



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. Logging in to the Platform

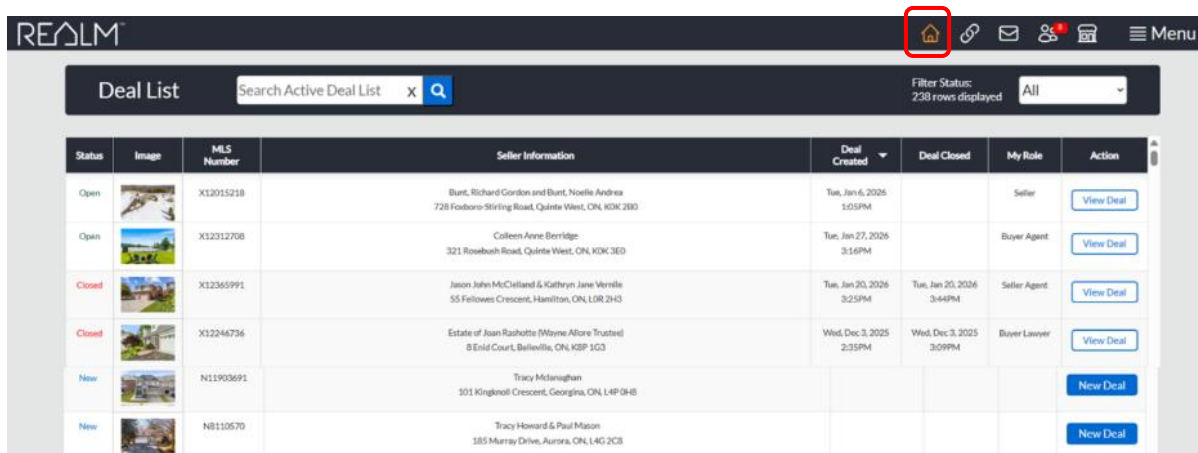
You can access the platform either through **SSO** or a **non-SSO login**, depending on your setup.

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**

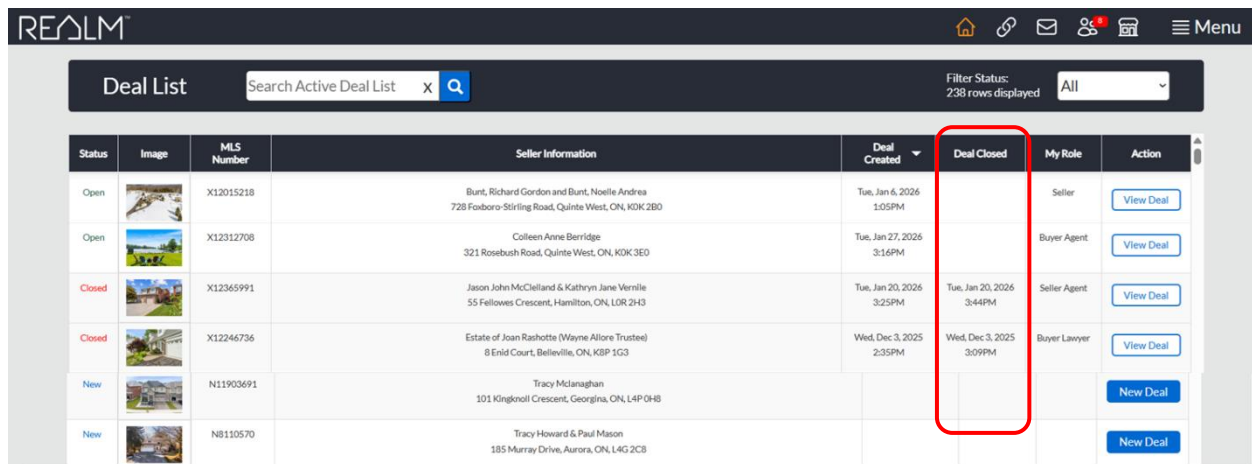


Status	Image	MLS Number	Seller Information	Deal Created	Deal Closed	My Role	Action
Open		X12015218	Burt, Richard Gordon and Burt, Noelle Andrea 728 Foxboro-Stirling Road, Quinte West, ON, K0K 2B0	Tue, Jan 6, 2026 1:05PM		Seller	View Deal
Open		X12312708	Colleen Anne Berridge 321 Rosebush Road, Quinte West, ON, K0K 3E0	Tue, Jan 27, 2026 3:16PM		Buyer Agent	View Deal
Closed		X12365991	Jason John McClelland & Kathryn Jane Verville 55 Fellows Crescent, Hamilton, ON, L0R 2H3	Tue, Jan 20, 2026 3:25PM	Tue, Jan 20, 2026 3:44PM	Seller Agent	View Deal
Closed		X12246736	Estate of Joan Rashotte (Wayne Alois Trustee) 8 Enid Court, Belleville, ON, K8P 1G3	Wed, Dec 3, 2025 2:35PM	Wed, Dec 3, 2025 3:09PM	Buyer Lawyer	View Deal
New		N11903691	Tracy McLaughlin 101 Kingdon Crescent, Georgina, ON, L4P 0H8				New Deal
New		NB110570	Tracy Howard & Paul Mason 185 Murray Drive, Aurora, ON, L4G 2C8				New Deal

- 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.

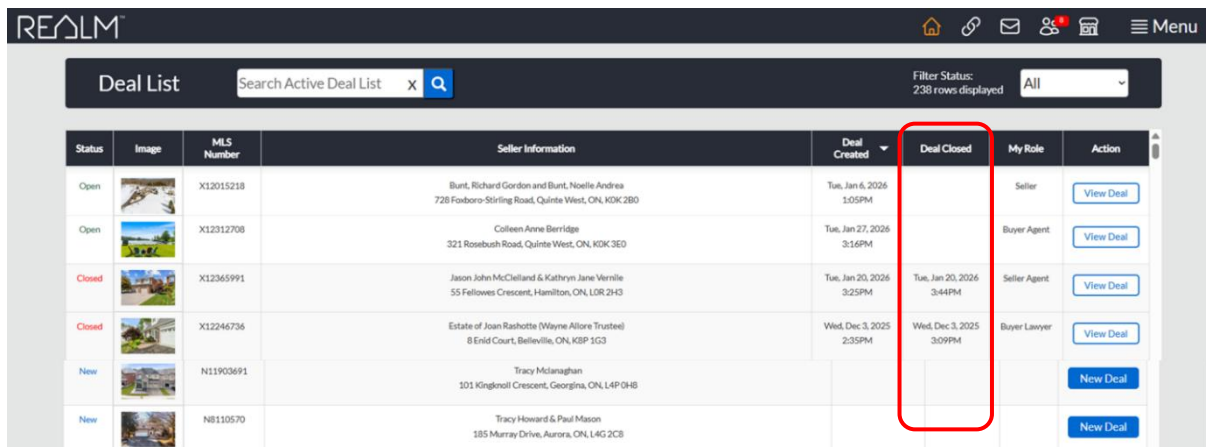


The screenshot shows the REALM Deal List interface. At the top, there's a search bar for 'Search Active Deal List' and a filter status dropdown set to 'All'. Below this is a table with columns: Status, Image, MLS Number, Seller Information, Deal Created, Deal Closed, My Role, and Action. A red box highlights the 'Deal Closed' column. The table contains several rows of deal information, including deal numbers, seller names, addresses, and dates for both creation and closure.

