Deal-making Portal

User Quick Guide

Deal-making Portal
https://dealmaking.ebram.org/

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1. Getting started

1.1. How to register

Step 1: Click on one of the ‘Register’ buttons on the Home Page.
Step 2: Enter your email address and click ‘Next’.
Step 3: A verification code will be sent to your email, enter this on the Mulit-factor Authentication page and click ‘Verify’.

1.2. Creating an account

After registering, follow the on-screen prompts to fill in the forms for:
- Company Representative Information
- Company Information
- Supplemental Information

You will also be asked to confirm you have read and accepted the policy documents. Once you have completed all the forms, you will be able to review/edit the information you entered before submitting.

Your account registration is now complete. Click ‘Back to Dashboard’ to start initiating a deal.
1.3. Using the Dashboard

The Dashboard provides an overview of the Portal features, as well quick access to your upcoming events and notifications for new and existing deals.

You can access the Dashboard, and other features including your Deal list, your Notifications, the e-Directory, your Event Calendar and your ‘My Documents’ storage facility using the menu bar on the left-hand side of the screen.
2. Creating and Managing Deals

2.1. Deal creation

Step 1: Click ‘Deals’ on the left menu.
Step 2: Click ‘Add New Deal’ to create a deal flow.

Step 3: Work through the ‘Deal Initiation’ form by inputting information on your role (Buyer or Seller), giving the Deal an appropriate name so that you will be easily able to identify it later, and other relevant details such as category type and your preferred language and currencies for doing business. You may also want to apply an expiry date which indicates to prospective business partners the deadline by which you will need a response.
**Step 4:** Preview your deal information to ensure the details are correct and click ‘Next’.

**Step 5:** Click ‘Go’ to search for potential business partners on the e-Directory.
**Step 6:** Use keywords to search for a potential business partner and click the ‘Search’ icon.

**Step 7:** Review the results and then click ‘Invite’ to send a notification to your selected company.

**Step 8:** You can now click ‘Deals’ in the menu bar to return to your Deal list.

**Step 9:** Select any of your deals in your Deal list by clicking on ‘Go to Deal’ to view the deal details.
2.2. Accepting a deal invitation

If your company has received a deal invitation, you will receive a notification (check your Notifications section in the Deal-Making Portal regularly to ensure you don’t miss an opportunity).

**Step 1:** Click ‘Show Details’ and you will be directed to the relevant deal.

![Show Details button](image)

**Step 2:** Review the deal information and click ‘Accept’ if you want to proceed.

![Deal List](image)

The deal status will be updated for both the Buyer and Seller after you accept the invitation and both company names will appear on the deal information.
3. Managing the Deal Flow

3.1. Deal-flow indicator

The deal workflow features an easy-to-follow colour coded indicator so that you can track the status of all your deals.

- **Pending** – waiting for the reciprocal party to accept the deal invitation.
- **In-progress** – the deal negotiation process is underway, but the deal has yet to close.
- **Completed** – both parties have e-signed the deal agreement and confirmed the completion of the deal.
- **Expired** – this indicates that the deadline by which the reciprocal party should have accepted the deal has already passed.

3.2. Contract negotiation

You can share contracts and related documents about the deal by uploading them to the common deal folder.

**Step 1:** Click ‘Upload’ or drag and drop to upload a file from your local drive to share the document with the reciprocal party.
After it has been uploaded, the file will appear in the common deal folder which can be viewed by the other party.

**Step 2:** When both parties have agreed on the content of the contract, one of the parties should upload the PDF version of the final contract to the common folder so that both parties can e-sign (see next section).
3.3. Deal completion

After signing the contract, you and your business partner might have some other relevant documents that you would like to save within the Portal as a record of your transaction, such as invoices, receipts, shipping documents, etc.

You can upload these supporting documents to record the execution list of your deal and to let the deal participants review and approve.

**Step 1:** Click ‘Add New Item’ and then follow the screen prompts to complete the process.

**Step 2:** Click the ‘Upload’ icon to upload a document, and choose the item type e.g., Purchase Order, and then click ‘Save’.
Step 3: The reciprocal party can review the document by downloading it to their local drive and clicking the ‘green dot’ to confirm receipt.

Step 4: Once both parties have uploaded and approved all relevant documents, the parties may then click ‘Confirm Completion’ to close the deal.

Step 5: A pop-up box will appear to invite you to rate your business partner and to add any comments that you feel may be useful for other users of the Portal.

When both parties have confirmed the completion, the deal indicator will be updated to ‘Completed’.
4. Enquiry and Customer Service

If you would like to know more about the features and services of the Deal-making Portal, please contact our Customer Service Team at +852 3844 0707 or email us at dealmaking@ebram.org.

For Technical Support, please call us at +852 3792 0568.