

# Transact: Create/Setup your Transact Account and Toggle between zipForm & Transact

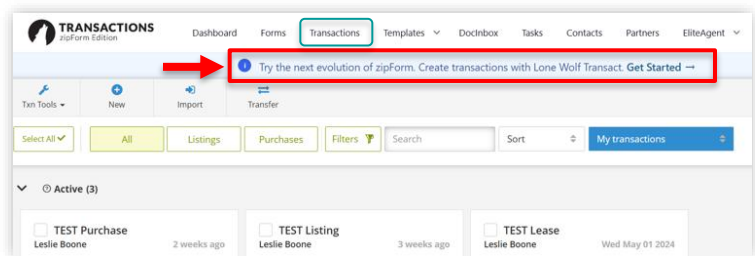
On October 1, 2025, Lone Wolf launched Transact, the new Transact transaction management system. You will need to create a Transact account either by clicking the “Get Started” link at the top of the Transactions page in zipForm or by creating a new transaction in zipForm and selecting Transact in the popup window. The steps in this guide detail both methods to create your account as well as how to toggle between the two platforms.

## Create your Transact Account with the ‘Get Started’ Link inside zipForm

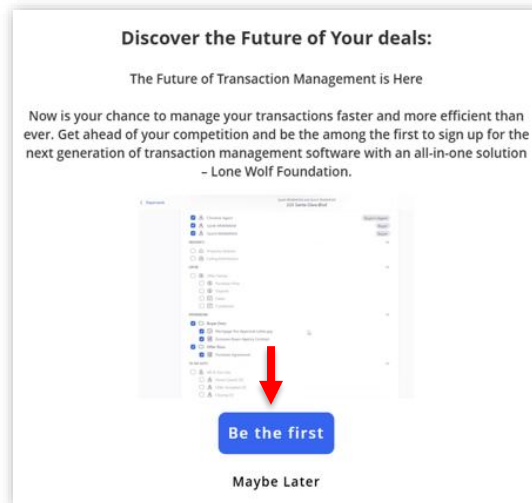
1. In your browser, go to [car.org](http://car.org) and login to your member benefit zipForm account.



2. On the **Transactions** page, click **Get Started** in the message in blue at the top of the page.

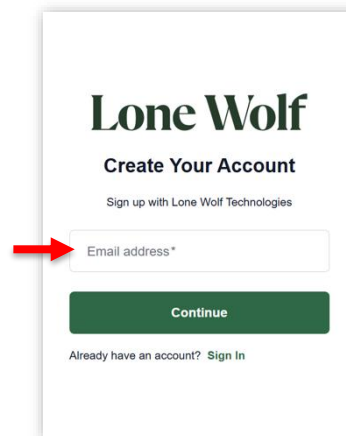


3. On the popup window, click **Be the first** to continue.



4. Type your email address – the email address *must be the same* as the email address in your **zipForm** account.

5. Click **Continue**.

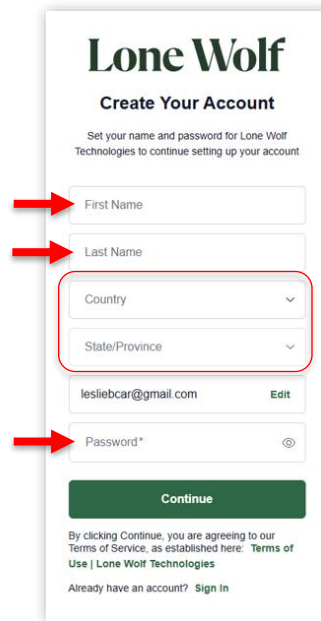


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## 6. Complete the following fields:

- **First Name**
- **Last Name**
- **Country** – select from the dropdown menu
- **State** – select from the dropdown menu
- **Email address** – this will be auto-filled from the previous screen
- **Password** – type a password for your Transact account

## 7. Click



**Lone Wolf**  
**Create Your Account**  
Set your name and password for Lone Wolf Technologies to continue setting up your account

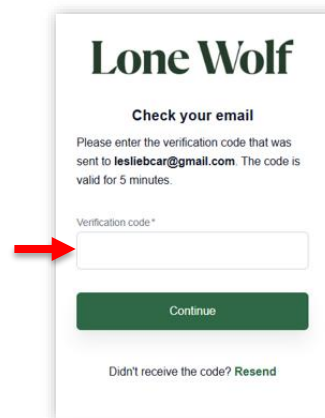
First Name  
Last Name  
Country  
State/Province  
lesliebcar@gmail.com Edit  
Password\*  
Continue

By clicking Continue, you are agreeing to our Terms of Service, as established here: [Terms of Use](#) | Lone Wolf Technologies  
Already have an account? [Sign In](#)

## 8. Type the verification code sent to your email address.

*NOTE: It may take a minute or two for the verification code to reach your email account.*

## 9. Click







**Lone Wolf**  
**Check your email**  
Please enter the verification code that was sent to [lesliebcar@gmail.com](mailto:lesliebcar@gmail.com). The code is valid for 5 minutes.

