



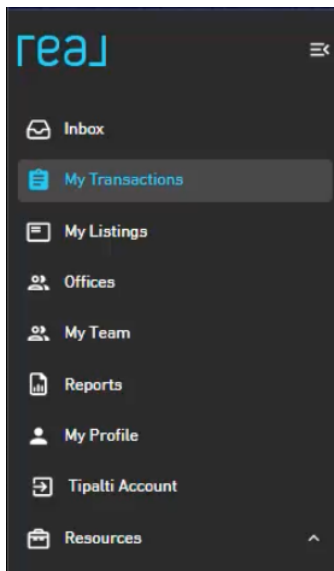
# reZEN 2.0 - How to Create a Transaction

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

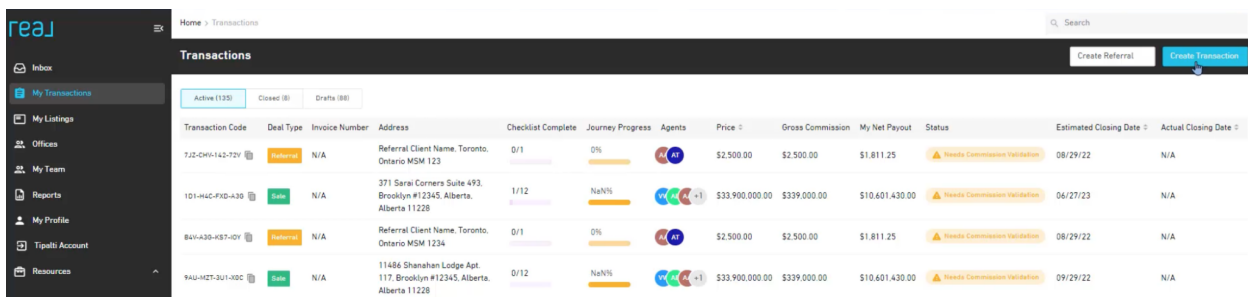
Don't forget: if you are the listing agent, you need to create a listing, before you can start the sales transaction.

## Create a Transaction:

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



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



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

Your new transaction is just a few minutes away!

**Hi, Alberta Agent** 🙌

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

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

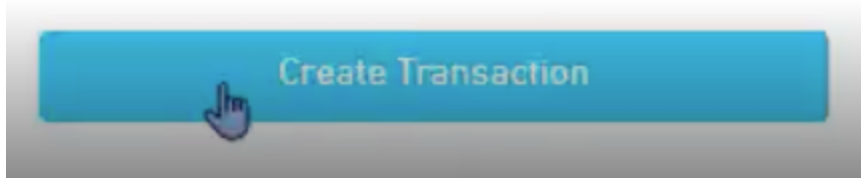
  
**Unit No.**  
  
[📍 Enter address manually](#)

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

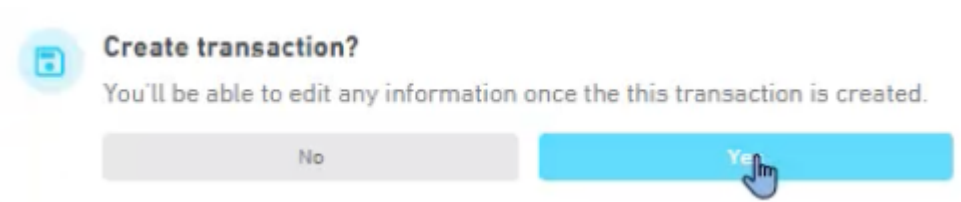
Some important notes:

- 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.

The screenshot displays the 'Transaction Details' page. It includes sections for 'Transaction Information', 'Commission Split', 'Commission Payer', and 'Payment Participants'. The 'Payment Participants' section shows a table with columns for Name, Role, and Commission Split.

Name	Role	Commission Split
Alberta Agent	Buyer / Tenant Agent	CAD 5,000.00

**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.

The screenshot displays a web application interface for managing real estate transactions. At the top, a breadcrumb trail reads: Home > Transactions > 123 Avenue Northwest, Dovercourt, Edmonton, AB, T5L > Detail. The main header area shows the property address "123 Avenue Northwest, Dovercourt, Edmonton, AB, T5L" and the price "\$250,000.00 CAD". A warning icon indicates "Compliance not verified. Contact Broker Tondefegig Fritsch".

Transaction details are listed on the left: Transac. Code: 76C-84P-74B-R56 (with a Copy icon), Deal Type: Sale, Commission: 2.00% | \$5,000.00 CAD, and Representing: Buy Side Representation. On the right, it shows "Real Broker CA-AB Office [example] Single Check", "Estimated Closing: 09/30/2022", "Actual Closing: no date yet", and "Transaction Processed: no date yet".

Below the details are two buttons: "Edit Transaction" (with a pencil icon) and "View Trade Record Sheets" (with a document icon). A navigation bar includes "Road To Success", "Checklist", "Transaction Details" (highlighted), "Deposits", "Comments", and "Activity".

