REALM™

Verified Transactions

USER GUIDE AND FAQ'S

2026

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1. Overview

- **What is REALM Verified Transactions?**
    - Imagine a world where every real estate transaction is seamless, transparent, and secure. As a real estate professional, you juggle countless details daily, from listing properties and managing documents to coordinating with buyers, sellers, inspectors, and lenders. The complexities and sheer volume of information can be overwhelming. But what if there was a way to simplify this process, reduce paperwork, and ensure every transaction is smooth and hassle-free? Enter REALM's Verified Transaction Platform — the next evolution in real estate technology.
    - The REALM Verified Transaction platform integrates directly with MLS systems, serving as a central hub for every real estate transaction. Once a property is sold on the MLS, the platform can capture content from all invited deal participants including buyers, sellers, Real Estate Agents, lenders, lawyers, insurers and more. It can help:
        - Reduce Fraud
        - Enhanced security and trust with authenticated participants and a blockchain enabled repository
        - Increase transparency amongst participants
        - Create a Single source of truth and access to documentation
        - And help streamline communication between participants
    - Our goal is to mitigate instances of fraud and strengthen the connections within the property ecosystem so that consumers and industry professionals in a real estate transaction can share, access and facilitate the distribution of secure and auditable documentation. Industry professionals will be able to streamline workflows, simplify the overall process, and improve customer experience with a single source of truth.
    - When all the steps in the deal have been completed, and the corresponding documents have been shared within our platform, an immutable and auditable closing report will be created and stored in a blockchain-enabled environment. The closing report will contain all available content, documents, changes, modifications, timestamps and participant information for each
    - Key Benefits include:
        - Secure document collaboration
        - Verified participants (ID-based onboarding)
        - Transparent access control
        - Complete audit trail for compliance
        - Automatic MLS data ingest
        - API integration with providers such as WebForms & SkySlope for signed documents (coming soon)

2. Loging in to the Platform

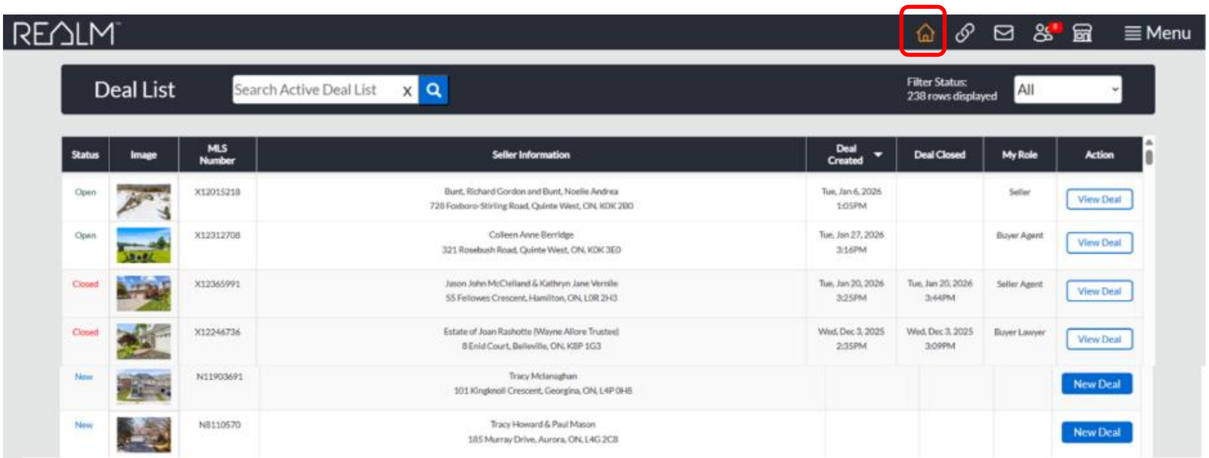
You can access the platform either through **SSO** or a **non-SSO login**, depending on your setup.

After logging in, you land directly on your **Dashboard**.

3. Your Dashboard

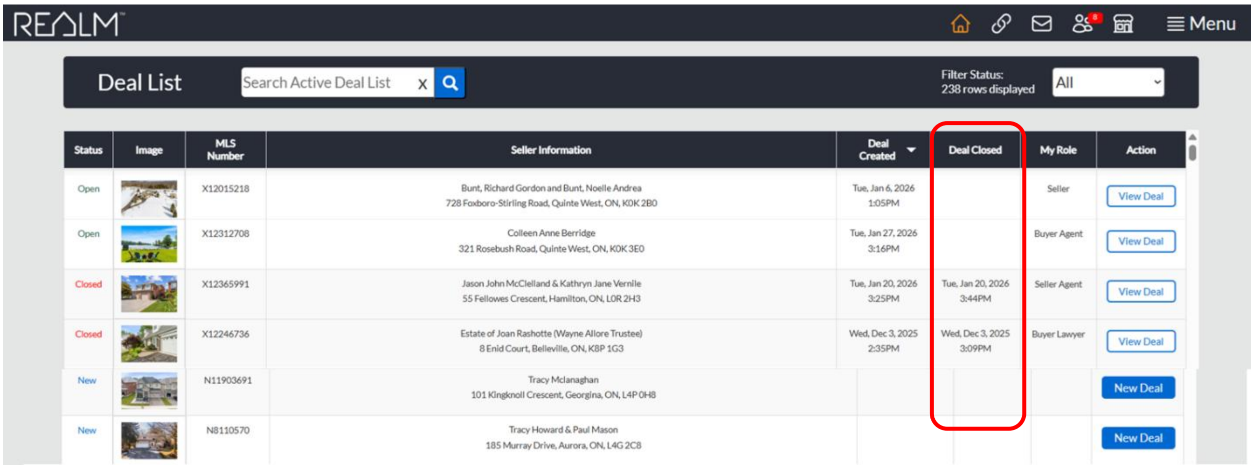
The dashboard lists all properties associated with you, including:

- Deals you've closed as a **listing agent**
- Deals you've been **invited to** as a selling agent or any other role
- Status Options include: **New**, **Open**, **Closed**, **Abandoned**

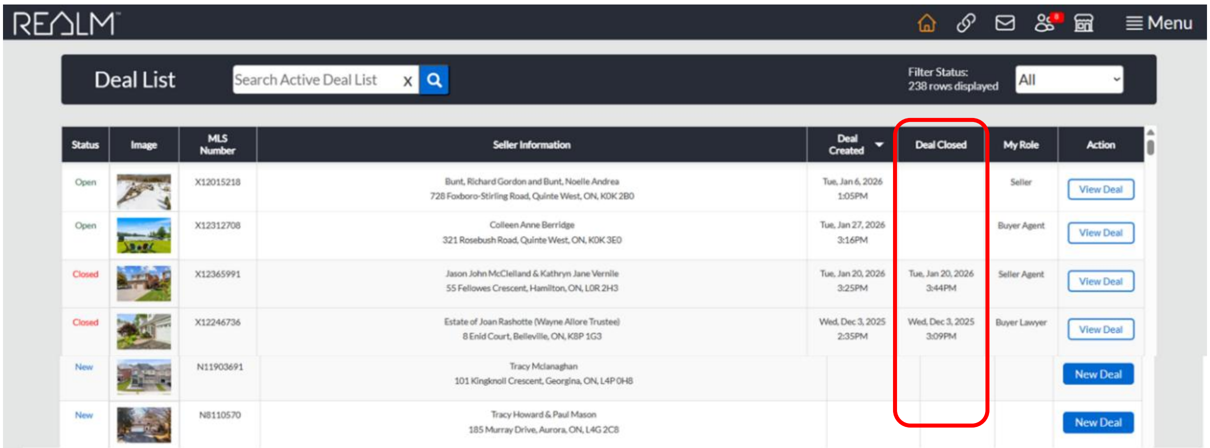


    - You can get to the dashboard by clicking on the home button on the top navigation
    - On the dashboard you will see all your own deals or deals that you have been invited to
    - As a listing agent, once a deal has closed in the MLS, meaning the MLS status would have changed to Sold or Sold Conditionally, those deals are automatically loaded into your dashboard, ready to be actioned and a deal room created.
    - You can view the following details
        - Deal room status (new, open, closed, abandoned)
        - Property image
        - MLS Number
        - Property Address
        - Seller Information
        - Deal Created (the date you initiate a deal room)
        - Deal Closed (the date you close a deal room)
        - My role (the role you play in this deal)
        - Action button (View open Deal room, Start new deal room)
    - As an office Manager you will see all deals that are part of your office (includes Agent name and office name)
    - As a Broker, you will see all deals that are part of your brokerage (includes Agent name and office name)

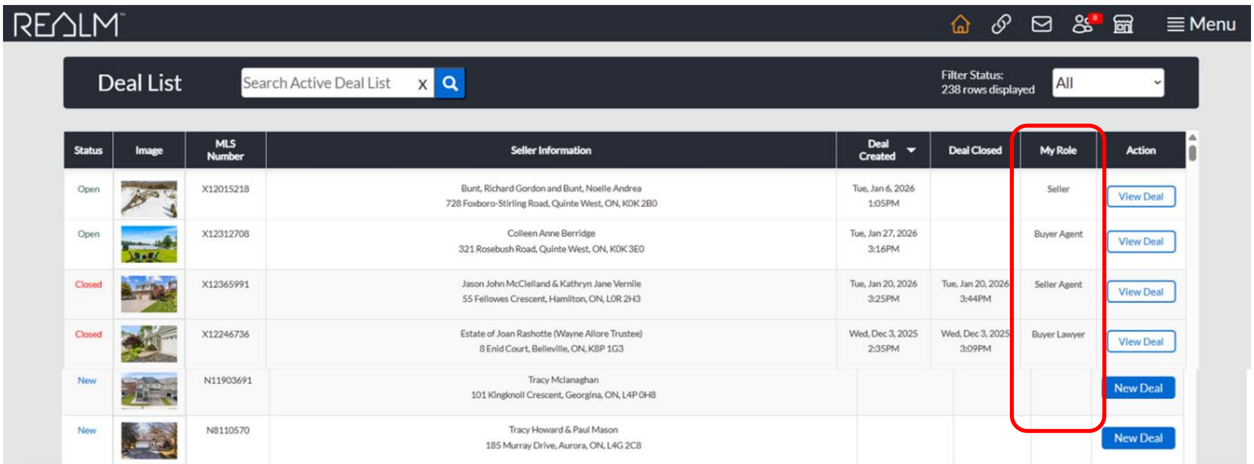
- **What does Deal Created Mean?**
  - Deal Created is the Date in which the Deal Room was initiated in the REALM Verified Transaction Platform. It has no relation to the MLS Listing creation date.



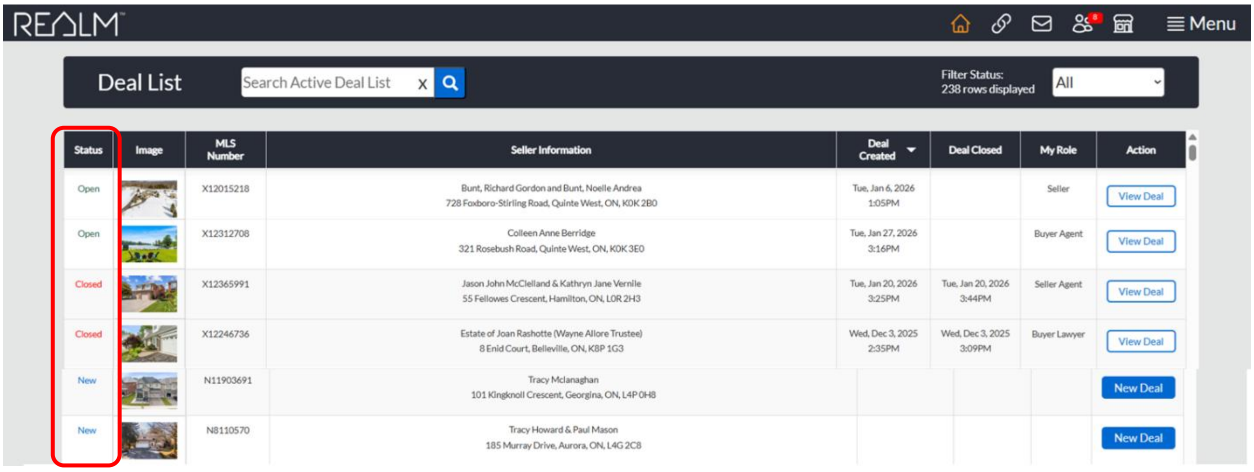
- **What does Deal Closed mean?**
  - The Deal Closed is the date in which the Deal Room was finalized and closed. Once a deal is closed, you can no longer make updates to it



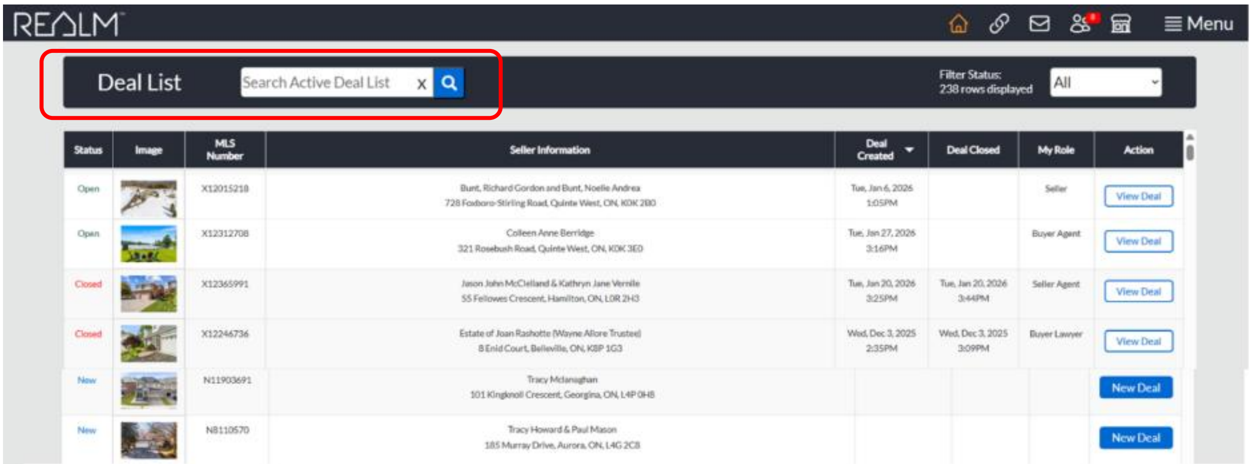
- **What does “My Role” mean?**
  - My role represents the role you play in this particular transaction. Roles can include, but not limited to the following: Listing Agent, Listing Agent Admin, Buying Agent, Buying Agent Admin, Broker, Buyer, Seller, Seller Lawyer, Buyer Lawyer, Lender, Mortgage Broker



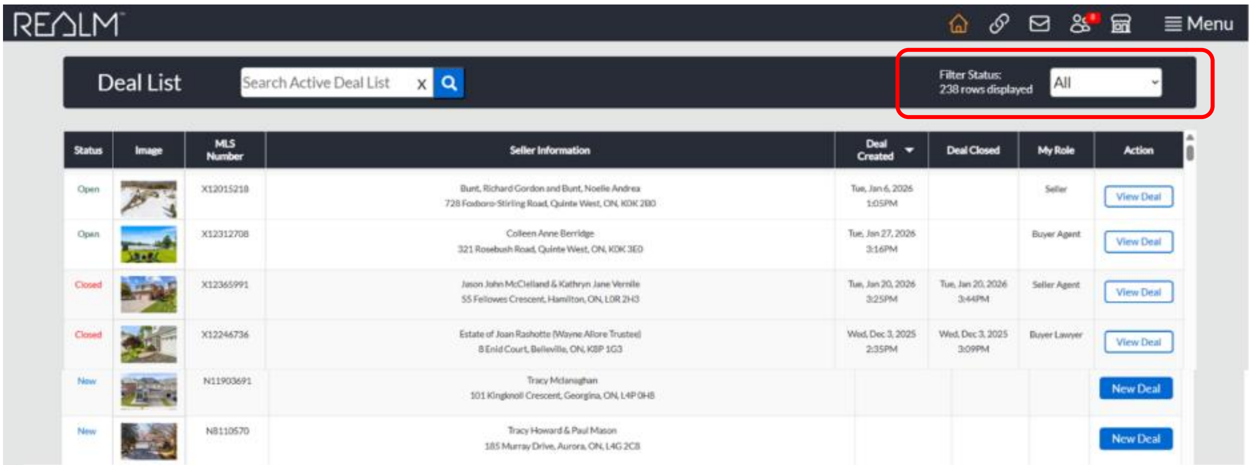
- **What does Status Mean?**
  - Status is the overall status of the Deal Room. Deals can have four different Statuses (New, Open, Closed, Abandoned)



