

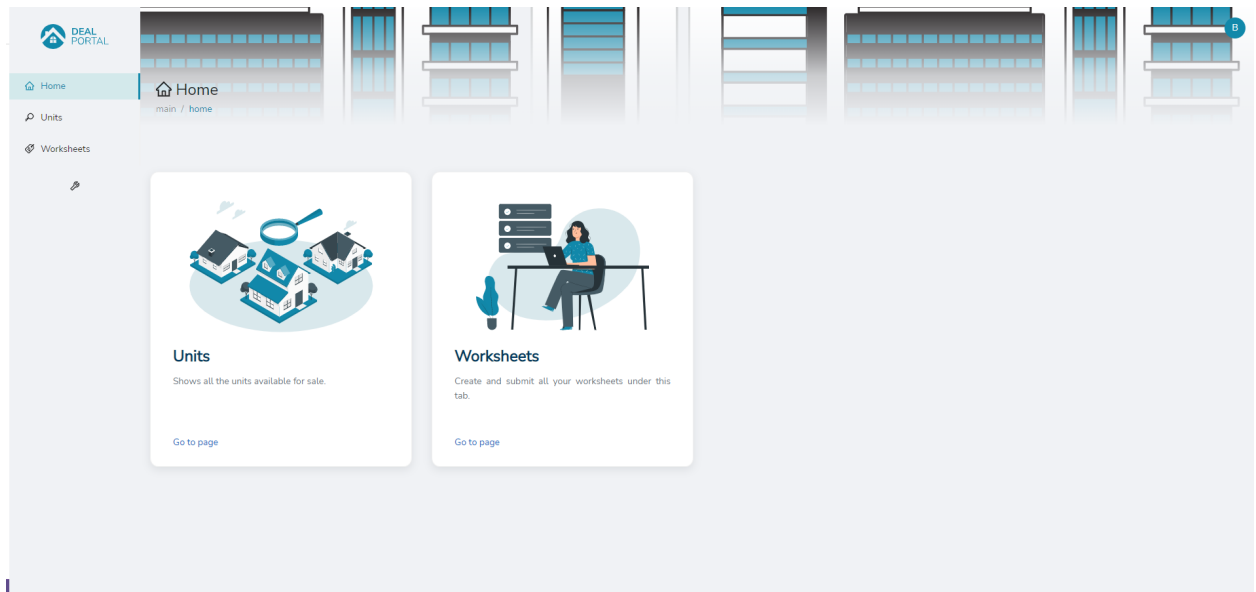
## Deal Portal Instructions:

Link to Sign-In: <https://brokerage.dealportal.ca/auth/login>

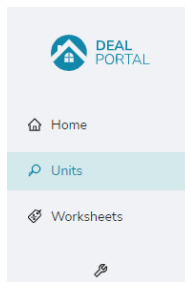
1. Once clicking the link, you will be prompted to sign in. Enter your individual username and password that was provided to you. If you forget your username or password, please email [newhomesales@regorealty.ca](mailto:newhomesales@regorealty.ca)



2. After hitting 'Log In', you will be brought to the main page.



3. From here, you can click on "Units" on the left side tab where you can see what units have been allocated to you.



4. Once you have viewed all units allocated to you and you are ready to submit a worksheet, you can click on the 'Tag' icon (highlighted in yellow below).

The screenshot shows the 'DEAL PORTAL' interface. On the left, there's a sidebar with 'Home', 'Units', and 'Worksheets'. The main area is titled 'Units' and shows a table of units. The table has columns: Unit, Floor, SqFt, Price, Building, Note, Status, and Actions. Two units are listed: Unit 101 (Floor 1, SqFt 723, Price \$0, Building 'The Flats at Rainbow Lake', Status 'Available') and Unit 501 (Floor 4, SqFt 1111, Price \$731,800, Building 'West Peak - Tower A', Status 'Available'). In the Actions column for Unit 501, there are three icons: a tag icon (highlighted with a yellow box), a lock icon, and a search icon. At the top right, there's a dropdown menu 'Select the building to filter' and a search icon.

5. Next, you will see the page to enter your worksheet pop up. You will get a preview of the unit details. You can enter notes and check off if they would like parking or a locker (if applicable). Once you are done with this section, click "Create", on the bottom right.

The screenshot shows the 'Add Worksheet' pop-up form. The form is titled 'Add Worksheet' and has a close button 'X'. It has two tabs: 'Basic' and 'Clients'. The 'Basic' tab is active. The form is divided into two sections: 'Information 501' and '\* Units'. The 'Information 501' section contains fields for Price (\$731,800), Discount (\$0), Orientation (NW), Floor (4), Bedrooms (1), Bathrooms (1), Reserved parking (0), Reserved lockers (0), Type (SUITE\_01), Full type (1 BED + DEN), Allow parking change (checked), Allow locker change (checked), SqFt (1111), Balcony Sq Ft (77), Unit type (Sales), and Status (Available). The '\* Units' section contains a dropdown menu for '501 - West Peak - Tower A', a 'Floor range' field, a 'Notes' field, and checkboxes for 'Parking' and 'Locker'. At the bottom right, there is a 'Create' button.

6. After clicking 'Create', you will be brought to the section where you enter all of your clients details. Click the '+' button to begin this. You will be prompted to upload their IDs, as well as all other needed information. This will have to be done for each client who is going on the APS.

