



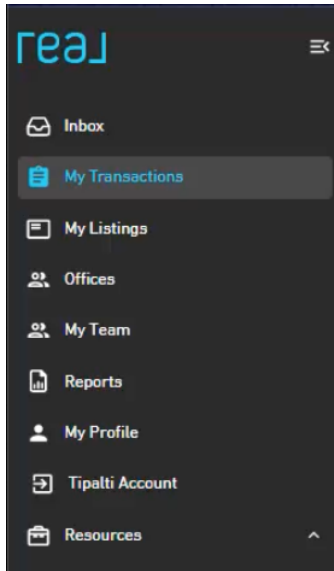
# reZEN 2.0 - How to Create a Transaction

## Learn how to create, edit, and manage your transactions.

Don't forget: if you are the listing agent, you need to create a listing, before you can start the sales transaction.

### Create a Transaction:

1. In the [Real App](#), go to My Transactions:



2. Then, click Create Transaction in the top right corner.

Transaction Code	Deal Type	Invoice Number	Address	Checklist Complete	Journey Progress	Agents	Price	Gross Commission	My Net Payout	Status	Estimated Closing Date	Actual Closing Date
01349547175F	Open	N/A	1234 San Angelo Boulevard, North Central, San Antonio, Texas 78201	0/12	100%	1/1	\$515,000.00	\$10,300.00	\$2,542.00	Needs Commission Validation	10/01/22	N/A
106121048174D	Open	N/A	12345 Hart Crest, Northwest Side, San Antonio, Texas 78249	0/12	100%	1/1	\$510,000.00	\$10,200.00	\$2,462.00	Needs Commission Validation	10/01/22	N/A
84885442119D	Open	N/A	345 East Maple Street, Midtown, San Antonio, Texas 78212	0/12	100%	1/1	\$250,000.00	\$7,500.00	\$480.00	Needs Commission Validation	10/01/22	N/A
04536816103F	Open	N/A	345 East Maple Street, Midtown, San Antonio, Texas 78212	0/0	0%	1/1	\$530,000.00	\$15,900.00	\$7,262.00	Needs Commission Validation	10/01/22	N/A
175409147180H	Sold	N/A	27 West 26 Street, New York, New York 10018	0/1	17%	1/1	\$250.00	\$250.00	\$0.00	Needs Commission Validation	09/21/22	N/A

3. The system will walk you through several steps to create the transaction:

Your new transaction is just a few minutes away!

Hi, Shane+Test Bralove+Test 🙌

We'll guide you through a few steps to create a new transaction.

**Search Address** (Source by Google)\*

E.g. 1st St. New York, NY 10010

**Unit No.**

Eg: 123

**Year Built\***

Eg: 2020

↕ Enter address manually

**MLS Number** (enter N/A if this is an exclusive / non-MLS deal)\*

E.g. 120001234AB

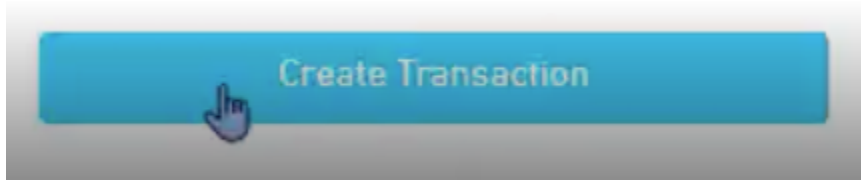
**Escrow #**

E.g. 01-12345-ABC

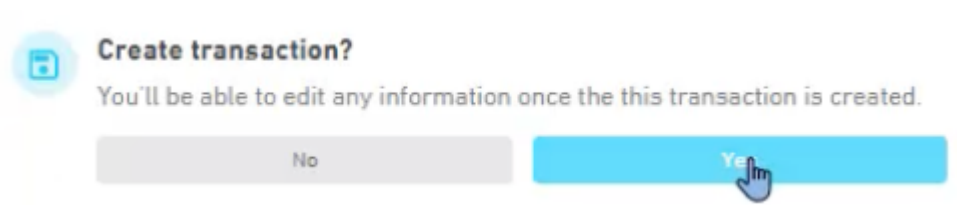
Some important notes:

- For transaction owner:
  - if you are an **admin or transaction coordinator**, enter the name of the agent you are working with.
  - If you are a solo agent, your name will be automatically in there. You can just click next.
  - **If you don't have the buyer or seller's lawyer, you can skip these questions by clicking "Next".**
- To whom should the commission document be sent:
  - Most of the time, this is title or escrow.
  - In some attorney states, this is the attorney.
  - If you don't have the attorney's information, you can just say "I don't know" and click next.

4. You will see the preview. Please review & click "Create Transaction" at the bottom right of the page.



5. Don't forget to click "yes" in the popup!



6. Now, the transaction is created. You can scroll to the middle left of the screen to add any payment participants.

Edit Transaction
View Commission Documents
Mark As Compliant

Road To Success
Checklist
Transaction Details
Deposits
Comments
Activity
Payment Invoices
Outgoing Payments

**Transaction Information**

Sale Price	USD 515,000.00
Gross Commission	USD 10,300.00
Gross Commission Percentage	2.00%
Status	Terminated
Deal Type	Sale
Commission Invoice Number	N/A
<b>Transaction Owner</b>	Pritesh Damani
Representing	Buy Side Representation
MLS #	11111111111111
Personal Deal	No

**Commission Split** [View Commission Documents](#)

Pritesh Damani USD 10,300.00  
100.00% split

**Commission Payer**

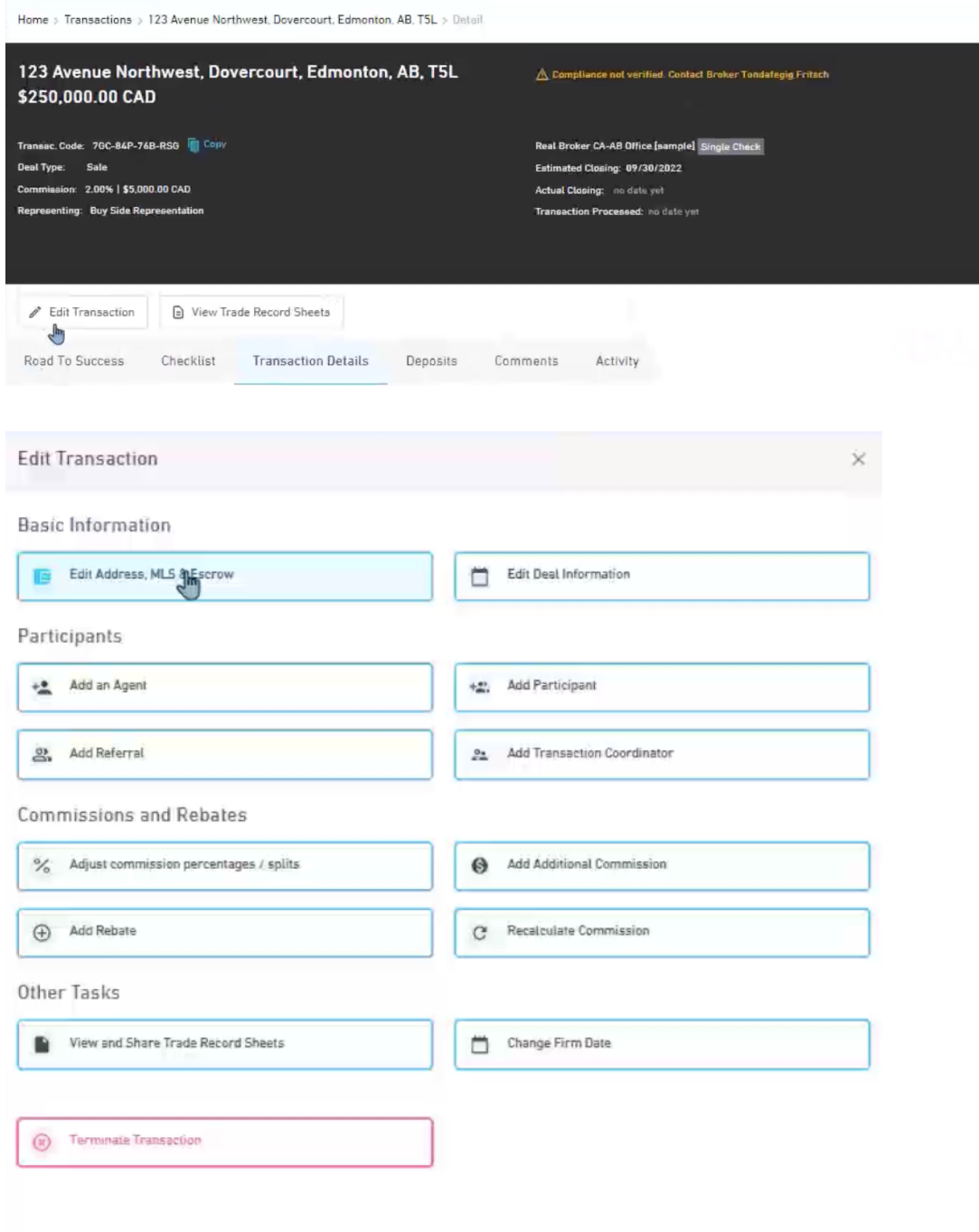
Name	Enter When Firm
Company	Fill in when firm
Email	idontknowyet@example.com
Phone	+1 (111) 111-1111
Role	Seller's Lawyer
Receives Invoice / Commission Document?	<input checked="" type="checkbox"/>

