








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
	Nick Trotta	513-246-0984	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	No; unneeded. Broker gets notified.	Yes	Tiered based on agent count	Email/Scan/ Fax/Direct	Yes; proprietary	Yes
	Vince Muscat	480-460-5007	Pending contact for information.											
	Mark Thomas	888-870-7889	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes but only through Reesio support	Yes	Yes	Yes	Yes	Flat rate	Email/Direct	Integrated with DocuSign	Tablet-yes Phones-soon
	Ramu Tremblay	408-384-8152	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	No; unneeded. Broker gets notified.	Yes	Tiered based on new files created	Email/Scan/ Direct	Integrated with DocuSign	Browser based with responsive design
	Jesse Long	415-240-4706	Broker/ Agent/ Transaction Coordinator	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Tiered based on agent count	Email/Scan/ Fax/Direct	Yes; proprietary	Yes
	Tera Rowe	866-279-9653	Pending contact for information.											
	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

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 (i.e.; tasks, pre-determined documents, appointments) which saves time.
- Notifications** The ability for the system to send individuals notifications via email or text when tasks or dealines occur.
- File Access Control** The ability for the broker to determine who can access the file or portions of the file on a person-by-person basis.
- 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 a document which is documented in an audit trail or file history which meets the requirement for broker review by ADRE.
- Broker Dashboard** A functionality within the system that allows a broker to see across all files at once using metrics or notifications that alert the 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.

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.