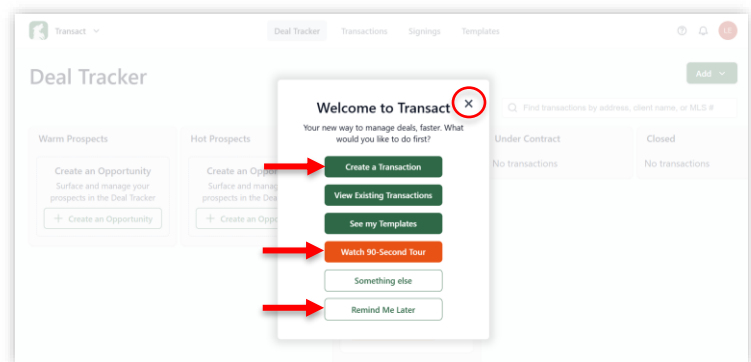
Verification code\*  
Continue

Didn't receive the code? [Resend](#)

## 10. On the **Welcome to Transact** popup window, click one of the following:

-  to create a new transaction in Transact
-  to take a quick tour of the new Transact platform
-  to continue to your Transact account
-  to close the popup window and continue to your Transact account

You will land on the **Deal Tracker** page in your Transact account by default.



Transact Deal Tracker Transactions Signings Templates Add

Deal Tracker

Warm Prospects Hot Prospects Under Contract Closed

Find transactions by address, client name, or MLS #

**Welcome to Transact** X  
Your new way to manage deals, faster. What would you like to do first?

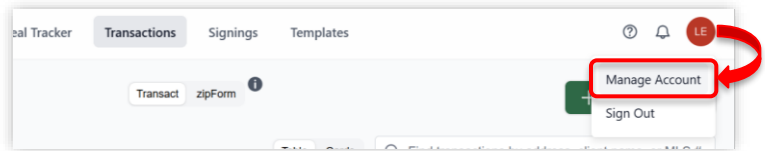
Create a Transaction  
View Existing Transactions  
See my Templates  
Watch 90-Second Tour  
Something else  
Remind Me Later

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## Edit Account Connections

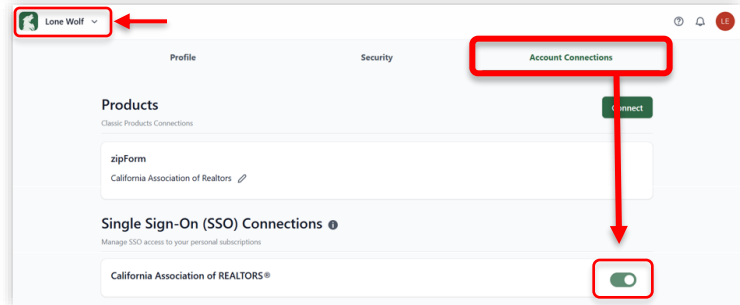
1. Next, click the initials in the top right corner and select **Manage Account** from the menu.



2. Click **Account Connections** at the top right.

3. Under **Single Sign-On (SSO) Connections**, click the slider to the right of California Association of Realtors® to turn it on.

4. Click the app switcher in the top left corner and **select Transact** from the dropdown menu to go back to your transactions in Transact.

