

DEALROOM · BROKER WALKTHROUGH

From scenario to funded, step by step.

A ten-step tour of the broker portal — price, submit, track, and get paid, with your borrower in one live room the whole way.

STEPS	TO FIRST QUOTE	SURFACES	YOUR BRAND
10 price → submit → fund	60 sec no login required	2 public pricer + workspace	White-label when enabled

What you'll need

Five minutes and a live scenario — an **address, the numbers, and the exit**. To access branded term sheets and lock your fee, you'll also sign the broker agreement (a 15-minute, one-time step). Screenshots below are from the working Dealroom build.

No portal to learn. If you can fill in a deal on a napkin, you can run it here — and your borrower never has to touch a thing they don't understand.

START HERE

Quote before you ever sign up.

1

Price a live scenario

- Enter the **property address, loan purpose, amount, estimated value, and exit.**
- For a DSCR file, add **monthly rent and target DSCR.**
- Hit **Get a number in 60 seconds.**

No login required — quote a borrower on the spot.

818capitalpartners.com / brokers

Price a live scenario
No login. We rank 14 partners by best execution. BR-2026-0422

Property address
412 Magnolia Ave, Fort Worth, TX 76104

Loan purpose
DSCR

Exit
Refinance

Loan amount
\$960,000

Estimated value
\$1,480,000

Monthly rent
\$9,400

Target DSCR
1.20x

For DSCR scenarios Minimum coverage

Get a number in 60 seconds

2

Read the ranked result

- We price across the capital panel and **rank by best execution.**
- The winner is flagged; runners-up show the spread — e.g. **+185 bps.**
- From here, **generate a branded term sheet** or submit the deal in one click.

One screen, the whole field, and why one wins.

818capitalpartners.com / brokers#exec

BEST EXECUTION

One scenario, your whole rolodex, ranked.

Stop calling four lenders to find the sharpest number.

Enter the deal once. We price it against 14 capital partners and rank them by best execution, so you see the winning quote next to the runners-up on one screen. A generic lender shows you one number and calls it a day. We show you the field and why one wins, for example +185 bps separating the top two on a DSCR file at 1.20x.

Partner	Rate	LTV	Term	Points
Capital Partner A BEST	10.25%	65%	18 mo	1.50
Capital Partner C	12.10%	65%	18 mo	1.75
Capital Partner B	12.40%	60%	24 mo	2.00

Ranked for BR-2026-0422 · DSCR 1.20x · next best +185 bps

[Compare partners on your deal](#)

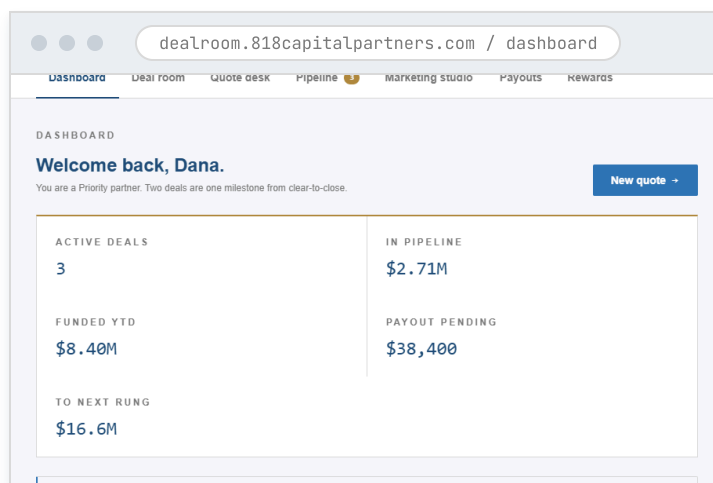
LOGGED IN

Your numbers, and your next move.

