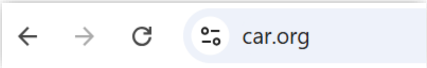
Transact: Create/Setup your Transact Account and Toggle between zipForm & Transact

CALIFORNIA ASSOCIATION OF REALTORS®

On October 1, 2025, Lone Wolf launched Transact, the new Transact transaction management system that will replace zipForm in 2027. Create your 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 "Create New Transaction" on the popup window. The steps in this guide detail both methods to create your account and how to toggle between the two platforms.

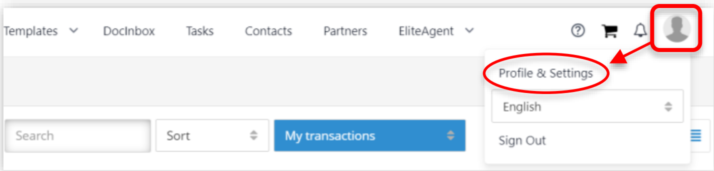
Create your Transact Account using the 'Get Started' Link inside zipForm

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



BEFORE you create your Transact account, you will need the current email address in your zipForm profile.

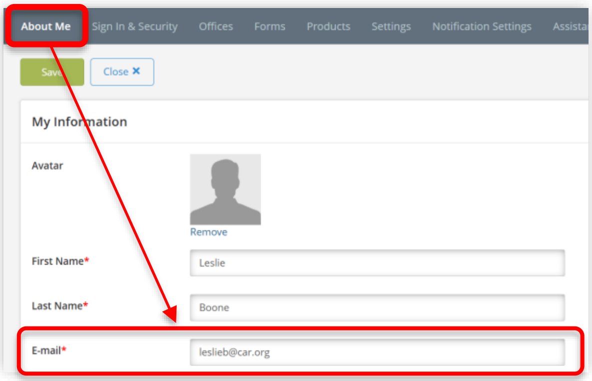
2. Click the photo in the top right corner and select **Profile & Settings** from the menu.



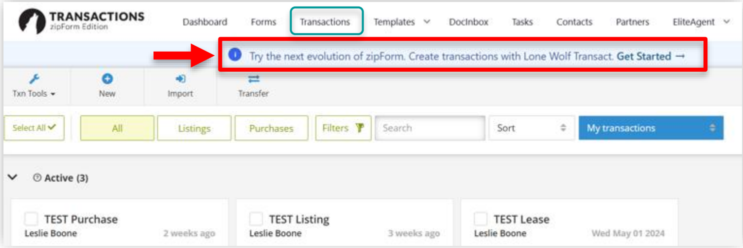
3. On the **About Me** tab, view the email address in the **Email*** field. This is the email address you must create your Transact account with for the accounts to sync.

4. *(optional)* If the email address is incorrect, type in the new email address and click Save at the top left to save your changes.

5. Click Close ✕ to exit your profile and follow the steps below to create your Transact account.

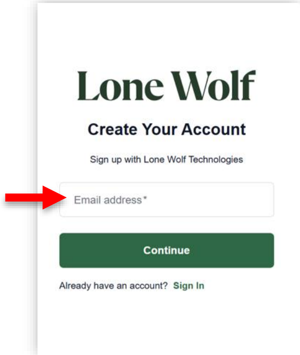


6. On the **Transactions** page, click **Get Started** in the blue banner message at the top of the page.



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

8. Click Continue.



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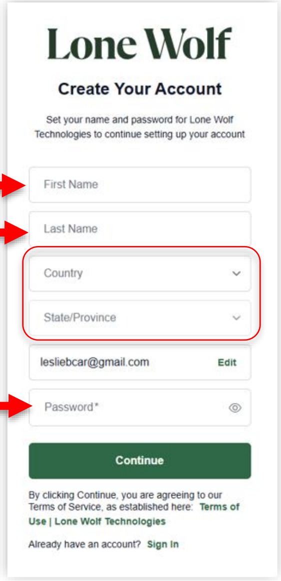
9. Complete the following fields:

- **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

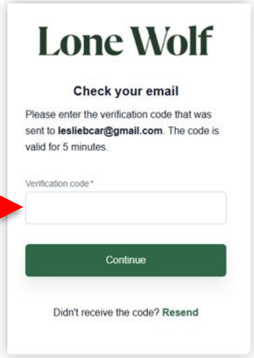
10. Click **Continue**.



