

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



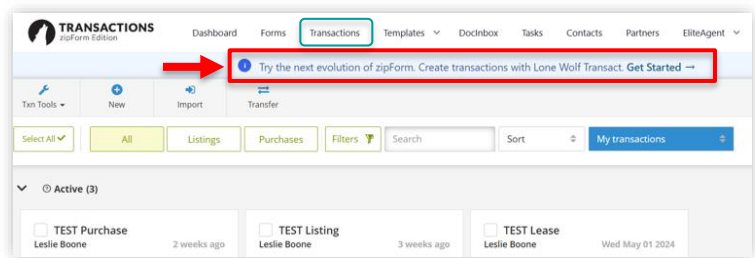
On October 1, 2025, the new Transact transaction management system launched. There are two ways to create your Transact account – by clicking the “Get Started” link at the top of the Transactions page in zipForm or by creating a new transaction in zipForm and selecting Transact. The steps in this guide 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

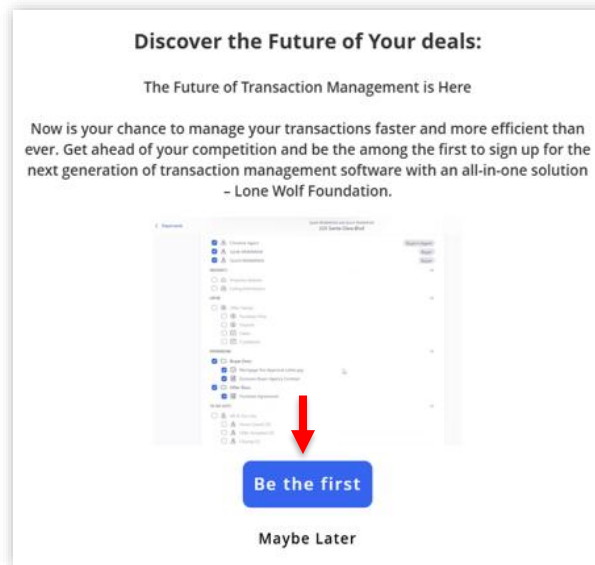
1. In your browser, go to car.org and login to your member benefit zipForm account.



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

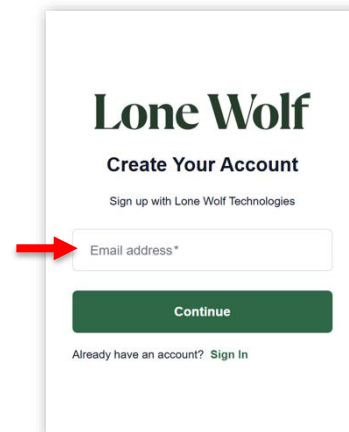


3. On the popup window, click **Be the first** to continue.



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

5. Click

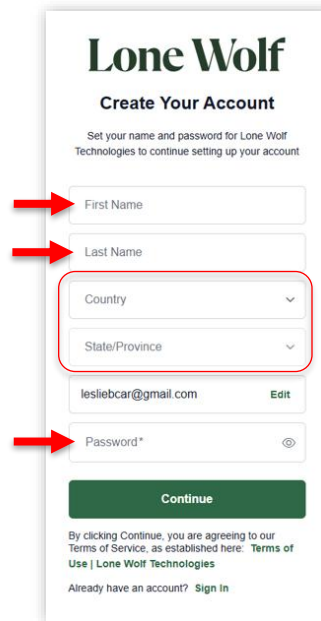
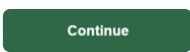


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6. Complete the following fields:

- **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*

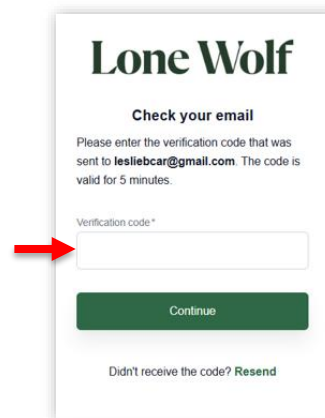
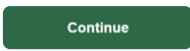
Continue

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**. The code is valid for 5 minutes.

