GURU SOLUTIONS

Ideas that work …

- ***we'll analyze your business processes and deliver sound advice based on best management practices***
- ***increase lead capture and conversion rates***
- ***increase per person productivity***

Solutions that fit …

- ***GURU Enterprise™ will be configured to fit your business***
- ***tools and systems that reinforce your brand and corporate values***
- ***roles tailored to your business model***
- ***workflow reinforces your business rules***
- ***training enhances productivity and retention of your best people***

Support when you need it …

- ***24 x 7 secure online hosting in tier 1 facility***
- ***live help desk support via web portal, email, or toll free number***
- ***online one-on-one and group training***
- ***real time data backup with daily archive stored offsite***
- ***continuous software maintenance & monitoring***
- ***hardware leasing, support and maintenance with 100% redundant capacity***
- ***24x7 engineering support***

Basic Office Management

Basic Office Management is the core component to the *Enterprise*™ system and is designed to eliminate redundancies and increase productivity. *Enterprise*™ enables single point entry with the ability to track all contacts and data pertaining to Listings, Sales and Buyer/Brokerage Agreements. Powerful report generators provide a variety of useful reports to manage inventory and track productivity.

❖ Access Control
- Access to folders is defined by the user's role in the folder
- Roles can be modified to meet business rules

❖ Basic Human Resources
- Track personnel data
- Generate office rosters and Emergency Contact Sheets

❖ Listings, Buyer Agreements and Transactions
- Track Sales and Listing Terms
- Capture contact information for all parties to the file
- View on-line case sheets
- Utilize extensive search options
- Create forms for unique business needs (REO, Commercial, Rental, etc.)

❖ Production Reporting
- Buyer Agreements
- Listing inventory
- Transaction reports
- Ability to save report templates by role or department
- PDF and exporting capabilities

Prerequisites: None

Workflow

Adding Workflow to your existing *Enterprise*™ system enriches functionality throughout the system. The tools provided with this component enable the users to track tasks, communicate via the system with the parties on the file and share and store documents with one another. Standardized checklists, forms and documents can be created to ensure a consistent experience for the customers and clients and will ensure that staff and agents follow best practices.

❖ Tasks Management

- Create and assign individual tasks or action plans (pre-defined checklists)
- Schedule and track relative to deadlines or to dependency on other tasks
- Automatically send reminders to relevant parties
- Create and apply profiles to different folder types

❖ Document Management

- Upload files and store documents online
- Give secure access to selected parties on a file, or as email attachments
- Create templates for letters, contracts or other documents that can populate from the database and any MLS interfaces

❖ Notes and Messages

- Communicate simultaneously to all relevant parties
- Keep time-stamped notes and messages for future reference

Prerequisites: ***One*** of the following is required:

- Basic Office Management
- Relocation & Leads Management
- Recruiting

Showing Management

The Showing Management module allows **showings** to be scheduled for both Seller Listings and Buyer Leads. Showings can be scheduled by the agent, office staff or a third party scheduler. Showing Management also allows feedback to be captured and shared for each showing. This module is an excellent enhancement tool for agents and is a user-friendly introductory component which encourages agents to access the system.

❖ Manage Showing Activities
- Schedule showings
- Track feedback from Showing Agent or Buyer Lead
- Share Seller view of feedback
- Protect confidential agent comments
- Schedule showings on MLS listings ~ requires MLS interface
- Generate Activity and Feedback Reports

Prerequisites: ***One*** of the following is required:
- Basic Office Management
- Relocation and Leads Management

Enhanced Human Resources

Enhanced HR provides the ability to track all pertinent details for employee and agent data. The flexible design and modular organization of the data enables the information to be managed by multiple parties. The Enhanced HR module offers real time reporting which allows quick retrieval of the data. This module is a key component for several other modules within the *Enterprise* ™ system as it feeds the data, business rules and unique configuration settings for each agent. This module will assist in cutting down on paper work as well as reduce administrative efforts.

- Employee Data
  - Track employment history
  - Manage reviews and review results
  - Track comprehensive benefits
  - Capture payroll and payroll history
  - Report Emergency Contact Information
  - Birthday Lists
  - Hire and termination checklists

- Agent Data
  - Record agent awards
  - Track Licensing and MLS membership
  - Billing Rules and Performance Tracking
  - Compliance tracking

Prerequisites: Basic Office Management

Financials

The Financials component is the crux of the *Enterprise* ™ system when being used to manage agent and office performance. This component will provide your management team immediate access to the real-time production data and statistics they need to run their offices and manage their agents effectively. The component not only automates both agent receivables and commission calculations, but also tracks and relates performance to agent pay plans. This module is a critical component for the majority of the management reports and for the Executive Information System. The commission specialists can be staffed in a centralized accounting department or distributed through the organization.

❖ Robust Pay Plan Calculators
- Flexible calculators customized to **your business model**
- Proportional tier calculations option
- Pay scales dependent upon specific transaction circumstances
- Multiple pay plan deduction options available
- Pay plan reset based on your measurement periods
- Pay plan performance based on your business criteria

❖ Commission Disbursement Calculators
- Separate team splits for commission, volume and units
- Supports agent's concessions and allocations
- Can deduct receivables based on business rules
- Automated tier increases
- Non-sales commission calculators
- Can interface with accounting
- Can calculate Franchise or Broker fees
- Comprehensive report generators of all financial data

Prerequisites: Both of the following are required:
- Basic Office Management
- Enhanced HR

Agent Accounts Receivable

The Agent Accounts Receivable module enables you to facilitate the collection of outstanding receivables for individual agents. The simplicity of the Agent Dashboard and the ability to create and monitor receivables will reduce outstanding balances, decrease errors and eliminate confusion and frustration relating to Agent Statements.

