/11](#)

- Then they can click to sign the document.



## Re-sending documents

- If the client needs the document re-sent, or the email address needs to be changed, you can do this by selecting the document pack from the dashboard and viewing the progress summary.
- Client information can be edited and the pack re-sent if needed.

**First Vendorino**
REMOVE & REFUND

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✔ Client details
^

<b>FULL NAME</b>	<b>MOBILE</b>
First Vendorino <a href="#">Edit/Resend</a>	None <a href="#">Edit/Resend</a>
<b>EMAIL</b>	
reisaformsdemo@gmail.com <a href="#">Edit/Resend</a>	

▶ Documents - not started
∨

CLIENT DETAILS
✕

### Email address

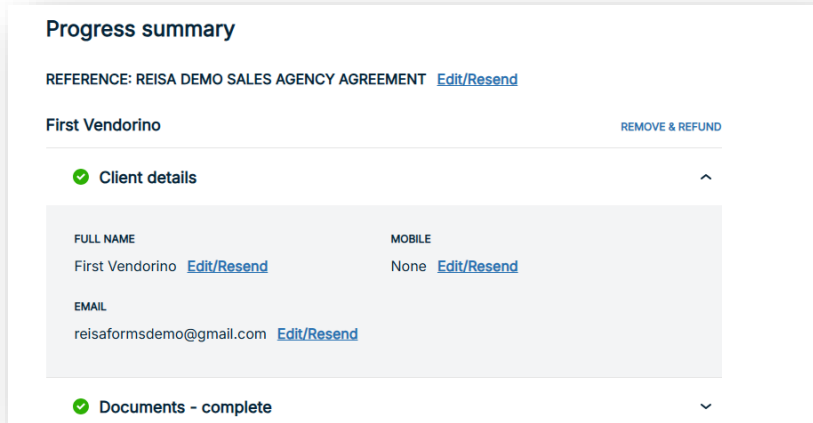
You can update First Vendorino's email address or resend it to the existing email address.

**EMAIL**

SAVE & RESEND
CANCEL

## Signing progress

- At any time, you can select the document pack from the dashboard to view the status of signing. From here, you can see which clients have signed and which haven't.



**Progress summary**

REFERENCE: REISA DEMO SALES AGENCY AGREEMENT [Edit/Resend](#)

First Vendorino REMOVE & REFUND

✓ Client details ^

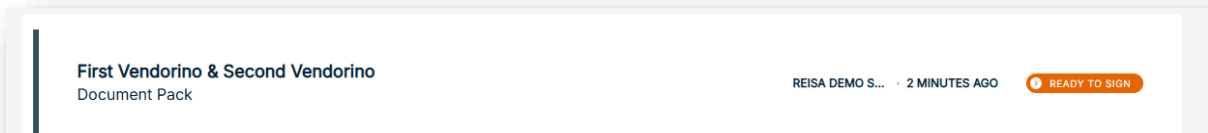
FULL NAME	MOBILE
First Vendorino <a href="#">Edit/Resend</a>	None <a href="#">Edit/Resend</a>
EMAIL	
reisaformsdemo@gmail.com <a href="#">Edit/Resend</a>	

✓ Documents - complete v

- Where some clients have signed, the document will have a status of In Progress.

## Countersigning / agent signing

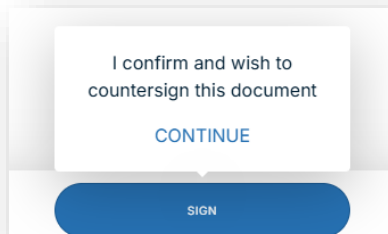
- When all clients have signed the document, the status will be updated to Ready to Sign (if the document needs to be countersigned).



First Vendorino & Second Vendorino  
Document Pack

REISA DEMO S... · 2 MINUTES AGO READY TO SIGN

- You will also receive an email.
- When the Ready to Sign document pack is opened, you will be presented with a message, asking you to confirm if you wish to countersign the document.



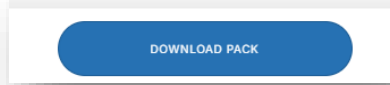
I confirm and wish to countersign this document

[CONTINUE](#)

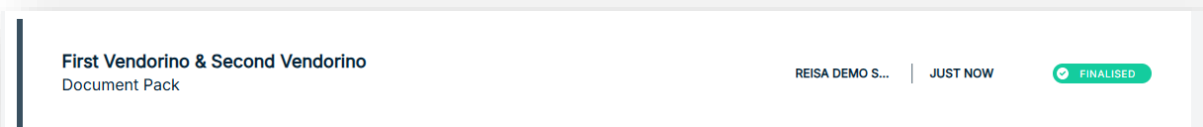
[SIGN](#)



- You can then download the pack as a PDF. Selecting Download Pack will download a zip file to your device.