**Payment Participants**

**Voila! You are done.**

# If you need to edit the transaction:

You can click "edit" on the left side. This will pop open a window on the right where you can click on the information you need to edit.



# How to process your transaction (Road to Success)

## Want to stay on top of all your transactions? Of course you do!

- You can click on "Road to Success" in the transaction. This will show you where the deal is in the process.

**Road To Success** Checklist Transaction Details Deposits Comments Activity Payment Invoices Outgoing Payments

9/27/2022 03:35 PM EDT ✔ **Accepted Contract** Complete

9/27/2022 03:36 PM EDT ✔ **Documents Uploaded** Complete

● **Commission Calculation Approved** Incomplete

● **Broker Approved for Commission Document Generation** Incomplete   
Not Started by Michael Yarrito - Broker

● **Commission Document Confirmed** Incomplete

● **Commission Document or Invoice Sent** Incomplete

● **Reviewed and Marked Fully Compliant** Incomplete   
Not Started by Michael Yarrito - Broker

● **Closing Day** Incomplete

- Or click on "Checklist" to see all of the items required to process the deal.
- PRO TIP:** click "Type" to sort by required tasks first.

Road To Success **Checklist** Transaction Details Deposits Comments Activity Payment Invoices Outgoing Payments

Search  Labels:  New Item

#	Item Name	Assigned To	Type	Status	Urgent	Due Date	Documents	Actions
1.	MLS (Showing Pending)	PD Pritesh Damani	Required	<input checked="" type="checkbox"/>	Pending	09/27/2022	1 Docs	Upload <span style="float: right;">✓ ✕</span>
2.	Executed Contract	PD Pritesh Damani	Required	<input checked="" type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>
3.	Earnest Money & Option Receipt	PD Pritesh Damani	Required	<input checked="" type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>
4.	Finance Addendum (TXR1901)	PD Pritesh Damani	Required	<input checked="" type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>
5.	Addendum For Property Located In Mandatory Propert	PD Pritesh Damani	Required	<input checked="" type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>
6.	Non-Realty Items Addendum	PD Pritesh Damani	Optional	<input type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>
7.	Non-Realty Items Addendum	PD Pritesh Damani	Optional	<input type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>
8.	Lead Based Paint (If Built Before 1978)	PD Pritesh Damani	Optional	<input type="checkbox"/>	Not Started	09/27/2022	0 Docs	Upload <span style="float: right;">✓ ✕</span>