Status	Image	MLS Number	Seller Information	Deal Created	Deal Closed	My Role	Action
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New		N8110570	Tracy Howard & Paul Mason 185 Murray Drive, Aurora, ON, L4G 2C8				New Deal

- **What does Deal Closed mean?**

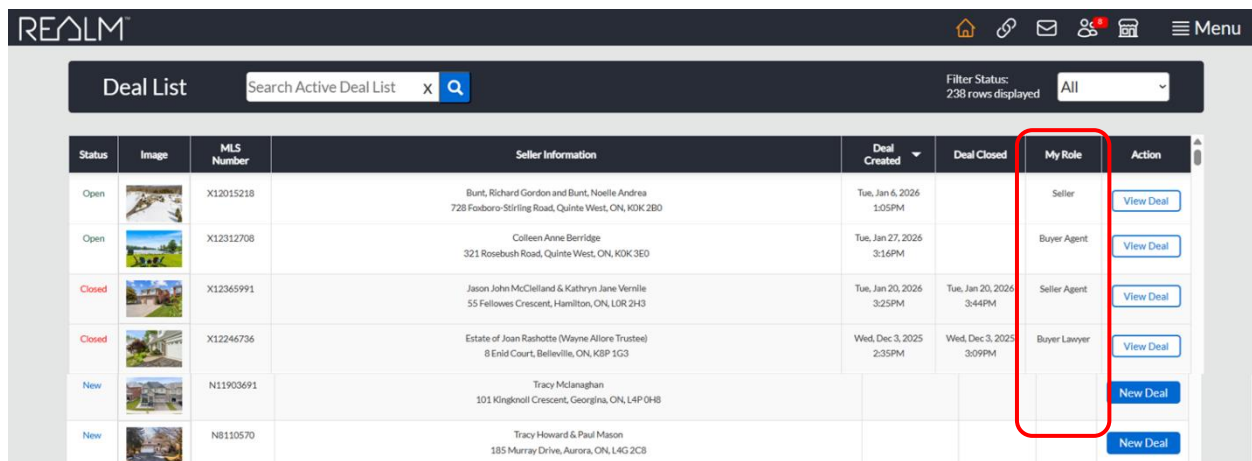
- The Deal Closed is the date in which the Deal Room was finalized and closed. Once a deal is closed, you can no longer make updates to it



This screenshot is identical to the one above, showing the REALM Deal List interface with the 'Deal Closed' column highlighted by a red box. It displays the same table structure and data rows, including deal numbers, seller information, and dates for creation and closure.

- **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



The screenshot shows the REALM Deal List interface with the 'My Role' column highlighted by a red box. The table structure and data rows are consistent with the previous screenshots, showing deal details and the user's role in each transaction.

Status	Image	MLS Number	Seller Information	Deal Created	Deal Closed	My Role	Action
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New		N8110570	Tracy Howard & Paul Mason 185 Murray Drive, Aurora, ON, L4G 2C8				New Deal

- **What does Status Mean?**

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

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- **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

REALM

Deal List Search Active Deal List x

Filter Status: 238 rows displayed All

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• 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

REALM

Deal List Search Active Deal List x

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• 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

REALM

Deal List Search Active Deal List x

Filter Status: 238 rows displayed All

Status	Image	MLS Number	Seller Information	Deal Created	Deal Closed	My Role	Action
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• How long do deals remain on the dashboard once the Status is "Closed"

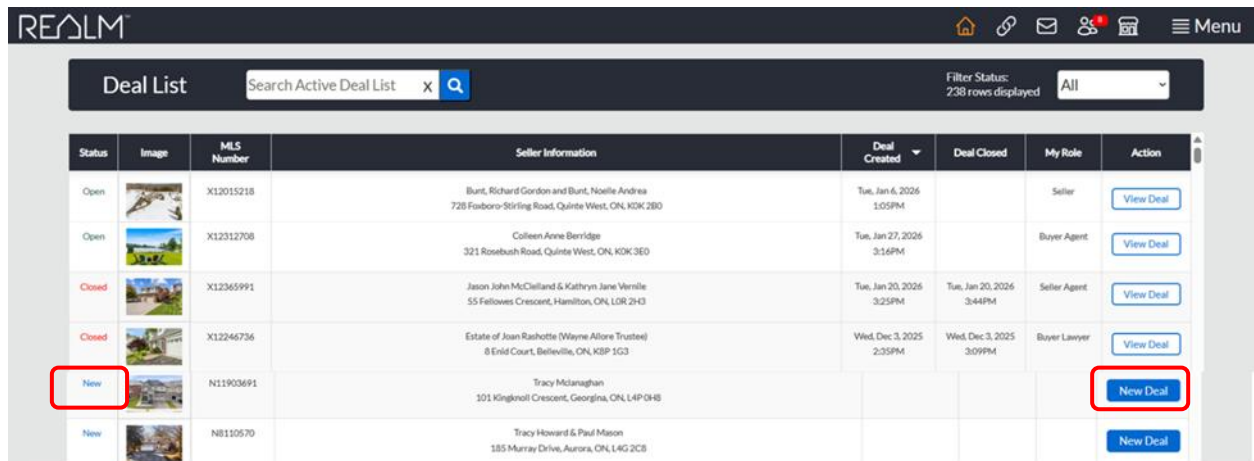
- Deals with a "closed" status remain accessible on your dashboard for 6 months (180 days) before they are archived.

- **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.

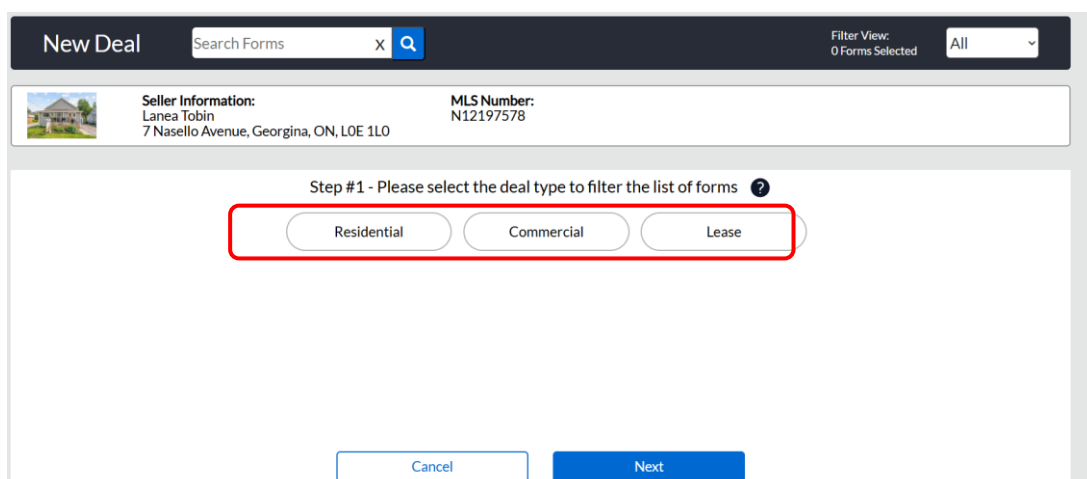
4. Starting a New Deal Room

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



Status	Image	MLS Number	Seller Information	Deal Created	Deal Closed	My Role	Action
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- 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



New Deal Search Forms x Q Filter View: 0 Forms Selected All

Seller Information: Lanea Tobin
7 Nasello Avenue, Georgina, ON, L0E 1L0 **MLS Number:** N12197578

Step #1 - Please select the deal type to filter the list of forms ?

☐ Residential ☐ Commercial ☐ Lease

[Cancel](#) [Next](#)

- **Step 2 – Choose the form placeholders you want to include and collaborate on in your deal room.**

- Forms are organized by OREA numbering system

New Deal Search Forms x Q Filter View: 0 Forms Selected All

Seller Information: Lanea Tobin 7 Nasello Avenue, Georgina, ON, L0E 1L0 MLS Number: N12197578

Step #2 - Choose the form placeholders you want in your new deal ?