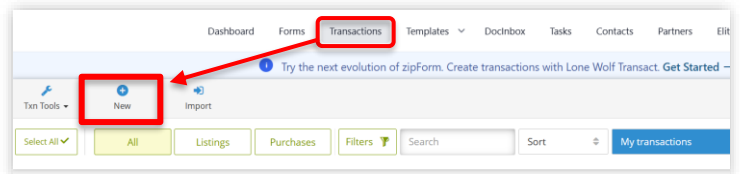


## Create your Transact Account when creating a new transaction in zipForm

1. In your browser, go to [car.org](http://car.org) and login to your member benefit zipForm account.

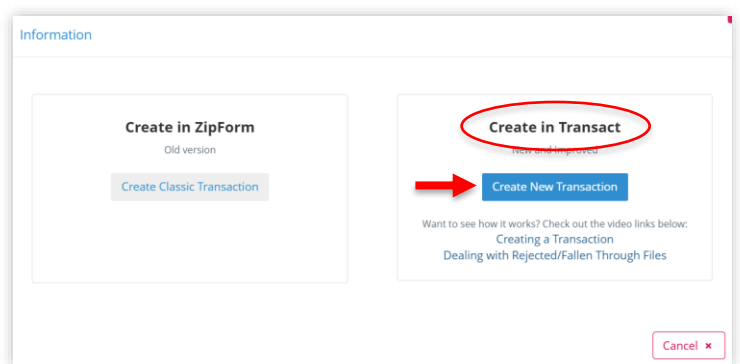


2. On the **Transactions** page, click **New** at the top left to create a new transaction.



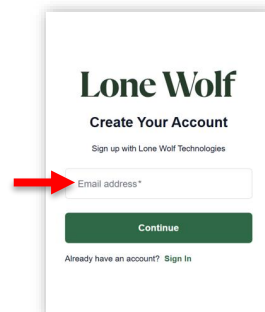
3. On the popup window, click **Create New Transaction** on the right to create a new transaction in **Transact**.

If you have not yet created your Transact account, you will be guided through the setup process to do so.



4. Type your email address – the email address *must be the same* as the email address in your **zipForm** account.

5. Click **Continue**.

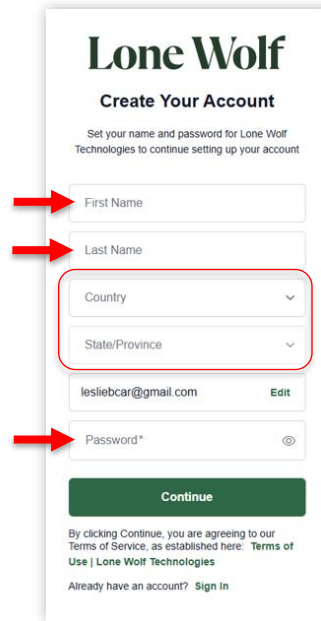


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6. Complete the following fields:

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7. Click



**Lone Wolf**  
**Create Your Account**  
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First Name

Last Name

Country

State/Province

lesliebcar@gmail.com Edit

Password\*

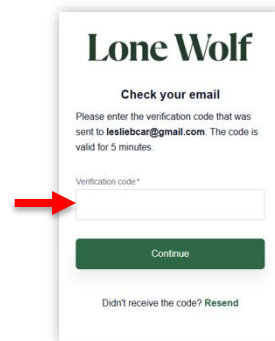
Continue

By clicking Continue, you are agreeing to our Terms of Service, as established here: [Terms of Use](#) | Lone Wolf Technologies  
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*NOTE: It may take a minute or two for the verification code to reach your email account.*

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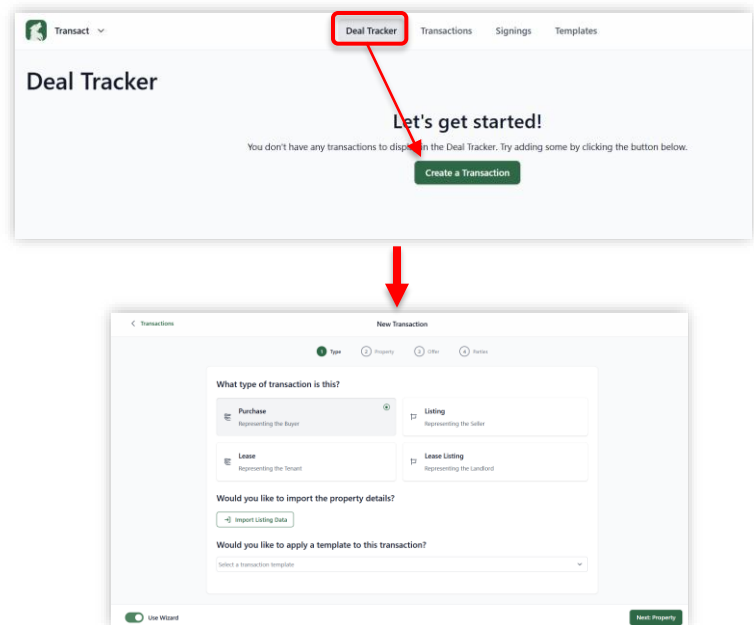
Verification code\*

Continue

Didn't receive the code? [Resend](#)

After account setup, you will be taken to the **Deal Tracker** page in your Transact account.

10. Click  to create a new transaction and follow the screens in the wizard to enter your transaction information.



Transact

Deal Tracker Transactions Signings Templates

**Deal Tracker**

Let's get started!

You don't have any transactions to display in the Deal Tracker. Try adding some by clicking the button below.

Create a Transaction

New Transaction

Type Property Other Renter

What type of transaction is this?

