
Deal-making Portal

User Guide

August 2023

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1. Introduction

Jointly built by lawyers and IT specialists, the Deal-Making Portal has been tailored to facilitate enterprises, especially micro-, small and medium-sized enterprises (MSMEs), to identify potential business partners and to create and finalise business deals. The user-friendly platform is equipped with advanced Cloud-based online deal-making services (with high-level security storage based only in Hong Kong servers), including deal-flow management, an intuitive workflow to execute digital signing of contracts using Blockchain technology, a business e-directory to identify your best business partners, secure identity verification, and video conference services for business negotiations including real-time transcription and in-built translation.

Whether you are a buyer or seller, this user guide provides information and guidance on how to use each feature in the Deal-making Portal.

Deal-making Portal

<https://dealmaking.ebram.org/>

2. Getting started

2.1. 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 Multi-factor Authentication page and click 'Verify'.

2.2. 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.

2.3. 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.

The screenshot displays the eBRAM Deal-Making Portal dashboard. At the top left is the eBRAM logo and the text 'Deal-Making Portal'. At the top right, there is a user profile for 'Jacky Chan' with an 'Account' link. A blue navigation sidebar on the left contains the following menu items: Dashboard, Notifications, Deals, Event Calendar, E-Directory, Chat (with a red notification badge), and Tools. The main content area features a top banner with a message: 'Get more badges by filling in more information in your profile. Business partners are more likely to transact with companies with fuller profiles.' Below this is a 'Go' button. The dashboard is divided into several sections: 'Upcoming Events' (0 events, 'Show all' link), 'Notifications' (5 items, 'Show all' link), 'E-Directory' (description: 'Search for potential business partners by industry, services, products and/or keywords...'), 'Meetings' (description: 'Schedule meetings with your trading partners...'), 'e-Signature' (description: 'Sign your contracts within the platform...'), and 'Documents and communication' (description: 'Consolidate all deal-related documents and communication...').

3. Creating and Managing Deals

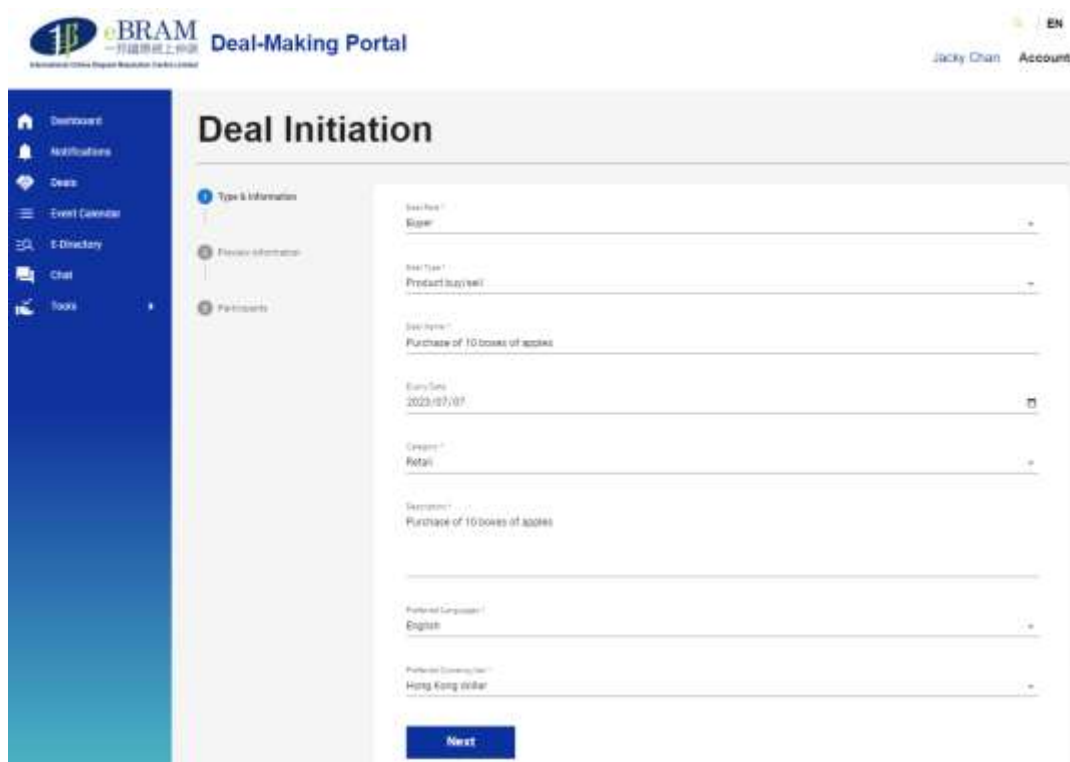
3.1. Deal creation

Step 1: Click 'Deals' on the left menu.

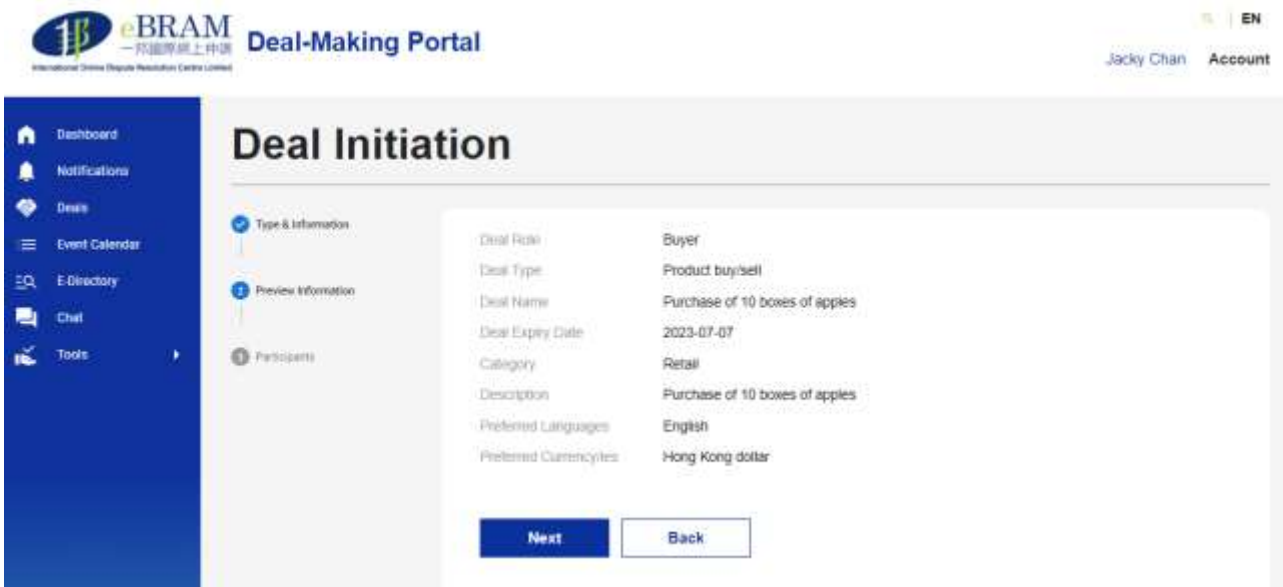
Step 2: Click 'Add New Deal' to create a deal flow.