Verification code*

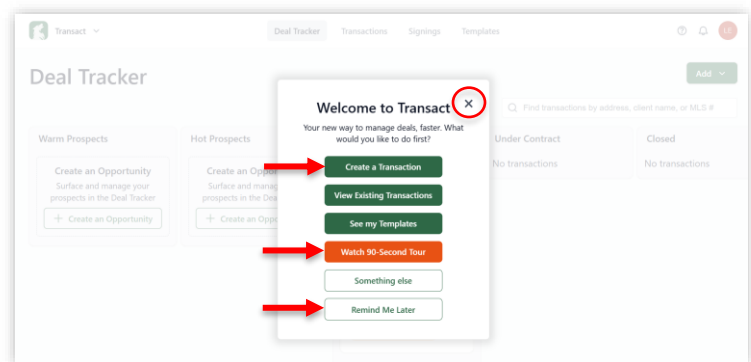
Continue

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** tab in your account by default.

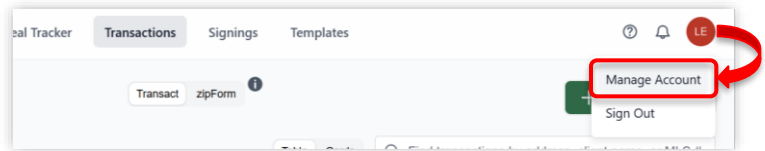


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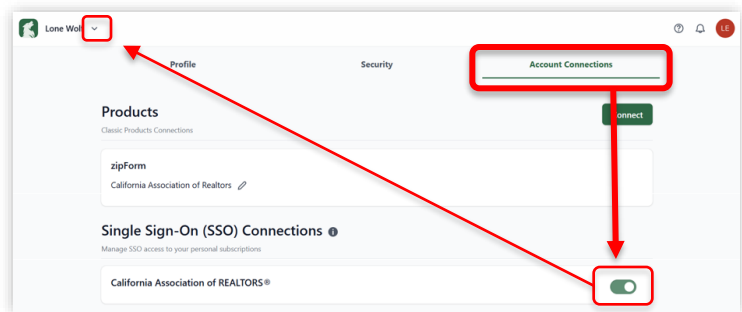


Edit Account Connections

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.



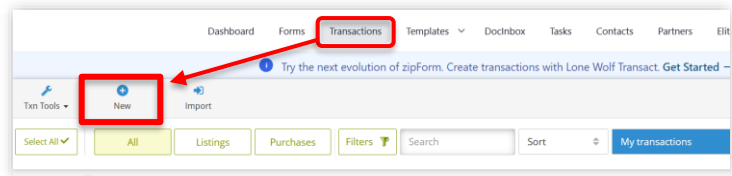
4. Click in the top left corner and **select Transact** from the dropdown menu to go back to your transactions in Transact.

Create your Transact Account when creating a new transaction in zipForm

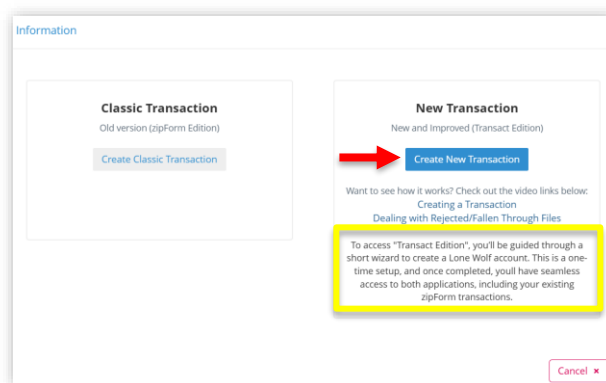
1. In your browser, go to car.org and login to your member benefit zipForm account.