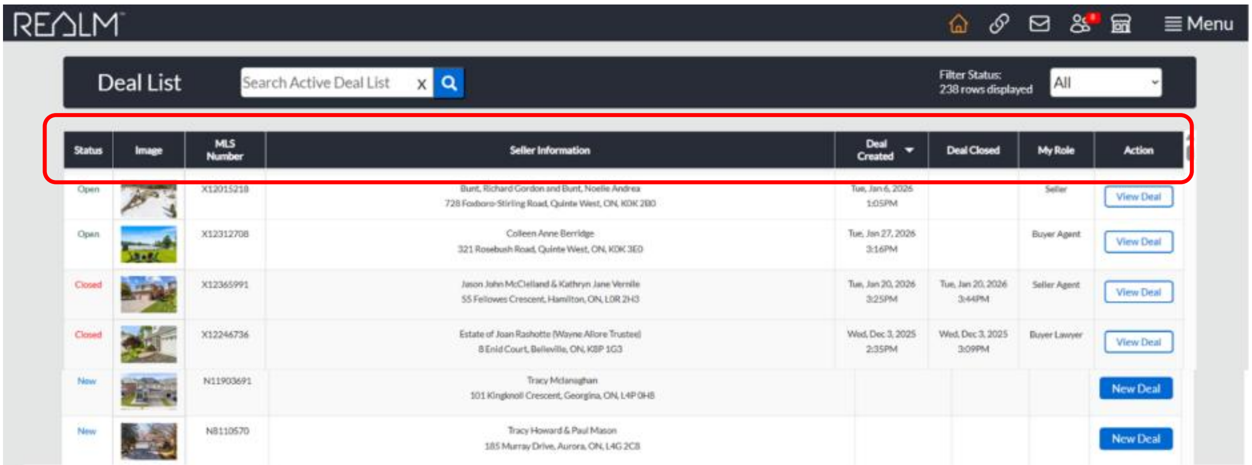
  - **What is “New” Status?**
    - New Status are assigned to deals that have recently closed in the MLS – their MLS status would have changed to Sold or Sold Conditionally. Once this status changes in the MLS, they are automatically loaded into your dashboard, ready to be actioned and a deal room created.
    - While in “New” status, a deal room has not yet been created for this listing, and no participants have been invited to collaborate
    - The listing agent, or their corresponding broker will need to click on “New Deal” to initiate a deal room
  - **What is “Open” Status?**
    - Open Status deals represent deal rooms that have been initiated. Participants can be invited; documents can be uploaded and shared and participants can collaborate in the deal room.
    - In this stage, participants are currently updating documentation and outstanding tasks remain to be completed
  - **What is “Closed” Status?**
    - Closed Status is assigned to a deal room once all documentation has been collected and all collaboration has been completed.
    - To get to a Closed Status, the Listing agent must “Close and File” the deal.
    - Participants cannot make any changes to a closed deal as it is permanently locked down in the blockchain.
  - **What is “Abandoned” Status?**
    - If a deal is abandoned, users can select this as a closed deal reason
- **How do I search deals?**
  - You can search for a deal by using the Deal List Search bar
  - You can search by MLS number, address, seller information and year
  - Simply type any part of an address, MLS number or seller name and click on the blue search button to see your results



- **How do I filter deals?**
    - You can filter deals by Status
    - Simply click on the Filter Status drop down from the deal list page and select your filter choice
    - Filters include, New, Open, Closed, Abandoned, New & open, Open & Closed, All



- **How do I sort deals?**
    - You can sort your deal list by column headers
    - Sort by Status, MLS number, Seller Info, Deal Created date or Deal Closed date



- **How long do deals remain on the dashboard once the Status is "Closed"**
    - Deals with a "closed" status remain accessible on your dashboard for 6 months (180 days) before they are archived.

- **What happens when a Deal is archived?**
    - One a Deal Room is archived, users can still access the closed deal report through the e-Store.

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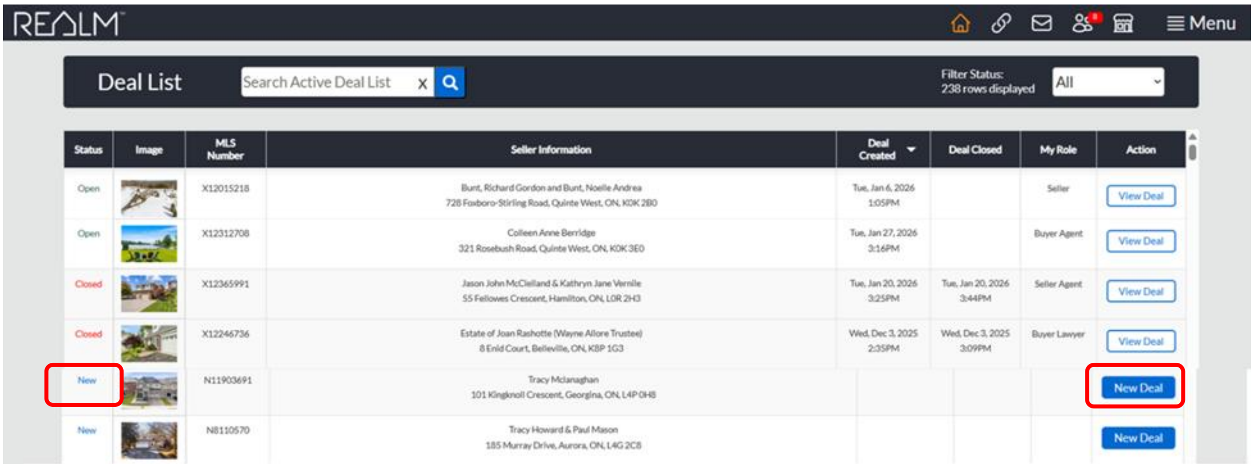
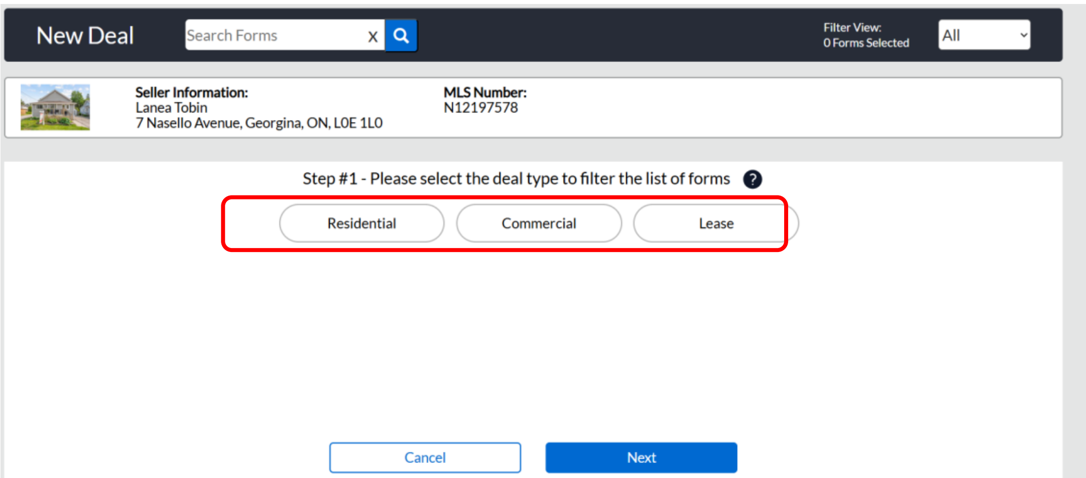
4. Starting a New Deal Room

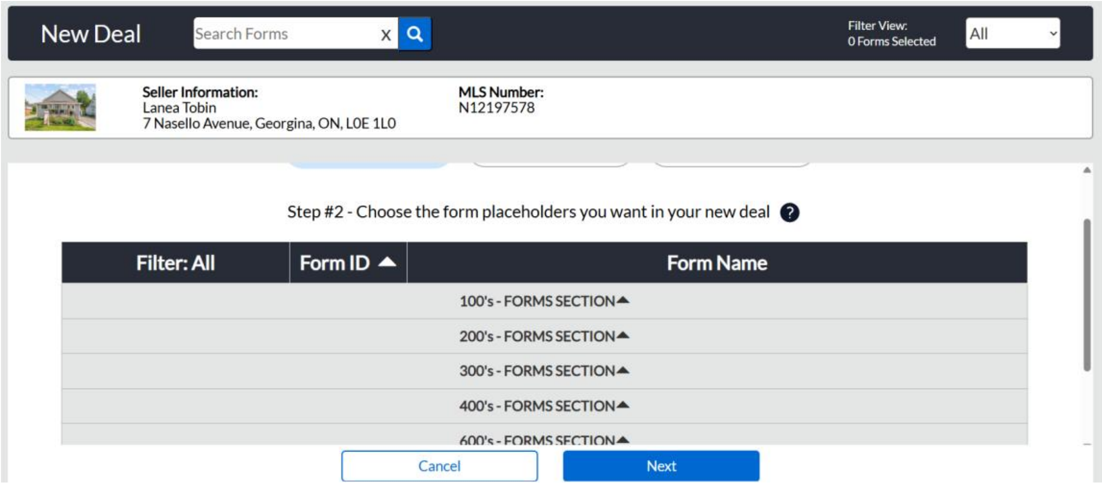
- **How do I start a new Deal?**



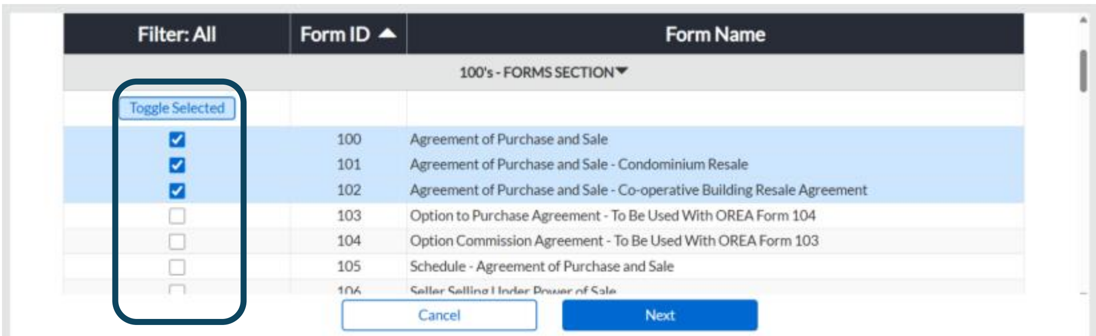
    - As a Listing Agent / Broker, you can create a new deal. Any other profile can not initiate a new deal room
    - From your dashboard / home screen, find a property with a Status of **"New"**
        - Note: the property must have their status on the MLS changed to Sold or Sold Conditionally in order to appear
    - Click on the "New Deal" in the Action Column to initiate the deal
    - **Step 1: Select the deal type to filter the list of required OREA forms.**
        - You can filter by Residential, Commercial or Lease forms. You can also multi select to include Residential and Lease forms



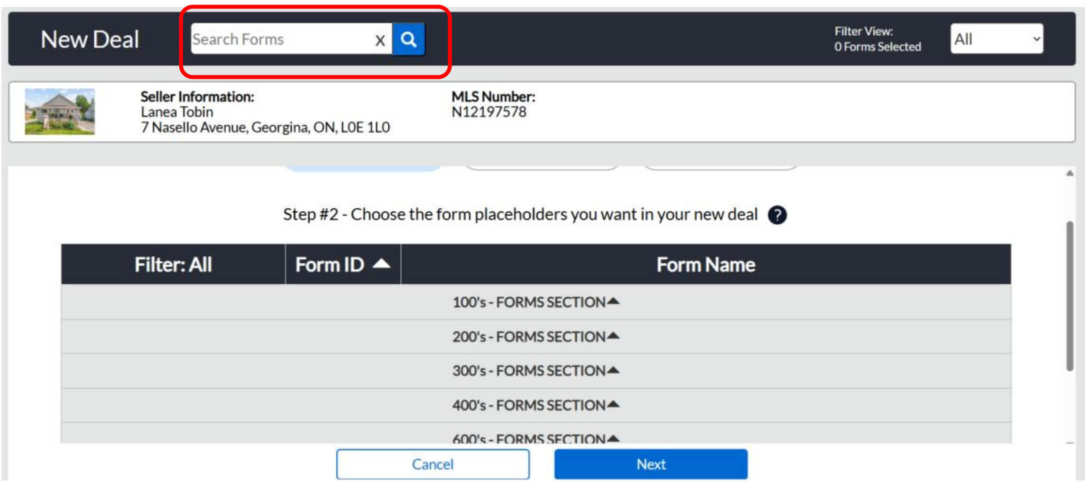
- **Step 2 – Choose the form placeholders you want to include and collaborate on in your deal room.**
  - Forms are organized by OREA numbering system



  - Click on each grouping to expand and select the form of interest by clicking the left-hand box

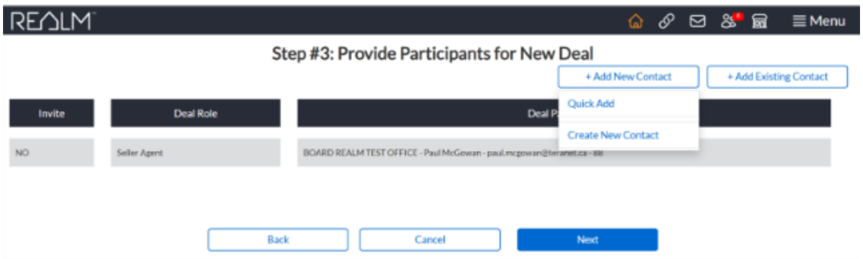


  - You can also search for any for number or name using the search bar

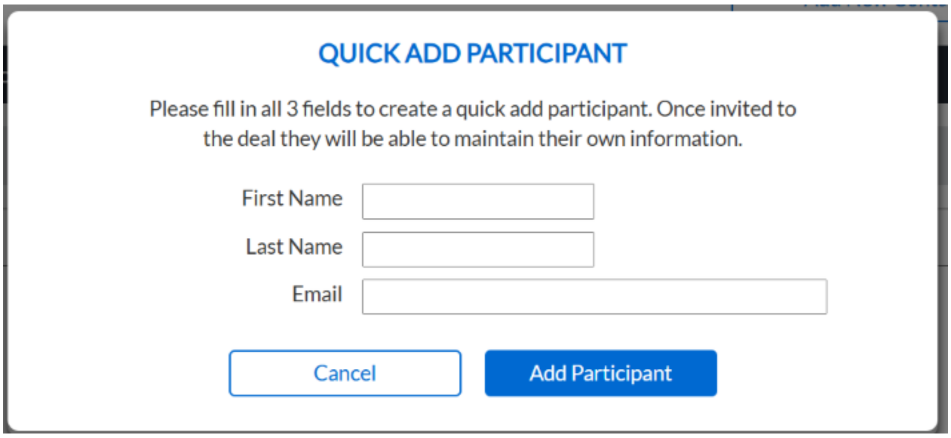


  - Once you are satisfied with the documents you have selected, click on "Next"
    - Note: you can always add forms later as needed

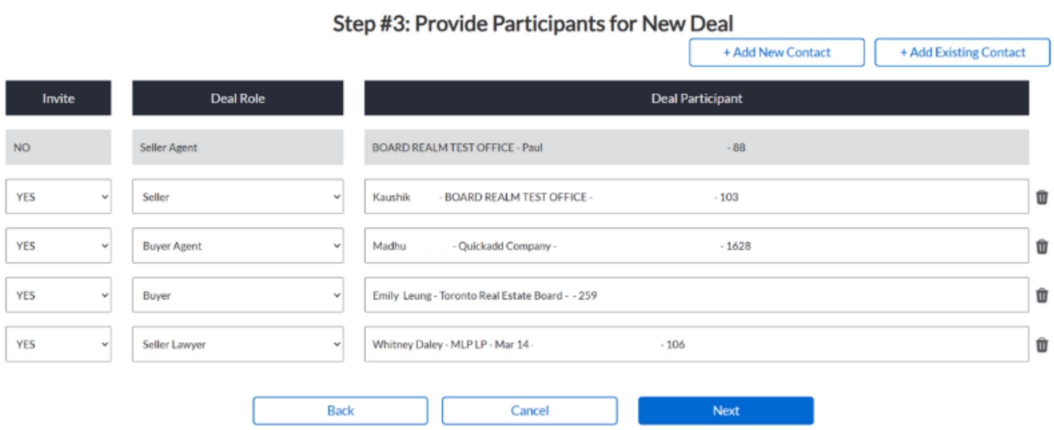
- **Step 3: Invite Participants to the Deal room**
  - **Option 1: Add New Contact (Quick Add)**
    - Click on the "+Add New Contact" button and select Quick Add



    - You will be asked to provide First Name, Last Name and Email address

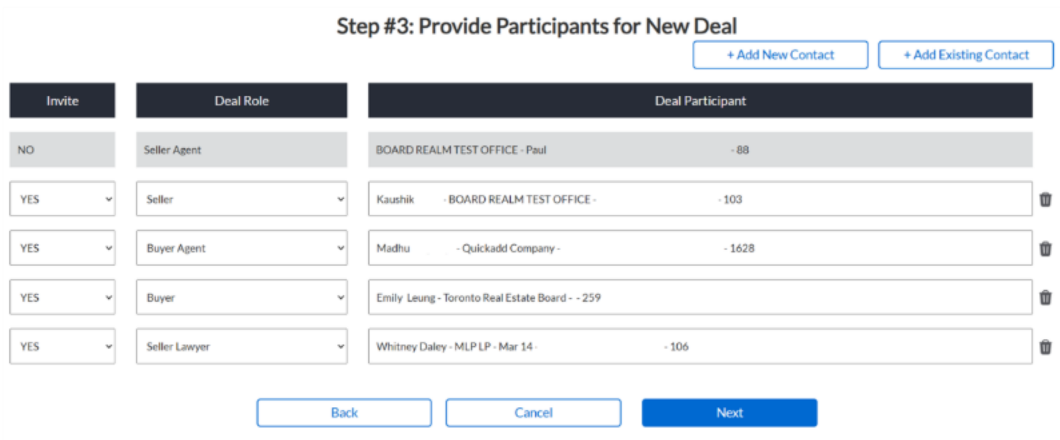


    - Once completed, an email will be sent to the participant to join the deal, and their name will be added to the deal participant list (new row)
  - **Option 2: Add New Contact (Create new Contact)**
    - If you select "Add New Contact" you will follow the standard process for creating a contact.
    - Once created, they will be added to the deal participant list (new row)
  - **Option 3: Add Existing Contact**
    - If you select Add Existing Contact, a contact must be in the system and part of your contact list.
    - A new row will appear, and you can manually type the users name or email to search for them.
    - You can repeat the actions above for every participant



