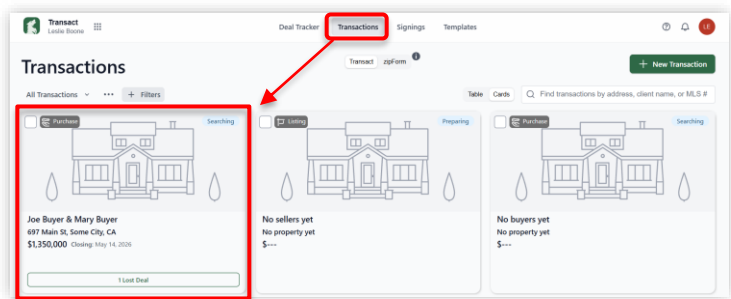


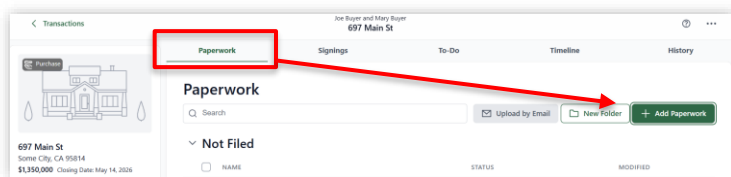
There are two ways to find C.A.R. forms in Transact and add them to your transaction. This guide shows the steps for the different methods to find and add forms in Transact.

'Add Paperwork' Button on the Paperwork tab inside a Transaction

1. On the **Transactions** tab in your Transact account, click on a transaction to open it.






2. On the **Paperwork** tab, click .



3. On the **Add Form or Document** window, click **Form Libraries** at the top left, then select a library from the dropdown list.

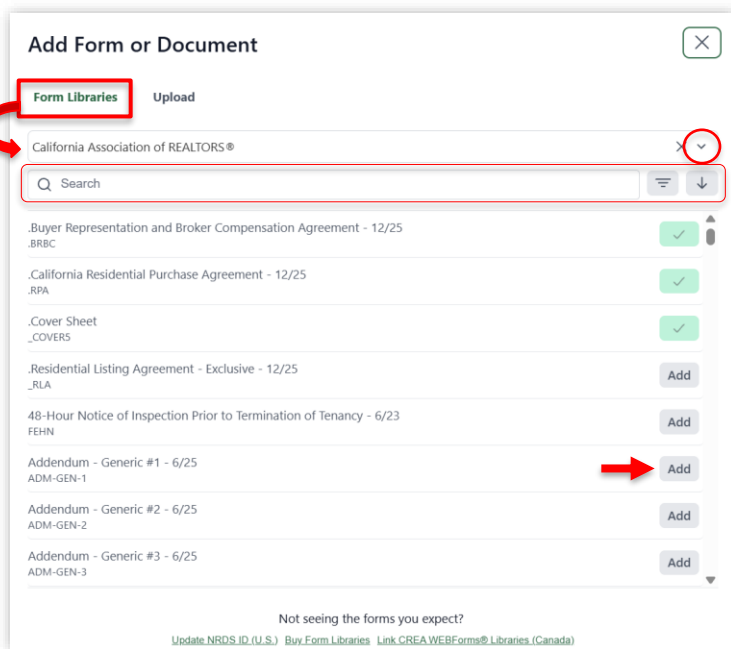
4. Use the following *optional* functions to find forms:

- **Search** – type a form name keyword or form acronym in the **Search** field to find specific forms
- **Filter** – click  on the right to filter forms in the selected library by transaction type
- **Sort** – click  on the right to sort forms in the selected library alphabetically or by form acronym

5. Click  to the right of a form name in the list to add it to your transaction.

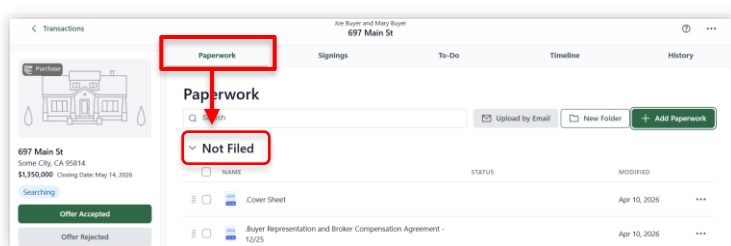
NOTE: Forms with a checkmark in a green box are already in your transaction.

6. Click  at the top right to close the menu.



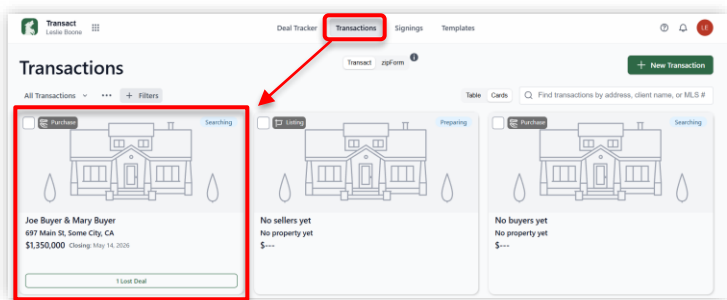
Forms added to the transaction using this method display in the **Not Filed** folder on the Paperwork tab by default.