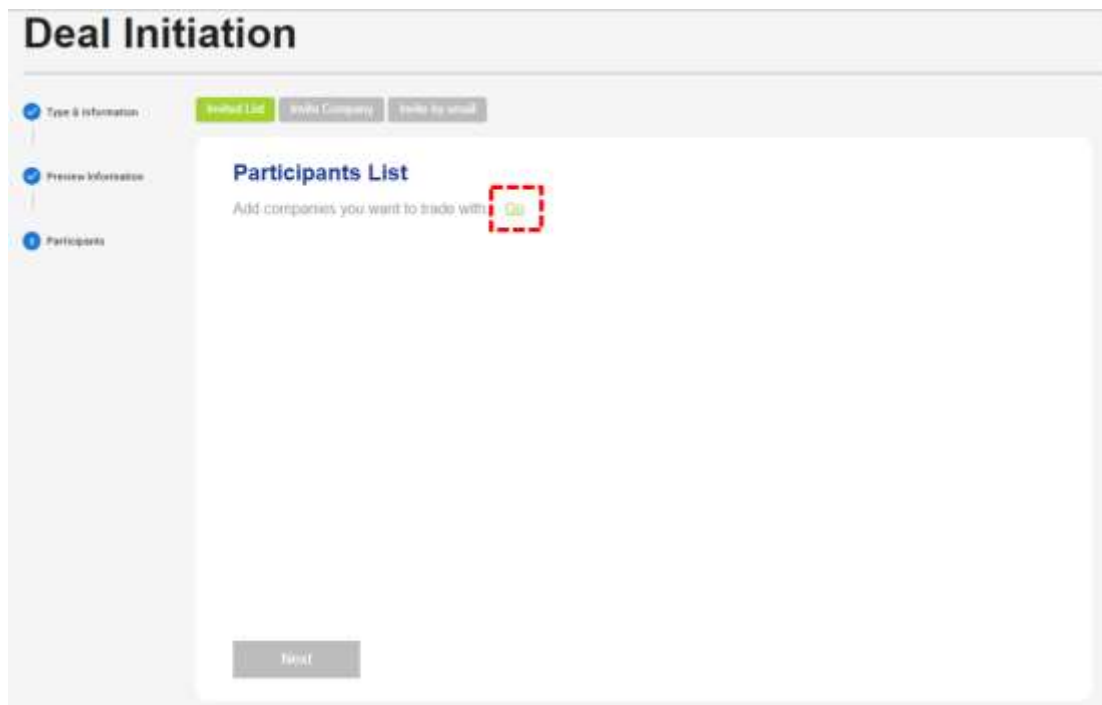
Step 3: Work through the 'Deal Initiation' form by inputting information on your role (Buyer or Seller), giving the Deal an appropriate name so that you will be easily able to identify it later, and other relevant details such as category type and your preferred language and currencies for doing business. 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 deal your deal information to ensure the details are correct and click 'Next'.

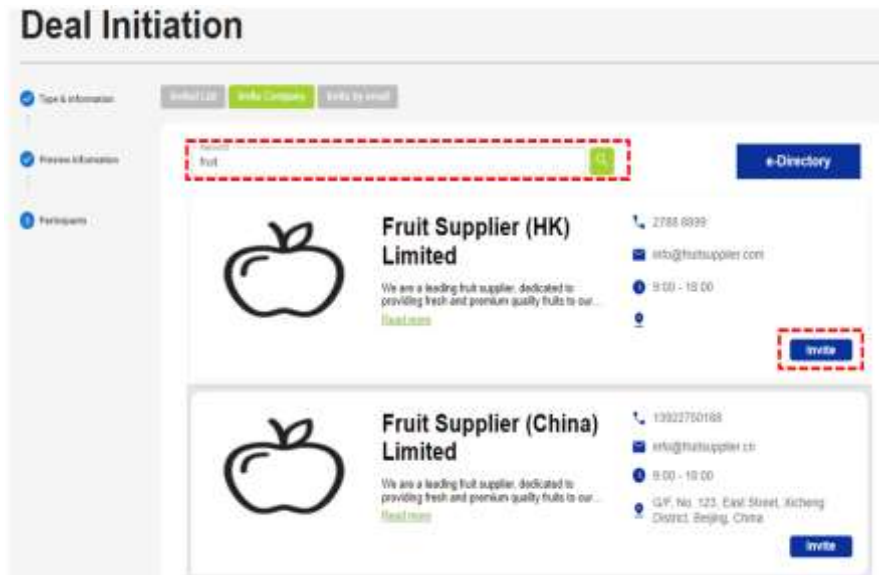


Step 5: Click 'Go' to search for potential business partners on the e-Directory.

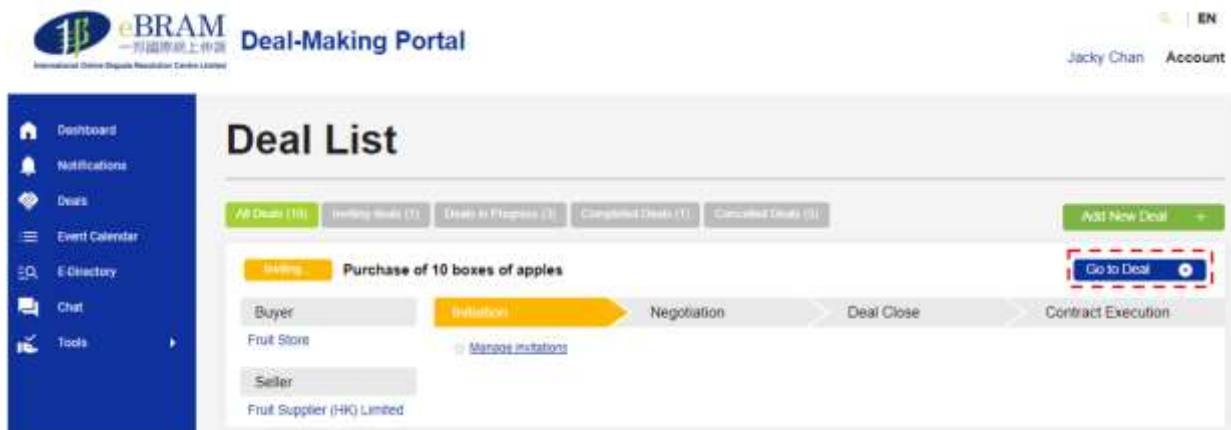


Step 6: Use keywords to search for a potential business partner and click the 'Search' icon.

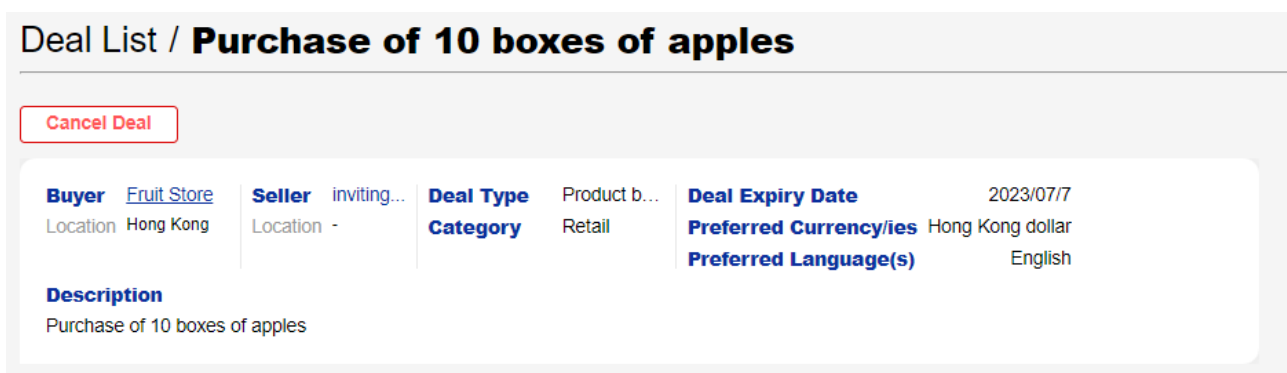
Step 7: Review the results and then click 'Invite' to send a notification to your selected company.



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.



3.2. 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.

Notifications [Show all](#)

Deal/Project Alert (1) Recommended (0) System (0)

Deal Participant invitation

from
6 mins ago

[Show Details](#)

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

Deal List / **Purchase of 10 boxes of apples**

Buyer Fruit Store Location Hong Kong	Seller inviting... Location -	Deal Type Category	Product b... Retail	Deal Expiry Date 2023/07/7 Preferred Currency/ies Hong Kong dollar Preferred Language(s) English
--	---	-------------------------------------	------------------------	---

Description
Purchase of 10 boxes of apples

(Deal is auto rejected if no reply before 2023/07/7) [Accept](#) [Reject](#)

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.