- Identify the Deal Participant Role
  - As you invite participants to the deal, assign a Deal role to them. You can select from the following options

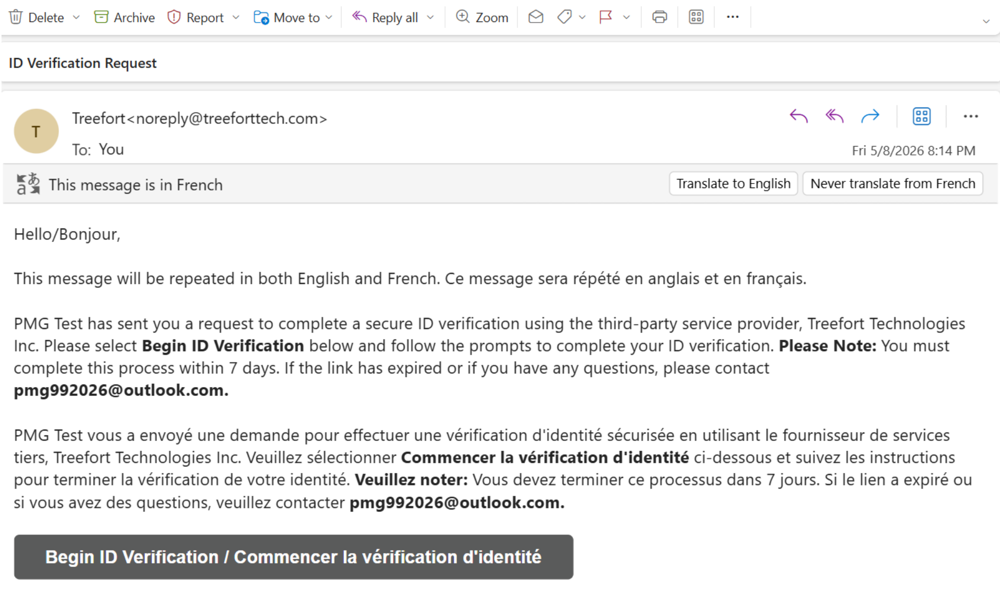
  - Be sure to select a deal role for each participant
- Invite the participants to the deal
  - Be sure to have the “Invite” column toggled to Yes, to ensure the invitation has been sent
- Click **Next** when all deal participants have been identified and their role assigned



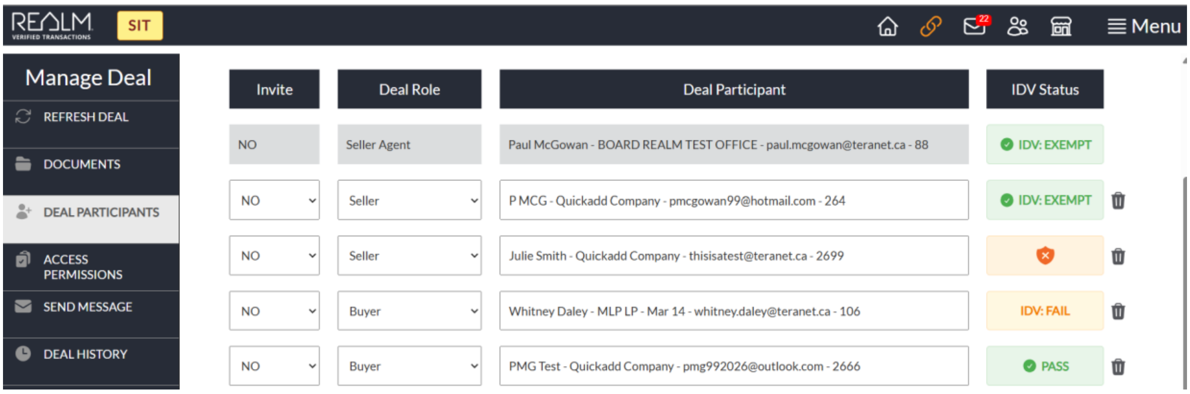
- Once completed, all participants will be automatically emailed by the system and invited to join the deal (invitation and links provided within the email)
  - **As part of the set-up process for new participants, all Deal Participants will be required to go through an eIDV certification process before being granted access to the system**

- **Managing eIDV**

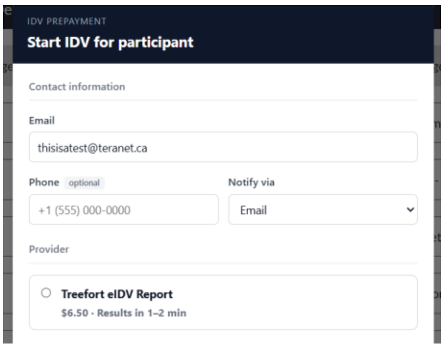
- When a deal participant is invited to your deal room, they will be asked to complete and pass an eIDV (electronic Identification Verification) before being permitted to access the platform.
    - This process is automated by the system
    - Users will be sent an email link from the eIDV provider to initiate the process



- Note: You have the ability to pre-pay for the end user or have them pay for themselves.
- Any added participant with a red IDV shield can be prepaid.



- To Prepay,, click on the shield to initiate the IDV process on behalf of your client (if desired)



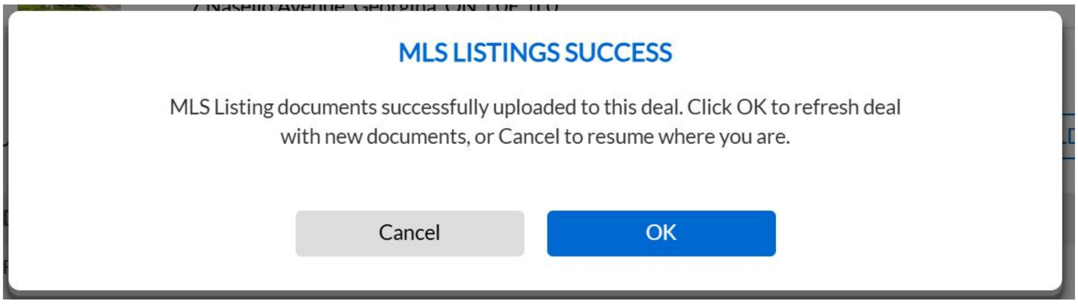
- A payment screen will be provided to accept your credit card and pre-payment.
- Once initiated (prepaid or not) you will see the status of their eIDV in the participant screen

5. Managing Open Deal Rooms

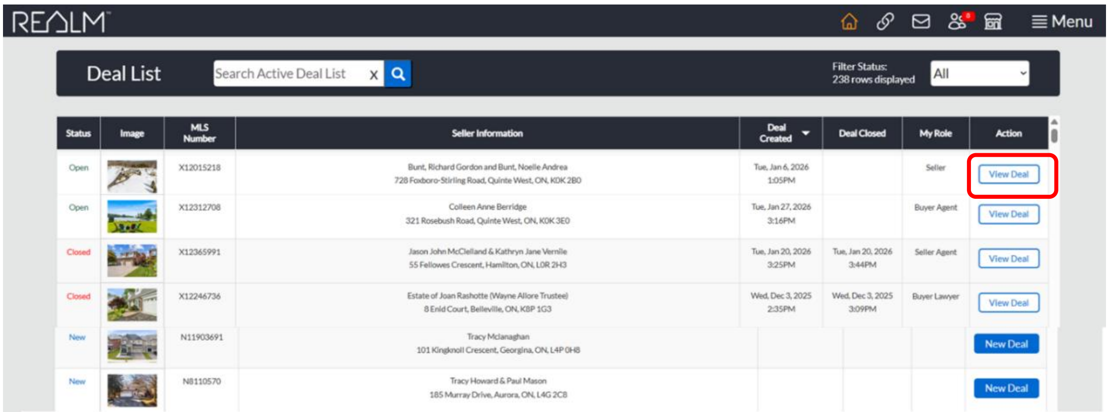
Within each open deal room, with the right permissions you can access and manage the following elements

1. **Documents**
2. **Deal Participants**
3. **Access Permissions**
4. **Send Message**
5. **Deal History**
6. **Close & File Deal**

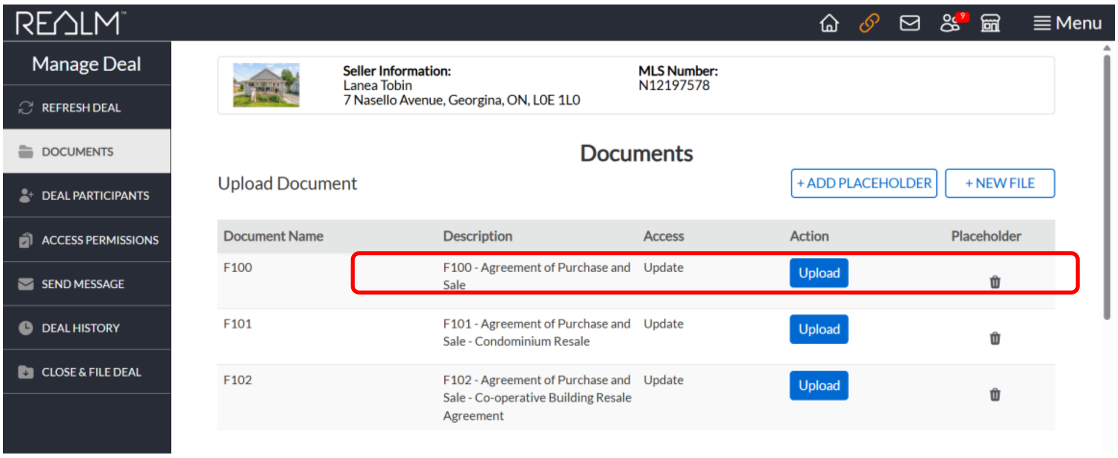
- **Documents**
    - **How are existing MLS documents brought into the REALM Verified Transaction platform?**
        - When a new deal room is created, the platform automatically connects to the MLS system and extracts a number of documents. Those documents can include the following:
            - Listing Images
            - Listing (Broker Full Sheet)
            - Attachments (e.g. floor plans, other listing attachments)
            - MLS Listing history
        - Users will see a notification when they first create a new deal room that the documents have been successfully imported



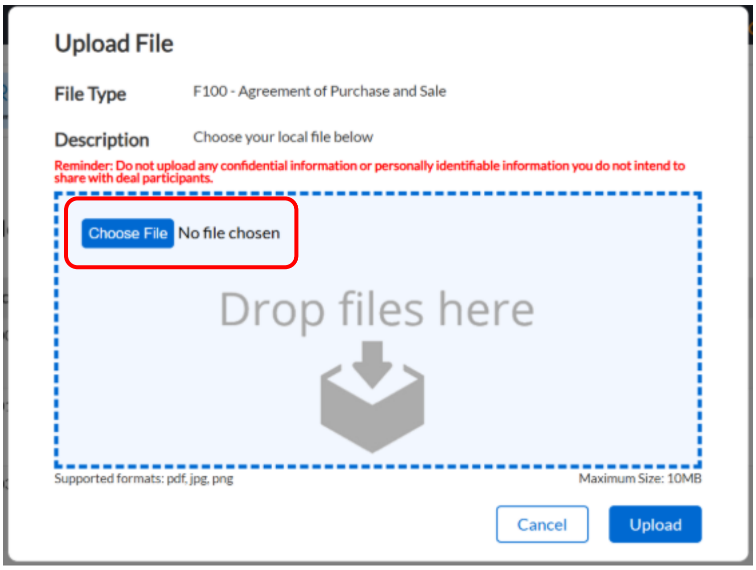
    - **How do I upload a document to an open deal room?**
        - To add a document to a deal room, you will need to be part of an active deal that is still open and follow these steps below:
        - From your dashboard, click 'View Deal' on the property you would like to add documents for.



- The Deal Room Documents tab will open with the list of all the document placeholders which have been requested for this deal. If you wish to add a file, find the Document Name under the list. If you have permission to add it, you will see the word “Upload” in blue in the Action column. If you do not have permission to add the document, the button will be greyed out.
- Click on the blue “Upload” button towards the right side of the page.

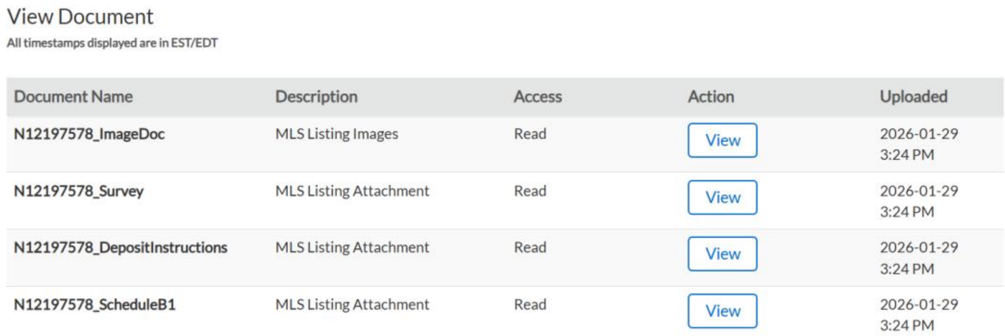


- A new box will appear on your page, with the option to “Upload File”.
  - Click on the blue “Choose File” button on the inside of the window.



- Your personal file folder will open on the screen. Locate the file you wish to upload and click ‘Open’.
- The file name will appear in the box beside the “Choose File” button.

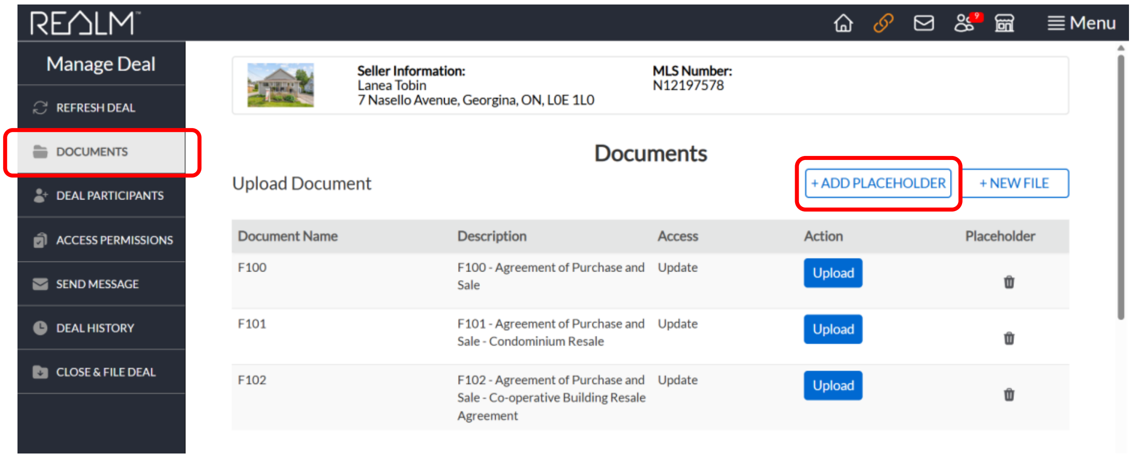
- Click the blue "Upload" button towards the bottom of the window.
 Once the file is successfully uploaded, you will see a modal on your window reading "FILE UPLOAD SUCCESS". Click "OK" and the window will disappear.
- To confirm your document has uploaded correctly, you can find it in the list of documents below the "View Document" header



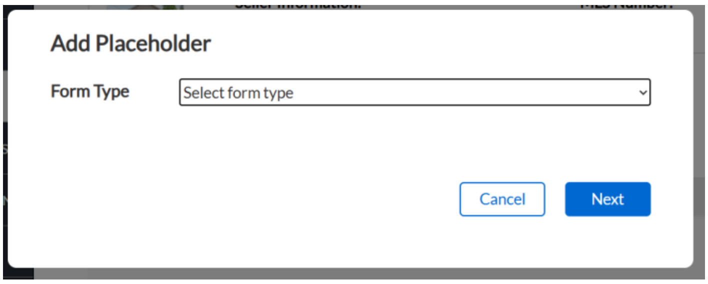
View Document
All timestamps displayed are in EST/EDT