Click and drag to move forms into other folders for better organization or simply leave them in the Not Filed folder and continue working.

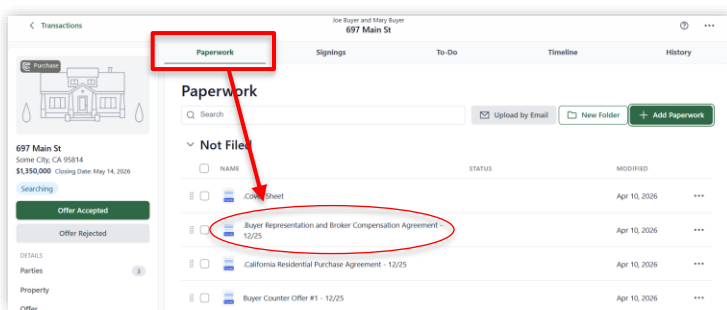


'Add Paperwork' Button in the Form Editor inside a Transaction

1. On the **Transactions** tab in your Transact account, click on a transaction to open it.



2. On the **Paperwork** tab, click on a form to open it in the Form Editor.



3. Click **+ Add Paperwork** in the **Forms and Documents** panel on the left.



4. On the **Form Libraries** tab, select a library from the dropdown list.

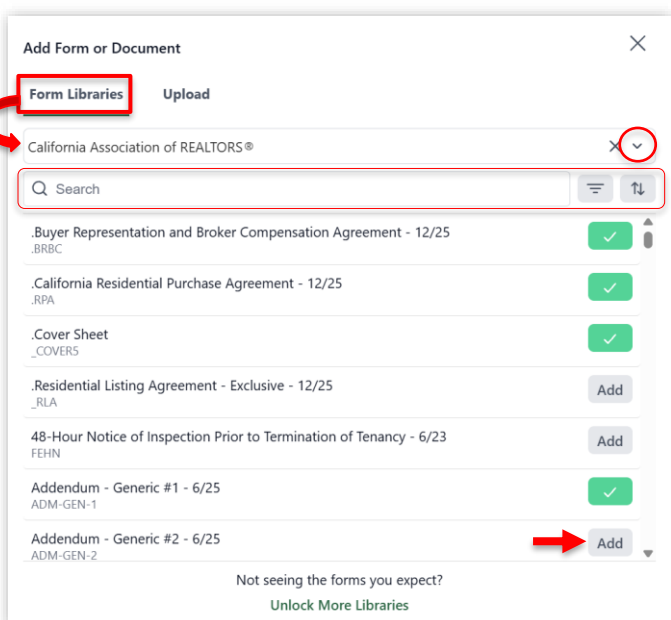
5. Use the following *optional* functions to find forms:

- **Search** – type a form name keyword or form acronym in the **Search** field to find specific forms
- **Filter** – click on the right to filter forms in the selected library by transaction type
- **Sort** – click on the right to sort forms in the selected library alphabetically or by form acronym

6. Click **Add** to the right of a form name in the list to add it to your transaction.

NOTE: Forms with a checkmark in a green box are already in your transaction.

7. Click at the top right to close the menu.



Transact: Finding Forms in Transact

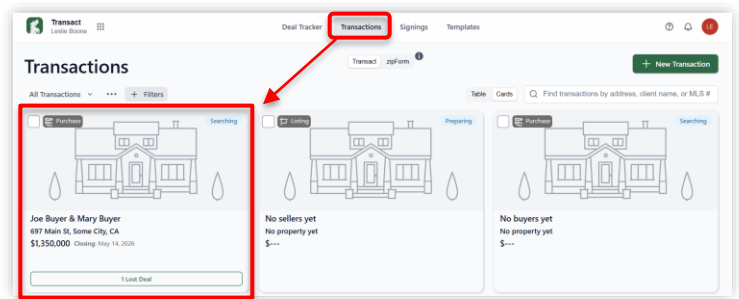
Forms added to the transaction using this method display in the top section of the **Forms and Documents** panel by default.

Click the **X** to the right of any form in the top section to move it down to the 'Grab from Transaction' section or simply leave it in the top section and continue working.