Deal List

All Deals (11) Pending deals (1) Deals in Progress (5) Completed Deals (0) Cancelled Deals (5) [Add New Deal](#) +

In Progress **Purchase of 10 boxes of apples** [Go to Deal](#)

Buyer Fruit Store	Initiation Partners confirmed	Negotiation Upload Contract Invite to Sign	Deal Close Sign Contract	Contract Execution Supporting Documents
Seller Fruit Supplier (HK) Limited				

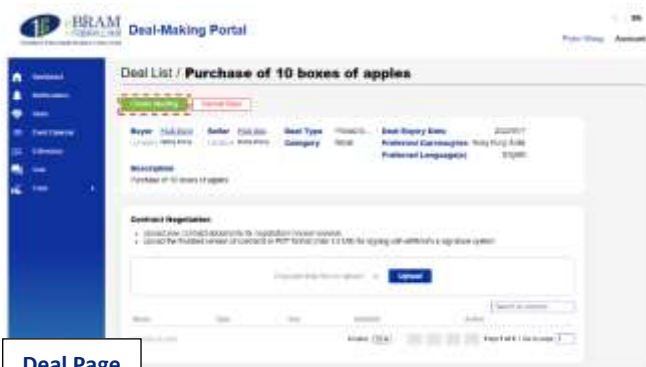
4. Video Conferences

The Deal-Making Portal has been designed so that you can create and finalise deals all within a secure environment. The Portal is equipped with an easy-to-use in-built video conference platform, a progress indicator, document sharing on a per deal basis, e-signing and deal completion confirmation features.

If you would like to set up a video conference with one of your business partners, just follow a few simple steps.

4.1. How to create a meeting

Step 1: Click 'Create Meeting' on the deal information page or on the 'Event Calendar' to set up a video conference meeting room.

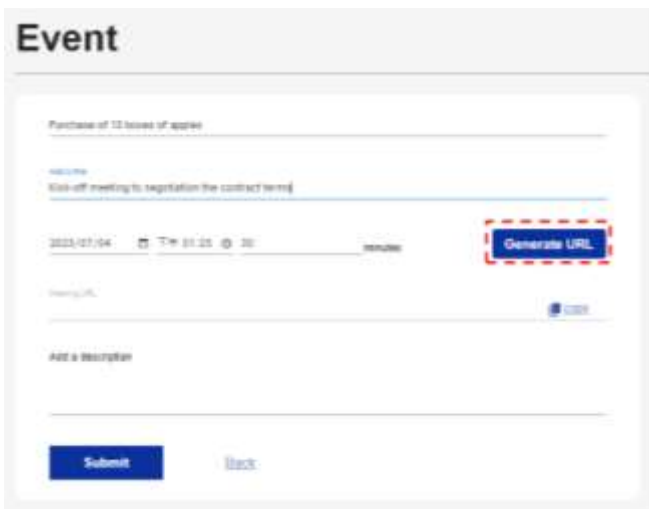


Deal Page

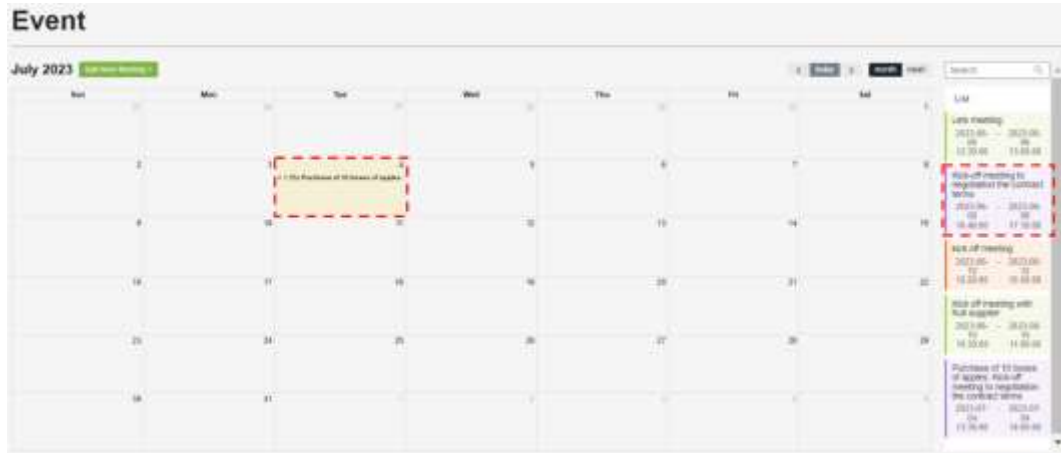


Event Calendar

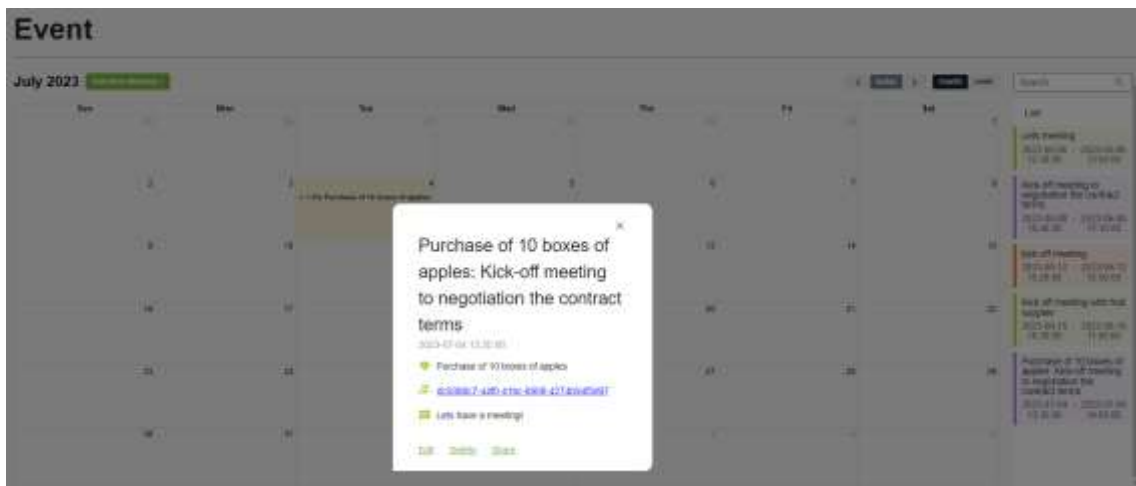
Step 2: Enter the meeting information then click 'Generate URL' and then 'Submit' to create a meeting room.



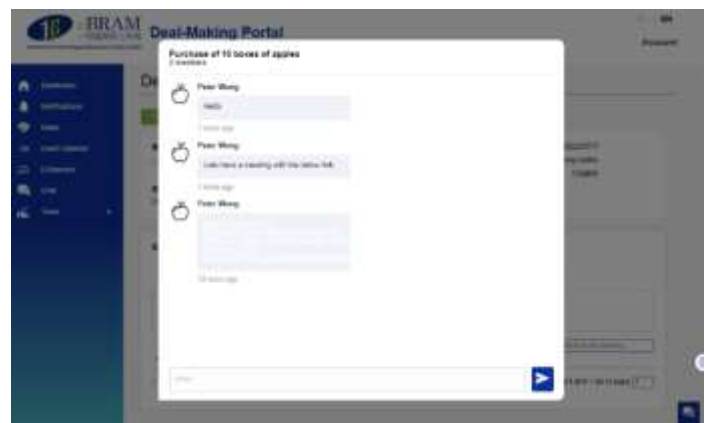
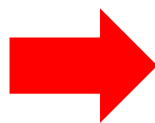
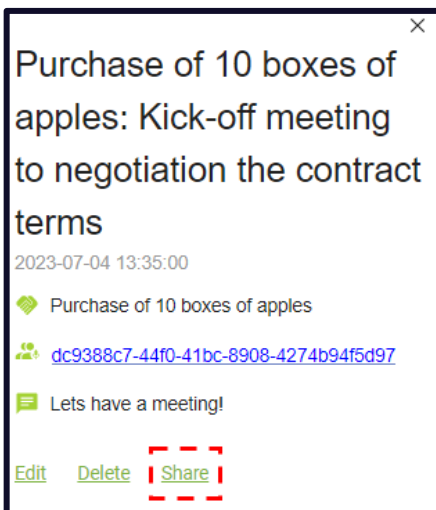
After clicking 'Submit', you will be redirected to the Event Calendar. The meeting will be shown on the 'Event Calendar' of both the initiating party and the reciprocal party.



Step 3: You can edit the meeting information, delete the meeting or share the meeting link with others involved in the deal.



Step 4: Click 'Share' to send a copy of the link to others through 'Chat'.