❖ <u>Track and Reduce Agent Receivables</u>

- Dashboard view of all open activity
- Add charges and credit memos
- Generate Agent Statements – centralized or office level
- Define billing options in agent’s profile
- Create receivables for multiple agents in one step with ability to edit individual values
- Payment history reporting
- Receivable activity reporting
- User friendly interface
- Intelligent exception error management

❖ <u>Agent Payment Flexibility</u>

- Cash receipts or payment via commission deductions
- Automatic deduction from next commission check available
- Disbursement of credit memos via checks or used as payment

<u>Prerequisites:</u> All three of the following are required:

- Basic Office Management
- Financials
- Enhanced HR

Funds Management

The secure Funds Management module is responsible for tracking cash related to the commission and transactions. This component is required when integrating with an accounting system to track commission, earnest money, bonuses and advances.

❖ <u>Track Funds on Each Transaction</u>

- Earnest money receipts, transfers and disbursements
- Commission Receipts and payments
- Agent advances against commission
- External agent bonuses
- Cash adjustments for concessions
- Integration with Accounting for debits, credits and inter office transfers
- Balance Sheets on a per transaction basis
- Track commissions and services paid at closing table
- Smart Summary with balances due and overage notification

❖ <u>Fund Management Reports</u>

- Earnest money deposits and disbursements
- Cash flow reporting
- Use for Bank reconciliation

<u>Prerequisites:</u> Financials

Relocation and Lead Management

The Leads Management module improves your lead conversion and instantly elevates the status of any, or all, of the leads your company is working with. This determines where your leads originate and how effectively they are being converted to listings and sales. The tracking and follow-up tools will improve, quality, accuracy and communication for prospects and referring partners alike. This will result in a better understanding of the process, a smoother transaction and mutually informed parties.

❖ Lead Capture

- Ability to capture lead from multiple websites
- Track incoming and outgoing referrals
- Create custom Source of Business lists
- Define source rules for pay plan definition or profit sharing
- Protect Source of Business rules, payment addresses and contact information for referring companies
- Capture detailed information on buyer preference or property details
- Track Relocation specific events and activities
- Payee information and vendor ID for accounting interface

❖ Linking Tools

- Track source from lead through settlement by linking folders and pushing data forward
- Ensures source and referral amounts do not get lost before commissions are disbursed

❖ Lead Reporting

- Extensive reporting tools with exporting capability
- Conversion rates, inventory and activity reports

Prerequisites: None

Executive Information Systems (EIS) Reporting

The EIS report generation tool gives senior management multiple options for monitoring, projecting goals and identify trends. The customized reports can be created as summarizing dashboards or detailed reports ranging from a broad view to explicit detail. EIS gives you the control to view your data the way you want to track it. The *Enterprise* ™ system will be configured to match the hierarchy of your **actual corporate structure** and reports can be run at any level within the organization dependent on the role and the user's position.

❖ Executive Information System

- Drill down to department, office, division or region
- Establish goals and track performance metrics relative to budget values
- Create unique indicators to capture data not currently held in the system
- Compare data in weekly, monthly or yearly increments
- Compare indicators for actual, projected and historical data
- Capture pre-implementation data to use in reports and projections
- Identify trends and changes in seasonality reporting
- Access a list of over 300 indicators for tracking reports
- User-friendly interface makes modification and creation simple
- User's role determines access to confidential information

Prerequisites: ***Both*** of the following are required:

- Basic Office Management
- Financials

Recruiting

The Recruiting module provides tools to track and manage potential agents, assign them to managers and follow the steps of the interview process. This results in the ability to determine which methods are most effectively turning potential agents into producing agents and share best practices among management. Using the workflow tools these methods can then be reproduced, and automated with tasks and documentation.

❖ <u>Recruit Capture</u>

- Create custom Source of Recruit lists
- Assign recruits to multiple offices
- Track productivity for experienced agents
- Track school/licensing for new agents
- Convert recruits to Internal Agents
- Track agent sponsorship
- Generate activity reports
- Module includes workflow for recruit and personnel folders

<u>Prerequisites:</u> Enhanced HR

Education Management

The Education Management module is designed to track the important factors of a Real Estate school and all internal training. This includes every step in the process from registration to licensing for new agents. Not limited to new agents, this component can also be configured to manage internal staff training and Conference/Training room reservations. The resource management for classrooms, instructors and materials makes this complex task straightforward, uncomplicated and provides efficiencies.

❖ <u>Attendee and Resource Tracking</u>

- Create training facility lists
- Create Course Registration information- location, time and dates
- Build Instructor database
- Maximum attendance quota
- Course Rosters with attendance/grades
- Material assignment and requirements
- Tuition fees for internal and external registrants
- Marketing and registration pushed to Company Web Site
- Centralized or distributed responsibilities
- Charge/collect payment for class tuition and materials
- Instructor and potential manager access to roster and grades
- Continuing Education Credit or audit class options
- Automated pass/fail based on quiz and test scores
- Configurable Instructor access for internal or external preferences

<u>Prerequisites:</u> Enhanced HR