- Selecting Finish will take you back to the dashboard, where the status of the pack will be updated to Finalised.



- If a document doesn't need to be countersigned, you will receive an email advising that the document pack is complete, and the status will automatically be updated to Finalised.
- Signatures will appear as follows on the signed document:



## Frequently asked questions

### Getting access

<b>How do I get access to the interim forms platform?</b>	Access the REISA website at <a href="https://reisa.com.au">reisa.com.au</a> and click on the REISA Forms link.
<b>How do I get access to Livesign?</b>	Click on the Livesign link on the REISA Forms link page.

### Creating forms

<b>Why are bank account and credit card details missing from some webforms?</b>	For security reasons, we can't store bank account and credit card details that have been entered into a form. If you wish to capture this information, you'll need to use the PDF version of the Form rather than the webform.
<b>Why can't I save an in progress form and come back to it later?</b>	<p>For security reasons, we can't store the data you've entered into the form in the interim solution.</p> <p>The new REISA Forms, launching in early 2025, has the full set of features you'd expect in a forms platform, and you'll be able to create drafts, save them, and edit them as many times as you need to.</p> <p>For now, if you think you will need to come back and edit a form, we recommend downloading the PDF, saving it your computer, and editing it as required.</p> <p>We recommend using the webform only when you have all the details at hand, or for a short form.</p>
<b>What do I do if I don't have access to Adobe Acrobat?</b>	Adobe Acrobat Reader is available for both Windows and MacOS at no cost. <a href="https://get.adobe.com/reader/">https://get.adobe.com/reader/</a>

### Livesign

<b>How do I know which forms can be signed with Livesign?</b>	<p>To make it easy to see if a Form can be signed with <i>Livesign</i>, compatible Forms will have the <i>Livesign</i> logo on the front page.</p>  <p>If the form doesn't have this logo, you'll need to print it out and have it signed in person or sign it on a tablet device.</p>
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<p><b>Can a form, annexure or attachment that doesn't need to be signed be added to a <i>Livesign</i> pack?</b></p>	<p>Yes, any document that doesn't need to be signed (like many annexures) can be included in a document pack, even if it doesn't have the <i>Livesign</i> logo.</p> <p>The only time you need to look for the <i>Livesign</i> logo in a form is if the form requires a signature.</p>
<p><b>Why are some forms not compatible with <i>Livesign</i>?</b></p>	<p>Some forms have a more complex signing workflow than others, with multiple parties or other unique scenarios.</p> <p>REISA has worked quickly with its partners to ensure the most popular REISA Forms can be used with <i>Livesign</i>. We will keep working to make all forms <i>Livesign</i> compatible soon.</p> <p>All forms can be used with <i>Livesign</i> when the new REISA Forms launches in early 2025.</p>
<p><b>How do I get access to <i>Livesign</i>?</b></p>	<p>REISA will organize your <i>Livesign</i> access, and you will receive a welcome email when your registration is confirmed.</p> <p>If you have difficulties with <i>Livesign</i> please call 07 31847581 or email <a href="mailto:support@live-sign.com">support@live-sign.com</a>.</p>
<p><b>How do I add or remove Users from <i>Livesign</i></b></p>	<p>Only the administrator can add or remove users. To add or remove users, navigate to <a href="https://app.live-sign.com/manage/settings/users">https://app.live-sign.com/manage/settings/users</a> and follow the prompts.</p>
<p><b>Do I have to pay for <i>Livesign</i>?</b></p>	<p>REISA has ensured you have free access to <i>Livesign</i> while this interim solution is available to you.</p> <p>When the new REISA Forms launches in early 2025, you will be able to subscribe to have <i>Livesign</i> access integrated with your REISA Forms subscription. From early 2025, much of the signing process will be automated and fully integrated with REISA Forms.</p>
<p><b>Why can't I add more than one document that needs signing to the same pack?</b></p>	<p>REISA has worked quickly with its partners to ensure REISA members have free access to electronic signing while we work on the new REISA Forms, due to launch in early 2025. This means we haven't been able to implement everything we wanted to in the interim.</p> <p>When the new REISA Forms launches in early 2025, you will be able to add as many signing documents as you like to the same pack from within the REISA Forms platform.</p>
<p><b>How do I sign annexures for additional vendors, purchasers, tenants, or landlords?</b></p>	<p>If you have a requirement to add extra signatories using one of the annexures for additional vendors, purchasers, tenants or landlord, you will need to sign these forms separately. They cannot be signed as a document pack with the primary form.</p>
<p><b>How do I initial all the pages electronically?</b></p>	<p>REISA's advice is that signatories do not need to initial all pages on an agreement if it is being signed electronically.</p>
<p><b>How do I add witnesses using <i>Livesign</i>?</b></p>	<p>REISA's advice is that signatories do not need to be witnessed if an agreement is being signed electronically.</p>