4.2. How to join a meeting

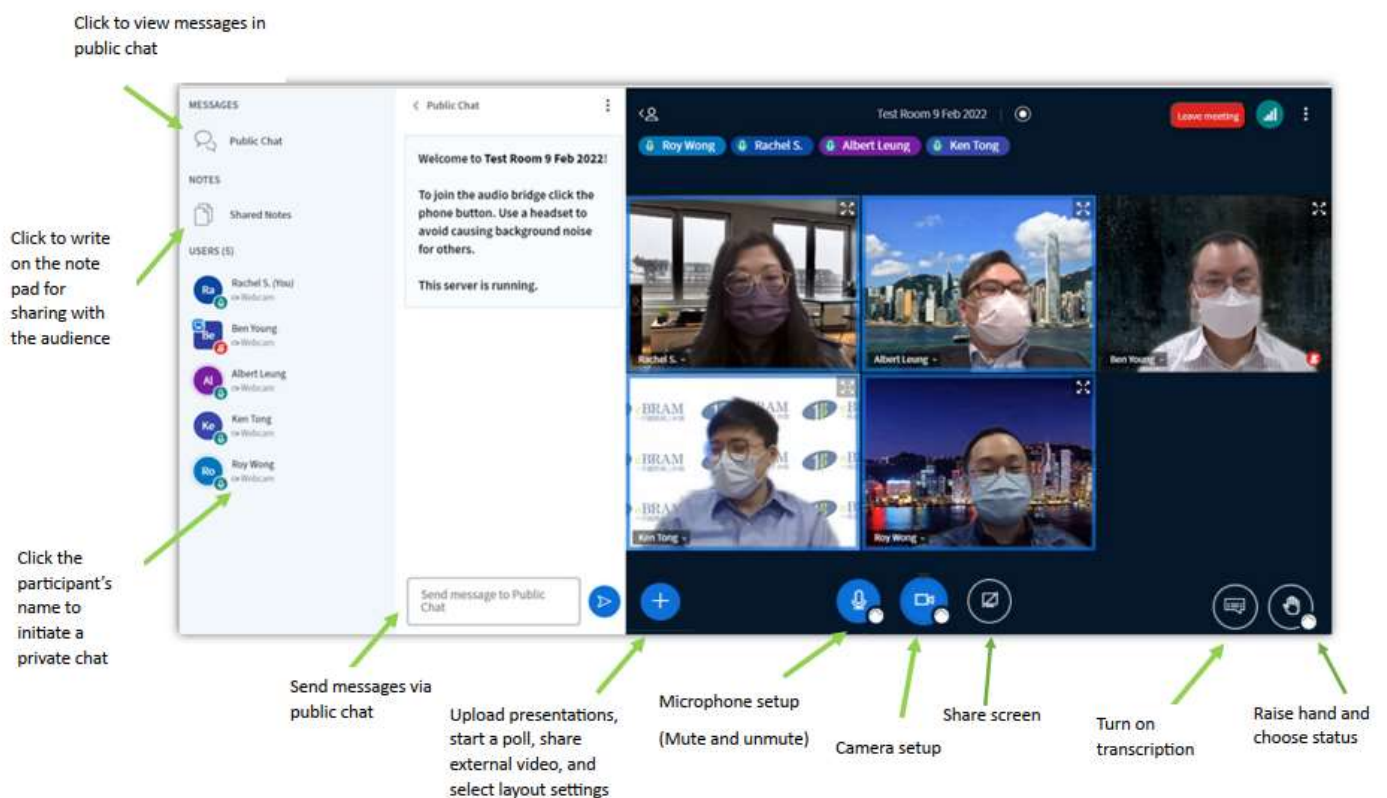
Step 1: Click the link on 'Event Calendar' to launch meeting.

Step 2: Choose the your audio and camera preferences.



4.3. Features within the video conference platform

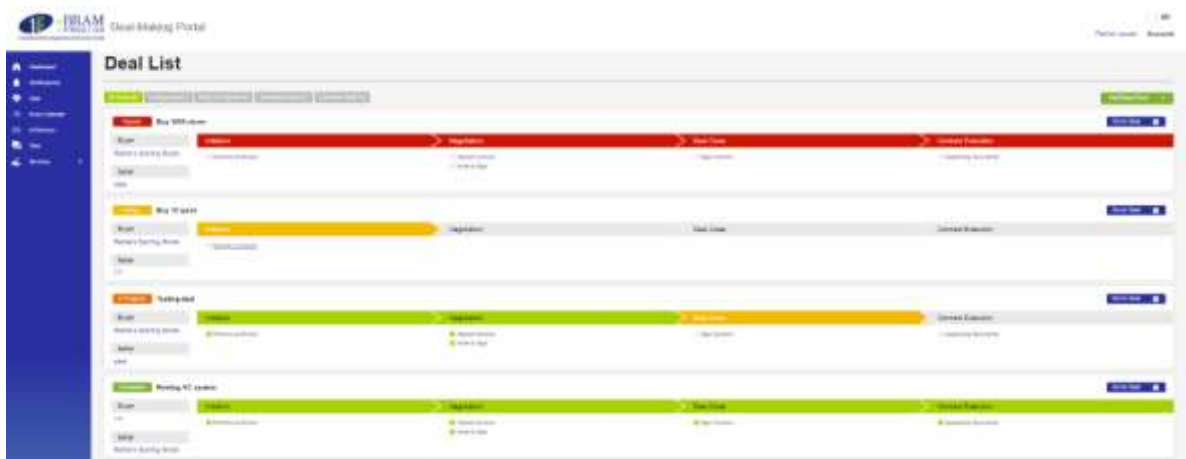
You can send a public message or private message to individual participants, share information with share note feature or display documents to everyone on the call. You have the option to display real-time transcription and translation depending on language availability. The below image highlights the key features:



5. Managing the Deal Flow

5.1. 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.

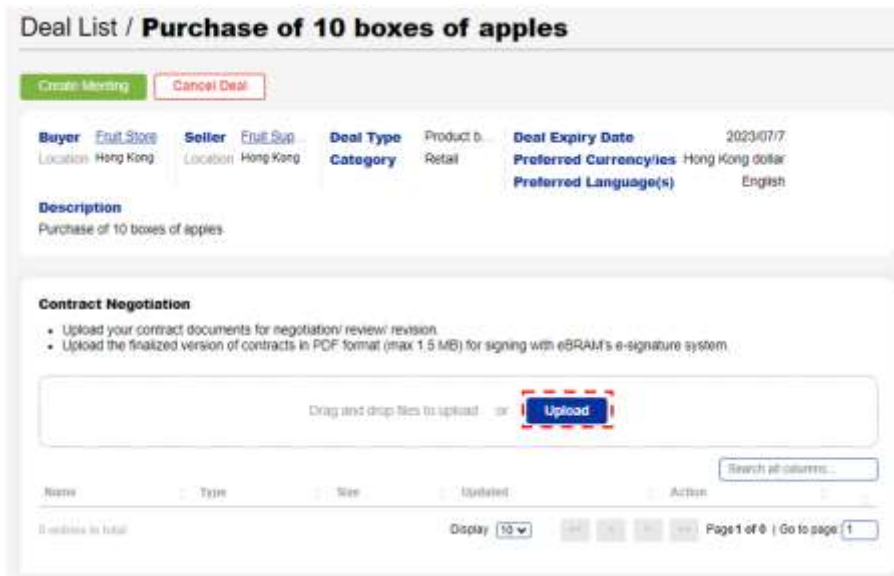
Completed – both parties have e-signed the deal agreement and confirmed the completion of the deal.

Expired – this indicates that the deadline by which the reciprocal party should have accepted the deal has already passed.

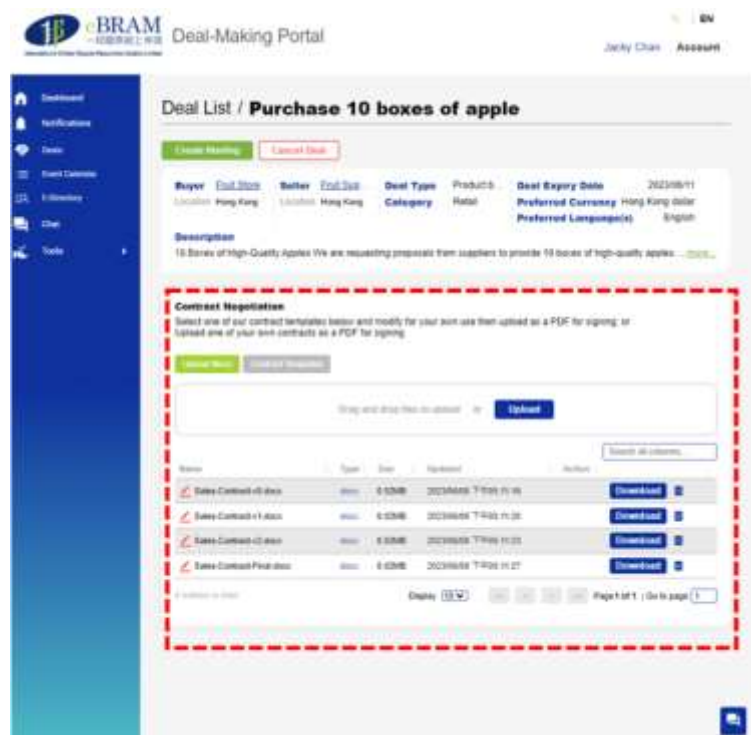
5.2. Contract negotiation

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).