Add Worksheet

BasicClients

+

C

+ Add Client

\* ID images on both sides

\* Full name

\* Date of birth

Select date

\* Email

\* Phone

\* Job title

\* Employer

\* Purpose

Address

\* Country

+ Add Client

\* Phone

\* Job title

\* Employer

\* Purpose

Address

\* Country

\* Province

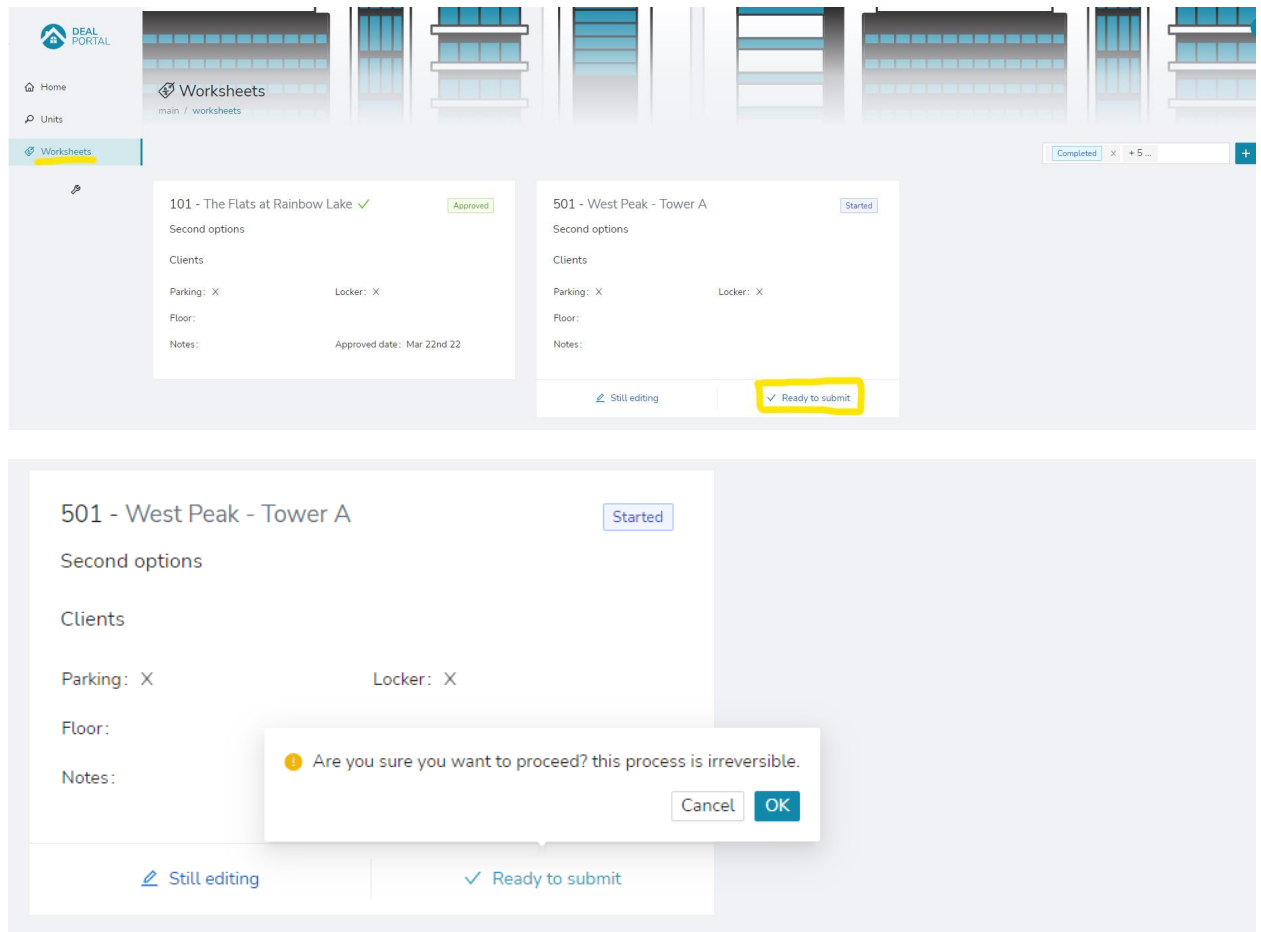
\* City

\* Address

\* Postal code

Create

7. After clicking 'Create' your client's details will automatically save. To add another purchaser, simply click on the '+' icon again.
8. After entering your worksheet, click on the 'Worksheets' tab on the left side menu. From here, you can hit 'Ready to Submit' on your worksheet if you would like to submit your worksheet for approval. If you would like to edit your worksheet before submitting, click 'Still Editing'. You can as well see the status of all other worksheets submitted in this tab.



Note: Ensure you click 'OK' after clicking 'Ready to Submit' this will officially submit your worksheet.

9. From here, nothing else is required on your end. Rego will review and approve worksheets submitted, and send out the paperwork via DocuSign for signature. If you have any questions, please email Alessandra at [newhomesales@regorealty.ca](mailto:newhomesales@regorealty.ca).

**DISCLAIMER:** Please be advised that we will assist as best as we can with this new process, but all worksheets will need to be submitted this way or they will not be accepted. It is VERY important to ensure all client information is correct (including spelling) and entered properly as this is the information that will be generated on the APS.