Filter: All	Form ID ▲	Form Name
		100's - FORMS SECTION ▲
		200's - FORMS SECTION ▲
		300's - FORMS SECTION ▲
		400's - FORMS SECTION ▲
		600's - FORMS SECTION ▲

Cancel Next

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

Filter: All	Form ID ▲	Form Name
		100's - FORMS SECTION ▼
Toggle Selected	100	Agreement of Purchase and Sale
☒	101	Agreement of Purchase and Sale - Condominium Resale
☒	102	Agreement of Purchase and Sale - Co-operative Building Resale Agreement
☐	103	Option to Purchase Agreement - To Be Used With OREA Form 104
☐	104	Option Commission Agreement - To Be Used With OREA Form 103
☐	105	Schedule - Agreement of Purchase and Sale
☐	106	Seller Selling Under Promise of Sale

Cancel Next

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

New Deal Search Forms x Q Filter View: 0 Forms Selected All

Seller Information: Lanea Tobin 7 Nasello Avenue, Georgina, ON, L0E 1L0 MLS Number: N12197578

Step #2 - Choose the form placeholders you want in your new deal ?

Filter: All	Form ID ▲	Form Name
		100's - FORMS SECTION ▲
		200's - FORMS SECTION ▲
		300's - FORMS SECTION ▲
		400's - FORMS SECTION ▲
		600's - FORMS SECTION ▲

Cancel Next

- 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

Deal Role

No Role Chosen

Seller Agent

Buyer Agent

Seller

Buyer

Seller Agent Admin

Buyer Agent Admin

Seller Lawyer

Buyer Lawyer

Lender

Mortgage Broker

Seller Lawyer ▼

- 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

Step #3: Provide Participants for New Deal

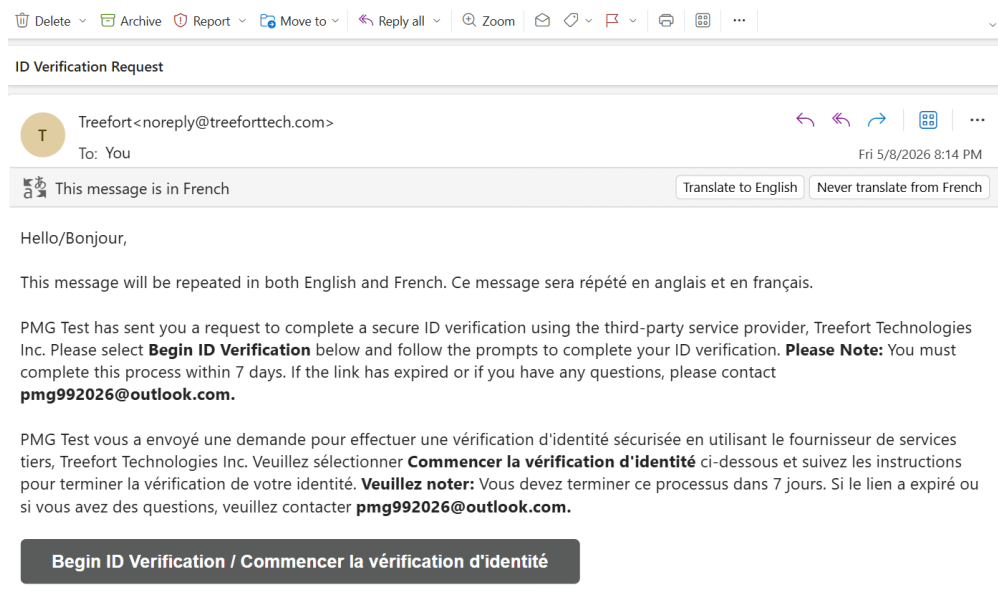
[+ Add New Contact](#)
[+ Add Existing Contact](#)

Invite	Deal Role	Deal Participant
NO	Seller Agent	BOARD REALM TEST OFFICE - Paul - 88
YES ▼	Seller ▼	Kaushik - BOARD REALM TEST OFFICE - - 103 🗑
YES ▼	Buyer Agent ▼	Madhu - Quickadd Company - - 1628 🗑
YES ▼	Buyer ▼	Emily Leung - Toronto Real Estate Board - - 259 🗑
YES ▼	Seller Lawyer ▼	Whitney Daley - MLP LP - Mar 14 - - 106 🗑

[Back](#)
[Cancel](#)
[Next](#)

- 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.

REALM SIT Home Link Link 22 Users Calendar Menu			
Manage Deal	Invite	Deal Role	Deal Participant
REFRESH DEAL	NO	Seller Agent	Paul McGowan - BOARD REALM TEST OFFICE - paul.mcgowan@teranet.ca - 88
DOCUMENTS	NO	Seller	PMCG - Quickadd Company - pmcgowan99@hotmail.com - 264
DEAL PARTICIPANTS	NO	Seller	Julie Smith - Quickadd Company - thisisatest@teranet.ca - 2699
ACCESS PERMISSIONS	NO	Buyer	Whitney Daley - MLP LP - Mar 14 - whitney.daley@teranet.ca - 106
SEND MESSAGE	NO	Buyer	PMG Test - Quickadd Company - pmg992026@outlook.com - 2666
DEAL HISTORY			
			IDV Status
			IDV: EXEMPT
			IDV: EXEMPT
			IDV: FAIL
			PASS

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

IDV PREPAYMENT

Start IDV for participant

Contact information

Email

thisisatest@teranet.ca

Phone optional

+1 (555) 000-0000

Notify via

Email

Provider

Treefort eIDV Report

\$6.50 - Results in 1-2 min

- 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

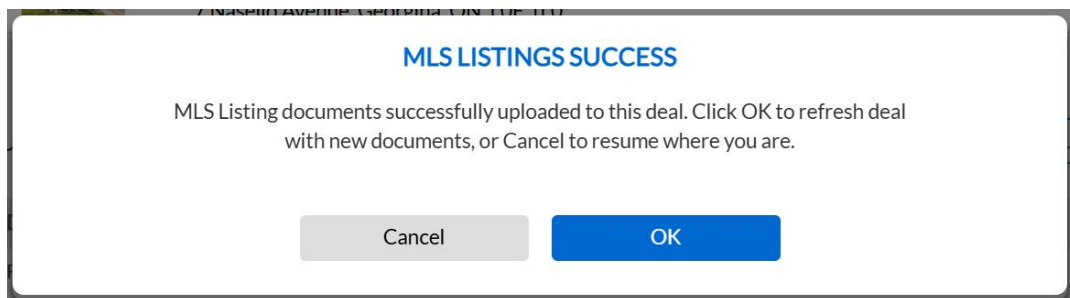
5. Managing Open Deal Rooms

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.

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New		N11903691	Tracy McAnaghgan 101 Kingmill Crescent, Georgina, ON, L4P 0H6				New Deal
New		N8110570	Tracy Howard & Paul Mason 185 Murray Drive, Aurora, ON, L4G 2C8				New Deal

- 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.

Document Name	Description	Access	Action	Placeholder
F100	F100 - Agreement of Purchase and Sale	Update	Upload	
F101	F101 - Agreement of Purchase and Sale - Condominium Resale	Update	Upload	
F102	F102 - Agreement of Purchase and Sale - Co-operative Building Resale Agreement	Update	Upload	

- 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.

Upload File

File Type F100 - Agreement of Purchase and Sale

Description Choose your local file below

Reminder: Do not upload any confidential information or personally identifiable information you do not intend to share with deal participants.