3

Your dashboard

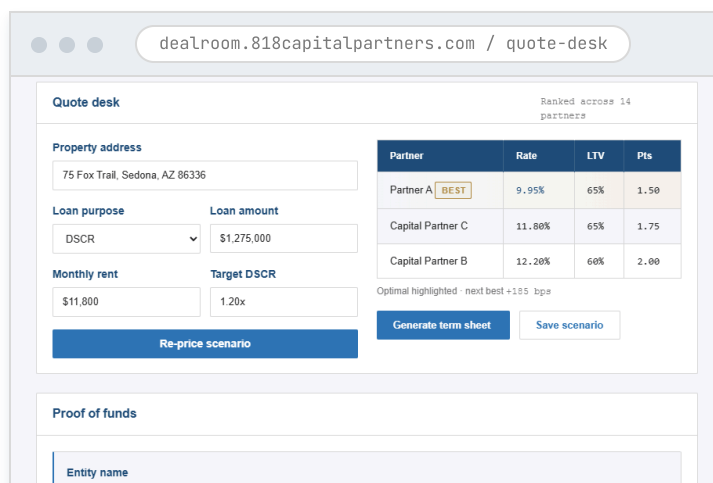
- Opens on your KPIs — **active deals**, **pipeline \$**, **funded YTD**, and **payout pending**.
- The **Next Action** card surfaces the single most urgent item.
- Start any file from **New quote**.



4

The Quote Desk

- Re-price any scenario against the panel; the ranked table shows **partner**, **rate**, **LTV**, and **points**.
- The optimal partner is highlighted with the runner-up spread.
- Click **Generate term sheet** (white-label-ready) or **Save scenario**.



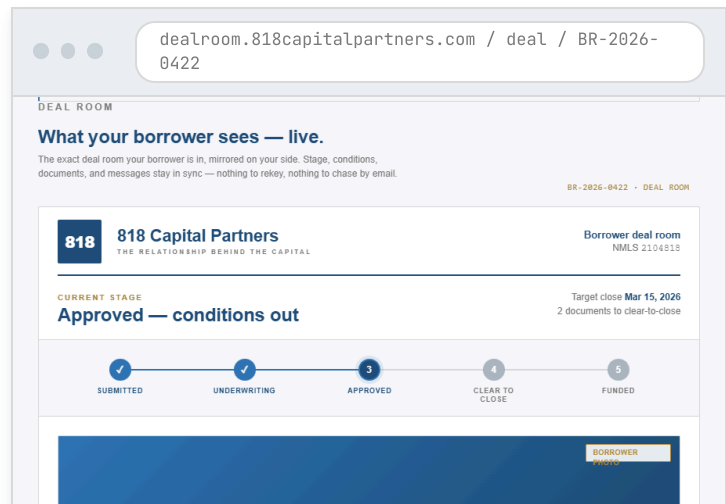
IN PROCESS

One room. You and your borrower, in sync.

5

Submit & the Deal Room

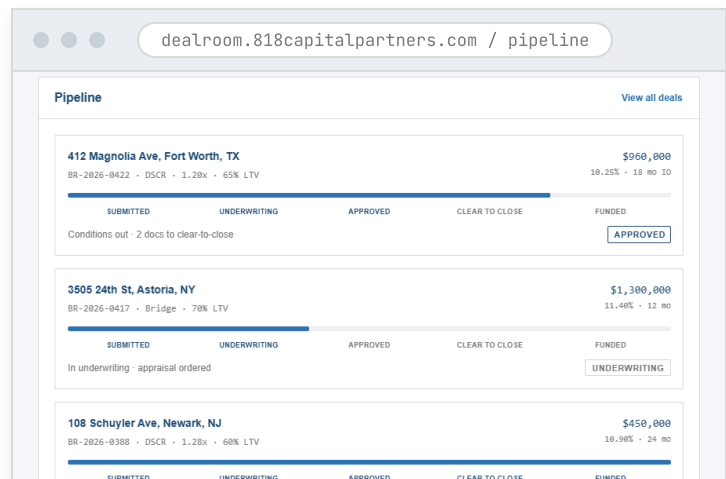
- One click **pre-fills the file** from your quote.
- You and your borrower share a **live Deal Room** — the exact room your client sees, mirrored on your side.
- Stage, conditions, documents, and messages **stay in sync** — nothing to rekey.



6

Track the Pipeline

- Every file shows a milestone bar: **Submitted** → **Underwriting** → **Approved** → **Clear-to-Close** → **Funded**.
- Conditions and **doc requests** surface early, right on the card.
- No black-hole, no status calls.



AT THE OFFER

Win the deal, and never sit in the dark.

7

Generate a Proof of Funds

- For realtor partners and live offers: enter **entity**, **amount**, **close date**, and **subject address**.
- Produces a **signed, address-specific PDF** in minutes.
- Gated behind a one-click approval and an expiry — **live now**.