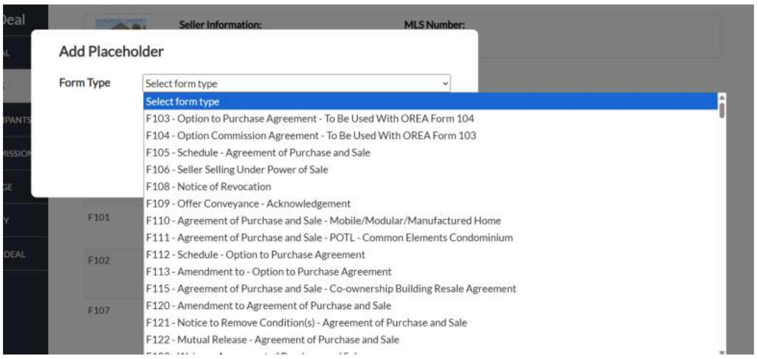
Document Name	Description	Access	Action	Uploaded
N12197578_ImageDoc	MLS Listing Images	Read	View	2026-01-29 3:24 PM
N12197578_Survey	MLS Listing Attachment	Read	View	2026-01-29 3:24 PM
N12197578_DepositInstructions	MLS Listing Attachment	Read	View	2026-01-29 3:24 PM
N12197578_ScheduleB1	MLS Listing Attachment	Read	View	2026-01-29 3:24 PM

- **How do I add a new placeholder document to an Open Deal Room?**
  - Within the Documents section of the Deal room, click on "+Add Placeholder"



  - A new window will appear, and you will be able to select any additional placeholder document to add to your document list

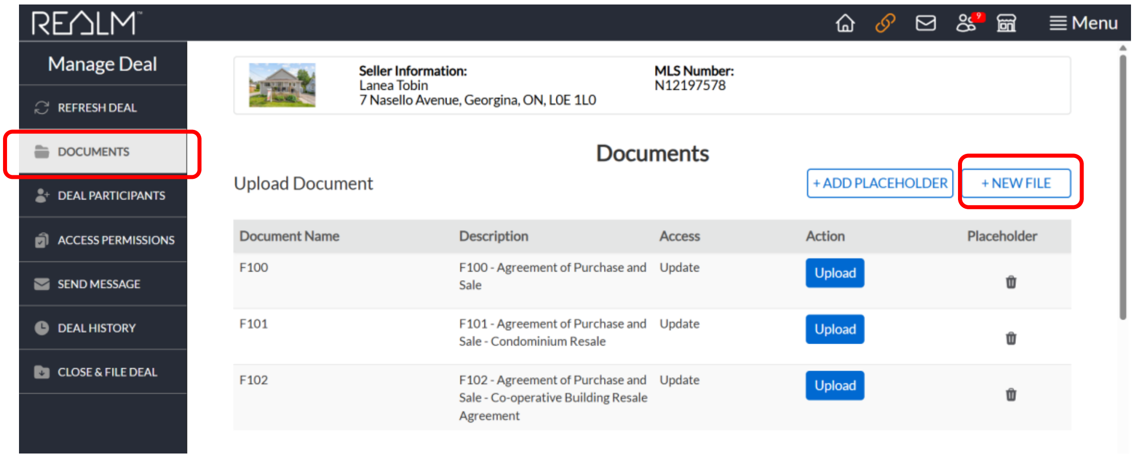




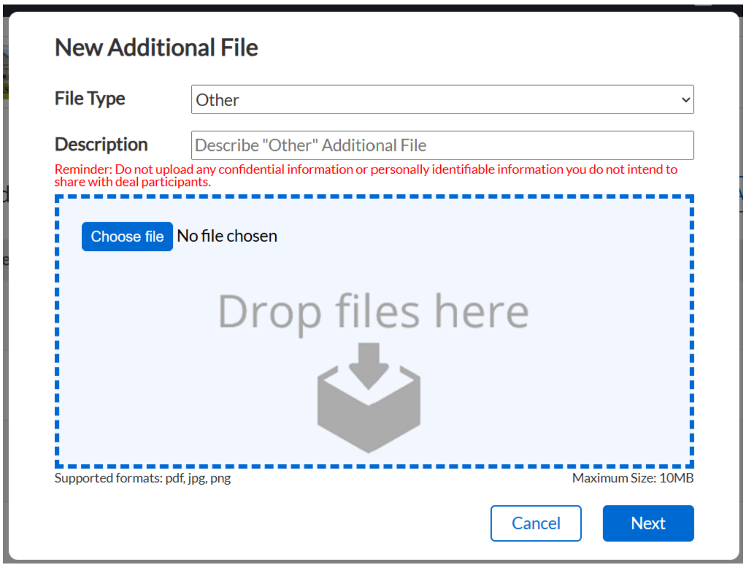
  - Click Next when you have selected the additional placeholder document

- A pop up will let you know that your document placeholder was successfully added

- **How do I add a new document or file to an Open Deal Room?**
  - Within the Documents section of the Deal room, click on "+New File"



  - A new window will appear, and you will be able to add any type of document to the deal room



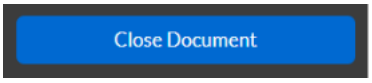
  - Enter a Description, click on "choose file" from your computer and then click "Next" to complete the task

- **How do I view documents?**
  - In the Documents section of a Deal room, you will see up to three sections
    - "Upload Document"
    - "View Document"
    - "View Old Replaced Documents" (note this only appears once documents have been updated with a new version)
  - To view current documents, scroll down to the "View Document" section and click on "View" to access the document

View Document

Document Name	Description	Access	Action	Uploaded
S9270758_ImageDoc	MLS Listing Images	Update	View	2025-02-21 11:26 AM
S9270758_ListingDoc	MLS Listing	Update	View	2025-02-21 11:26 AM

- A new window will open with the PDF copy of the document. To close the file, click the "Close Document" button on the top right hand of the screen. You can also download the file from this screen

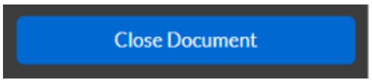


- **How do I view previous versions of a document?**
  - In the Documents section of a Deal room, you will see up to three sections
    - "Upload Document"
    - "View Document"
    - "View Old Replaced Documents" (note this only appears once documents have been updated with a new version)
  - To view Previous / Replaced Documents scroll down to the "View Old Replaced Documents" section and click on "View" to access the document

View Old Replaced Docs (Click to Hide)

Document Name	Description	Access	Action	Uploaded
Test document.pdf	F100 - Agreement of Purchase and Sale	Update	View	2026-01-30 12:49 PM

- A new window will open with the PDF copy of the document. To close the file, click the "Close Document" button on the top right hand of the screen. You can also download the file from this screen

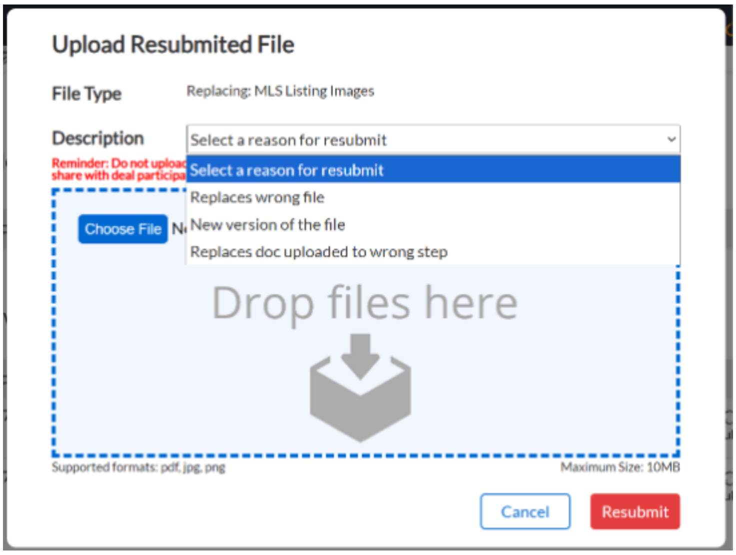


- **How do I refresh documents in the deal room?**
  - If you would like to submit a new version of a document (new, updated, correction etc.), you can click on the "Resubmit" button. If you don't see this button, you do not have the option to resubmit the file.

View Document

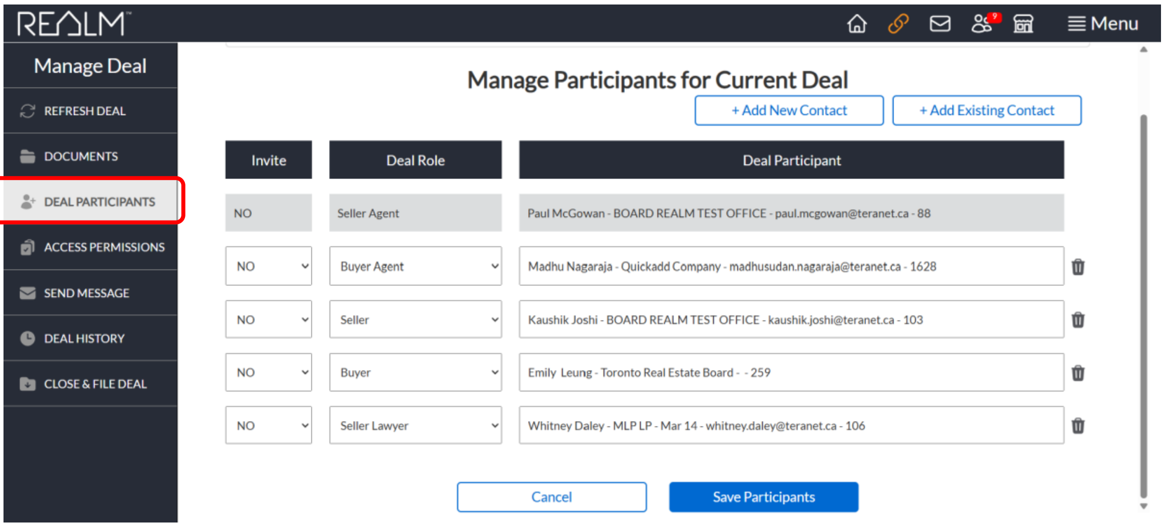
Document Name	Description	Access	Action		Uploaded
S8274964_ImageDoc	MLS Listing Images	Update	View	Resubmit	2025-03-11 11:28 AM
S8274964_ListingDoc	MLS Listing	Update	View	Resubmit	2025-03-11 11:28 AM

  - A new window will appear with the header, "Upload Resubmitted File". This will allow you to add a new file in place of the one you already have. You must select a reason for re-submitting the file in the picklist beside the Description header. Select the statement which best suits the reason.

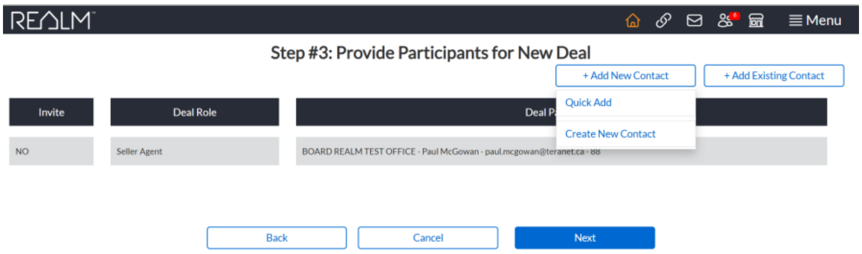


- Click the "Choose File" option from the top left corner inside the box and then Resubmit when ready

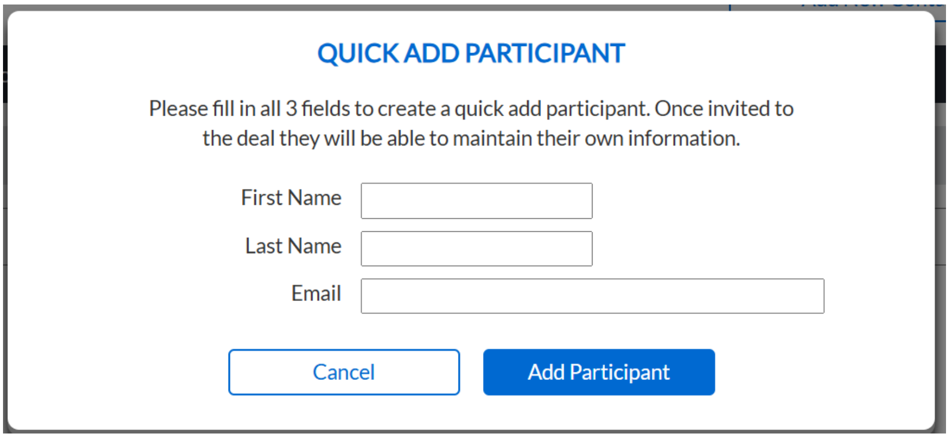
- **Deal participants**
  - How do I add a participant to an existing deal room?
    - If you have permission, Click on the Deal Participants within an open deal



- With the right permission, you can add or delete a participant at any time
- **Option 1: Add New Contact (Quick Add)**
  - Click on the "+Add New Contact" button and select Quick Add



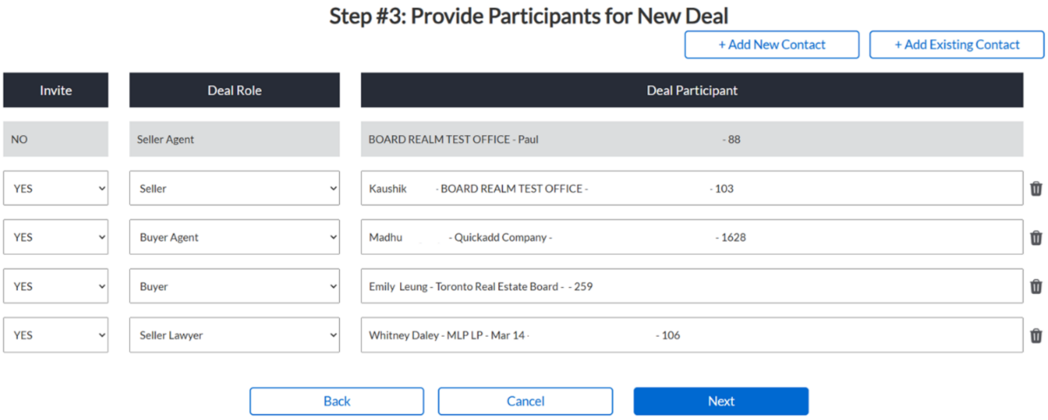
  - You will be asked to provide First Name, Last Name and Email address



- Once completed, an email will be sent to the participant to join the deal, and their name will be added to the deal participant list (new row)

▪ **Option 2: Add New Contact (Create new Contact)**
  - If you select “Add New Contact” you will follow the standard process for creating a contact.
  - Once created, they will be added to the deal participant list (new row)

▪ **Option 3: Add Existing Contact**
  - If you select Add Existing Contact, a contact must be in the system and part of your contact list.
  - A new row will appear, and you can manually type the users name or email to search for them.
  - You can repeat the actions above for every participant

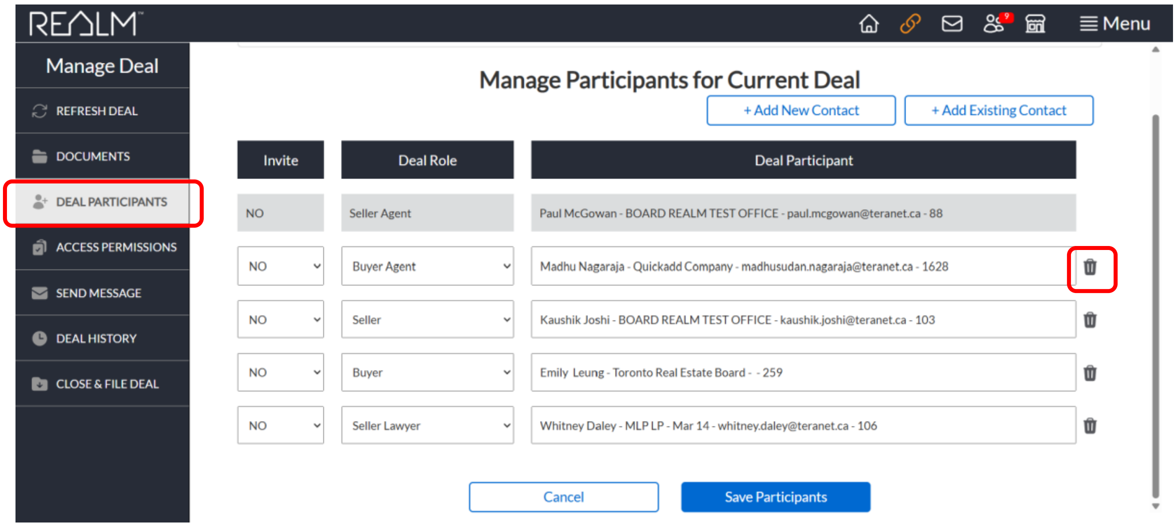


▪ Identify the Deal Participant Role

▪ As you invite participants to the deal, assign a Deal role to them. You can select from the following options