An "Edit Transaction" modal window is open, featuring a close button (X) in the top right. It is organized into several sections:

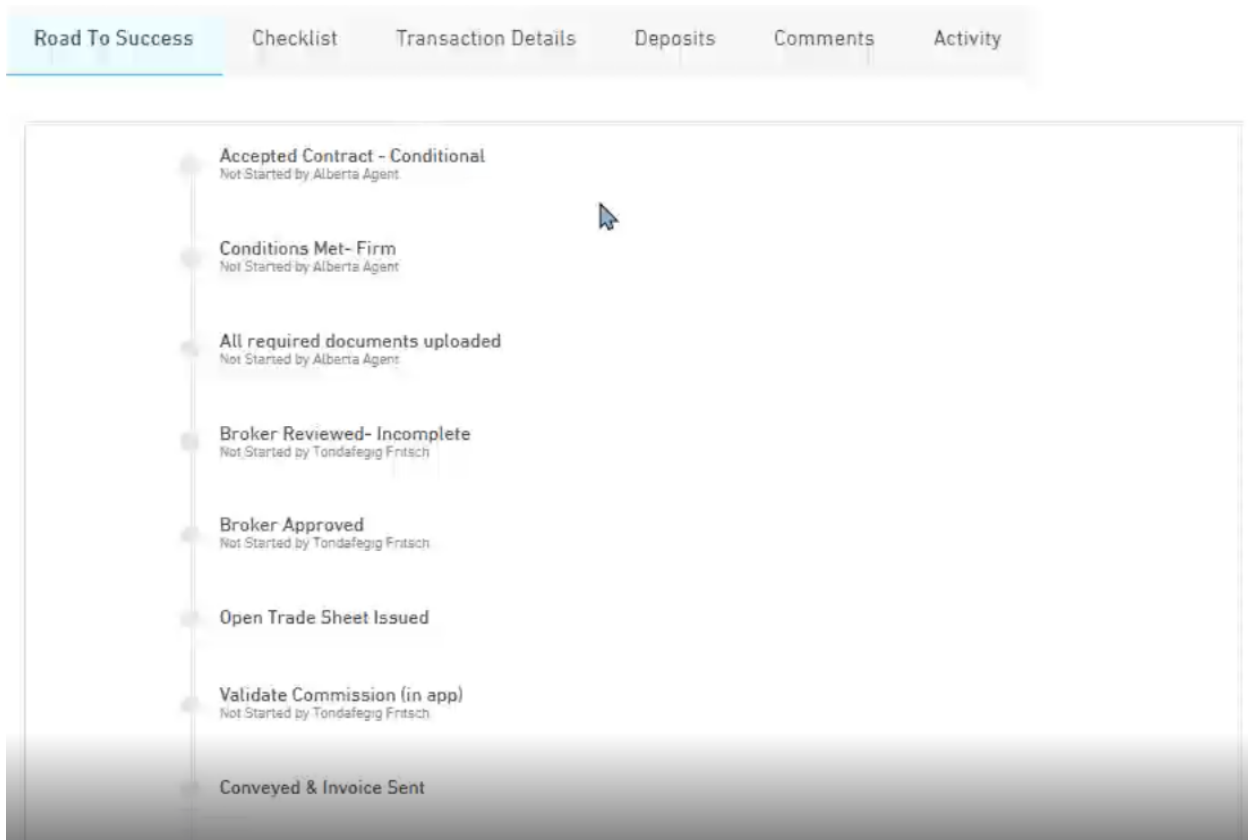
- Basic Information:** Includes "Edit Address, MLS # Escrow" (with a house icon) and "Edit Deal Information" (with a calendar icon).
- Participants:** Includes "Add an Agent" (with a person icon), "Add Participant" (with a group icon), "Add Referral" (with a person icon), and "Add Transaction Coordinator" (with a person icon).
- Commissions and Rebates:** Includes "Adjust commission percentages / splits" (with a percentage icon), "Add Additional Commission" (with a dollar sign icon), "Add Rebate" (with a plus icon), and "Recalculate Commission" (with a refresh icon).
- Other Tasks:** Includes "View and Share Trade Record Sheets" (with a document icon) and "Change Firm Date" (with a calendar icon).

At the bottom of the modal is a red-bordered button labeled "Terminate Transaction" with a red 'X' icon.

# 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.



- 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

Q Search Labels: Add label...

#	Item Name	Assigned To	Type	Status	Urgent	Due Date	Documents	Comments
39	Trade Record Sheet	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
38	Referral Invoice	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
37	Commission Invoice	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
30	ROF (Fintrac Receipt Of Funds)	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
26	FINTRAC - 1	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
23	Buyer Representation Agreement (BRA)	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
22	Working With A Realtor (WWR)	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	
7	Deposit Receipt	Alberta Agent	Required	Not Started		09/03/2022	0 Docs Upload	