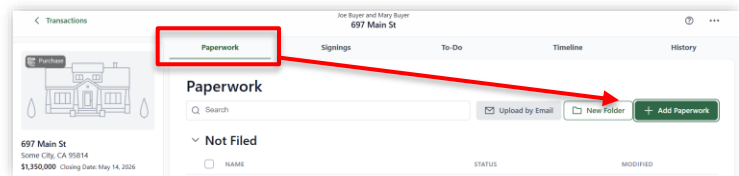
Add Form Libraries in Transact

1. On the **Transactions** tab in your Transact account, click on a transaction to open it.

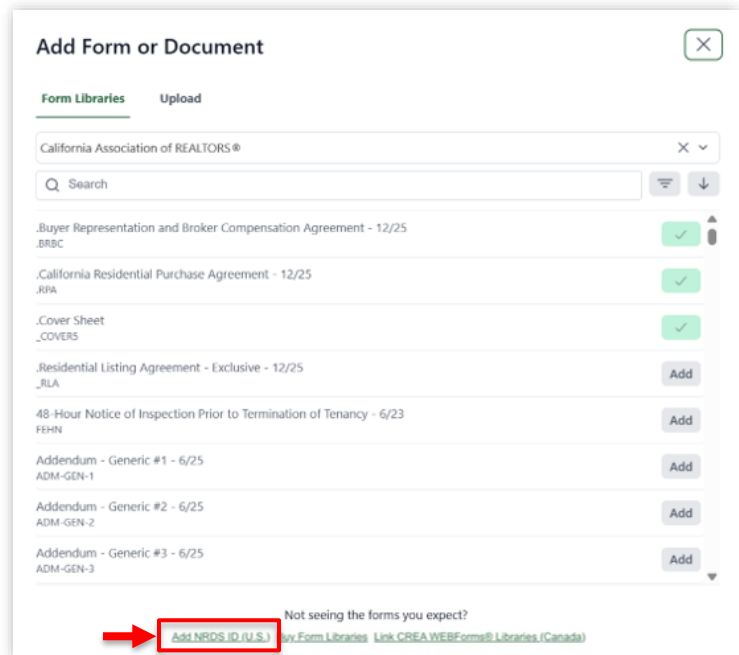


Paperwork Tab

2. On the **Paperwork** tab, click .



3. On the **Add Form or Document** window, click the **Add NRDS ID (U.S.)** link at the bottom of the window.



4. Complete the following fields:

- **Last Name**
- **NRDS ID** (9-digit number)
- **NRDS State** = California

5. Click **Submit** to save your information, and your standard libraries and forms will immediately be available in the Form Libraries list.

Form Editor

1. On the **Paperwork** tab, click on a form to open it in the Form Editor.

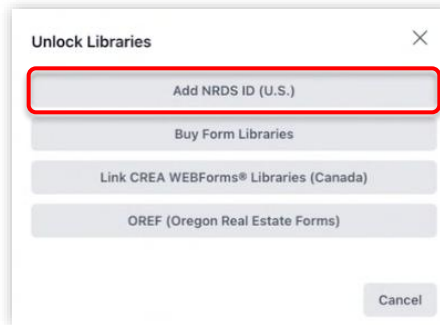
2. Click **+ Add Paperwork** in the **Forms and Documents** panel on the left.

3. On the **Add Form or Document** window, click the **Unlock More Libraries** link at the bottom of the window.

Form Name	Version	Status
.Buyer Representation and Broker Compensation Agreement - 12/25	.BRBC	✓
.California Residential Purchase Agreement - 12/25	.RPA	✓
.Cover Sheet	.COVERS	✓
.Residential Listing Agreement - Exclusive - 12/25	.RLA	Add
48-Hour Notice of Inspection Prior to Termination of Tenancy - 6/23	FEHN	Add
Addendum - Generic #1 - 6/25	ADM-GEN-1	✓
Addendum - Generic #2 - 6/25	ADM-GEN-2	Add

Not seeing the forms you expect?
[Unlock More Libraries](#)

4. On the **Unlock Libraries** window, click **Add NRDS ID (U.S.)**.



Unlock Libraries

Add NRDS ID (U.S.)

Buy Form Libraries

Link CREA WEBForms® Libraries (Canada)

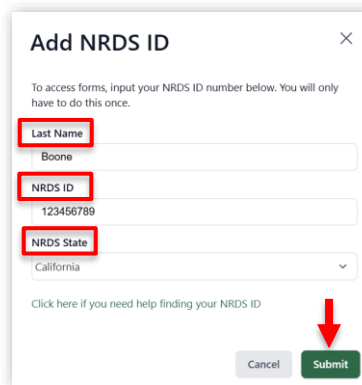
OREF (Oregon Real Estate Forms)

Cancel

5. Complete the following fields:

- **Last Name**
- **NRDS ID** (9-digit number)
- **NRDS State** = California

6. Click **Submit** to save your information, and your standard libraries and forms will immediately be available in the Form Libraries list.



Add NRDS ID

To access forms, input your NRDS ID number below. You will only have to do this once.

Last Name
Boone

NRDS ID
123456789

NRDS State
California

Click here if you need help finding your NRDS ID

Cancel Submit