



Transaction Management Comparison Matrix



Contact Name	Contact Phone	File Creation	Templating	Notifications	File Access Control	Audit Trail Integrity	Broker Review	Broker Dashboard	Tasks	Pricing	Document Upload	Esigning	Mobile Friendly	AZ Companies Currently Using	Custom Branding
Sales	877-720-2040	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Yes	No	Tiered based on agent count	Email/Fax/ Direct/ Drag & Drop	Yes; DocuSign	Yes	Please contact DocuSign	Yes
Nick Trotta	513-246-0984	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes; Version NOW Technology	Yes	Yes, plus API, SSO & customization	Yes	Tiered based on agent count	Email/Scan/ Fax/ Direct/ Drag & Drop	Yes; proprietary	Yes	Keller Williams Call for more!	Yes
Sales	800-668-8768	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes, complete audit trail	Yes	Yes	Yes	Tiered based on number of agents	Yes	Yes, built-in and fully integrated	Yes	Please contact Instanet	Yes, at no extra cost
Sales	866-279-9653	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Tiered based on agent count	Direct	No	No	Yes; please contact Lone Wolf for details	Yes
Vince Muscat	602-549-9361	Broker/ Agent/ Transaction Coordinator	Yes; dynamically built	Yes	Yes	Yes, with full document versioning	Yes	Yes; plus broker notification	Yes	Flat rate or per file closed	Email/Scan/ Fax/ Direct plus Split-Merge	Integrated with GoPaperless	Tablet	Yes; please contact PaperFree Agent for details	Yes
Ramu Tremblay	408-384-8152	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Yes	Yes; relative due to date triggers	Tiered based on new files created/ no setup fee/ no long-term contract	Email/Scan/ Direct/ Dropbox	Integrated with DocuSign	Browser based with responsive design	Please contact Paperless Pipeline	Yes
Randy Toby	248-381-1573	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Customizable	Yes	Flat rate	Email/Scan/ Fax/ Direct	Integrated with DocuSign	Yes	Please contact RealtyCommander	Yes
Mark Thomas	415-572-5334	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Yes; plus broker notification	Yes	Tiered based on agent count	Email/ Direct	Yes; proprietary	Tablet-yes Phones-soon	Cactus Mountain Properties, Green Streat Realty, and several others	Can Build upon request
Sales	888-318-2660 Ext. 565	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Yes; limited to transaction level info	Yes	Tiered based on number of agents using system	Email/Scan/ Fax/ Direct/ zipForm*	Integrated with DocuSign & Digital Ink via zipForm*	Yes	Please contact Relay	Yes
Jesse Long	415-240-4706	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes, with email and text message tracking	Yes	Yes, with AZ specific compliance features and Lonewolf integration	Yes	Tiered based on agent count	Email/Scan/ Fax/ Direct	Yes; proprietary	Yes	DPR Realty, West USA, RE/MAX Fine Properties, plus 50+ more brokerages....	Yes, at no extra cost

Column Legend:

- File Creation** Individuals who are permitted to open/create a new file in the system.
- Templating** The ability to apply predetermined content/activity to a file which saves time.
- Notifications** The ability for the system to send individuals notifications via email or text for tasks or dealines.
- File Access Control** The ability for the broker to determine who can access the file or portions of the file.
- Audit Trail Integrity** The system keeps a record of all activity on the file and the record cannot be edited or deleted.
- Broker Review** The ability for a broker to look at or "review" a document which is documented in an audit trail .
- Broker Dashboard** Functionality allowing broker to see across all files using metrics alerting broker to pending tasks.

- Tasks** The ability for the system to list, monitor and mark complete activities on part of the agents and broker.
- Pricing** The general pricing structure charged to the broker for using the system.
- Document Upload** The methods by which an individual gets a document into the system.
- Esigning** The methods by which documents can be sent directly from the system for electronic signing.
- Mobile Friendly** Whether the system is compatible with tablets and smart phones.
- AZ Companies Currently Using** References of current Arizona companies using the system
- Custom Branding** Broker can have company branding appear to agents using the system

Any transaction management system is acceptable by ADRE. The difference between systems is how much work does a broker need to do to stay in compliance; some systems do more to keep the broker in compliance than others.

Refer to ADRE SPS 2010.01 for detailed information on requirements for electronic storage.
All information above was obtained directly from representatives of each system.