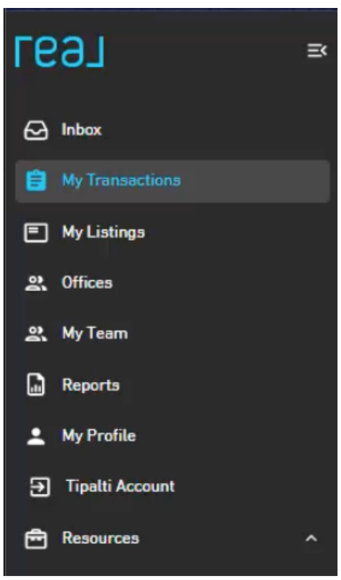
reZEN 2.0 - How to Create a Transaction

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

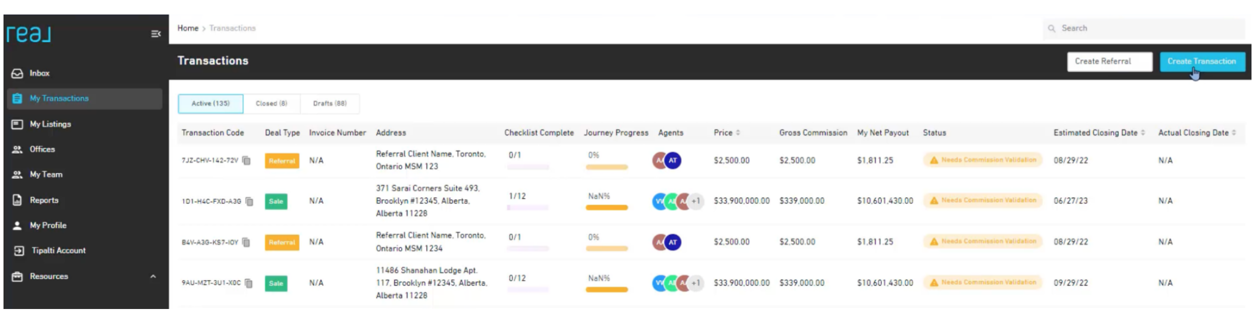
Don't forget: if you are the listing agent, you need to create a listing, before you can start the sales transaction.

Create a Transaction:

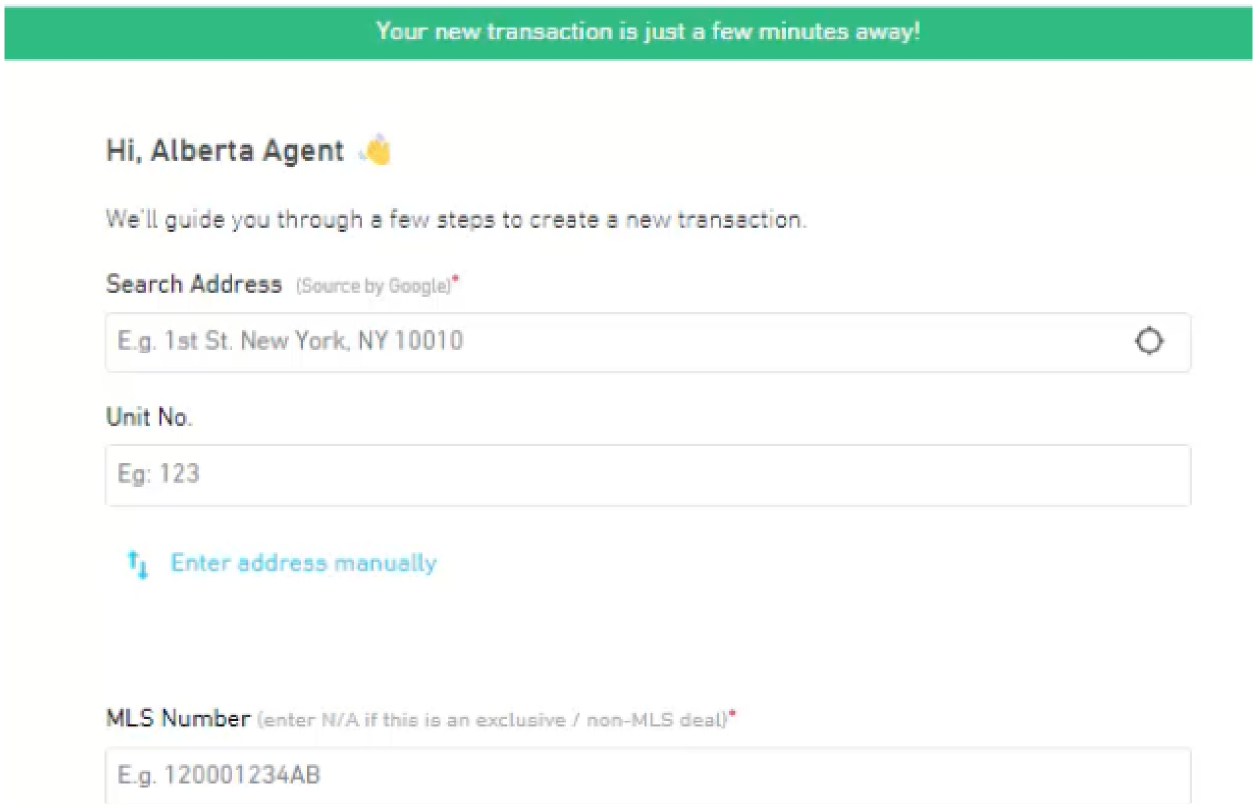
1. In the Real App, go to My Transactions:



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



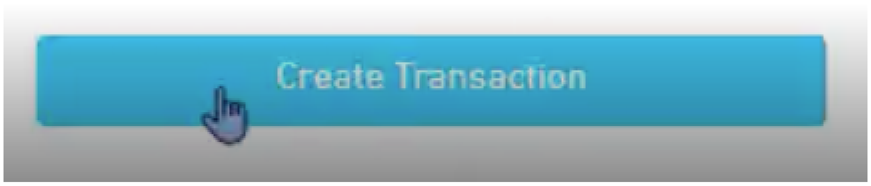
3. The system will walk you through several steps to create the transaction:



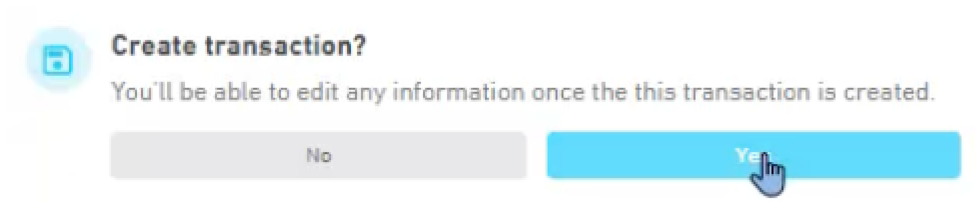
Some important notes:

- 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.

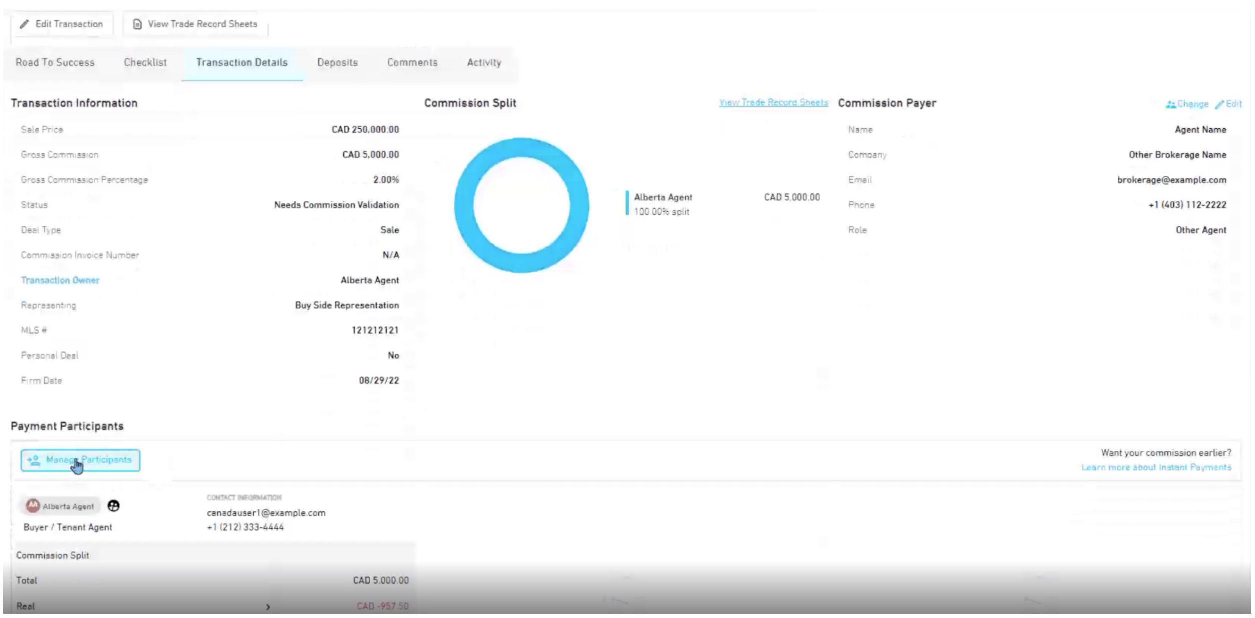
4. You will see the preview. Please review & click "Create Transaction" at the bottom right of the page.