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



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

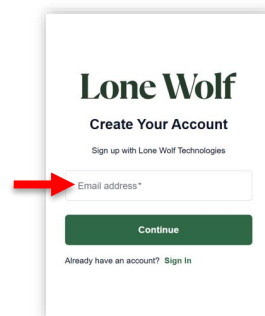


4. Please read the text below the button that describes the account setup process:

“To access "Transact Edition", you'll be guided through a short wizard to create a Lone Wolf account. This is a one-time setup, and once completed, you'll have seamless access to both applications, including your existing zipForm transactions.”

5. Type your email address – the email address *must be the same* as the email address in your car.org/zipForm account.

6. Click .

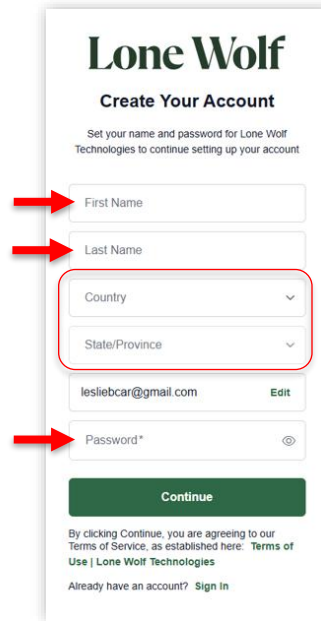


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7. Complete the following fields:

- **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

8. Click



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

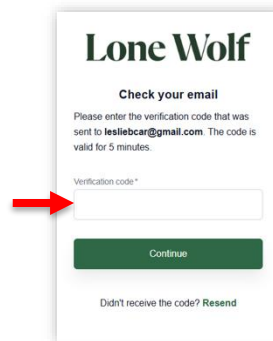
First Name
Last Name
Country
State/Province
lesliebcar@gmail.com Edit
Password*
Continue

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](#)

9. 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.

10. Click



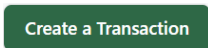
Lone Wolf
Check your email
Please enter the verification code that was sent to lesliebcar@gmail.com. The code is valid for 5 minutes.

Verification code*
Continue

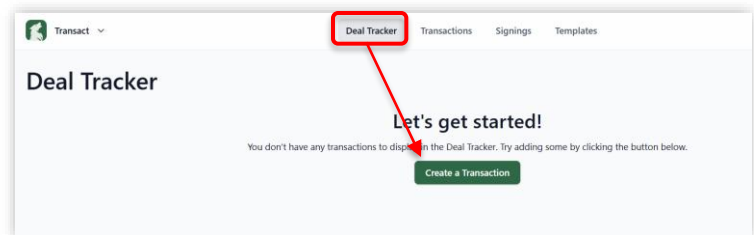
Didn't receive the code? [Resend](#)

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

11. Click



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

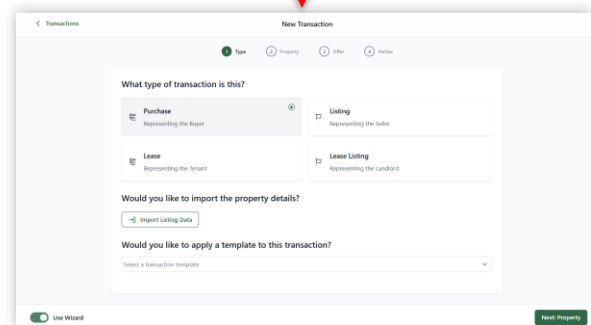


Transact
Deal Tracker Transactions Signings Templates

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



Transactions
New Transaction

Type Property Other Lease

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

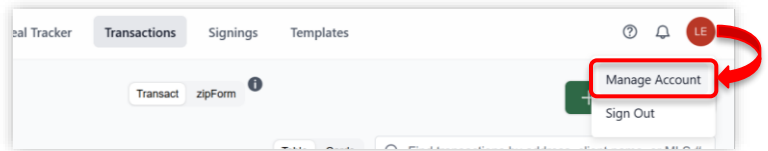
Would you like to apply a template to this transaction?
Select a transaction template