5.3. Contract e-signing

Use the secure e-sign feature to sign contracts anytime, anywhere.

Step 1: To invite the other party to sign a contract, click 'Invite to sign'.

Contract Negotiation

- Upload your contract documents for negotiation/ review/ revision.
- Upload the finalized version of contracts in PDF format (max 1.5 MB) for signing with eBRAM's e-signature system.

Drag and drop files to upload or [Upload](#)

Search all columns...

Name	Type	Size	Updated	Action
Sales-Contract-v0.docx	docx	0.02MB	2023/07/04 14:02:18	Download
Sales-Contract-v1.docx	docx	0.02MB	2023/07/04 14:02:21	Download
Sales-Contract-v2.docx	docx	0.02MB	2023/07/04 14:02:23	Download
Sales-Contract-Final.docx	docx	0.02MB	2023/07/04 14:02:25	Download
Sales-Contract-Final.pdf	pdf	0.14MB	2023/07/04 14:02:27	Invite to sign Download

5 entries in total

Display [10](#) << < > >> Page 1 of 1 | Go to page: [1](#)

Step 2: After clicking 'Invite to sign', the action status will be updated to 'Inviting' and a new section with e-sign buttons will automatically be generated.

Buyer [Fruit Store](#) **Seller** [Fruit Store](#) **Deal Type** Retail **Product b...** **Deal Expiry Date** 2023/07/7
Location Hong Kong **Location** Hong Kong **Category** Retail **Preferred Currency/ies** Hong Kong dollar
Preferred Language(s) English

Description
Purchase of 10 boxes of apples

Contract Negotiation

- Upload your contract documents for negotiation/ review/ revision.
- Upload the finalized version of contracts in PDF format (max 1.5 MB) for signing with eBRAM's e-signature system.

Drag and drop files to upload or [Upload](#)

Search all columns...

Name	Type	Size	Updated	Action
Sales-Contract-v0.docx	docx	0.02MB	2023/07/04 14:02:18	Download
Sales-Contract-v1.docx	docx	0.02MB	2023/07/04 14:02:21	Download
Sales-Contract-v2.docx	docx	0.02MB	2023/07/04 14:02:23	Download
Sales-Contract-Final.docx	docx	0.02MB	2023/07/04 14:02:25	Download
Sales-Contract-Final.pdf	pdf	0.14MB	2023/07/04 14:02:27	Waiting Download

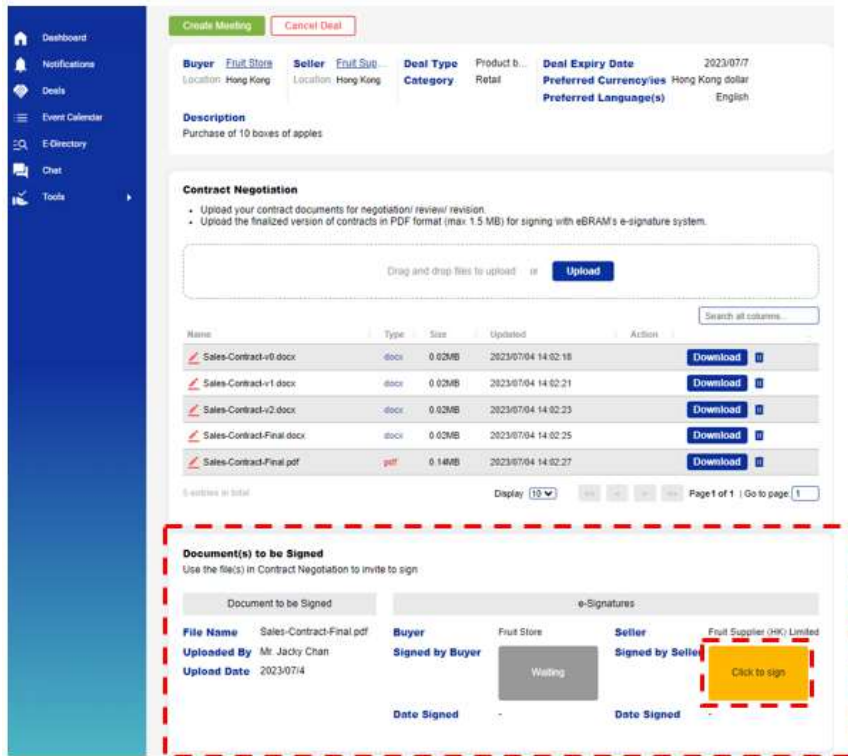
5 entries in total

Display [10](#) << < > >> Page 1 of 1 | Go to page: [1](#)

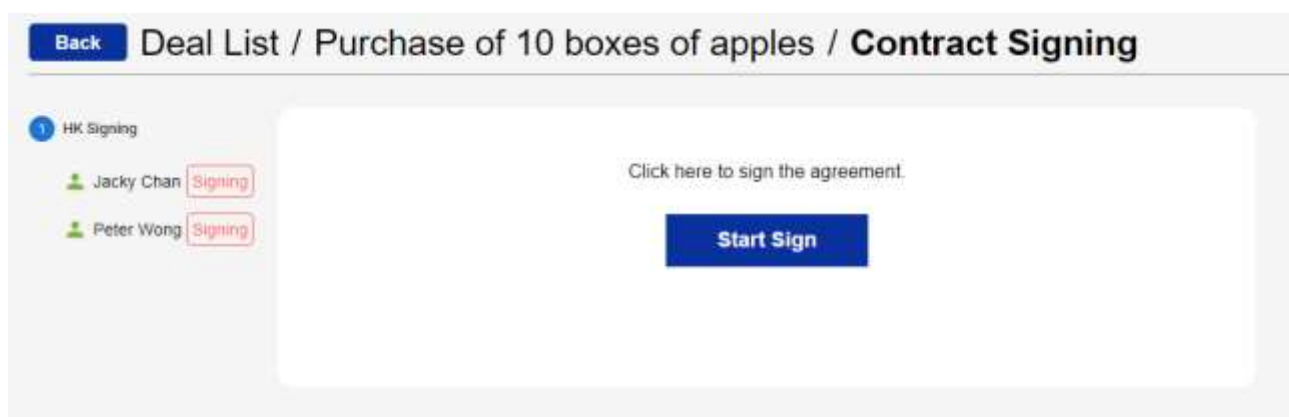
Document(s) to be Signed
Use the file(s) in Contract Negotiation to invite to sign

Document to be Signed	e-Signatures
File Name Sales-Contract-Final.pdf	Buyer Fruit Store Seller Fruit Supplier (HK) Limited
Uploaded By Mr. Jacky Chan	Signed by Buyer Signed by Seller
Upload Date 2023/07/4	Date Signed Date Signed

Step 3: On the reciprocal user's account, the system will generate an indicator 'Click to sign'. Click the 'Click to Sign' button to be directed to the e-sign link.



Step 4: Click the 'Start Sign' button to sign the agreement. A verification code will be sent through email to the signees.



Step 5: Enter the One-time Password and click 'Verify'.

A screenshot of a web page titled "One-time Password". At the top center is a padlock icon. Below it, the text reads: "One-time Password", "A one-time password has been sent to the email address associated with your account: info@fruitstorep.com", and "Please enter the code in the field below:". There are six empty input boxes for the password code. Below the boxes is a large blue button labeled "Verify". At the bottom, there is a link "Didn't receive it? Resend code" and the text "eBRAM International Online Dispute Resolution Centre Limited".