The screenshot shows a web browser window with the URL `dealroom.818capitalpartners.com / proof-of-funds`. The page is titled "Proof of funds" and contains a form with the following fields:

- Entity name:** Sedona Key LLC
- Amount:** \$1,275,000
- Close by:** Jun 30, 2026
- Subject address:** 75 Fox Trail, Sedona, AZ

Below the form is a blue button labeled "Generate signed letter". Underneath the button, it says "Signed, address-specific PDF in minutes." At the bottom of the form, there is a "Notifications" section.

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Stay ahead with Notifications

- Milestone pushes land by **email, SMS, and in-app**.
- Conditions out, clear-to-close, funded — with your **fee wired** and your card ready.
- Toggle channels per milestone so you only get what matters.

The screenshot shows a web browser window with the URL `dealroom.818capitalpartners.com / notifications`. The page is titled "Notifications" and displays a list of milestones:

- Conditions are out on BR-2026-0422. You are 2 docs from clear-to-close. 2 hours ago
- BR-2026-0388 funded. Your fee of 1.50 points wired today, and your co-branded card is ready to download. Jun 2, 2026
- Deal BR-2026-0417 received. Conditions land within one business day, and we will push each one to you. Jun 1, 2026

Below the notifications is a "Marketing studio" section. It includes a text input field for "Broker name on card" with the value "Dana Whitfield". To the right, there is a "Co-branded, rendered for you" section showing a "JUST FUNDED" card for BR-2026-0388. The card displays the address "108 Schuyler Ave, Newark, NJ" and the amount "\$450,000 - DSCR - 24-month term - 1.75%".

AFTER THE CLOSE

Market yourself, on your own brand.

9

Co-branded Marketing Studio

- When a deal funds, generate a **just-funded card** or financing one-pager.
- Your **name and logo merge automatically** — rendered for you, not built by you.
- Download the PNG. RESPA-safe — marketing services only, never per referral.

The screenshot shows a web browser window with the URL `dealroom.818capitalpartners.com / marketing-studio`. The page is titled "Marketing studio" and includes a sub-header "Co-branded, rendered for you". The main content area has a heading "Generate a co-branded just-funded card for BR-2026-0388. Your name and logo merge automatically." Below this, there is a form with a "Broker name on card" field containing "Dana Whitfield". A "Format" dropdown menu is set to "Just-funded card". There are two buttons: "Generate card" and "Download PNG". To the right of the form is a preview of the generated card, which displays "JUST FUNDED", the address "108 Schuyler Ave, Newark, NJ", the amount "\$450,000", the term "24-month term", the rate "1.28x", and the broker information "Brokered by Dana Whitfield" with the "818" logo. A footer note states "RESPA-safe. Marketing services only, never per referral." Below the main content area is a section titled "Fee and payout" which contains a table with columns: Deal, Loan, Points, Fee, and Status.

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Present under your own brand

- White-label partners run the **entire portal and term sheets under their own brand**.
- Your borrower sees **your name** from quote to close.
- Shown here as "Meridian Capital Access" — 818's system underneath, your brand on top.

The screenshot shows a web browser window with the URL `portal.yourfirm.com`. The page header includes the "MCA Meridian CAPITAL ACCESS" logo and navigation links: "How it works", "Best execution", "Fee protection", and a "Request access" button. The main content area is titled "FOR BROKERS" and features a large heading "Quote your borrower in 60 seconds. Close in 10 days." Below this, a paragraph states: "We fund as principal. You keep your borrower, you keep your fee, and we put both in writing before the term sheet goes out." At the bottom, a smaller text block reads: "Price a live scenario right now, no login. We rank capital partners by best execution and hand you a branded term sheet on the first pass. Bridge, fix-and-flip, and DSCR from \$250,000 to \$5,000,000."



THE WHOLE LOOP

From a napkin to a wire, in one room.

- 1 **Price** a live scenario — no login — and read the ranked best-execution result.
- 2 **Generate** a branded term sheet and submit the deal in one click.
- 3 **Share** a live Deal Room with your borrower and track every milestone.
- 4 **Win** the offer with a signed proof of funds; stay ahead on multi-channel alerts.
- 5 **Get paid** at closing — locked fee wired — and download your co-branded card.

Ready to run your first file?

Price a scenario at dealroom.818capitalpartners.com (or 818capitalpartners.com/broker-program), then apply once for full portal access. Term sheets and your locked fee apply to every deal after.

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