[Choose File](#) No file chosen

Drop files here

Supported formats: pdf, jpg, png Maximum Size: 10MB

[Cancel](#) [Upload](#)

- 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”

Documents

Upload Document

[+ ADD PLACEHOLDER](#) [+ NEW FILE](#)

Document Name	Description	Access	Action	Placeholder
F100	F100 - Agreement of Purchase and Sale	Update	Upload	
F101	F101 - Agreement of Purchase and Sale - Condominium Resale	Update	Upload	
F102	F102 - Agreement of Purchase and Sale - Co-operative Building Resale Agreement	Update	Upload	

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

Add Placeholder

Form Type: Select form type

[Cancel](#) [Next](#)

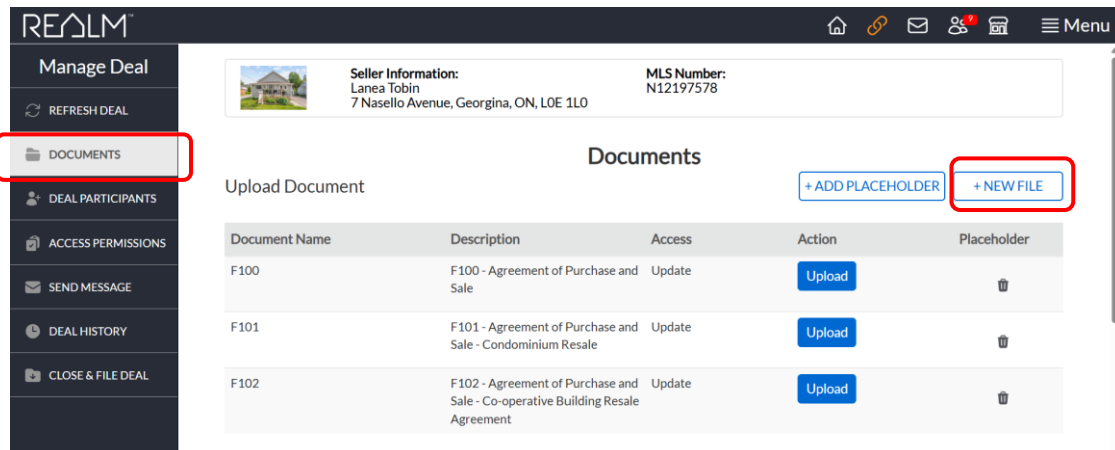
Add Placeholder

Form Type: Select form type

- Select form type
- F103 - Option to Purchase Agreement - To Be Used With OREA Form 104
- F104 - Option Commission Agreement - To Be Used With OREA Form 103
- F105 - Schedule - Agreement of Purchase and Sale
- F106 - Seller Selling Under Power of Sale
- F108 - Notice of Revocation
- F109 - Offer Conveyance - Acknowledgement
- F110 - Agreement of Purchase and Sale - Mobile/Modular/Manufactured Home
- F111 - Agreement of Purchase and Sale - POTL - Common Elements Condominium
- F112 - Schedule - Option to Purchase Agreement
- F113 - Amendment to - Option to Purchase Agreement
- F115 - Agreement of Purchase and Sale - Co-ownership Building Resale Agreement
- F120 - Amendment to Agreement of Purchase and Sale
- F121 - Notice to Remove Condition(s) - Agreement of Purchase and Sale
- F122 - Mutual Release - Agreement of Purchase and Sale

- 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

The 'New Additional File' pop-up window contains the following elements:

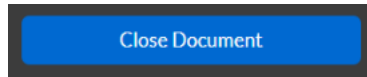
- File Type:** A dropdown menu currently set to 'Other'.
- Description:** A text input field with the placeholder text 'Describe "Other" Additional File'.
- Reminder:** A red text line stating: 'Reminder: Do not upload any confidential information or personally identifiable information you do not intend to share with deal participants.'
- File Upload Area:** A large dashed blue box containing a 'Choose file' button, the text 'No file chosen', and a large 'Drop files here' text with a downward arrow icon.
- Supported formats:** 'Supported formats: pdf, jpg, png' at the bottom left.
- Maximum Size:** 'Maximum Size: 10MB' at the bottom right.
- Buttons:** 'Cancel' and 'Next' buttons at the bottom right.

- 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



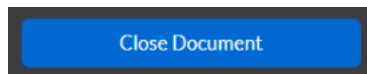
○ How do I view previous versions of a document?

- 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	2025-03-11 11:28 AM
S8274964_ListingDoc	MLS Listing	Update	View	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

QUICK ADD PARTICIPANT

Please fill in all 3 fields to create a quick add participant. Once invited to the deal they will be able to maintain their own information.

First Name

Last Name

Email

Cancel

Add Participant

- 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

Step #3: Provide Participants for New Deal

+ Add New Contact

+ Add Existing Contact

Invite	Deal Role	Deal Participant
NO	Seller Agent	BOARD REALM TEST OFFICE - Paul - 88
YES ☐	Seller	Kaushik - BOARD REALM TEST OFFICE - 103 🗑
YES ☐	Buyer Agent	Madhu - Quickadd Company - 1628 🗑
YES ☐	Buyer	Emily Leung - Toronto Real Estate Board - 259 🗑
YES ☐	Seller Lawyer	Whitney Daley - MLP LP - Mar 14 - 106 🗑

Back

Cancel

Next

- 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

Deal Role

No Role Chosen

Seller Agent

Buyer Agent

Seller

Buyer

Seller Agent Admin

Buyer Agent Admin

Seller Lawyer

Buyer Lawyer

Lender

Mortgage Broker

Seller Lawyer ▼

- 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

REALM
 Home Link Chain Mail User Profile Calendar Menu

Manage Deal
 REFRESH DEAL
 DOCUMENTS

DEAL PARTICIPANTS

 ACCESS PERMISSIONS
 SEND MESSAGE
 DEAL HISTORY
 CLOSE & FILE DEAL

Manage Participants for Current Deal

[+ Add New Contact](#)
[+ Add Existing Contact](#)

Invite	Deal Role	Deal Participant
NO	Seller Agent	Paul McGowan - BOARD REALM TEST OFFICE - paul.mcgowan@teranet.ca - 88
NO ▼	Buyer Agent	Madhu Nagaraja - Quickadd Company - madhusudan.nagaraja@teranet.ca - 1628 🗑
NO ▼	Seller	Kaushik Joshi - BOARD REALM TEST OFFICE - kaushik.joshi@teranet.ca - 103 🗑
NO ▼	Buyer	Emily Leung - Toronto Real Estate Board - - 259 🗑
NO ▼	Seller Lawyer	Whitney Daley - MLP LP - Mar 14 - whitney.daley@teranet.ca - 106 🗑

[Cancel](#)
[Save Participants](#)

- 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

Task Participant Access / Notification Settings

Emily Leung - Toronto Real Estate Board - - 259 - Role:Buyer

Document Description	Participant Access			Notifications		
	Allow Update	Read Only	No Access	Notify	Acknowledge	Allow Delete
Select Entire Column	Select All	Select All	Select All	Select All	Select All	Select All
F100 - Agreement of Purchase and Sale Test document.pdf - Uploaded	☒	☐	☐	☒	☒	☒
MLS Listing Images N12197578_ImageDoc - Uploaded	☐	☒	☐	☐	☐	☐
MLS Listing Attachment N12197578_Survey - Uploaded	☐	☒	☐	☐	☐	☐
MLS Listing Attachment N12197578_DepositInstructions - Uploaded	☐	☒	☐	☐	☐	☐
MLS Listing Attachment N12197578_ScheduleR1 - Unloaded	☐	☒	☐	☐	☐	☐

