

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

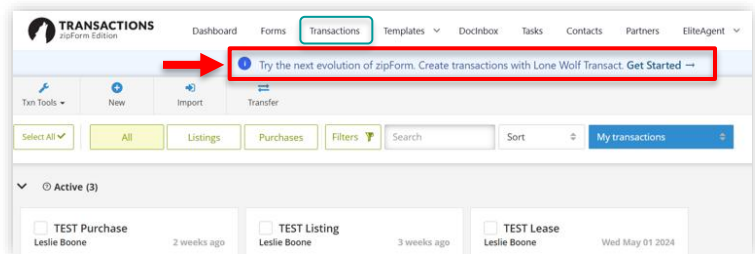
On October 1, 2025, Lone Wolf launched Transact, the new Transact transaction management system. You will need to create a Transact account either by clicking the “Get Started” link at the top of the Transactions page in zipForm or by creating a new transaction in zipForm and selecting Transact in the 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 and login to your member benefit zipForm account.

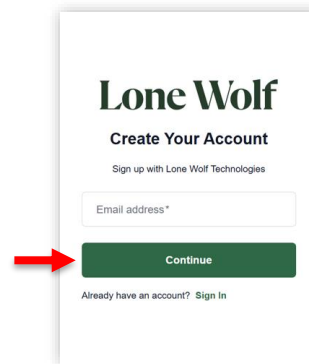


2. On the **Transactions** page, click **Get Started** in the message in blue at the top of the page.



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

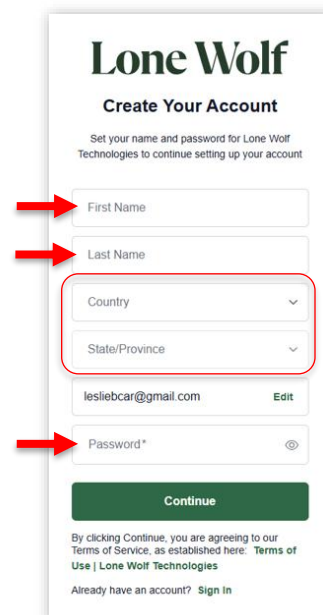
4. Click



5. 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

6. Click

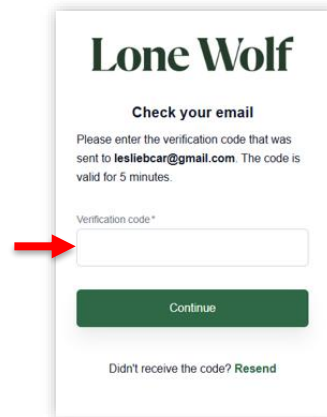


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7. Type the verification code sent to your email address.

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

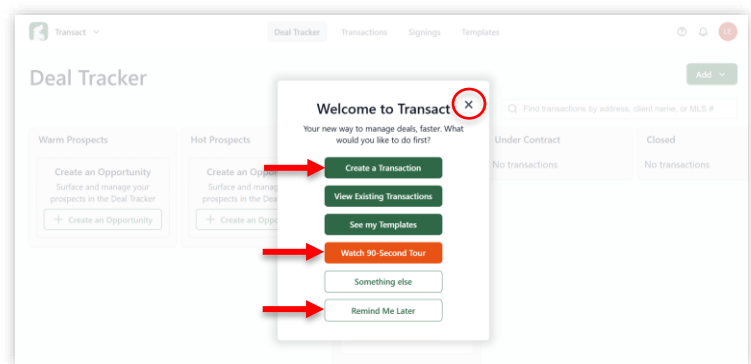
8. Click .



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

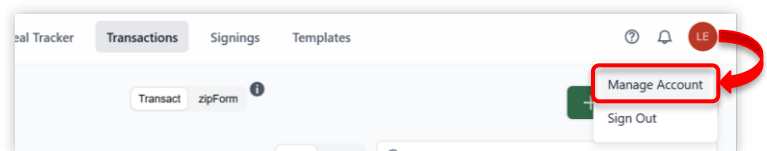
-  to create a new transaction in Transact
-  to take a quick tour of the new Transact platform
-  to continue to your Transact account
-  to close the popup window and continue to your Transact account

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



Edit Account Connections

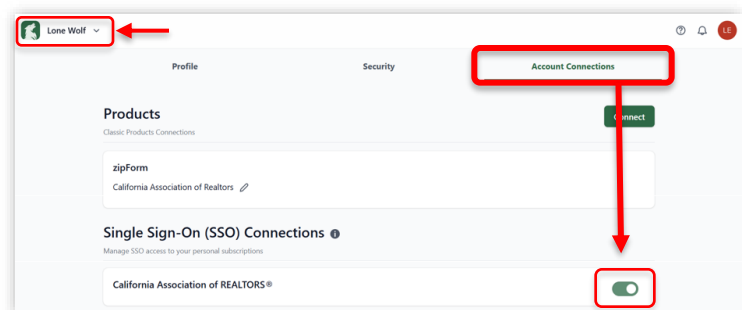
1. Next, click the initials in the top right corner and select **Manage Account** from the menu.