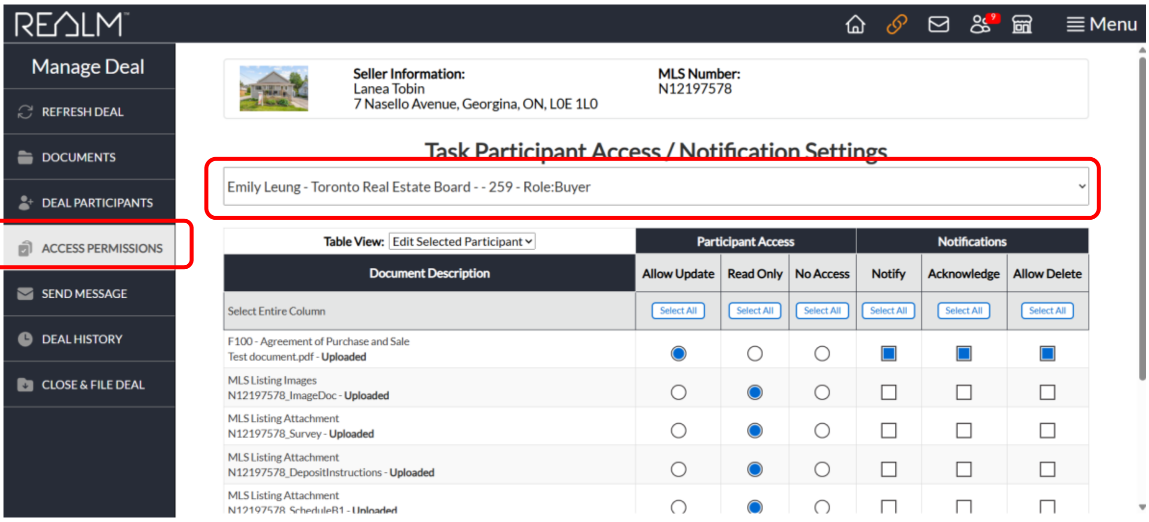
- Be sure to select a deal role for each participant
- Invite the participants to the deal
  - Be sure to have the "Invite" column toggled to Yes, to ensure the invitation has been sent
- Click "Save Participants" when all new deal participants have been identified and their role assigned
- Once completed, all new participants will be automatically emailed by the system and invited to join the deal (invitation and links provided within the email)
- As part of the set-up process for new participants, all Deal Participants will be required to go through an eIDV certification process before being granted access to the system (coming soon)

- **How do I delete a participant from an Open Deal Room?**
  - If you have permission, Click on the Deal Participants within an open deal

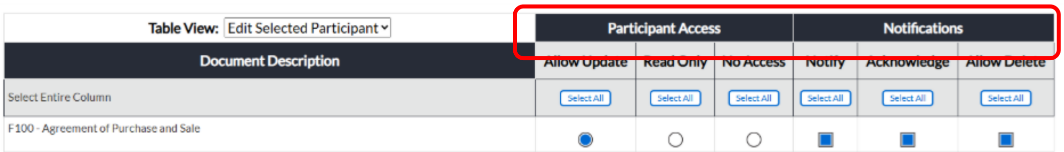


  - With the right permission, you can delete a participant at any time
  - Simply click on the garbage can icon to the left of the contact and they will be removed from the Deal Room

- **Access Permissions**
  - **How do I change document permissions for deal participants?**
    - If you have permission, you will have the ability to adjust document permissions and notifications by participant. Meaning, you can control what they are able to update, view or restrict document access.
    - Click on the "Access Permissions" Tab from within an Open Deal Room

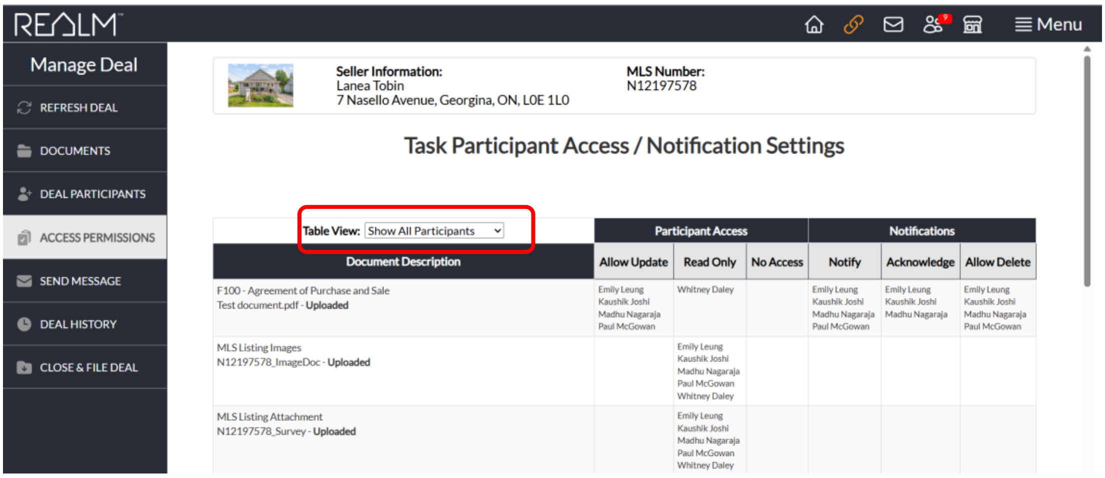


    - All the settings for each user are preset, depending on the type of user they are labeled as in the main deal room. This means that it isn't mandatory for you to make any adjustments to the user settings when the deal is launched.
    - To adjust settings for a deal participant, find the individual's name in the picklist at the top of the page. Once you have selected the users name, the columns below will update to show their current default settings. There are two different areas for customization on the panel: Participant Access and Notifications



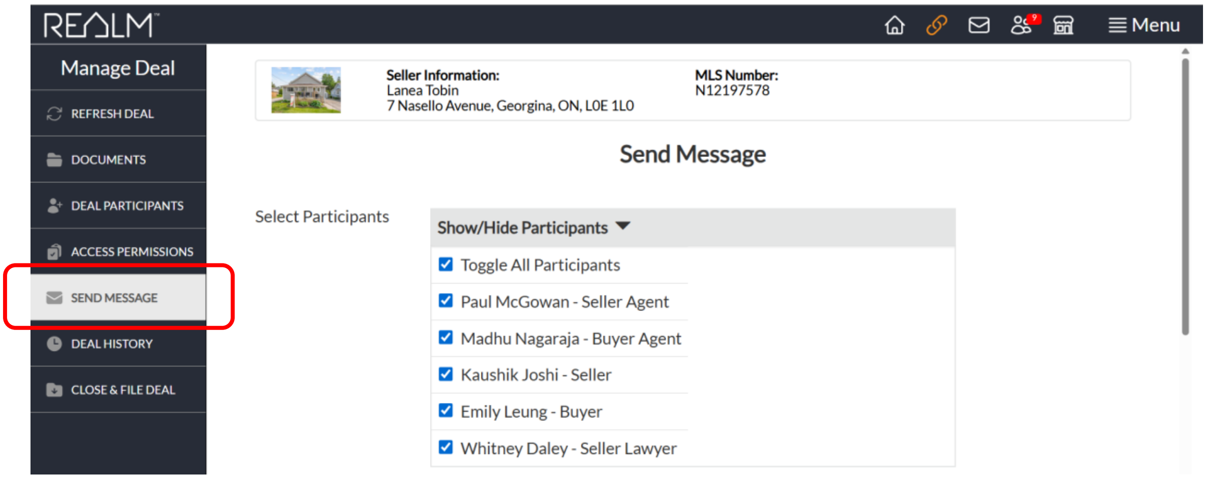
    - The Participant Access section allows you to change how everyone interacts with the deal and each one of the documents. They can be set to:
      - Allow Update: this will let the participant add files to the deal
      - Read Only: this will let the user view and download the files that have been uploaded, but not upload or replace this specific document
      - No Access: this will prevent the participant from viewing the specific document
    - The Notifications section allows you to choose from three options for whether the participant will receive notifications.
      - Notify: this will send an email to Notify the participant that a new or updated document has been added to the Deal Room.
      - Acknowledge: Within the application, it provides the ability to ask for users to acknowledge receipt of the communication.
      - Allow Delete: Allows users to delete messages from the system inbox.

- How do I see a summary of Deal Participant document access?
    - Change the Table View from “Edit Select Participant” to “Show All Participants”

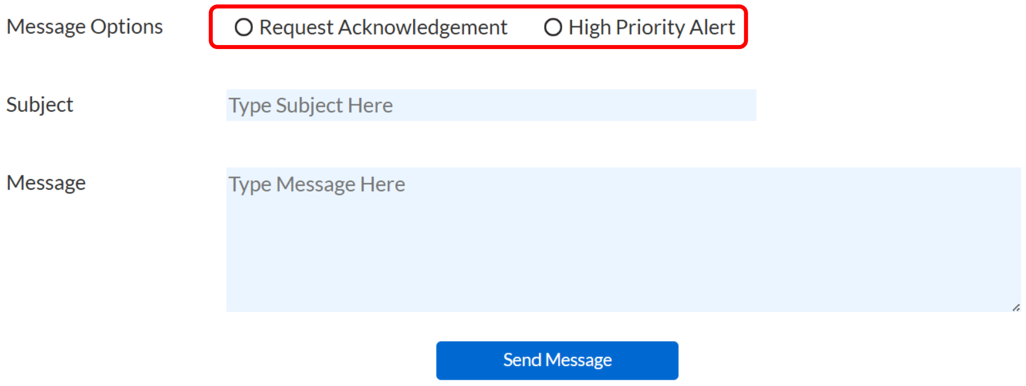


    - Once you change the table view, you will see a summary for each document, who has what permission.

- **Send Message**
  - **How do I send a message?**
    - To send a message, you must be in the desktop version of the app. It is not possible to write a message in the mobile app, you can only read and acknowledge messages.
    - Click on “Send Message” from within an Open Deal Room



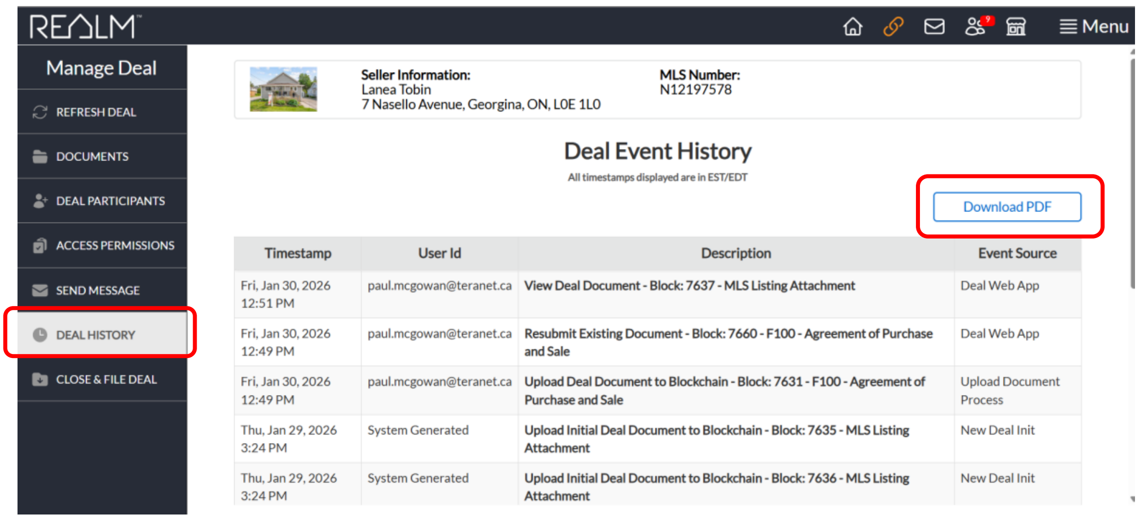
    - At the top of the page, you will see a list of the participants in that deal. All the names of the participants will automatically be selected. If there is anyone you do not want to be included in the message, remove the check mark from beside their name.
    - There are two toggles available with Message Options: Request Acknowledgement and High Priority Alert



- If you select "Request Acknowledgement", you will receive an in-application and email notification when the individual reads the message and clicks the "Acknowledge" button.
- You can also set the message as High Priority Alert

- Complete the Subject and Message and then Click the Send Message button at the bottom of the page. The individual will receive an email with the message, and will also receive the message in their REALM Verified Transactions Message Center

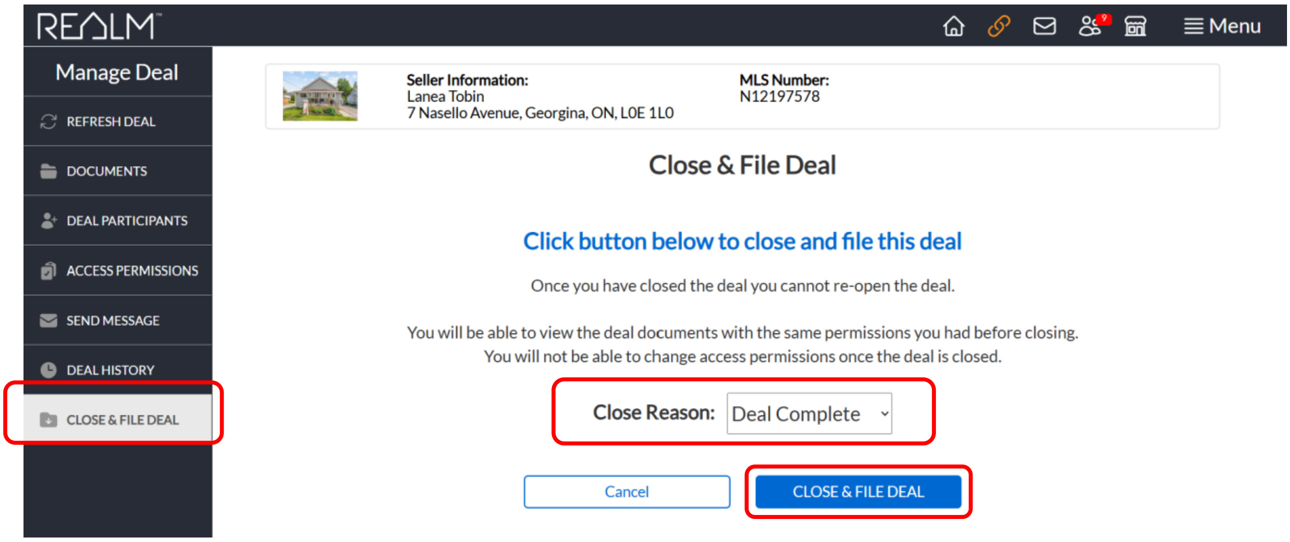
- **Deal History**
  - **What is the Deal Event History?**
    - To access the Deal History, click on "Deal History" Tab from within an Open Deal Room



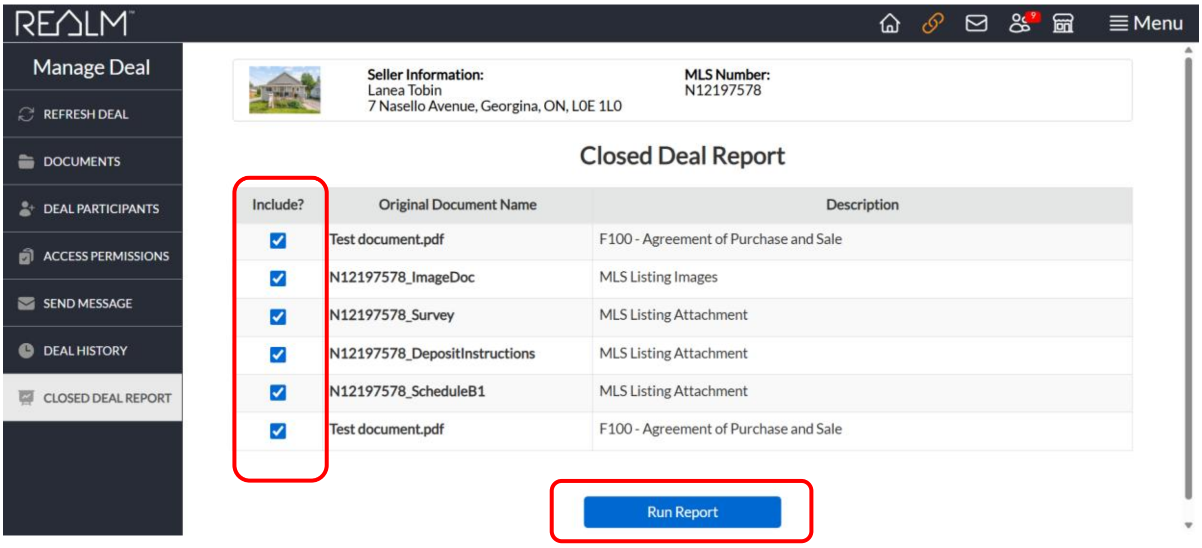
- The Deal History is an immutable record of every action taken by both system and individuals that are participating in the Deal Room
- Each and every action taken is recorded. That includes such events like initiating a deal, inviting participants, uploading and replacing files, viewing files and more.
- The Deal Event History Log captures the timestamp, UserID (which can be a user or system generated), a description of the activity and the location of where the activity took place
- This can be used for audit purposes, change control management & tracking purposes.
- The Deal Event History is stored within the blockchain

        - Users can also download a PDF copy of the history by clicking on “Download PDF” button above the history table