- 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

Document Description	Allow Update	Read Only	No Access	Notify	Acknowledge	Allow Delete
Select Entire Column	Select All	Select All	Select All	Select All	Select All	Select All
F100 - Agreement of Purchase and Sale	☒	☐	☐	☒	☒	☒

- 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”

Task Participant Access / Notification Settings

Table View: Show All Participants

Document Description	Participant Access			Notifications		
	Allow Update	Read Only	No Access	Notify	Acknowledge	Allow Delete
F100 - Agreement of Purchase and Sale Test document.pdf - Uploaded	Emily Leung Kaushik Joshi Madhu Nagaraja Paul McGowan	Whitney Daley		Emily Leung Kaushik Joshi Madhu Nagaraja Paul McGowan	Emily Leung Kaushik Joshi Madhu Nagaraja Paul McGowan	Emily Leung Kaushik Joshi Madhu Nagaraja Paul McGowan
MLS Listing Images N12197578_ImageDoc - Uploaded		Emily Leung Kaushik Joshi Madhu Nagaraja Paul McGowan Whitney Daley				
MLS Listing Attachment N12197578_Survey - Uploaded		Emily Leung Kaushik Joshi Madhu Nagaraja Paul McGowan Whitney Daley				

- 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

Send Message

Select Participants

Show/Hide Participants ▼

- ☒ Toggle All Participants
- ☒ Paul McGowan - Seller Agent
- ☒ Madhu Nagaraja - Buyer Agent
- ☒ Kaushik Joshi - Seller
- ☒ Emily Leung - Buyer
- ☒ Whitney Daley - Seller Lawyer

- 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

Message Options

☐ Request Acknowledgement ☐ High Priority Alert

Subject

Type Subject Here

Message

Type Message Here

Send Message

- 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

Deal Event History
All timestamps displayed are in EST/EDT

Timestamp	User Id	Description	Event Source
Fri, Jan 30, 2026 12:51 PM	paul.mcgowan@teranet.ca	View Deal Document - Block: 7637 - MLS Listing Attachment	Deal Web App
Fri, Jan 30, 2026 12:49 PM	paul.mcgowan@teranet.ca	Resubmit Existing Document - Block: 7660 - F100 - Agreement of Purchase and Sale	Deal Web App
Fri, Jan 30, 2026 12:49 PM	paul.mcgowan@teranet.ca	Upload Deal Document to Blockchain - Block: 7631 - F100 - Agreement of Purchase and Sale	Upload Document Process
Thu, Jan 29, 2026 3:24 PM	System Generated	Upload Initial Deal Document to Blockchain - Block: 7635 - MLS Listing Attachment	New Deal Init
Thu, Jan 29, 2026 3:24 PM	System Generated	Upload Initial Deal Document to Blockchain - Block: 7636 - MLS Listing Attachment	New Deal Init

- 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

REALM

Manage Deal

REFRESH DEAL

DOCUMENTS

DEAL PARTICIPANTS

ACCESS PERMISSIONS

SEND MESSAGE

DEAL HISTORY

CLOSE & FILE DEAL

Seller Information:
Lanea Tobin
7 Nasello Avenue, Georgina, ON, L0E 1L0

MLS Number:
N12197578

Close & File Deal

Click button below to close and file this deal

Once you have closed the deal you cannot re-open the deal.

You will be able to view the deal documents with the same permissions you had before closing.
You will not be able to change access permissions once the deal is closed.

Close Reason: Deal Complete

Cancel

CLOSE & FILE DEAL

- 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

Manage Deal

REFRESH DEAL

DOCUMENTS

DEAL PARTICIPANTS

ACCESS PERMISSIONS

SEND MESSAGE

DEAL HISTORY

CLOSED DEAL REPORT

Seller Information:
Lanea Tobin
7 Nasello Avenue, Georgina, ON, L0E 1L0

MLS Number:
N12197578

Closed Deal Report

Include?	Original Document Name	Description
☒	Test document.pdf	F100 - Agreement of Purchase and Sale
☒	N12197578_ImageDoc	MLS Listing Images
☒	N12197578_Survey	MLS Listing Attachment
☒	N12197578_DepositInstructions	MLS Listing Attachment
☒	N12197578_ScheduleB1	MLS Listing Attachment
☒	Test document.pdf	F100 - Agreement of Purchase and Sale

Run 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

05173832-80b6-40a9-80ad-5d4597c4821a

1 / 18 100%

REALM™
Verified Transactions

Address: 7 Nasello Avenue, Georgina, ON L0E 1L0
MLS Number: N12197578
MLS Close Date: 2025-07-24
Deal Close Date: 2026-01-30 13:42:00
Document Created: 2026-01-30 13:47:18

- You can view, print and download this document

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

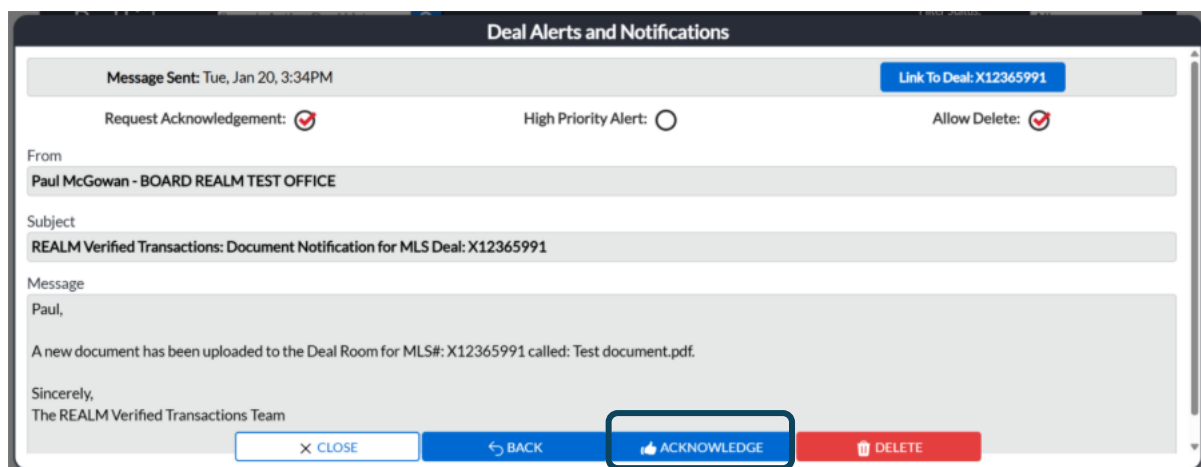
- You can sign in to the application and read it in your notification center. Simply click on the envelope icon on the top navigation bar and you will see all your notifications



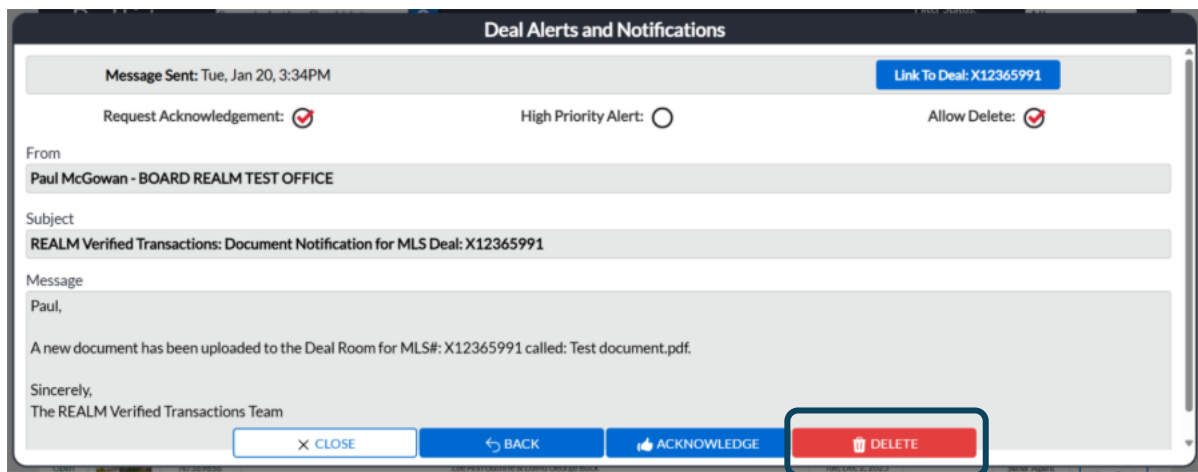
- Once you click on the Deal Alerts and Notifications you will see all notifications