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.




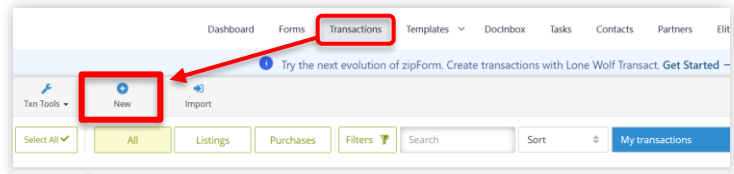
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Create your Transact Account when creating a new transaction in zipForm

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

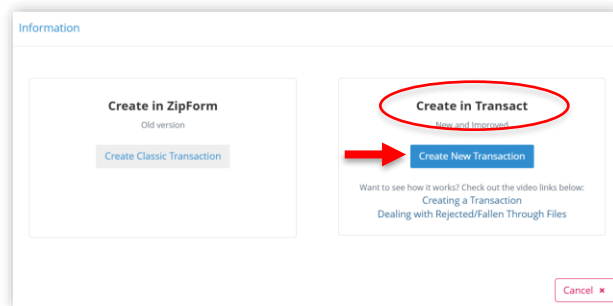


2. On the **Transactions** page, click  at the top left to create a new transaction.



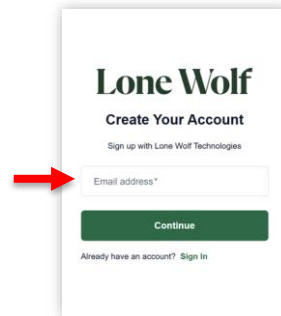
3. On the popup window, click  on the right to create a new transaction in **Transact**.

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.

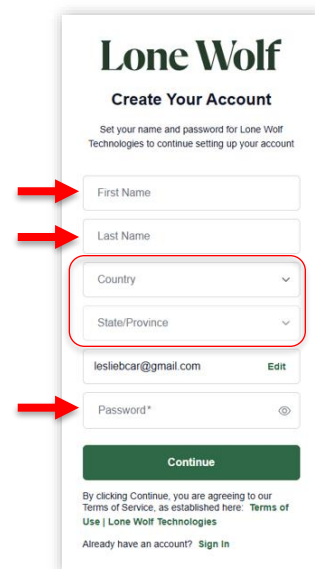
5. Click .



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
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7. Click .



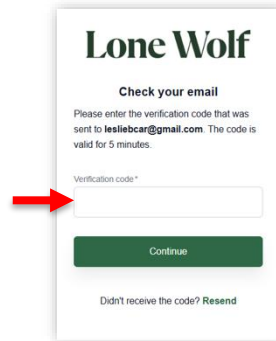
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8. Type the verification code sent to your email address.

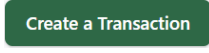
NOTE: It may take a minute or two for the verification code to reach your email account.

9. Click

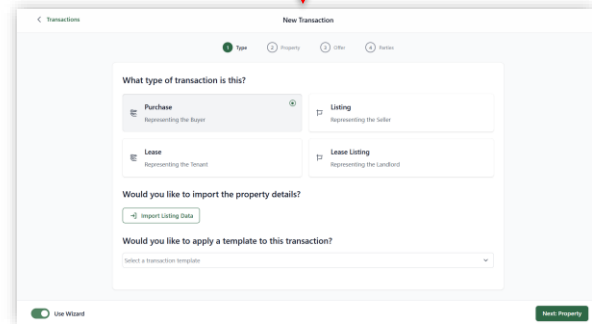
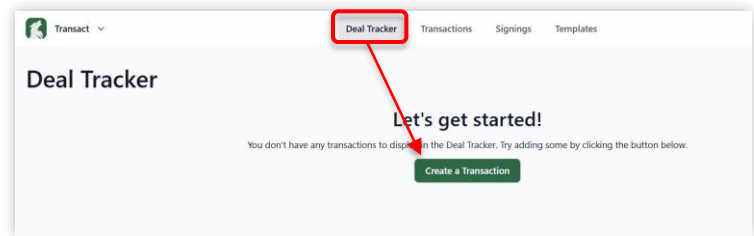


After account setup, you will be taken to the **Deal Tracker** page in your Transact account.