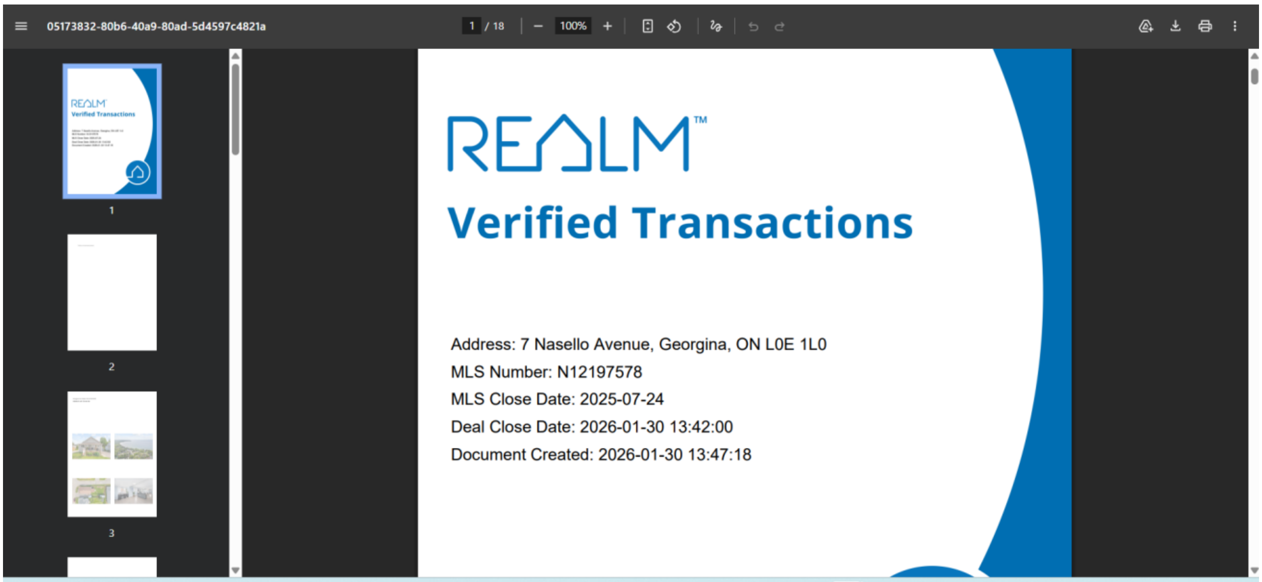
- **Close & File Deal**
    - Once all the deal participants have submitted their documents and agreed that all the information has been completed, the deal can be closed.
        - It is important to note that only Broker, Office Manager, Seller Agents or Seller Agent Admins have the option to close a deal.
        - When a Deal is Closed, you will no longer be able to edit or make any changes to the Deal Room
    - Once closed, you can export a full closing report containing:
        - All documents
        - MLS images & attachments
        - Version history
        - Audit logs
        - Summary of actions and participants
    - To Close a Deal, click on the **“Close and File Deal”** tab within an Open Deal Room



    - Select a “Close Reason”.
        - You have two options to select from the pick list: Deal Complete or Deal Abandoned.
        - Both options will close the deal, but depending on what you select, the label will be different.
    - Click on Close & File Deal when ready
    - You will then be notified that the Deal was Successfully closed.
    - At this time, you will be prompted to run an optional Closed Deal Report



- The Closed Deal Report allows users to create a PDF summary report including all documents and activity that took place within the Deal Room
- Select which documents you would like to include by ensuring the blue checkbox is clicked. When ready, click on the Run Report button
- A new screen will pop up with your PFD Deal Closing Report



- You can view, print and download this document

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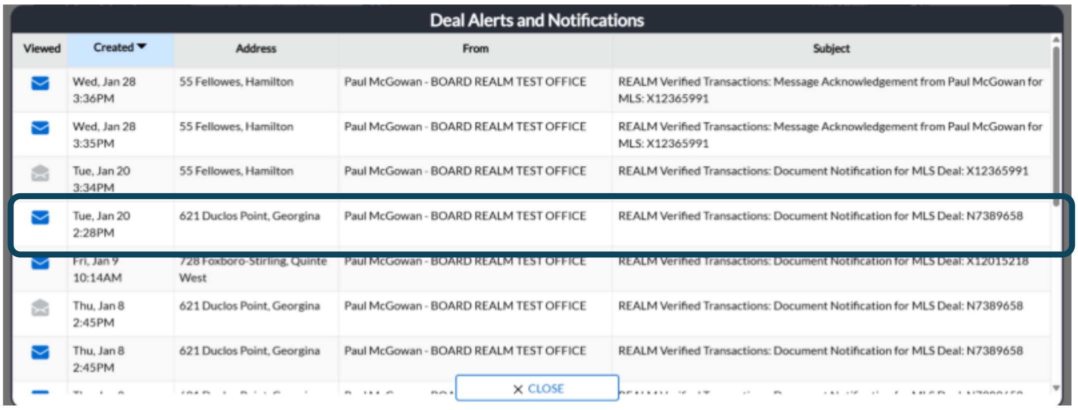
6. Messaging Within the Platform

You can send messages to deal participants from within the platform and help prompt deal participants for required actions. Notifications appear in the platform inbox AND via email.

- **Where do I find deal alerts and notifications?**
  - To view a message, you have two options.
    - You can read the email that will be sent directly to your email inbox based on the email provided to set up your account

- You can sign in to the application and read it in your notification center. Simply click on the envelope icon on the top navigation bar and you will see all your notifications

  - Once you click on the Deal Alerts and Notifications you will see all notifications



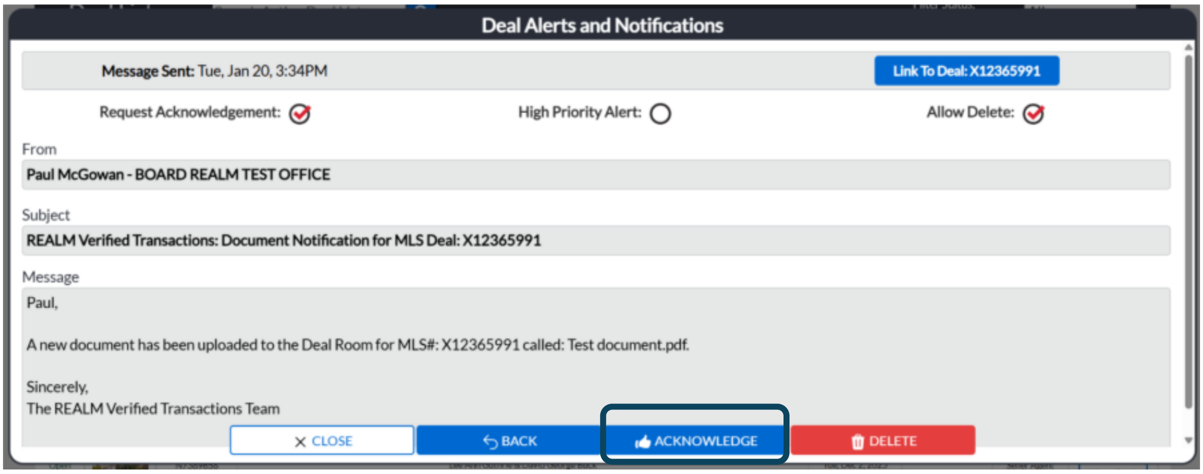
Deal Alerts and Notifications

Viewed	Created	Address	From	Subject
	Wed, Jan 28 3:36PM	55 Fellowes, Hamilton	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Message Acknowledgement from Paul McGowan for MLS: X12365991
	Wed, Jan 28 3:35PM	55 Fellowes, Hamilton	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Message Acknowledgement from Paul McGowan for MLS: X12365991
	Tue, Jan 20 3:34PM	55 Fellowes, Hamilton	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Document Notification for MLS Deal: X12365991
	Tue, Jan 20 2:28PM	621 Duclos Point, Georgina	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Document Notification for MLS Deal: N7389658
	Fri, Jan 9 10:14AM	728 Foxboro-Stirling, Quinte West	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Document Notification for MLS Deal: X12015218
	Thu, Jan 8 2:45PM	621 Duclos Point, Georgina	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Document Notification for MLS Deal: N7389658
	Thu, Jan 8 2:45PM	621 Duclos Point, Georgina	Paul McGowan - BOARD REALM TEST OFFICE	REALM Verified Transactions: Document Notification for MLS Deal: N7389658

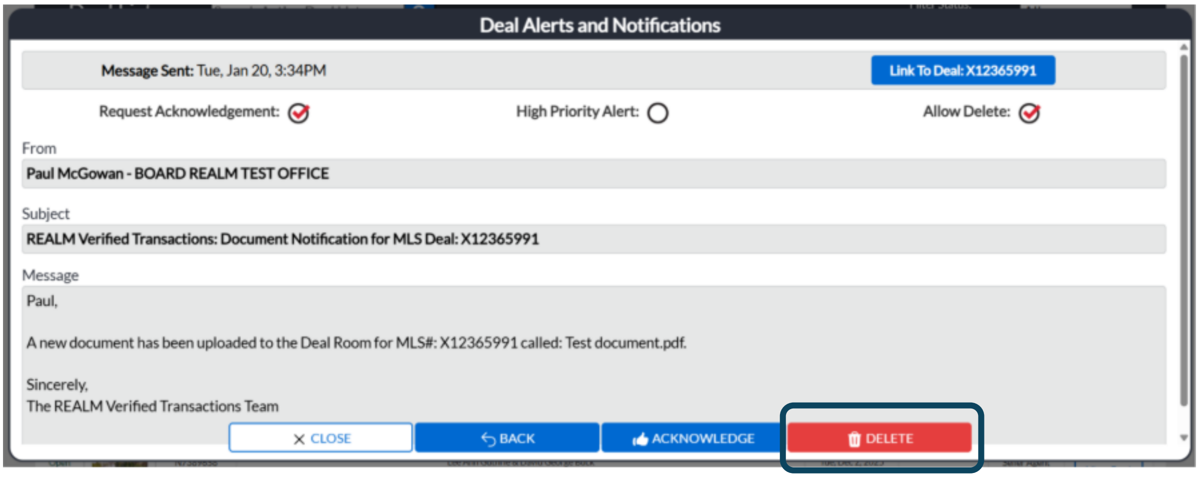
CLOSE

  - Simply click on any line to view your message

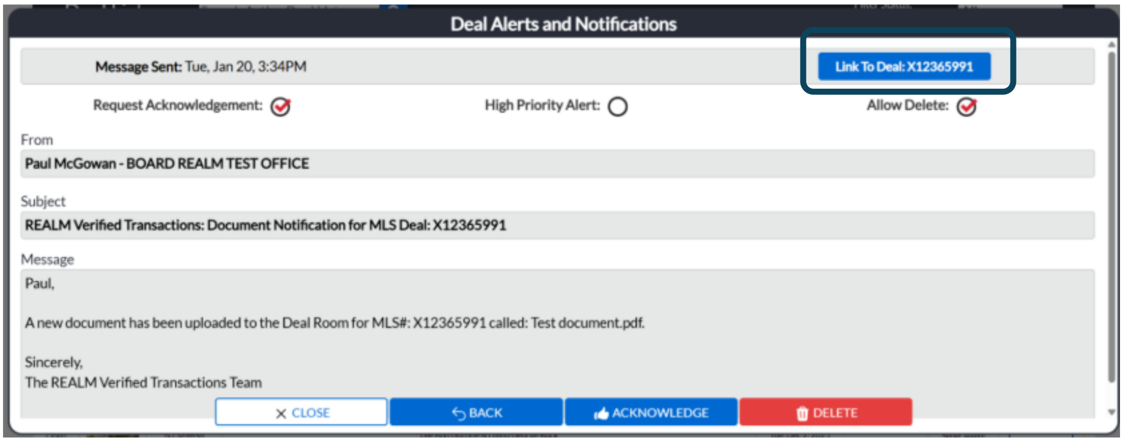
- **What does acknowledge mean within a message?**
  - Acknowledge provides a notification back to the sender that you have seen the message sent to you and you have acknowledged receipt.



- **What happens if I delete a message?**
  - If you click delete from within a message, the notification will be removed from your notification center



- **How do I link to deals from a message?**
  - Each message provides a link back to the deal room.
  - Simply click on the blue box (top right of the screen) which links directly to the deal room



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7. Accessing the Reports Store

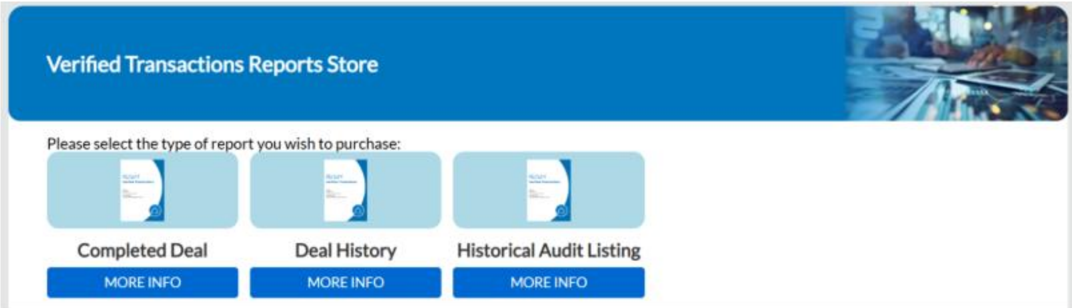
The reports store contains access to completed deal reports, deal history and historical audit reports

- **How do I access the Reports Store?**
  - Simply click on the Store icon in the top navigation bar to access the Reports Store

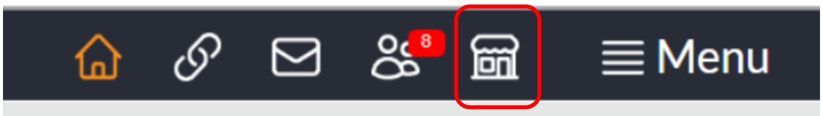
- **What can I purchase in the reports store?**
  - There are three different reports to choose from
    - Completed Deal Report
      - A comprehensive summary binder report in PDF format that documents all key information for your deal
    - Deal History Report

- A detailed history of all interactions on the deal by all participants and system actions. You can view the user or system action that performed the task along with a timestamp of the activity.

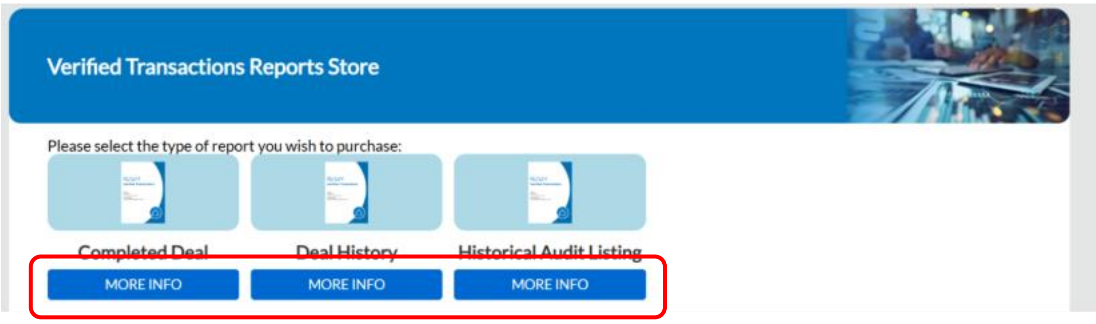
- Historical Audit Listing Report
    - A detailed report showing all changes from the MLS system for the property over time from when the MLS listing was created and through the time the last changes were made in the MLS system, up to the property being sold.



