



**No Annual Contract!**  
**Set Up Fee: \$375**  
**Monthly Fee: \$49.00**  
*for single user/ log-on*

## **Summary: TransAction Guru™**

### **Overview:**

TransAction Guru is a web-based system that offers agents and/or transaction coordinators the ability to manage their transactions from listing to close! The system consolidates all of the information that is necessary to close a transaction allowing users to see their work and manage their work, minimizing their use of paper files.

### **Key Components of TransAction Guru™ -**

- Transaction and Listing Management
  - Data collection of terms and parties involved in transactions
  - Visibility controls for primary user, allowing restricted views for third parties
  - Costs Tracking
  - Vendor Assignment
  - Task Management
  - Document Posting and Sharing
  - Notes and Messages logs
  - Un-editable audit trail
  - Summary Reports (Task Summary Reports, Transaction Summary Reports, Notes & Messages Reports)
- Consolidated Task Management
  - Customizable & Automated Action Plans
  - Task Status Tickler System
  - Custom Sort Features (by Property, by Provider, by Date, by Client)
- Document Management
  - Document (Virtual Drive) Storage
  - Document Posting to Online Transaction
  - Dynamically populated Templates
  - Customizable Templates
  - Unlimited Storage
  - File Upload & File Sharing for outside Parties
- Contact Management
  - User Defined Groups

- Source of Business Tracking
- Dated 'Notes' Logs
- Provider Database with Privacy Features
- Internal messaging
- External email capability
- Private and Shared messaging
- Reports
  - Production Reports by volume
  - Inventory reports by status
  - Downloadable Summary Reports
- Data Access & Storage
  - Data stored on line promoting ease of access
  - Data held by hosting service that meets stringent standards prescribed by the Financial Modernization Act of 1999, (the Gramm-Leach-Bliley Act).
  - Data Export of off-line storage
  - User owned data

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## **The Guru Story:**

Guru has been building web-based solutions for real estate brokerage firms since 1995. We were the first offer web-based transaction management in 2000 and, in 2003, the first to offer customizable web-based enterprise systems built specifically for the real estate industry. Since that time, Guru has added modules for everything from Relocation and Recruiting to Leads management and Agent Receivables.

## **Our Mission:**

We build partnerships with other forward thinkers, providing solutions which enable them to improve efficiencies and consistently deliver ever greater experiences to their customers.

## **Our Promise:**

- Understand our clients and their unique and evolving needs
- Work hard, communicate honestly and promptly, and do what's right
- Provide our services in a way that is fun, fair and profitable for all parties.

*everything happens in Guru*