



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 | 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 |
| 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 |
| Sales | 866-627-4729 | Broker/ Agent/ Transaction Coordinator | Yes | Yes | Yes | Yes | Yes | Yes, with ability for broker to broadcast messages to agents | Yes | Tiered flat fee based on agent count | Email/Scan/Fax/ Direct/Dropbox with integration to zipForm® | Yes; Digital Ink and DocuSign | Yes | Please contact zipLogix® | Yes |

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.