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

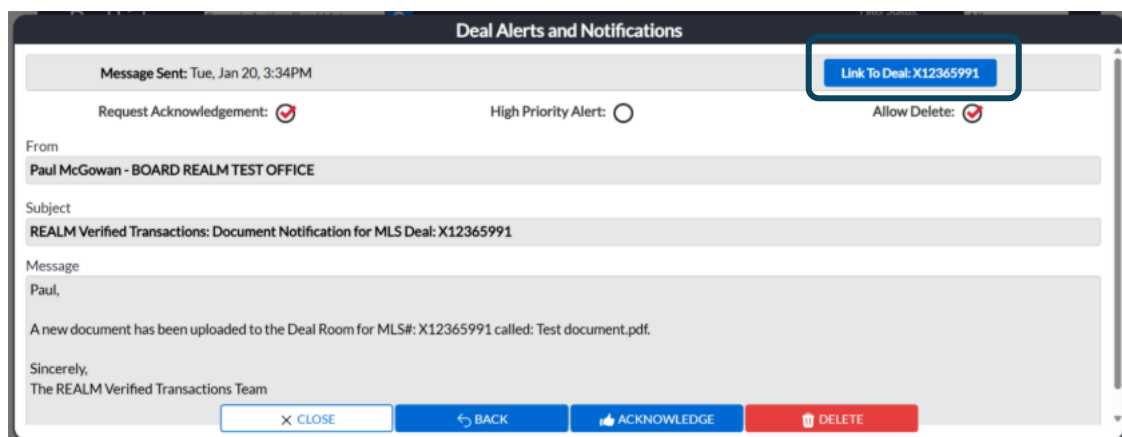
- Simply click on any line to view your message
- **What does acknowledge mean within a message?**
 - Acknowledge provides a notification back to the sender that you have seen the message sent to you and you have acknowledged receipt.



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



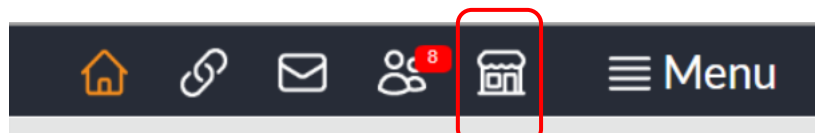
- **How do I link to deals from a message?**
 - Each message provides a link back to the deal room.
 - Simply click on the blue box (top right of the screen) which links directly to the deal room



7. Accessing the Reports Store

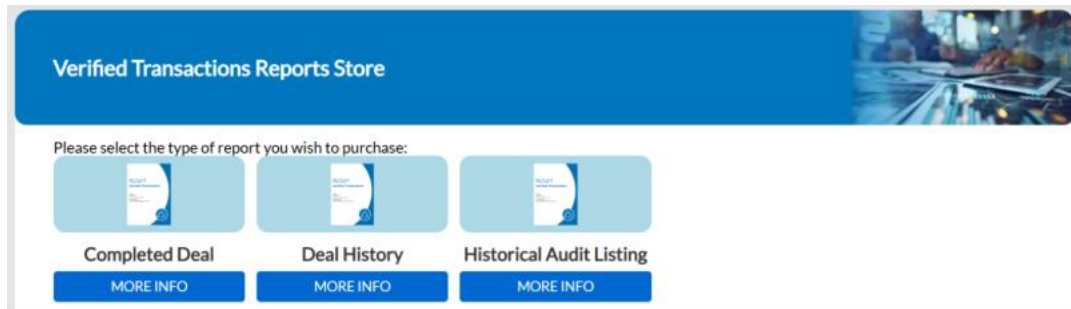
The reports store contains access to completed deal reports, deal history and historical audit reports

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



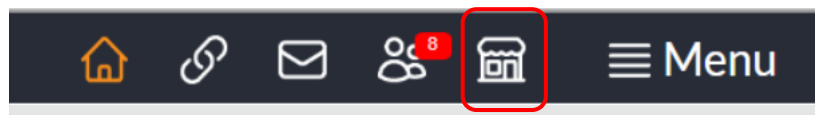
- **What can I purchase in the reports store?**
 - There are three different reports to choose from
 - Completed Deal Report
 - A comprehensive summary binder report in PDF format that documents all key information for your deal
 - Deal History Report

- 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.

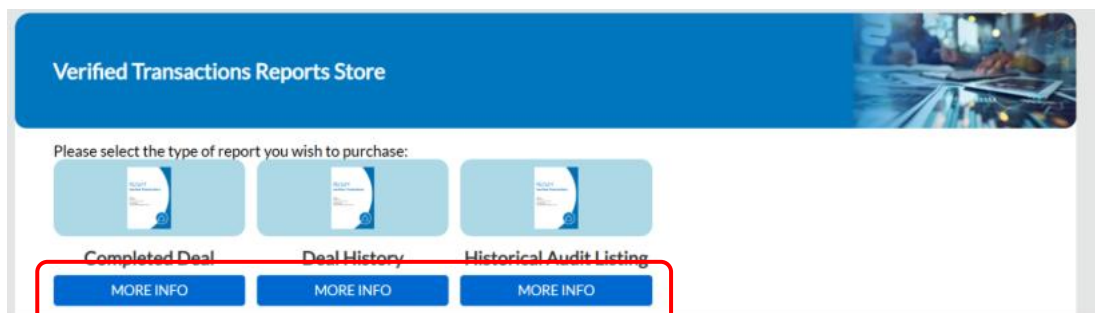


- **How to I purchase a report in the store? (e.g. Completed Deal)**

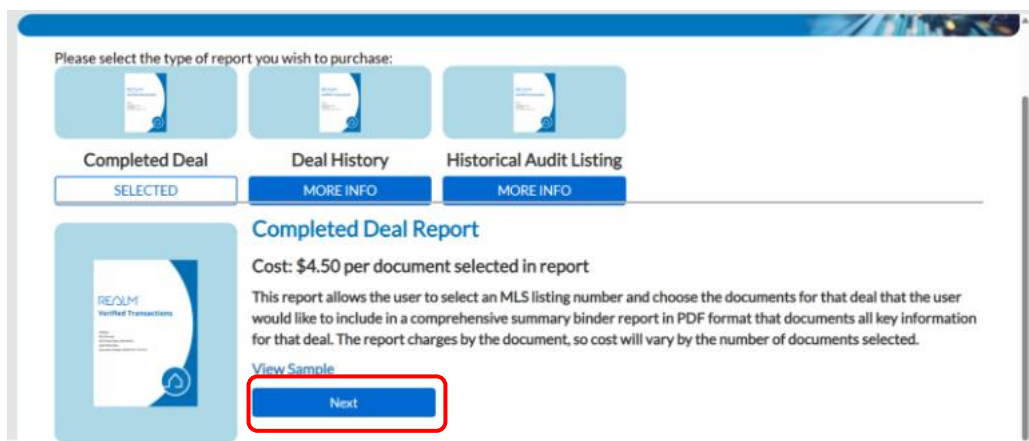
- Navigate to the store by selecting the store icon from the top navigation bar