Step 6: Click 'Next' to review each page of the document.

Step 7: Click on the document on the signing page to create e-signing pad.

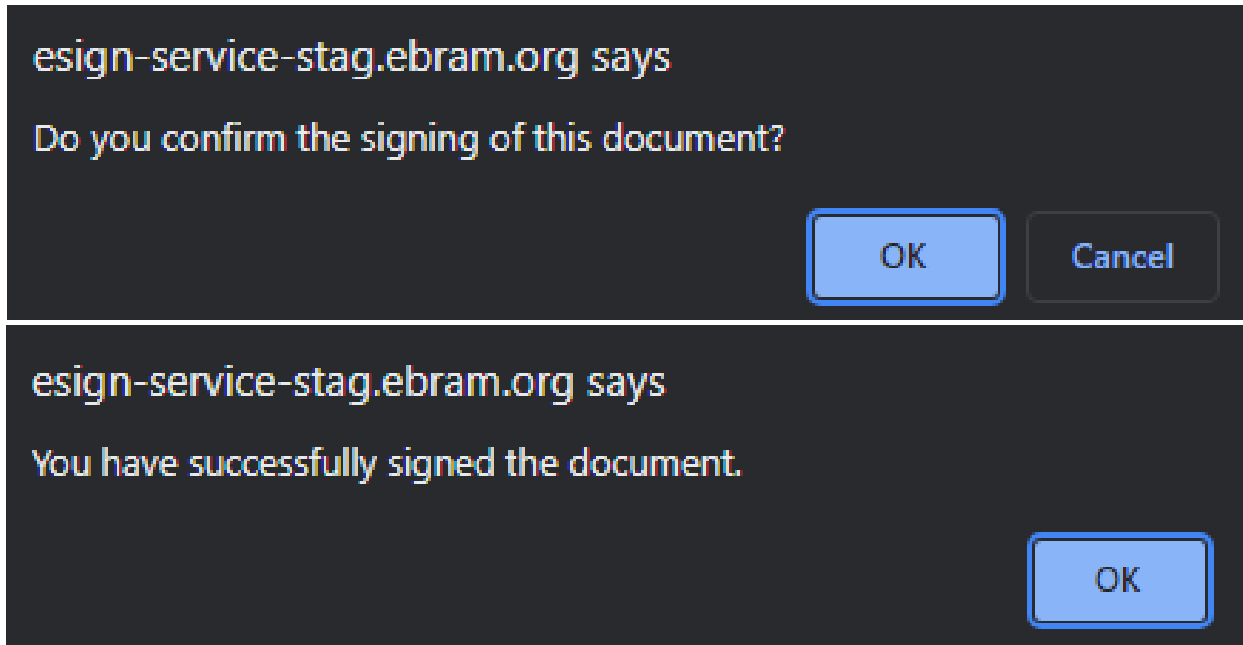
A screenshot of a document review interface. The left pane shows a "SALES CONTRACT" with sections for "PREAMBLE", "TERMS AND CONDITIONS", and "EXCLUSIONS". The right pane shows a signature form with fields for "CUSTOMER" (Name, Signature, Date) and "SELLER" (Name, Signature, Date). A red dashed box highlights the "SELLER" section. At the bottom, a navigation bar shows "Page: 4 / 4" and buttons for "First", "Previous", "Next", and "Last". The "Last" button is highlighted with a red box.

Step 8: Sign on the signature box, click 'Time Stamp' and then click 'Confirm'.

A screenshot showing the "Signature Box" interface and the resulting signed document. The "Signature Box" window on the left contains the text "Please sign on the signature box:", a signature area with a handwritten signature, a "Sign on mobile" button, a checked "Timestamp" checkbox, and "Clear" and "Confirm" buttons. The document on the right shows the "CUSTOMER" and "SELLER" signature fields. The "CUSTOMER" signature is filled with the handwritten signature, and the date is "16 Jun 2023 15:24:30 (GMT+0)". The "SELLER" fields are empty.

Step 9: Move your signature to the correct location and click 'Send' to submit. The system will generate two messages to confirm the submission.

Step 10: Click 'OK', and you will be redirected to the deal management page.



When both parties have signed the document, the indicators will change to green and will state they have been 'Signed'.

Document(s) to be Signed

Use the file(s) in Contract Negotiation to invite to sign

Document to be Signed		e-Signatures			
File Name	Sales-Contract-Final.pdf	Buyer	Fruit Store	Seller	Fruit Supplier (HK) Limited
Uploaded By	Mr. Jacky Chan	Signed by Buyer		Signed by Seller	
Upload Date	2023/07/4	Date Signed	2023/07/04	Date Signed	2023/07/04

The two signatures with respective time stamps will appear on the contract.

SIGNATURE AND DATE

- The Parties hereby agree to the terms and conditions set forth in this Agreement and such is demonstrated throughout their signatures below:

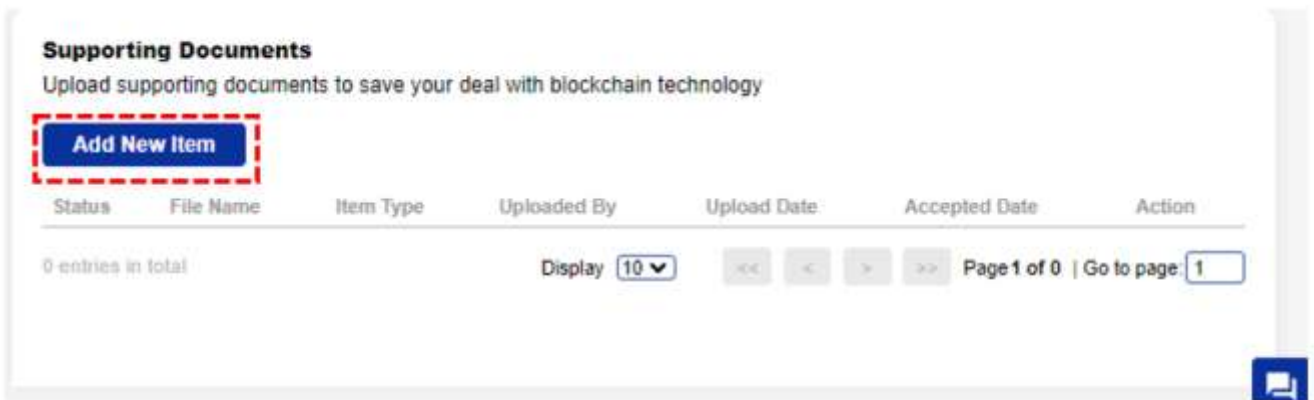
CUSTOMER		SELLER	
Name: _____		Name: _____	
Signature: _____		Signature: _____	
Date: 16 Jun 2023 15:24:30 (GMT +8)		Date: 16 Jun 2023 15:24:04 (GMT +8)	

5.4. Deal completion

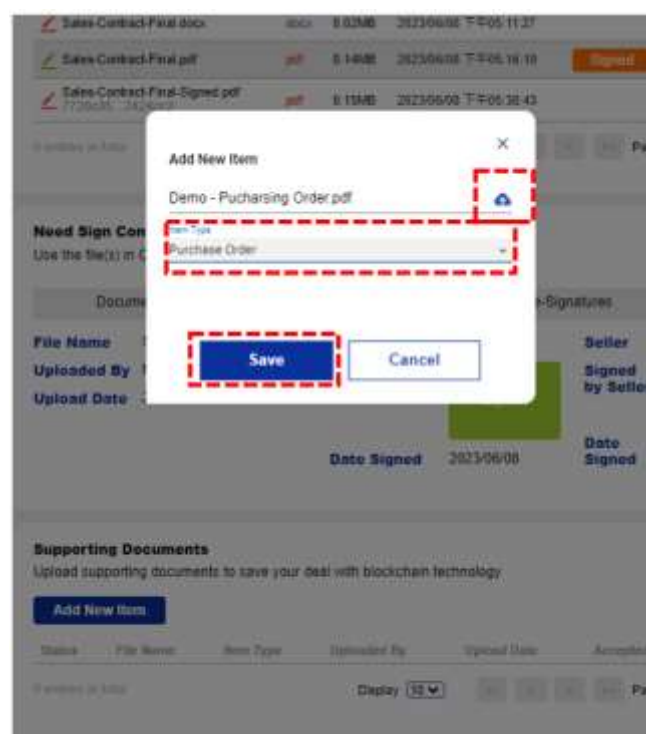
After signing the contract, you and your business partner might have some other relevant documents that you would like to save within the Portal as a record of your transaction, such as invoices, receipts, shipping documents, etc.