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



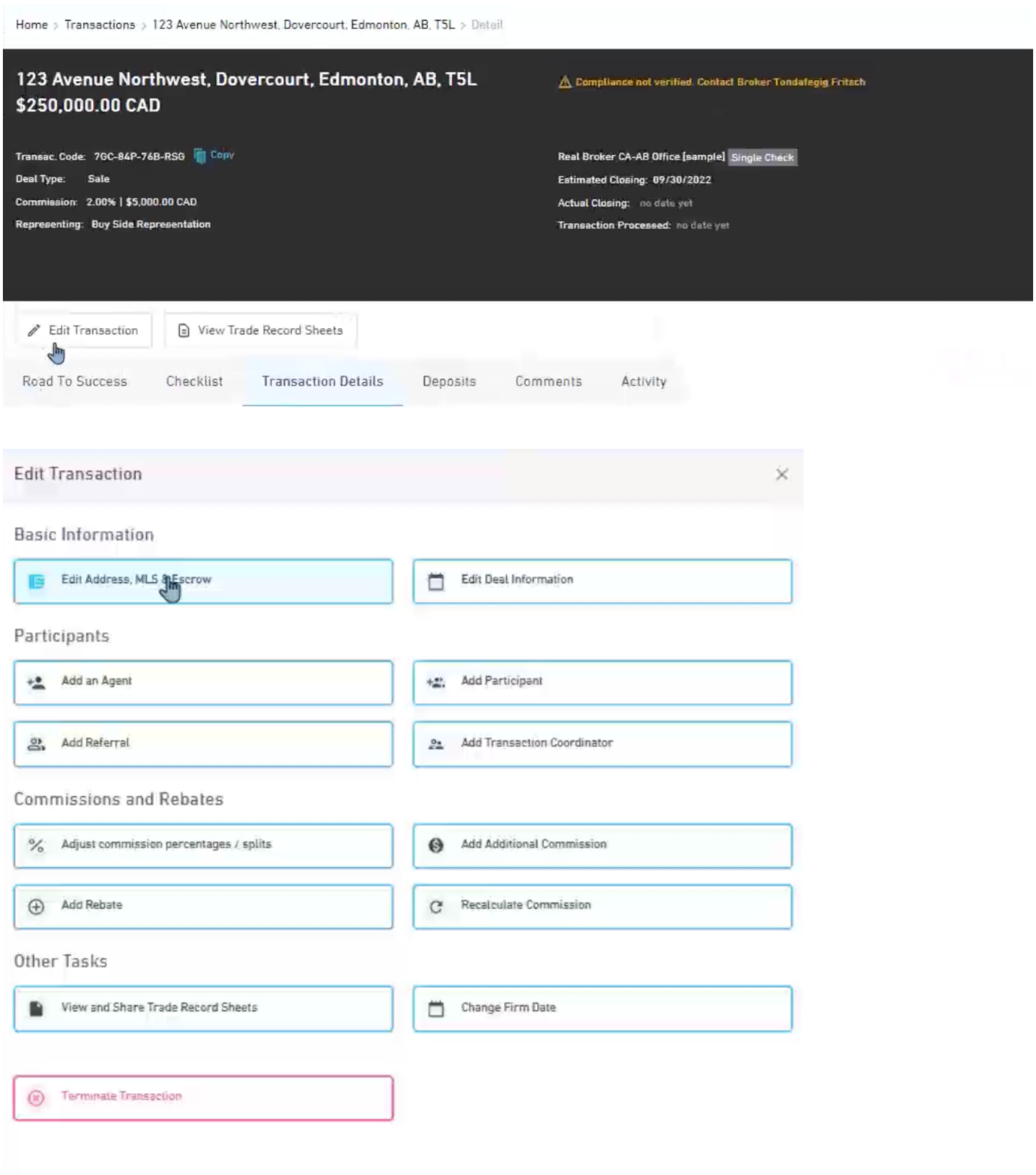
6. Now, the transaction is created. You can scroll to the middle left of the screen to add any payment participants.