11. Type the verification code sent to your email address.

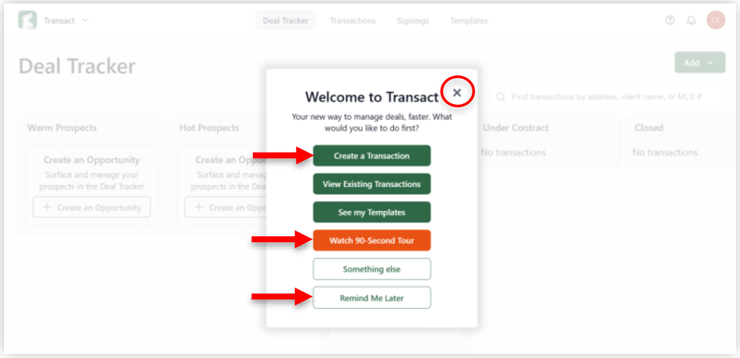
NOTE: It may take a minute or two for the verification code to reach your email account.

12. Click **Continue**.

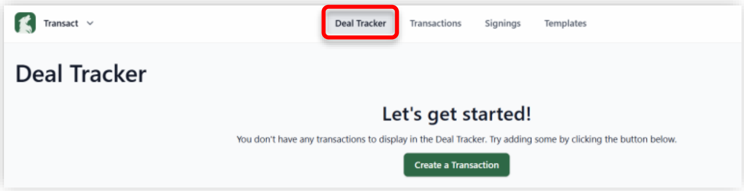


13. On the **Welcome to Transact** popup window, click one of the following:

- **Create a Transaction** to create a new transaction in Transact
- **Watch 90-Second Tour** to take a quick tour of the new Transact platform
- **Remind Me Later** to continue to your Transact account
- **✕** to close the popup window and continue to your Transact account

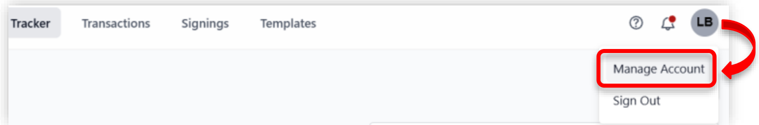


You land on the **Deal Tracker** page in your Transact account by default.



Edit Profile & Account Connections

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

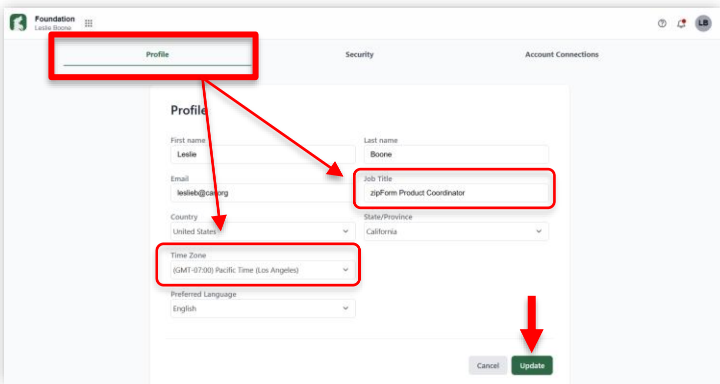


2. On the **Profile** tab, complete the following:

- **Time Zone** – set the time zone to Pacific Time
- **Job Title** – enter your title, ex. Realtor, Broker, Broker Associate, etc.

3. Click Update at the bottom right to save your changes.

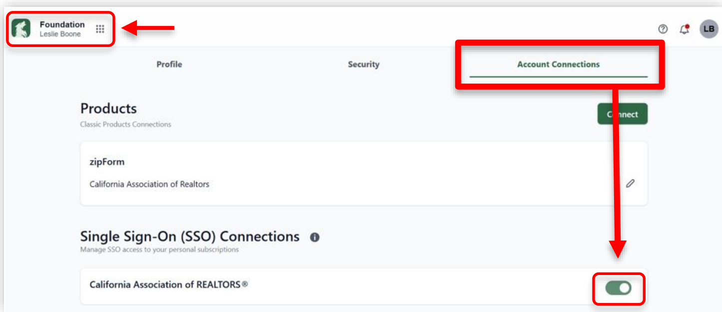
NOTE: The Update button is grayed out until you make changes.



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

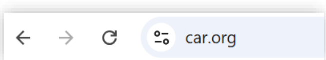
5. Under **Single Sign-On (SSO) Connections**, click the slider to the right of California Association of Realtors® to turn it on.

6. Click the app switcher in the top left corner and **select Transact** from the menu to return to Transact.



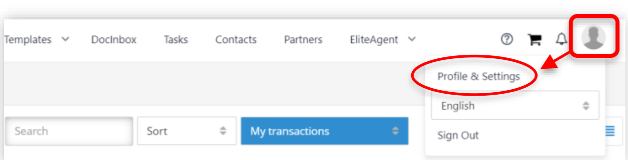
Create your Transact Account when creating a new transaction in zipForm

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



BEFORE you create your Transact account, you will need the current email address in your zipForm profile.