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

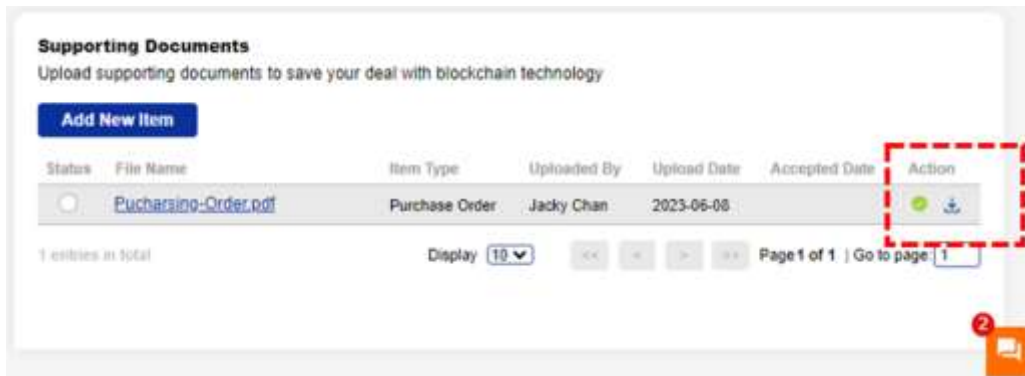
Step 1: Click 'Add New Item' and then follow the screen prompts to complete the process.



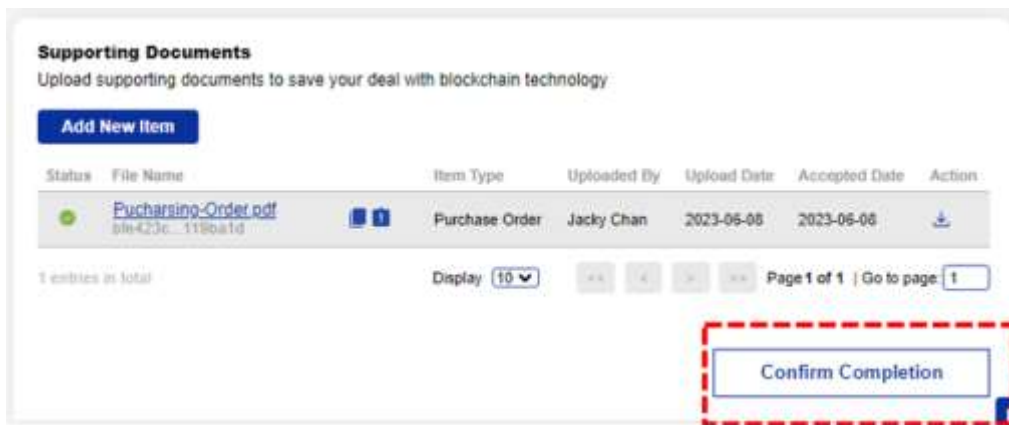
Step 2: Click the 'Upload' icon to upload a document, and choose the item type e.g., Purchase Order, and then click 'Save'.



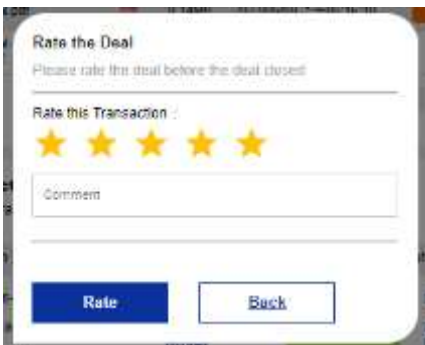
Step 3: The reciprocal party can review the document by downloading it to their local drive and clicking the 'green dot' to confirm receipt.



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'.

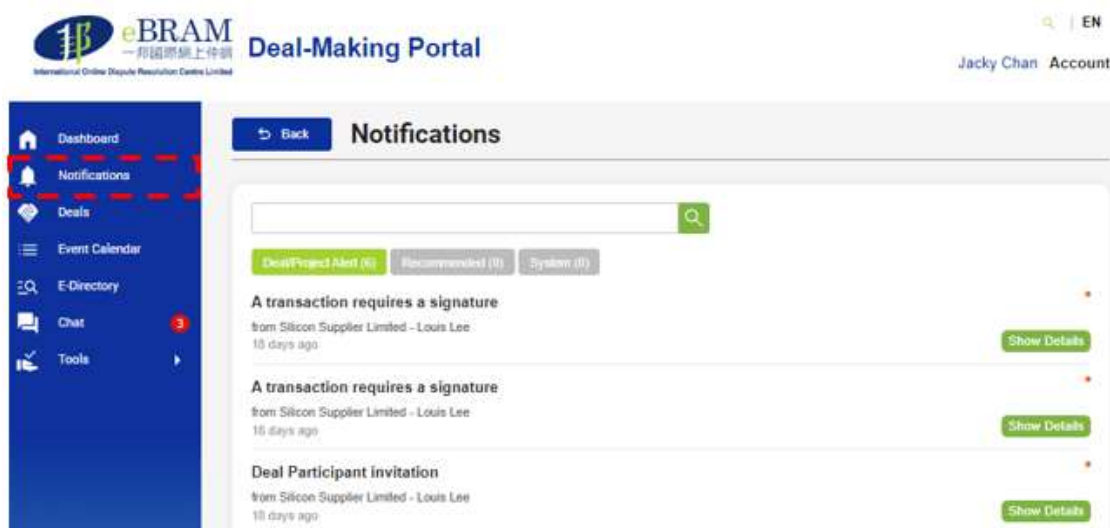


6. Notifications

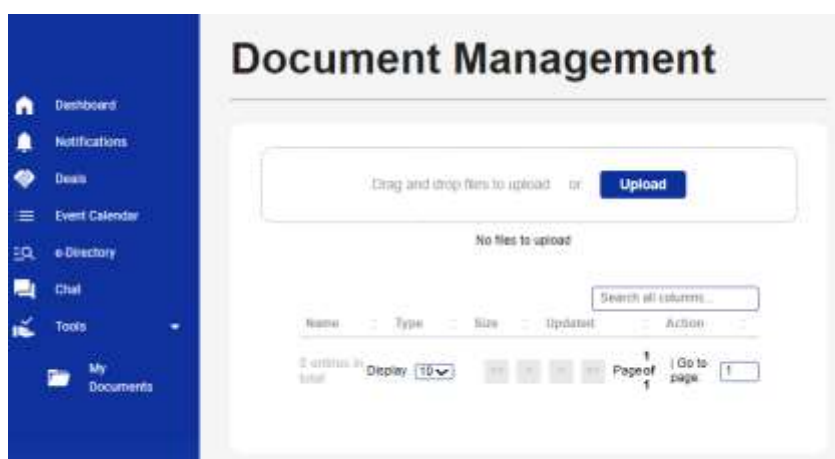
Users can view all notifications by clicking on 'Notifications' in the left-hand menu bar. An indicator will show the number of new notifications received.

A user will receive notifications for the following events:

- Receipt of a message in chatroom.
- An invitation to participate in a deal.
- An invitation to perform e-signature.



