Quick start guide

Lone Wolf Transact

The client-first transactions software for real estate.

Lone Wolf

Getting started with Transact? Here's a quick tour of the key things to know — and how to use it for your deals.

Find documents and forms

The Paperwork tab shows all forms and PDFs associated with an offer no matter what stage of the deal you are in.

Manage and store signings

The Signings tab is where you can review all signings related to that transaction in-flight and completed.

Track your tasks

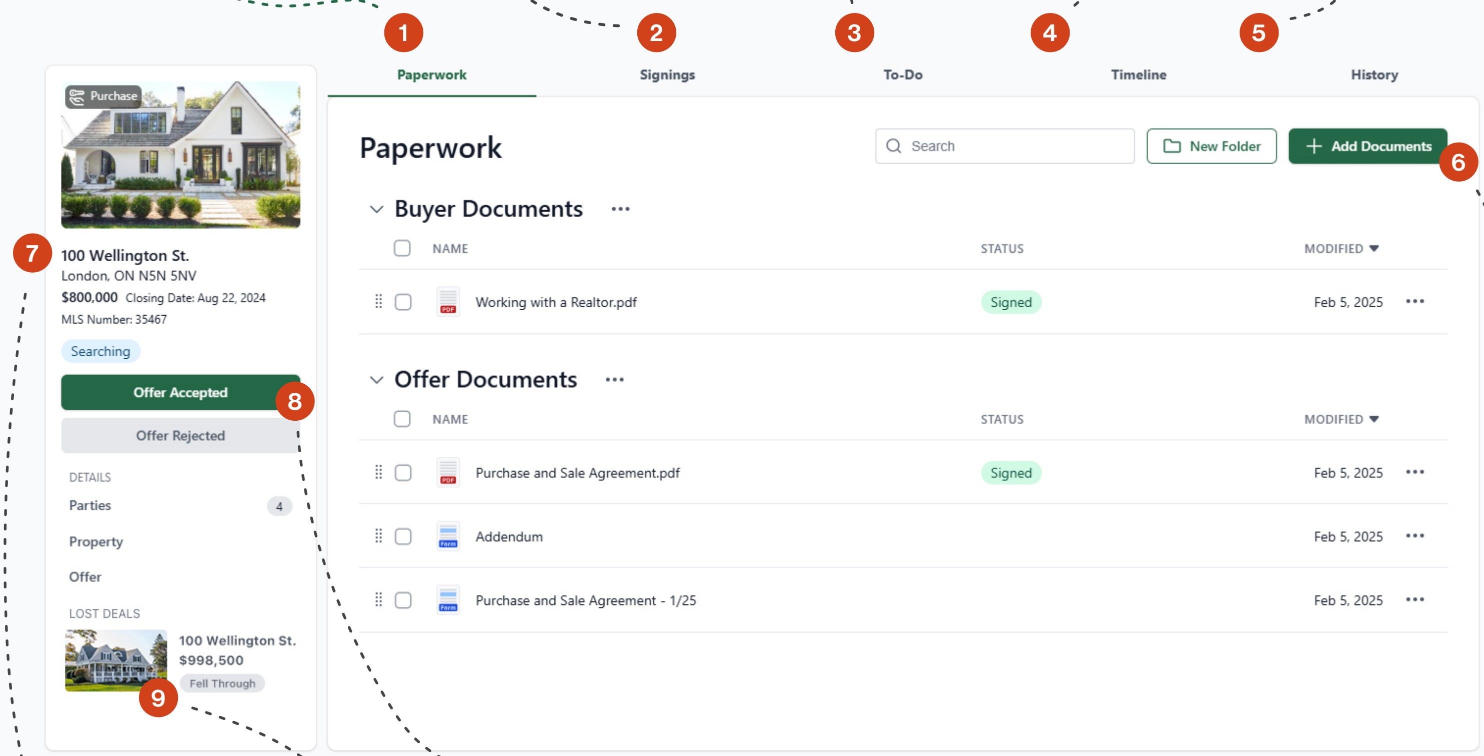
Your to-do list stores and tracks any tasks that you've set up for working on a transaction.

See everything at a glance

Your timeline view shows all upcoming transaction dates, tasks, and events.

Keep a complete record

Your history section keeps a complete, audit-ready trail of all activity related to your client's deals.



Get an overview of details

The details section shows property, party, and offer details — and lets you edit them quickly, too.

See lost deals

Transact saves lost deals here so you can see all previous offers nested in your client's journey.

Keep your transaction on track

The status action buttons move the transaction to the next phase of the deal making it easier to add a new buyer when a deal falls through.

Add documents to your transactions

The Add Documents button in the Paperwork tab lets you add new forms and documents to an offer.