Purchase Representing the Buyer

Lease Representing the Tenant

Listing Representing the Seller

Lease Listing Representing the Landlord

Would you like to import the property details?

Import Listing Data

Would you like to apply a template to this transaction?

Select a transaction template

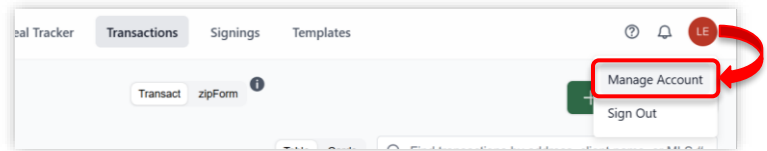
Use Wizard Next Property

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## Edit Account Connections

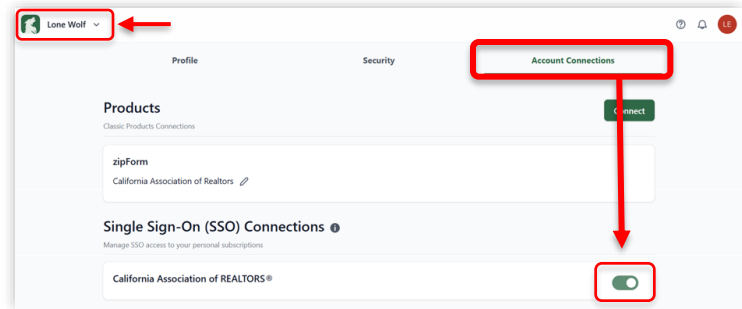
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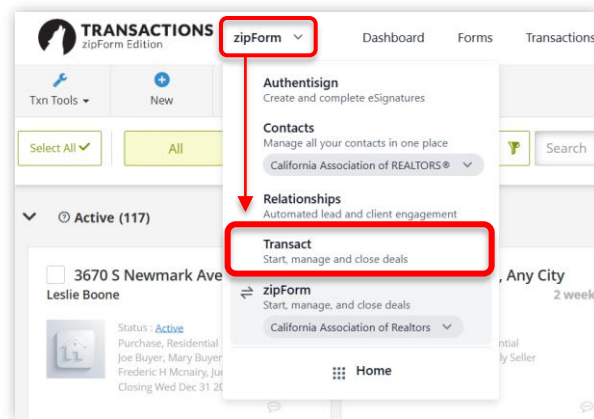
## Toggle between zipForm and Transact platforms

After you have created your Transact account, you can toggle between Transact and zipForm to manage your transactions in both platforms.

### zipForm → Transact

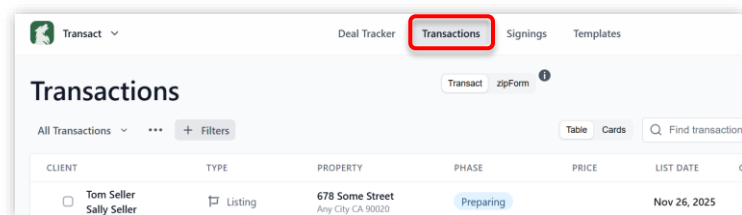
1. In **zipForm**, click the app switcher at the top left of the page.

2. Select **Transact** towards the bottom of the menu.



You will land on the Deal Tracker page in Transact by default.

3. Click **Transactions** at the top of the page to view your transactions in Transact.



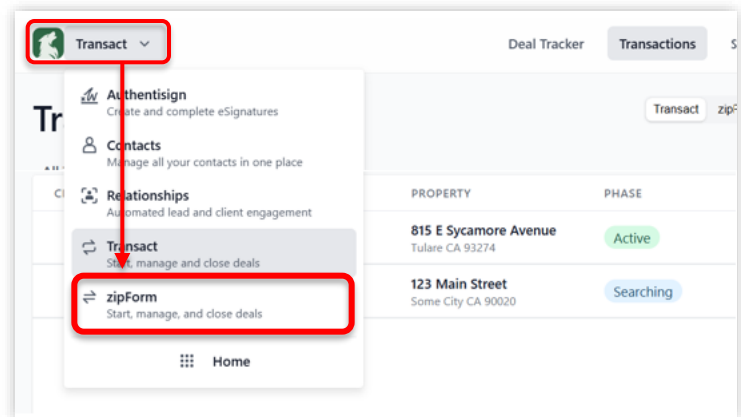
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## Transact → zipForm

1. In **Transact**, click the app switcher at the top left of the page.

2. Select **zipForm** towards the bottom of the menu.

*NOTE: You may have to do these steps twice.*



You will land on the **Transactions** page in zipForm by default.