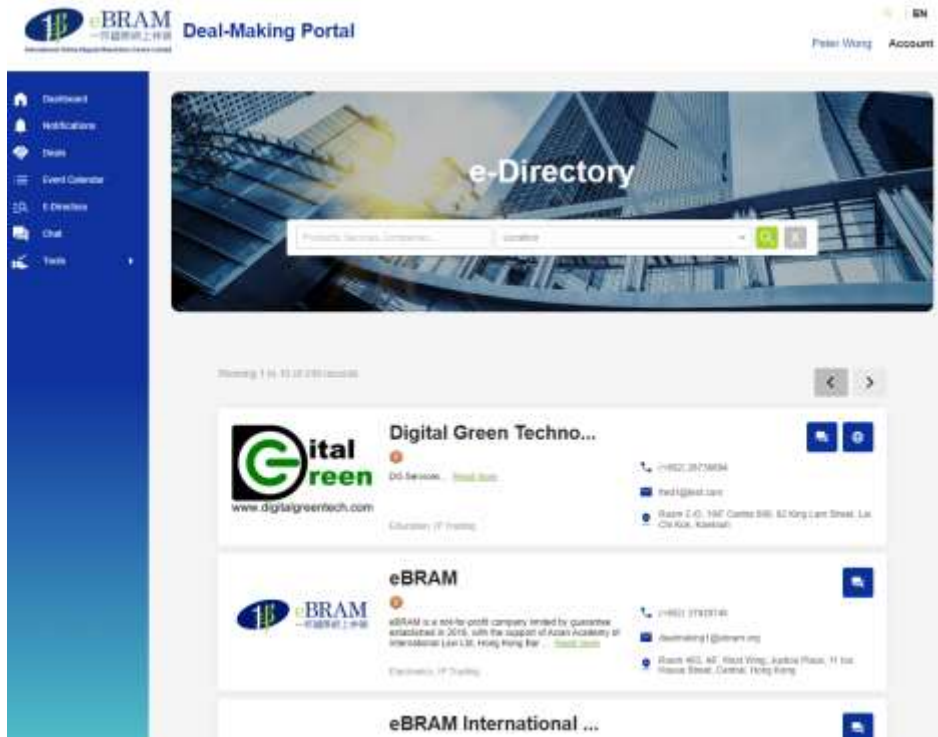
7. Document Storage



Every user of the Deal-Making Portal has access to 100MB of private document storage providing a dedicated area for storing templates, checklists, reference materials, price lists. Simply click on 'Upload' or drag and drop to upload documents for your own use.

8. e-Directory

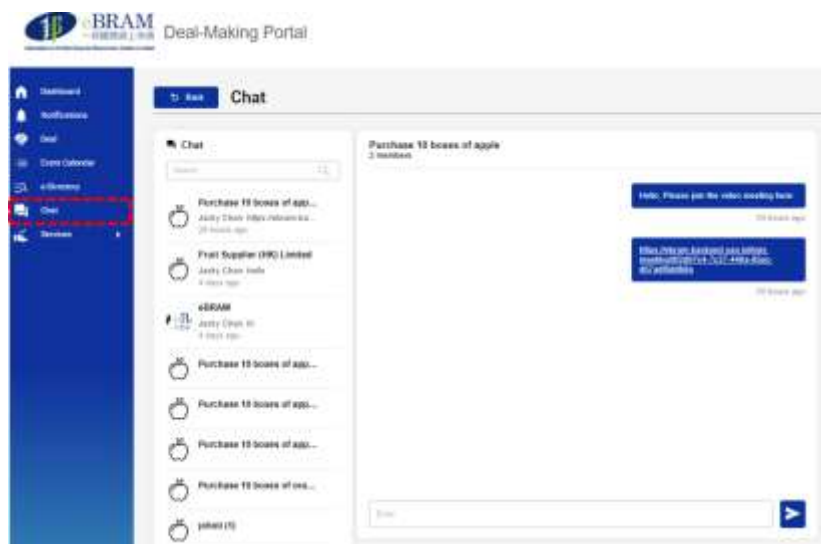
Search for a business partner via the e-Directory using a keyword search and narrowing your targets by location. Each entry in the e-Directory contains details on the company as well as contact details. Click the chat icon to start conversation within the Portal with the selected companies for a potential deal.



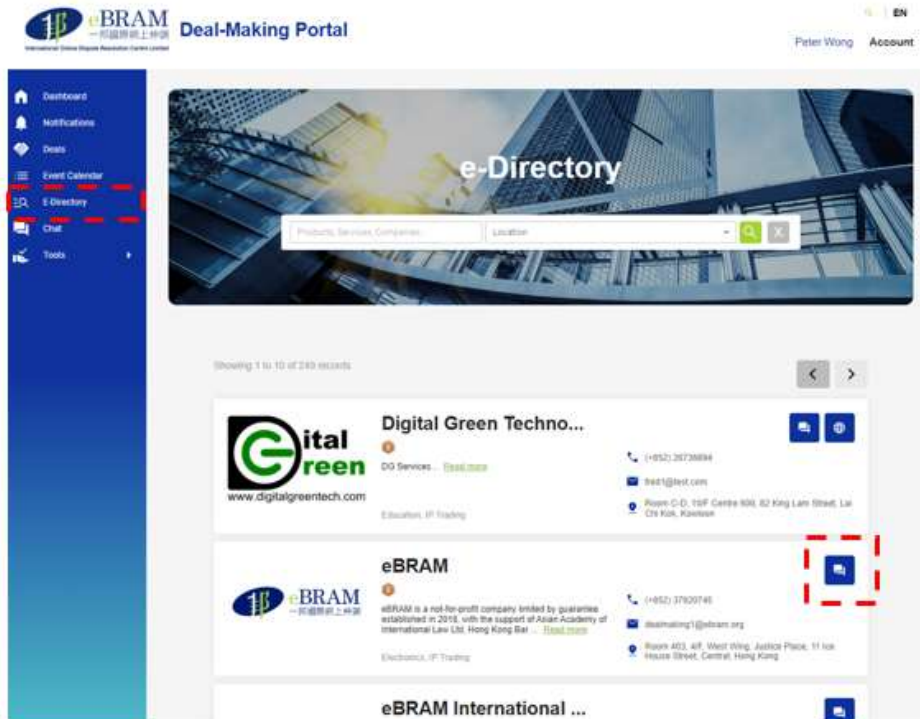
8.1. Chat

There are three ways to access your chatroom depending on whether you want to create a chat with a prospective business partner, or an existing deal partner.

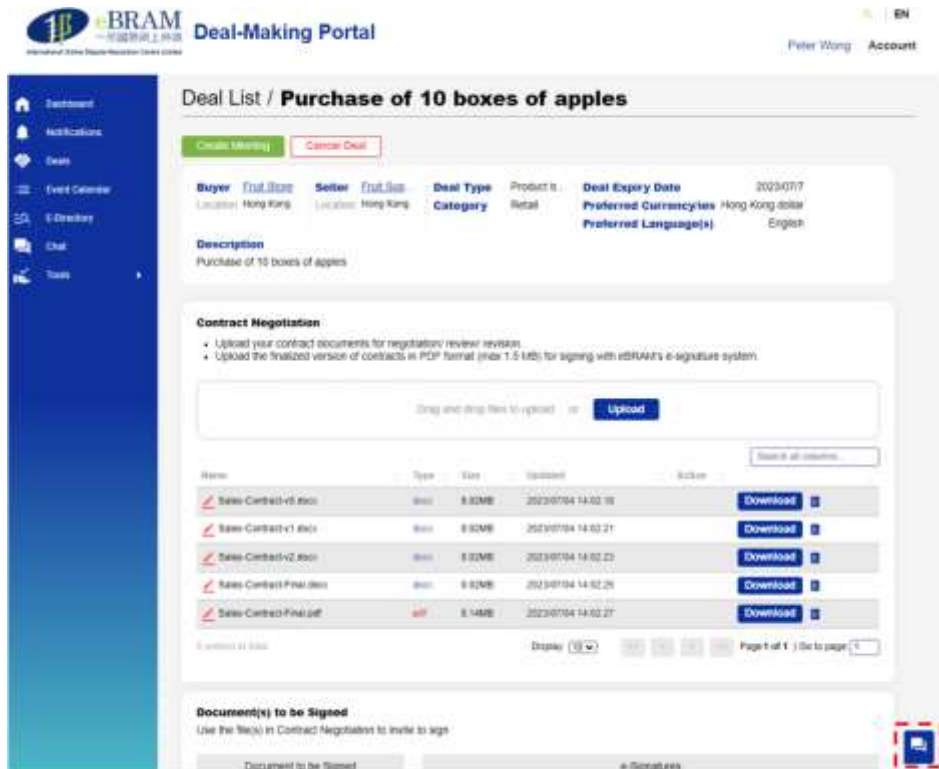
1. Click 'Chat' on the left-hand menu.



2. Click 'e-Directory' and click the 'Chat' icon next to the company information.



3. Click the 'Chat' icon at the bottom right-hand side of a deal page.



9. 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.

Room 403, 4/F, West Wing, Justice Place, 11
Ice House Street, Central, Hong Kong
+852 3792 0568 Technical Support
+852 3844 0707 General Enquiry
| dealmaking@ebram.org | <https://www.ebram.org>