Use Wizard Next Property

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Edit Account Connections

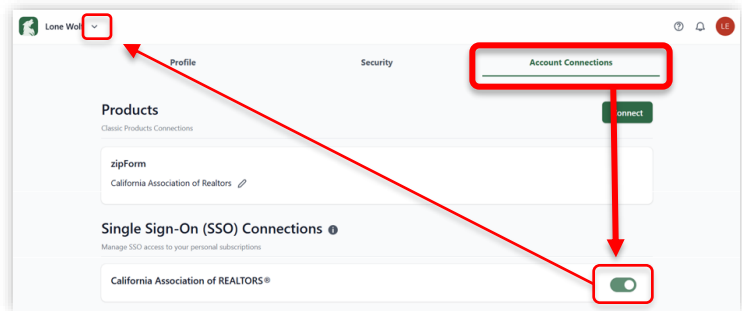
1. Next, click the initials in the top right corner and select **Manage Account** from the menu.



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



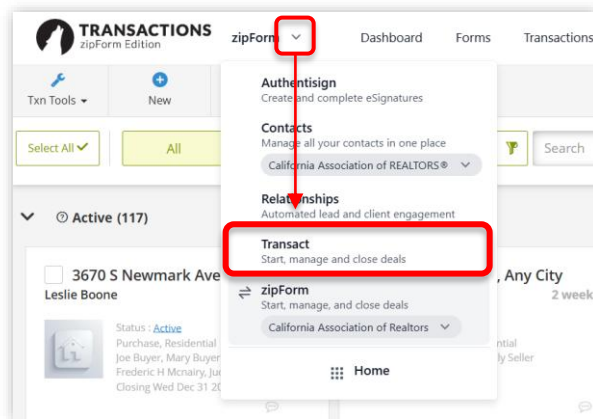
Toggle between zipForm and Transact platforms

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

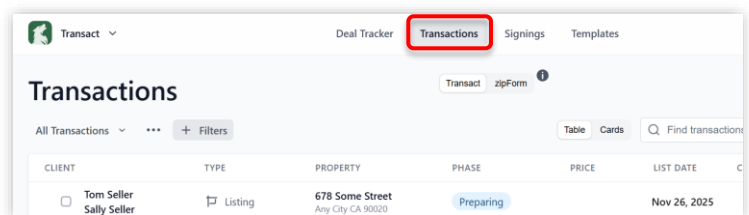
zipForm → Transact

1. In **zipForm**, click the dropdown arrow at the top left of the page and wait for the full menu to load.

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



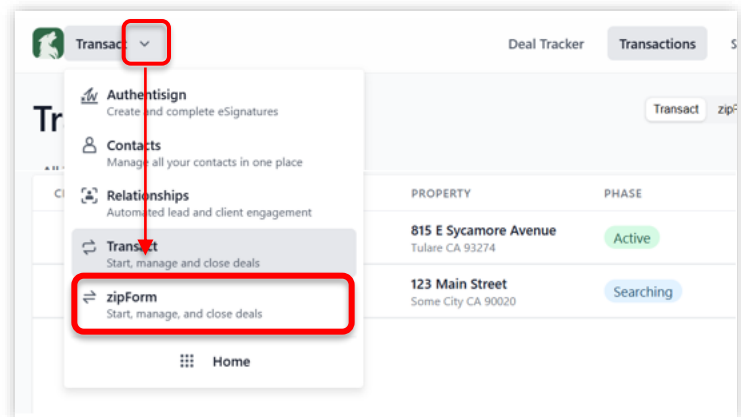
3. Click **Transactions** at the top of the page to view your transactions in Transact.



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

Transact → zipForm

1. In **Transact**, click the dropdown arrow at the top left of the page.
2. Select **zipForm** towards the bottom of the menu.



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

