SOP: Creating an Offer Using SkySlope Forms

Objective:

To ensure agents use the correct brokerage templates and standardized clauses to prepare a compliant, professional, and complete offer package for clients.

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1. Log Into SkySlope

- Go to your Board Login and Click on SkySlope
- You Should be in **SkySlope Forms** (not SkySlope Transactions)

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2. Start a New File for the Offer

- Click on **“Create Transaction”** or **“Start New File”**.
- Enter the property address (if not yet on MLS, enter it manually).
- Select the **Transaction Type**: *Purchase* or *Residential Lease*.
- Link to the MLS, if available, to auto-fill property data.

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3. Select the Correct Brokerage Template

- From the templates list, choose your **brokerage-specific offer package**, e.g.:
- *C21 Heritage – Buyer Offer Package*
- *Residential Lease – Tenant Offer Package*
- These templates will include:
- Standard forms required by the brokerage and RECO.
- Pre-entered brokerage clauses are in relevant sections (Schedule A, etc.)

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4. Complete Client & Offer Information

Fill in:

- Buyer’s legal names
- Offer price
- Deposit amount and method
- Irrevocable time

- Closing date
- Chattels & fixtures

Tip: Double-check client name spellings and legal identifiers.

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5. Review & Customize Pre-Loaded Clauses

- Go to **Schedule A.**
- Review all **pre-entered brokerage clauses**—these may include:
- Home inspection
- Financing conditions
- **Add or remove clauses** based on client circumstances.
- Use clause library or saved personal clauses if needed.

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6. Review Required Forms Checklist

Typical buyer offer packages may include:

- **Agreement of Purchase and Sale (Form 100)**
- **Form 801**
- **Buyer Representation Agreement**
- **RECO Information Guide**
- **Confirmation of Co-operation and Representation (Form 320)**
- **Other Brokerage Schedule B (Attached to listing or call Agent)**
- **Clause Addendums, if applicable**

Note • **FINTRAC – Individual ID Verification and Receipt of funds should be done in the FINTRACKER APP**

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7. Sign the Offer

- Click **“Prepare for Signature”**.
- Choose **SkySlope DigiSign**
- Set signing order and client contact info.
- Send documents for e-signature.

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8. Save & Export Final Package

- Once signed, download the full offer package as a PDF.
- Save a copy to your **deal folder** or **SkySlope Transaction Record**.
- Send the offer to the listing agent per your standard submission procedure (email, DocuSign Room, etc.).

** IF you are doing a Lease - Make sure you use the Ontario Standard form of lease

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9. Post-Submission Checklist

- Confirm receipt with the listing agent.
- Upload the signed offer to **SkySlope Transactions** under the correct deal file.
- Mark the offer status: “Submitted,” “Countered,” or “Accepted” when applicable.
- You may hand in the documents to the front desk for them to submit the deal

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Compliance Tip

Always use the **brokerage-approved templates** and **clause packages** to ensure compliance with office policy, RECO standards, and TRESA regulations. Double-check for:

- Missing initials or signatures
- Incomplete schedules
- Proper irrevocable times
- Proper use of representation documents

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