ONLINE FILE MANAGEMENT AND COMPLIANCE FOR BROKERS

Automated Compliance Manager tools help brokerages manage their listing, sale and lease files much more efficiently while reducing legal exposure. Compliance tools are included with DocBox and TransactionDesk modules, available through Instanet Solutions at NO ADDITIONAL COST.

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ONLINE FILE MANAGEMENT AND COMPLIANCE FOR BROKERS

Available in TransactionDesk and Docbox at No Additional Cost

Online Document Checklist

A checklist of required and optional documents will automatically be added to each new transaction. Agents will know which documents they need to submit.

File Status Tracking

Anyone looking at the file will see what is complete and what is missing from a file.

Automated Alerts

Automated emails notify brokerage staff when documents are ready to review.

Reporting Dashboards

See exactly which documents you need to review in a simple report with links to each document that makes accessing and reviewing easy and fast. The automated Broker File Management tool helps brokerages manage their listing, sale and lease files much more efficiently while reducing legal exposure.

Broker Controlled

The system lets you know when documents are ready for review. Only broker staff can mark off documents as reviewed.

Reduce Risk

Agents know what documents are needed for each transaction. Broker file review work is automatically documented in transaction file history.

Save Time

Stop shuffling paper. Perform file reviews faster, from your computer, tablet or even your smartphone, anytime, anywhere. Spend less time chasing agents for documents - when agents update their files online, the broker files are updated and staff is notified.

Save Money

In addition to saving staff time, brokerages save money on paper, toner and storage costs by going paperless. Try our paperless savings calculator at www.InstanetSolutions.com and see how much you could save.

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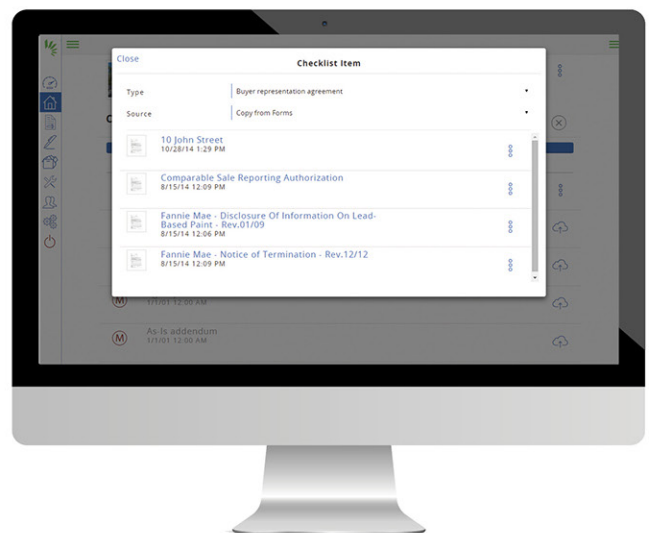
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