- 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

The screenshot shows the 'REALM Completed Deal Report' interface. At the top, there's a navigation bar with the REALM logo and a menu icon. Below it, a blue header bar contains the title 'REALM Completed Deal Report'. Underneath, there are two tabs: 'Properties' and 'Summary'. The 'Properties' tab is active. Below the tabs, there's a search bar with a refresh icon and a 'My Deals' button, which is highlighted with a red box. To the right of the 'My Deals' button are several input fields: 'MLS#', 'Closed' (a dropdown menu), 'PIN#', 'OwnerName', 'Street Name', and 'City'. A magnifying glass icon is at the end of the search bar. Below the search bar, there are two main sections: 'Property Search Results - 0 Properties' on the left and 'Properties Selected - 0' on the right. Each section has a table with headers: 'ALL', 'MLS#', 'PIN#', 'Status', and 'Address' for the left section, and 'MLS#', 'Owner Name' for the right section. At the bottom, there are four buttons: 'Add To List', 'Clear List', 'Prev Step', and 'Next Step'.

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

This screenshot is identical to the one above, showing the 'REALM Completed Deal Report' interface. The 'My Deals' button is highlighted with a red box. The interface includes a search bar with various filters, two empty result tables, and navigation buttons at the bottom.

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

This screenshot is identical to the one above, showing the 'REALM Completed Deal Report' interface. The search bar, including the 'My Deals' button and the filter fields, is highlighted with a red box. The interface includes a search bar with various filters, two empty result tables, and navigation buttons at the bottom.

- 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).

REALM Completed Deal Report

Properties | Summary

Properties ↺ My Deals 🔍

Search Results - 42 Properties

ALL	MLS#	PIN#	Status	Address
☐	C7360684	211380238	Closed	179 Blythwood Road, Toronto C04, ON
☐	X8209086	714600168	Closed	97 Wellington Street, Mapleton, ON
☐	C9506862	null	Closed	419-1169 Queen Street, Toronto C01, ON
☐	X9283041	714670071	Closed	10 Elora Street, Mapleton, ON

Properties Selected - 0 Properties

MLS# | Owner Name

REALM Completed Deal Report

Properties | Summary

Properties ↺ My Deals 🔍

Search Results - 41 Properties

ALL	MLS#	PIN#	Status	Address
☐	C7360684	211380238	Closed	179 Blythwood Road, Toronto C04, ON
☐	X8209086	714600168	Closed	97 Wellington Street, Mapleton, ON
☐	C9506862	null	Closed	419-1169 Queen Street, Toronto C01, ON
☐	X9283041	713300141	Closed	8 Vancouver Drive, Guelph, ON

Properties Selected - 1 Properties

MLS#	Owner Name
X9283041	Andrew Neil Miller

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

REALM Completed Deal Report

Properties | Summary

Report Parameter Summary - Run Report

Parameters Collected: 0 Params

Parameter Name/Value
☒ Properties
(X9283041) - 10 Elora Street, Mapleton, ON, N0G 2K0

- 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

Include?	Original Document Name	Description
☒	X9283041_ImageDoc	MLS Listing Images
☒	X9283041_ListingDoc	MLS Listing
☒	X9283041_zoningmap	MLS Listing Attachment
☒	X9283041_zoning	MLS Listing Attachment
☒	X9283041_wellagreement	MLS Listing Attachment
☒	Test document.pdf	E100 - Agreement of Purchase and Sale

- 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.

REPORT COST - CONTINUE?

This report Charges by Documents in the report:

The total cost for this report will be
(8 DOCUMENTS * \$4.50): \$36.00 Total

If you would like to proceed with this report please press Checkout.
 If you do NOT wish to proceed please press Cancel

- 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

REPORT PREVIOUSLY RUN - NO CHARGE

This report Charges by Documents in the report has been run by you within the last month with the same filter criteria - there is no charge to rerun it in any of the available report formats (PDF, Screen, Excel-CSV)

- 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

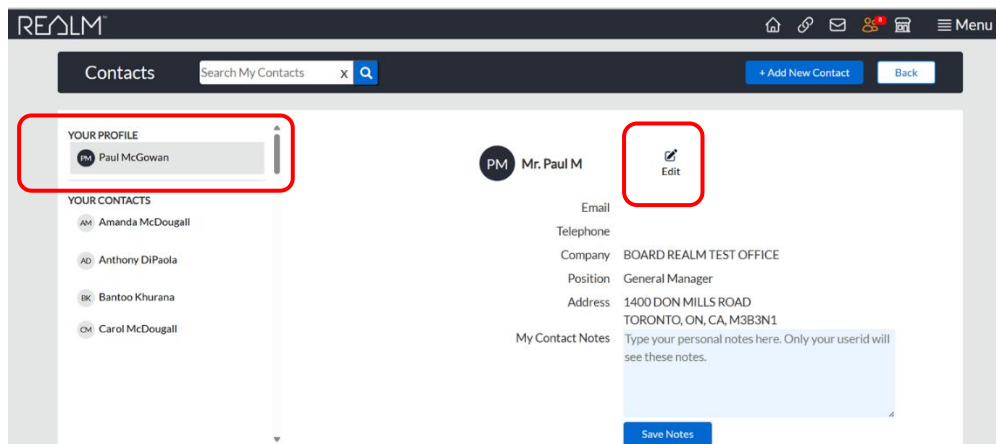
8. Managing your Profile and Contacts

- **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.

The screenshot shows the 'Manage/Add Contact' form. It has two main sections: 'Contact Details' and 'Company Details'. The 'Contact Details' section includes fields for Salutation (Mr.), First Name (Paul), Last Name (M), Email, Mobile Number, and Primary Telephone. The 'Company Details' section includes fields for Company/Individual (BOARD REALM TEST OFFICE), Street Number (1400), Unit Number, Street Name (DON MILLS ROAD), Street Type, Street Direction (Not Applicable), City (TORONTO), Province (Ontario), Country (Canada), and Postal Code (M3B3N1). At the bottom, there are 'Cancel' and 'Save' buttons.