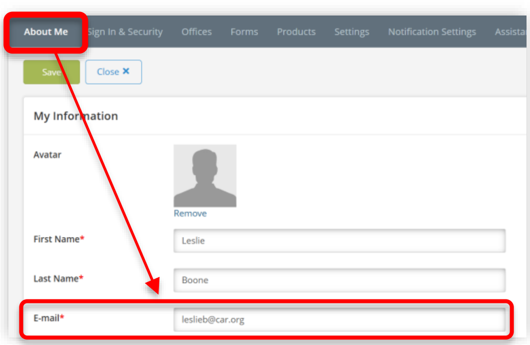
2. Click the photo in the top right corner and select **Profile & Settings** from the menu.



3. On the **About Me** tab, view the email address in the **Email*** field. This is the email address you must create your Transact account with for the accounts to sync.

4. *(optional)* If the email address is incorrect, type in the new email address and click Save at the top left to save your changes.

5. Click Close ✖ to exit your profile and follow the steps below to create your Transact account.



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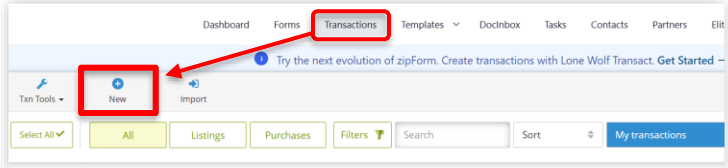
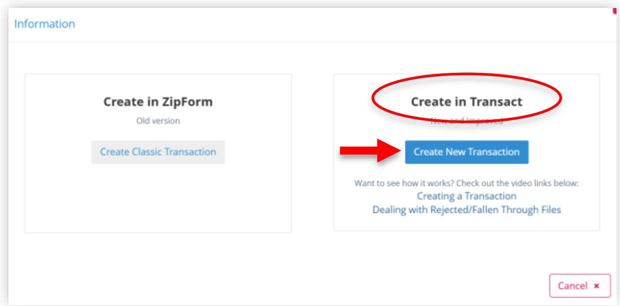
6. On the **Transactions** page, click New at the top left to create a new transaction.



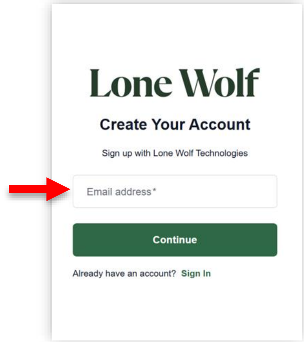
7. On the popup window, click Create New Transaction on the right to create a new transaction in **Transact**.

If you have not yet created your Transact account, you will be guided through the account setup screens.



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

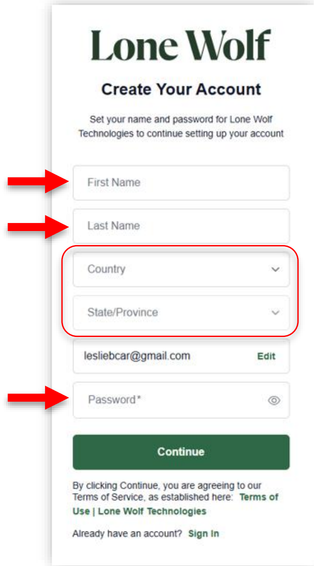
9. Click Continue.



10. 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

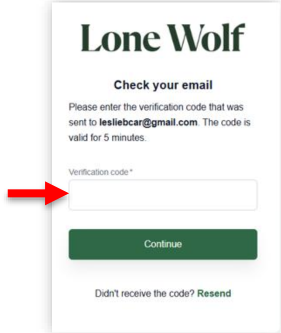
11. Click Continue.



12. 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.

13. Click **Continue**.



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

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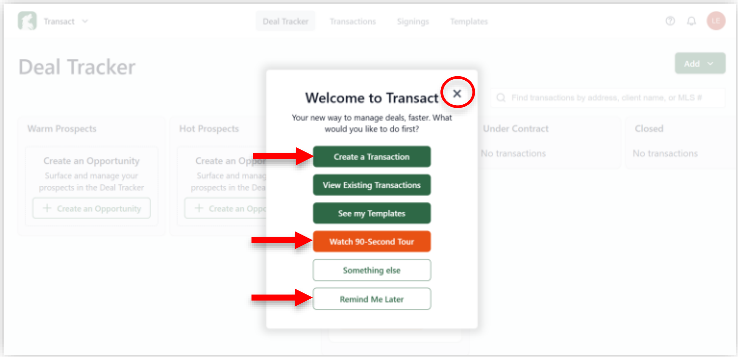
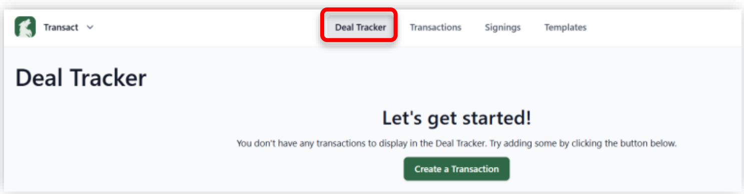


You land on the **Deal Tracker** page in your Transact account by default.