Voila! You are done.

If you need to edit the transaction:

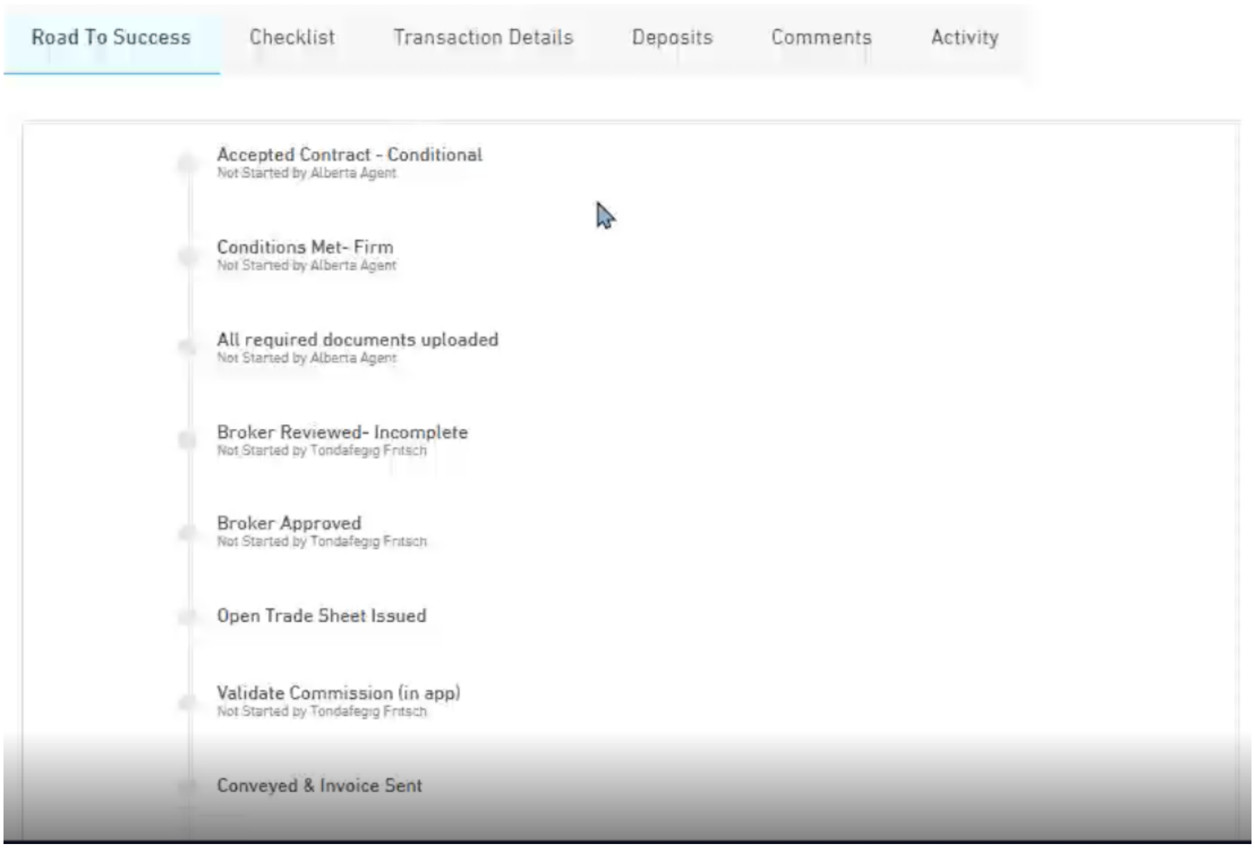
You can click "edit" on the left side. This will pop open a window on the right where you can click on the information you need to edit.



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.



- 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.