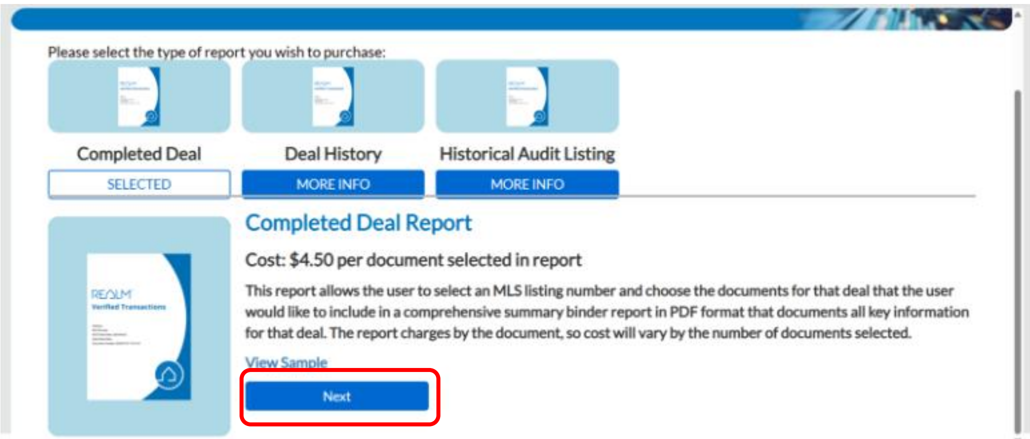
- **How to I purchase a report in the store? (e.g. Completed Deal)**
    - Navigate to the store by selecting the store icon from the top navigation bar



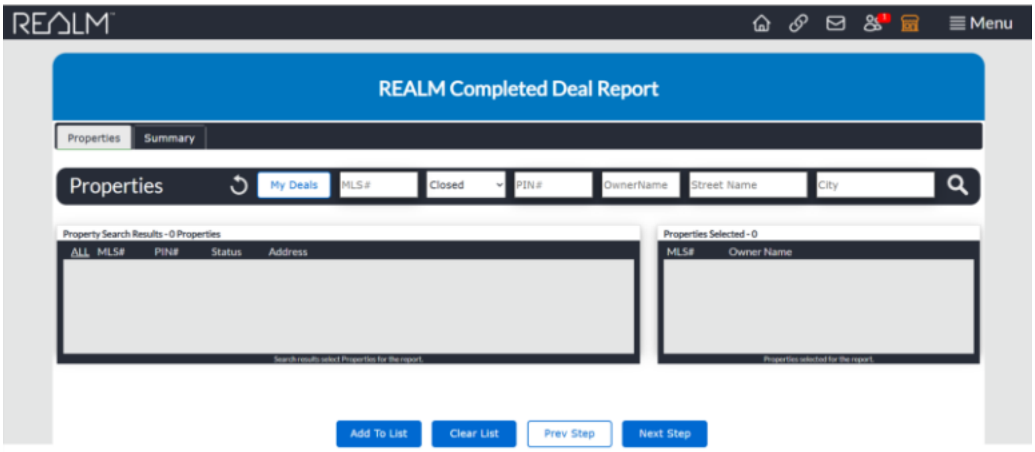
- Once in the store, click on the report you would like to purchase (more info)



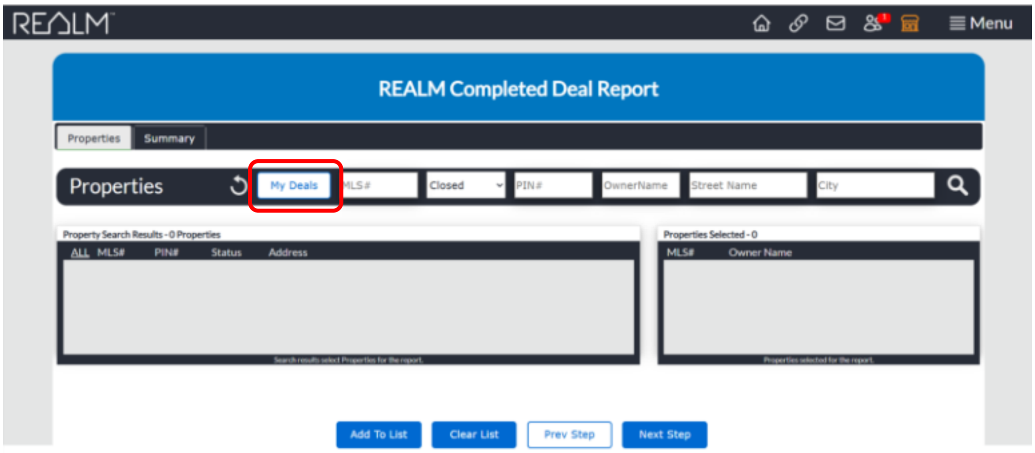
- Click on **Next** of your preferred report



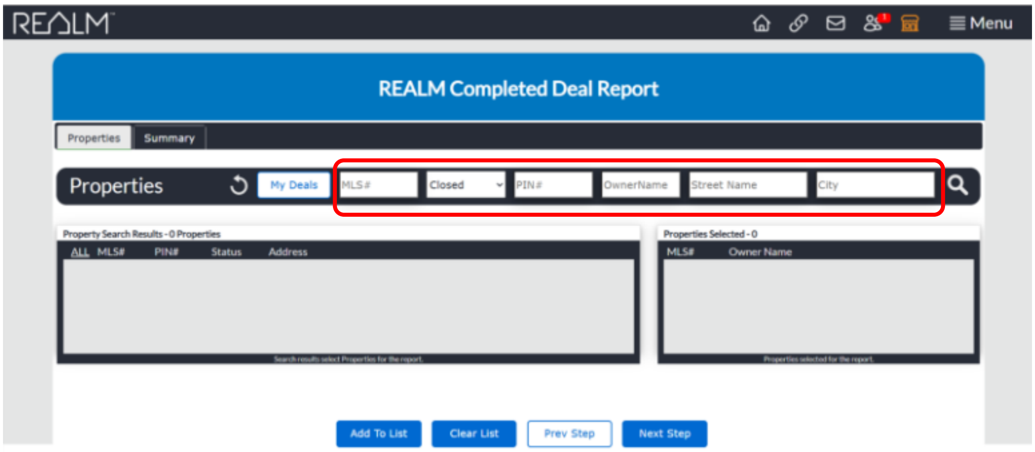
- You will then enter the store environment



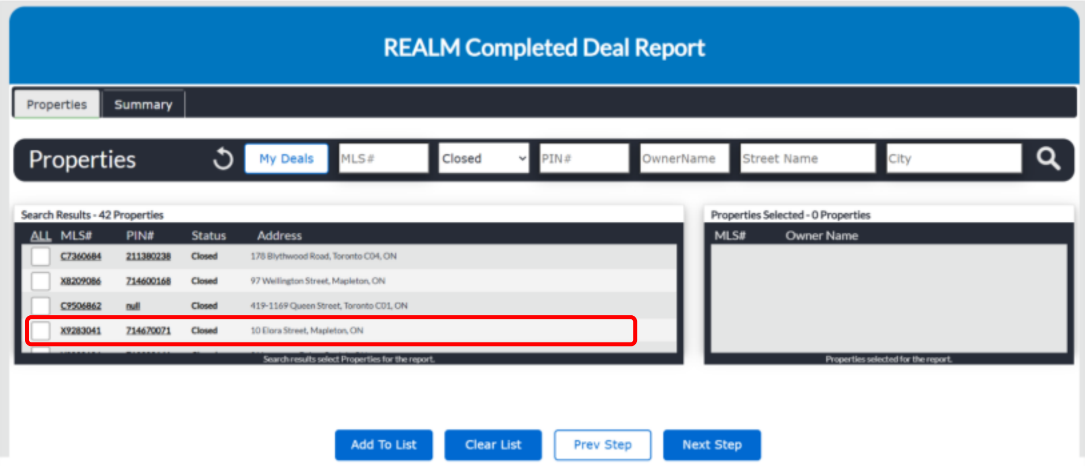
- Start by searching for a property of interest
  - **Option 1:** Click on **My Deals** for access to all your closed deals

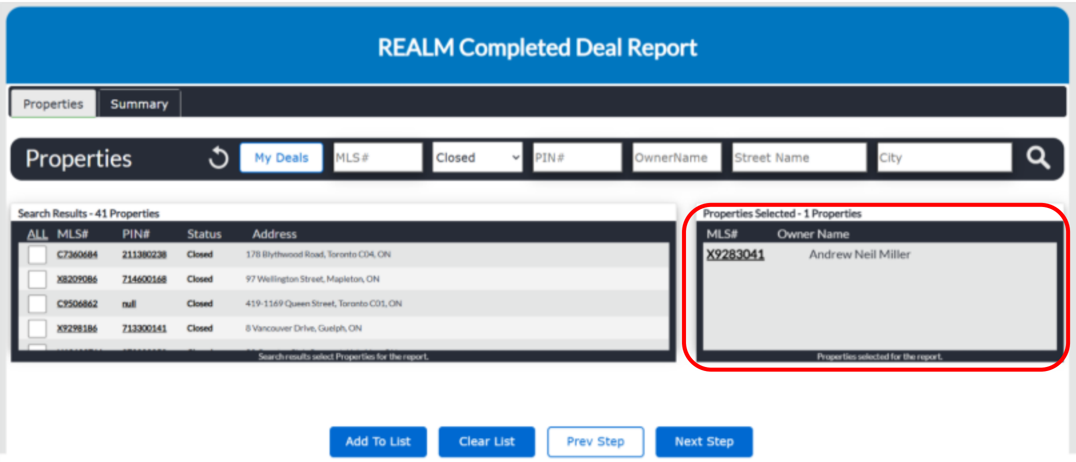


  - **Option 2**: You can manually search by typing any of the below into the proper field:
    - MLS#
    - PIN#
    - Owner Name
    - Street Name
    - City

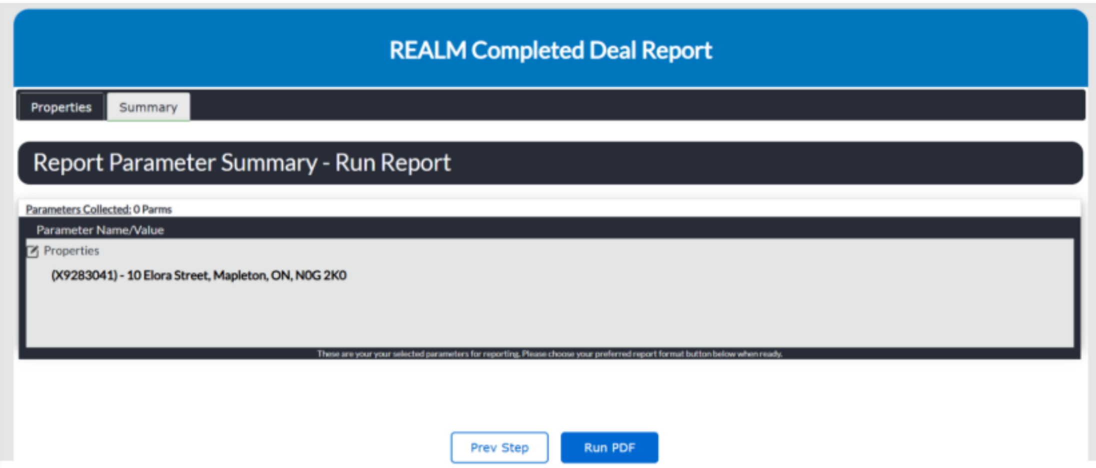


- Find the property of interest, and double click on it – you will see it move from the search results screen (left side) to the Properties Selected screen (right side.

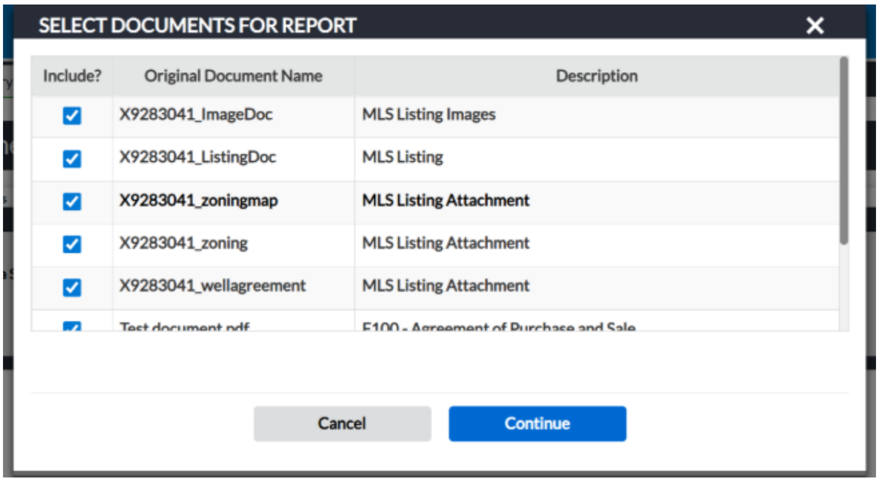




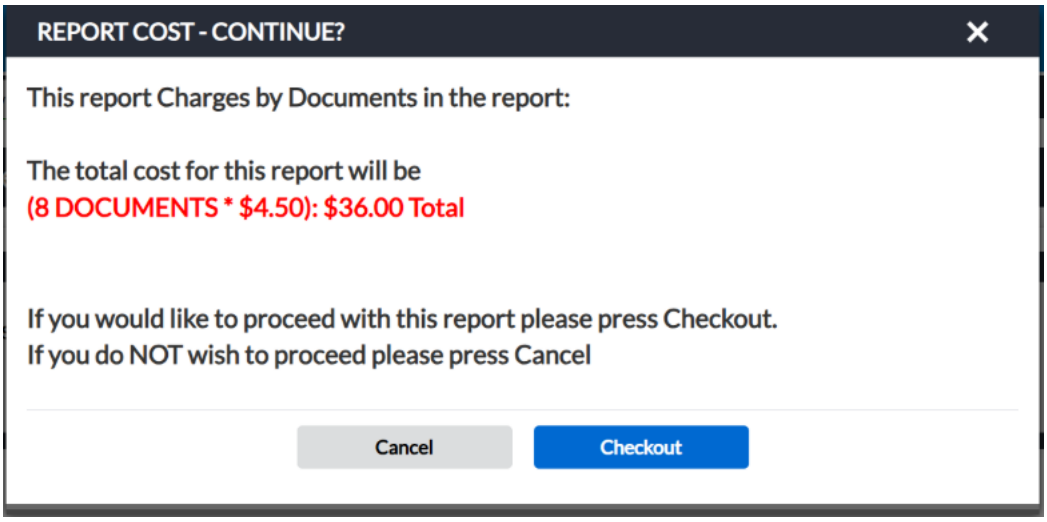
- Click "Next step"
- Confirm your property and click on Run PDF



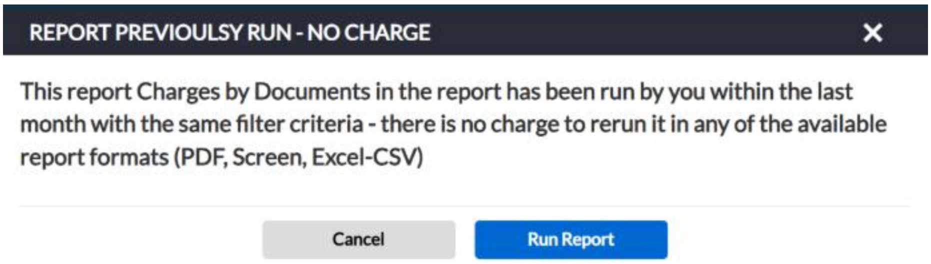
- You will then be prompted to select the documents you would like to include in your report. All documents that were either system generated or user generated are available for inclusion. Ensure check boxes are checked off for every document you would like to see included.
- Once all documents have been selected, click continue



- The cost for this report is based on the total number of documents included in your selection. In this example, each document is $4.50. 8 documents will cost $36.00 plus tax.



- If you would like to proceed, click on Checkout
- You will then be prompted to pay all fees associated with the purchase of your report via a credit card payment through Stripe.
  - If you have already paid for this report previously, you will not be charged twice



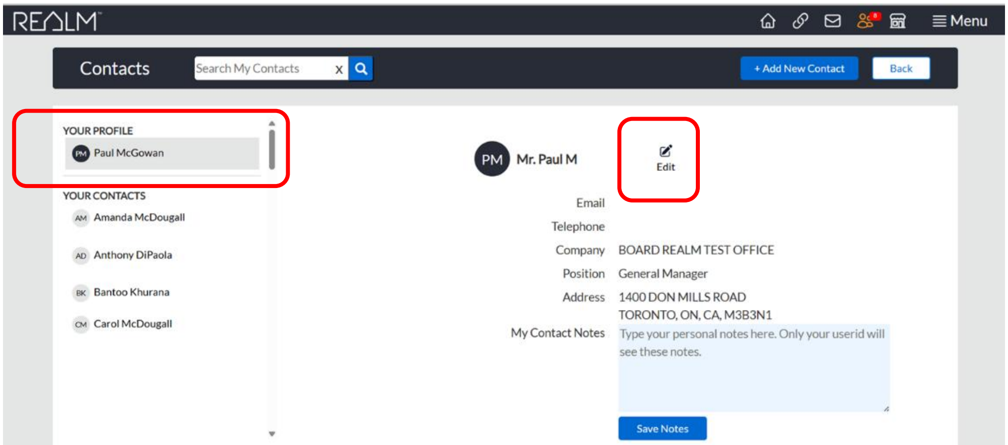
- Once payment is received, click on Run Report
- The PDF will automatically generate on screen and will be available for download

- **Why can't I find a specific property in the store search?**
  - Only closed deals will show up in the store. If a deal has a status of New, Open or Abandoned, the property will not show up in the store search

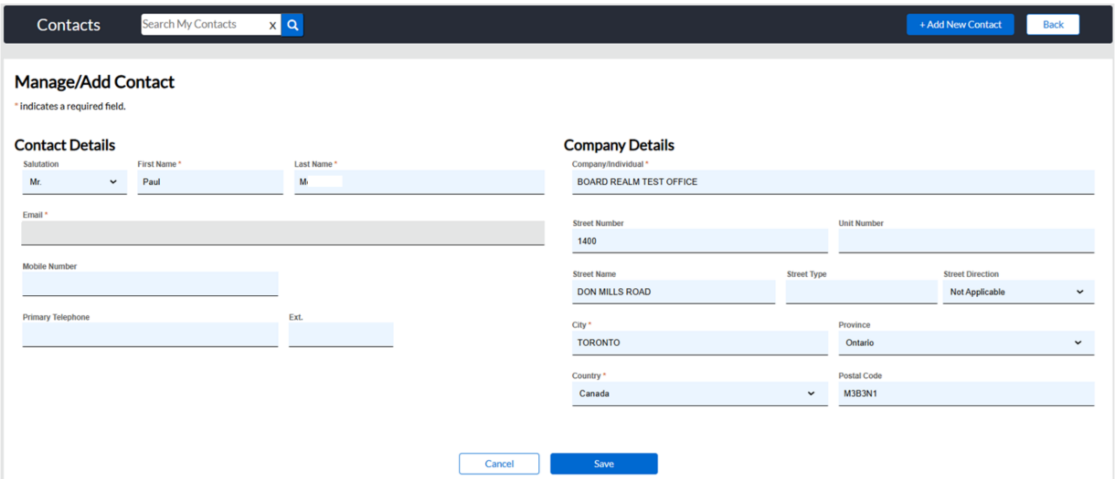
8. Managing your Profile and Contacts

- **How do I update my profile?**
  - Simply click on the Contacts icon in the top navigation bar

  - Once in your contacts, you will see your profile listed first



  - To Edit your profile, click on the edit icon
  - From there, you can edit your profile.