- Click Save to save any of your changes

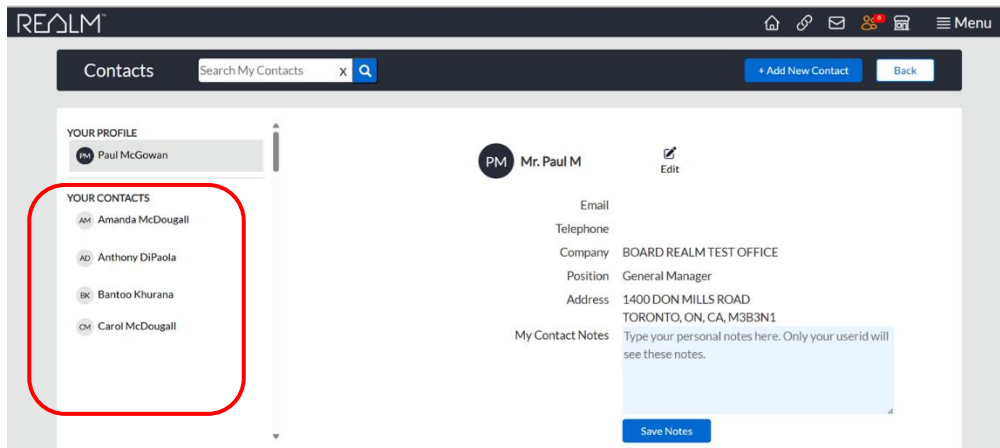
Manage Contacts

- **How do I find my contact list?**

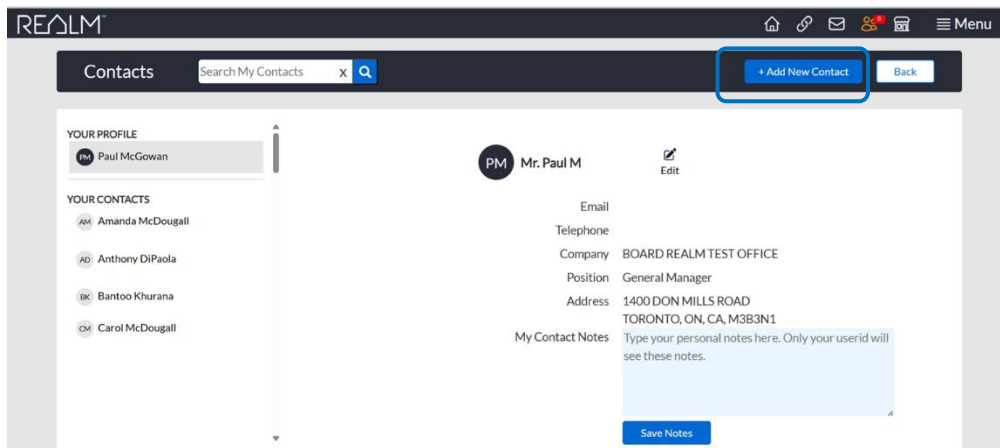
- Simply click on the Contacts icon in the top navigation bar



- 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

Add New Contact - Check For Existing Contact

Email *

Check Email

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

Contacts Search My Contacts X Q + Add New Contact Back

Manage/Add Contact
* Indicates a required field.

Contact Details

Salutation: Mr. First Name: Paul Last Name: M

Email:

Mobile Number:

Primary Telephone: Ext:

Company Details

Company/Individual: BOARD REALM TEST OFFICE

Street Number: 1400 Unit Number:

Street Name: DON MILLS ROAD Street Type: Street Direction: Not Applicable

City: TORONTO Province: Ontario

Country: Canada Postal Code: M3B3N1

Cancel Save

- 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

REALM Home Link Mail 8 People Calendar Menu

Contacts Search My Contacts X Q + Add New Contact Back

YOUR PROFILE

PM Paul McGowan

YOUR CONTACTS

AM Amanda McDougall

AD Anthony DiPaola

BK Bantoo Khurana

CM Carol McDougall

PM Mr. Paul M Edit

Email:

Telephone:

Company: BOARD REALM TEST OFFICE

Position: General Manager

Address: 1400 DON MILLS ROAD, TORONTO, ON, CA, M3B3N1

My Contact Notes Type your personal notes here. Only your user id will see these notes.

Save Notes

- **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

Contacts Search My Contacts X Q + Add New Contact Back

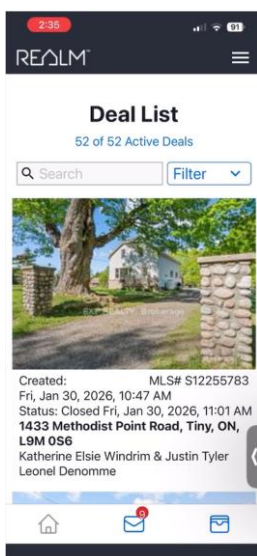
9. Mobile App Features

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)

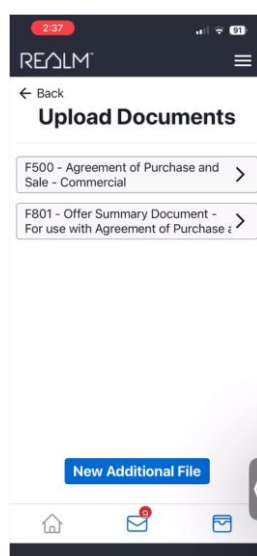
Dashboard



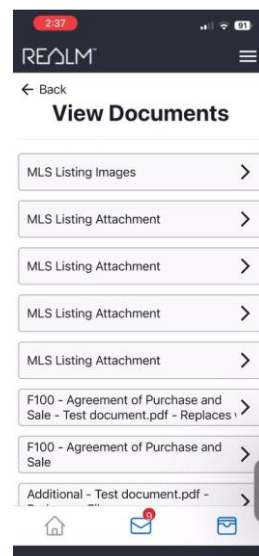
View Deal



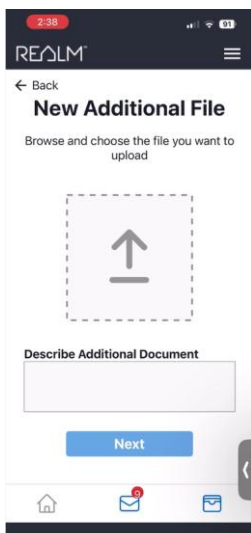
Upload Docs



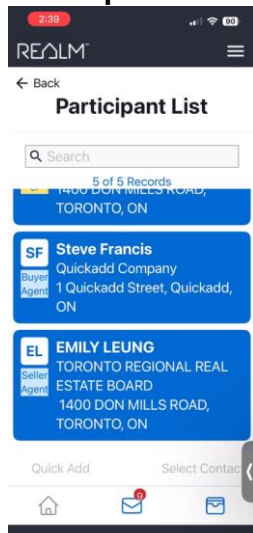
View Documents



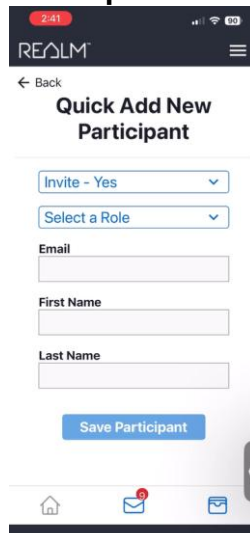
Add Docs



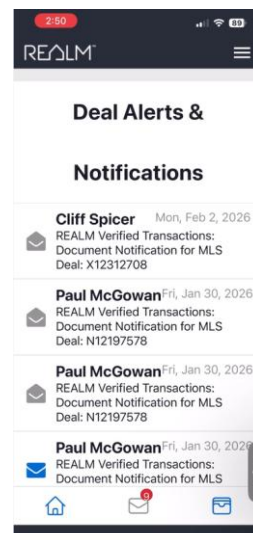
View Participants



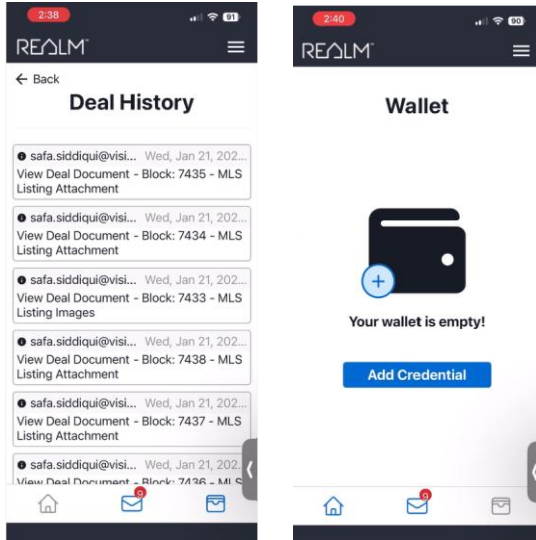
Add Participants



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 in 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**.

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**.

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.

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.

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.

6. Collaboration is real-time, with automatic notifications

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

7. Document permissions are fully customizable

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

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.

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.

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.**