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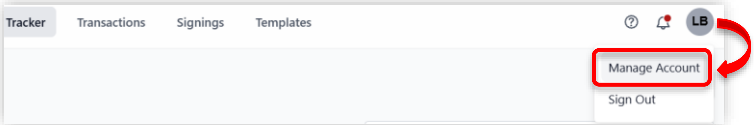

2. On the **Profile** tab, complete the following:

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3. Click **Update** at the bottom right to save your changes.

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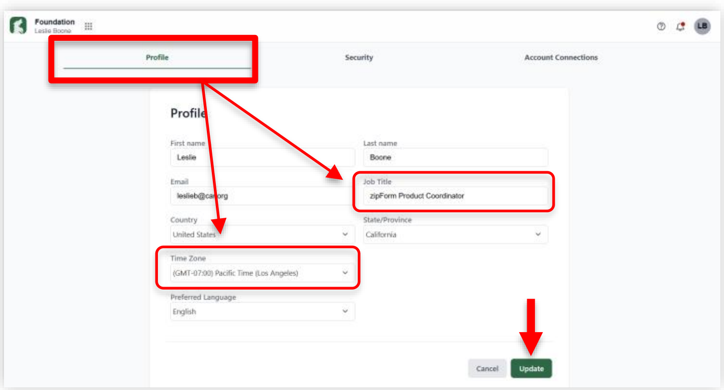

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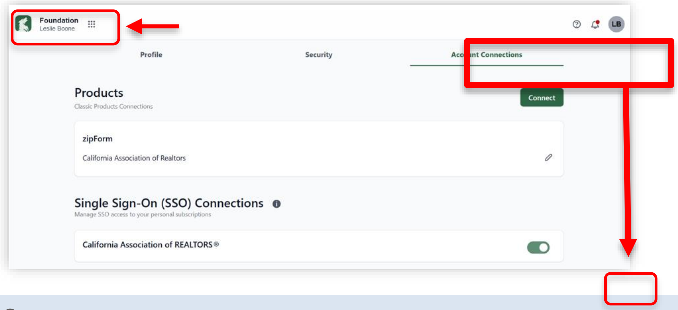
4. Click **Account Connections** at the top right.

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

6. Click the app switcher in the top left corner and **select Transact** from the menu to return to Transact.



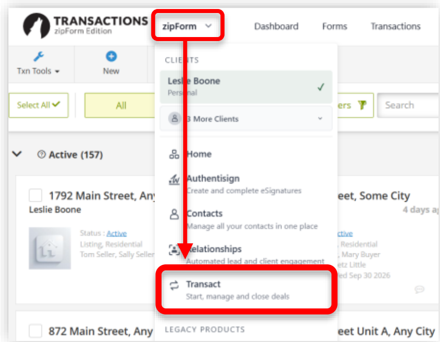
Toggle between zipForm and Transact platforms

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

<u>zipForm → Transact</u>

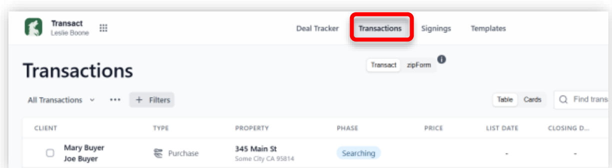
1. In zipForm, click the app switcher at the top left of the page.

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



You 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.

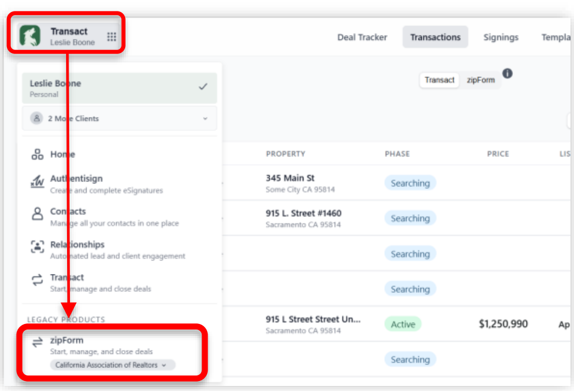


<u>Transact → zipForm</u>

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

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

NOTE: Occasionally, you may have to do these steps twice.



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