10. Click

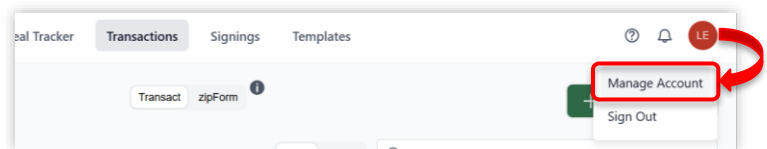


to create a new transaction and follow the screens in the wizard to enter your transaction information.



Edit Account Connections

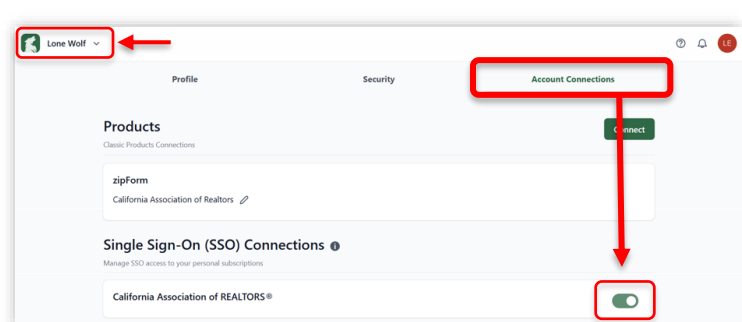
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2. Click **Account Connections** at the top right.

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.



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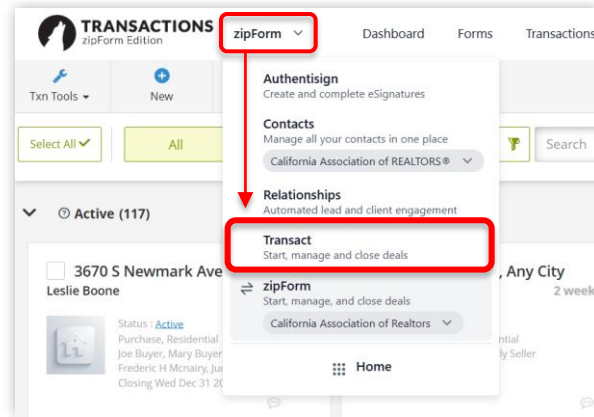


Toggle between zipForm and Transact platforms

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

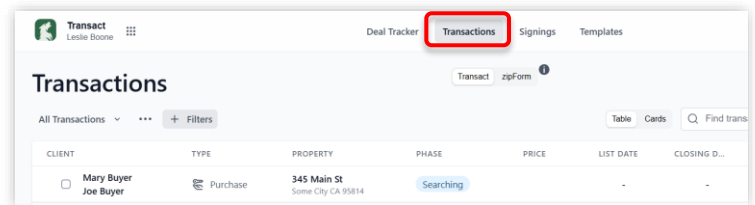
zipForm → Transact

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



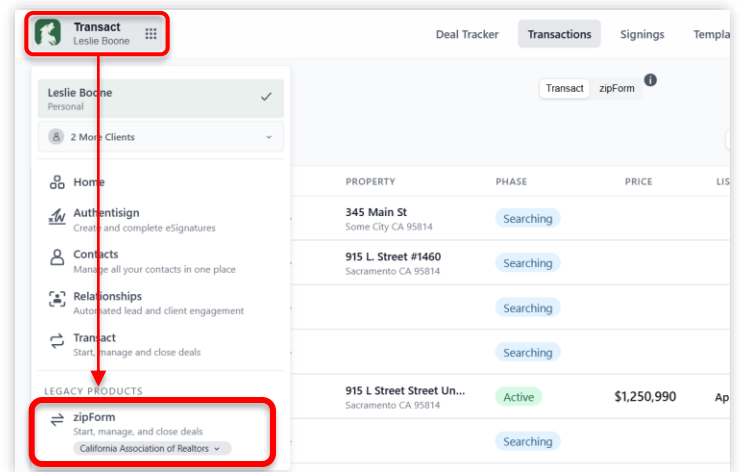
You will land on the Deal Tracker page in Transact by default.

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



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



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