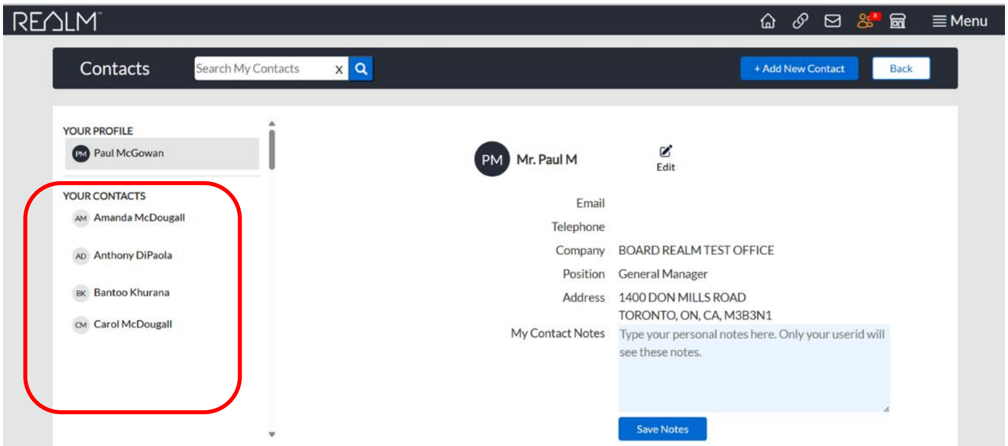


  - Click Save to save any of your changes

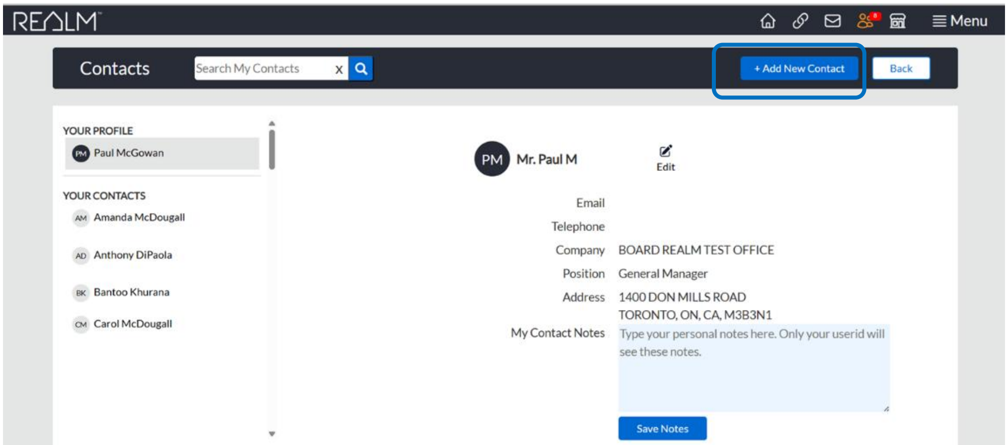
Manage Contacts

- **How do I find my contact list?**
  - Simply click on the Contacts icon in the top navigation bar

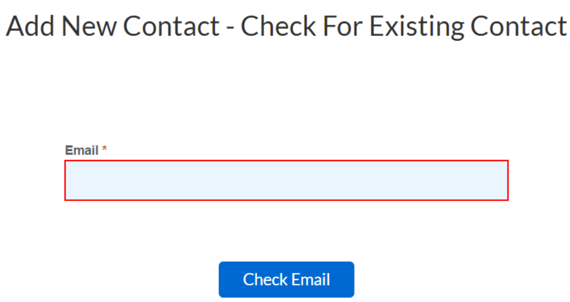
  - Once in, you can scroll and search your contact list



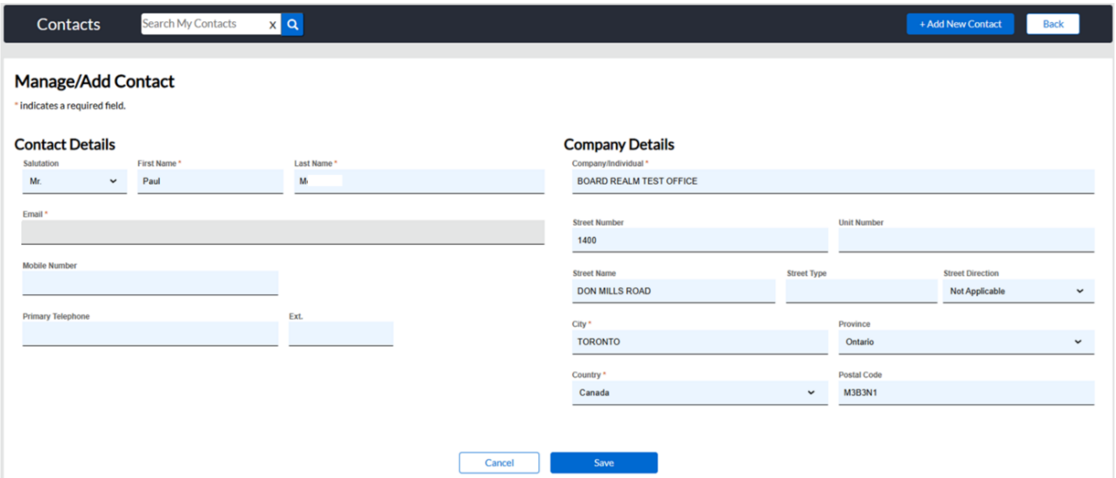
- **How do I add a new contact?**
    - Click on "+Add New Contact"



    - You will be asked to provide an email address of your contact, to check for an existing contact – enter the email address and click check email

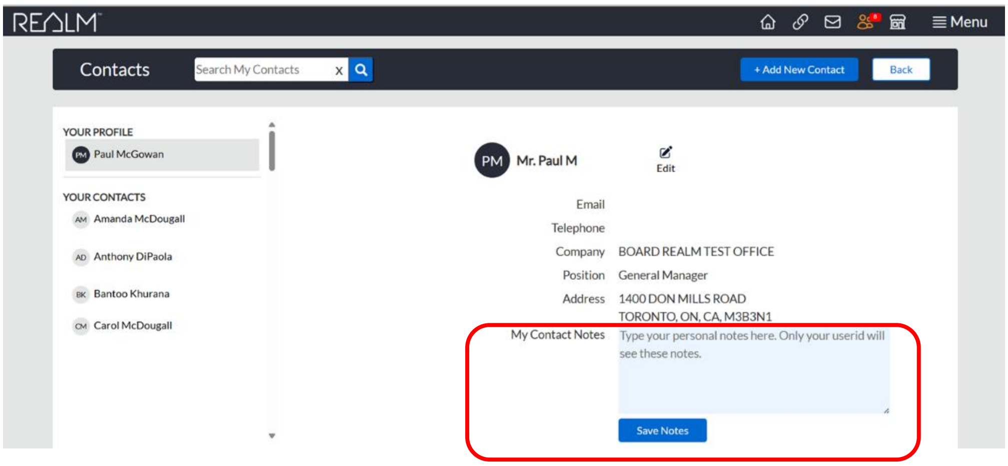


    - If a contact does not already exist, you will then be able to provide contact details / info for your new contact



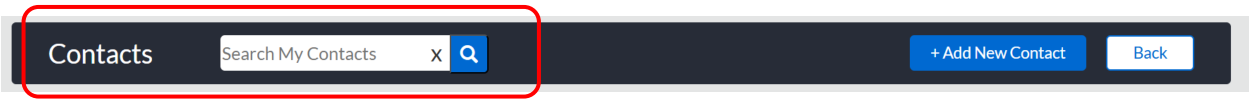
- Fill in your details and then click save to continue

- **Why can I no longer edit a contacts info? / What does "Save notes" mean for a contact?**
  - Once an invited participant has logged into the platform for the first time, they are able to "claim" their profile. Their profile and contact information are now exclusively managed by the account owner. They are responsible to keep their contact information and details updated.
  - You can still save your own personal notes / comments to a contact, that only you will see. Simply add notes into the "my contact notes" field for your own personal reference



- **How can I search for a contact?**
  - Simply click on the Contacts icon in the top navigation bar

  - Once in, you can search or scroll through your contact list



9. Mobile App Features

The REALM Verified Transactions app is available for iOS and Android devices and can be downloaded from the Apple Store or Google Play Store. Search for REALM Verified Transactions

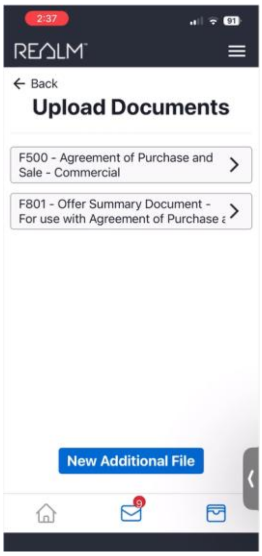
The mobile app allows you to:

- Access your Dashboard
- View individual deal rooms
- Upload & view documents
- View / Add participants
- View notifications
- View Deal History
- Use digital wallet features for eIDV credentials (coming soon)

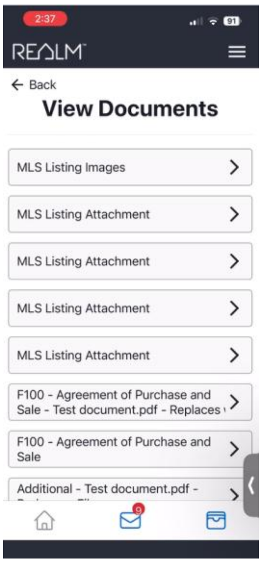
Dashboard

View Deal

Upload Docs

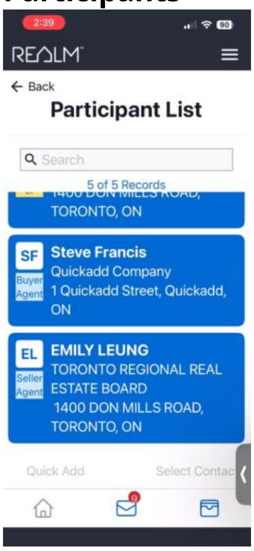


View Documents

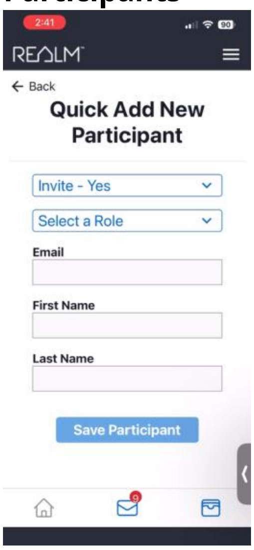


Add Docs

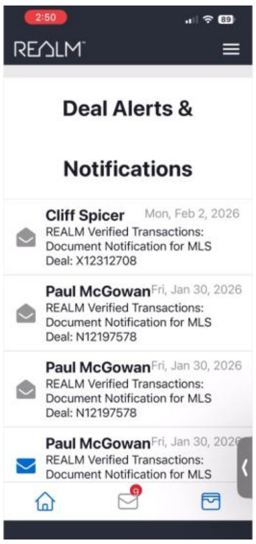
View Participants



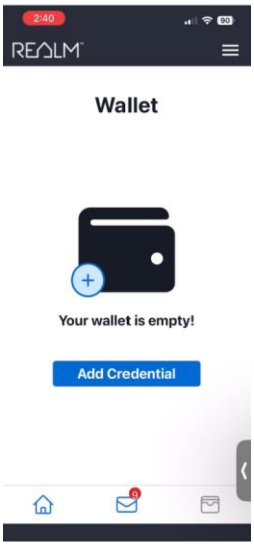
Add Participants



View Notifications



View History Wallet



The mobile app does not allow you to:

- Create a new deal (desktop-only)
- Close and file a deal (desktop only)

Additional Frequently Asked Questions (FAQ)

Who can use this platform?

- Anyone involved in a real estate transaction, including:
  - Property Buyers & sellers
  - Real estate agents
  - Lawyers
  - Mortgage brokers
  - Insurers
  - Lenders
- All must complete ID verification before gaining access.

How do deals get onto the platform?

- The system automatically pulls in a listing **once its MLS status changes to Sold or Sold Conditionally**. The deal then appears on your dashboard. [3]

What is Electronic Identification Verification (eIDV)?

- Electronic identity verification (eIDV) is the process of **confirming a person's identity digitally** using a computer or mobile device. It replaces traditional, in-person document checks by cross-referencing user data with sources such as authoritative databases, biometric scans, and credit history. eIDV is designed to help prevent fraud, protect consumer data, and help satisfy compliance standards like Know Your Customer (KYC) and Anti-Money Laundering (AML) regulations

Who is required to go through the eIDV process?

- **All participants** (Buyers, sellers, lawyers, agents, mortgage brokers, etc.) that have been invited to a deal room are required to go through the eIDV process before they can participate in a deal room

Are Agents / Brokerages / Staff required to go through the eIDV process?

- **No.** Agents, Brokers & Staff are not currently required to go through the eIDV process

Why do participants have to go through the eIDV process?

- This helps to keep the environment secure with verified participants and prevents unauthorized access. This is an additional security measure used within the REALM Verified Transactions Platform.

Does the eIDV process have a cost?

- **Yes.** It will cost approximately $6.50 to process an eIDV request.

Who pays for the eIDV?

- There are **two options:**
  1. **End user pays –** invited participants will be prompted to pay for an eIDV when they first attempt to login
  2. **Agent / Brokerage pays** – Agents inviting participants to a deal room have the ability to pay on behalf of the participant immediately after they are invited

Are completed eIDV reports made available?

- **No.** The use of eIDV is an additional security measure used within the REALM Verified Transactions Platform. The platform stores a Pass/Fail indicator for each participant which has been provided by the eIDV provider following the identity review.

Do participants have to complete an eIDV for every deal room?

- **No.** As long as participants have a valid eIDV they can participate an any amount of deal rooms.

Do eIDV's expire?

- **Yes.** eIDV's expire after one year, or if a piece of personal identification that was used has expired.

Who provides eIDV services?

- Two vendors have been selected to conduct eIDV services. **Treefort and Fintracker.** This provides choice to users. The platform will be launched with Treefort and Fintracker will follow

How does the system handle signed documents?

- Signing does **not** currently happen inside this platform
- You can continue to use existing signing tools. Once documents are fully signed, the platform can integrate with your platform and pull them in automatically via APIs (coming soon).

Does the platform track document versions?

- Yes. Every version is stored, and nothing is deleted (because it uses blockchain). You can view old versions anytime.

Will participants be notified when documents are updated?

- Yes. All participants automatically receive email notifications whenever documents are added or updated.

Can I control who sees each document?

- As a Listing Agent, you can manage document permission for each participant through the "Access & Permissions" section. As a Deal Participant, when you upload a new document to the Deal Room, you will be prompted to select who in the Deal Room has access to view your document.

How is activity tracked?

- Every action—uploads, views, changes, invitations—is logged, timestamped, and stored as an audit record. This can be downloaded or reviewed at any time.

What happens when a deal is closed?

- Locks the deal room permanently
- Prevents further changes
- Generates a full closing report containing all documents and history.

Can I access historical MLS activity?

- Yes. You can pull a **Historical Audit Listing**, which shows all listing changes, prices, status updates, and activity from creation to sale.

Top 10 Things You Should Know

1. Deals appear automatically after the MLS status changes to Sold

You don't need to manually add new deals — the system pulls them in once a listing becomes **Sold** or **Sold Conditionally**.

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2. The Dashboard shows all deals you're involved in

Whether you're the listing agent, selling agent, or an invited participant, all relevant deals appear in one place with their statuses: **New**, **Open**, **Closed**, **Abandoned**.

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3. Creating a Deal Room starts with selecting forms

You choose Residential / Commercial / Lease and pick the OREA forms you plan to collaborate on. You can also add additional or custom forms later.

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4. Invite participants easily — everyone must verify identity (eIDV)

Buyers, sellers, lawyers, agents, mortgage brokers, etc. will be required to complete ID verification before accessing the deal room (coming soon). This keeps the environment secure and prevents unauthorized access.

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5. MLS data and attachments are imported automatically

Images, attachments, floor plans, schedules — all listing-related content is automatically pulled into the deal room, saving time and ensuring accuracy.

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6. Collaboration is real-time, with automatic notifications

Every upload, update, or version change notifies participants instantly by email. Nothing goes unnoticed.

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7. Document permissions are fully customizable

Control who can upload, read, or view nothing — per document, per role. This ensures sensitive files stay restricted.

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8. Full audit trail is tracked and blockchain-secured

Every action — system or user-driven — is timestamped, logged, and preserved permanently. Great for compliance and professional standards.

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9. Closing a deal locks it permanently

Once you close and file a deal, no more edits can be made. A complete **Closing Report** can be generated containing all files, versions, and history in one package.

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10. Mobile app is available for daily workflow

You can view deals, upload photos, message participants, and manage contacts.
Only limitation: **new deals can only be started from the desktop**.
