zipForm: Create a new Transaction in zipForm

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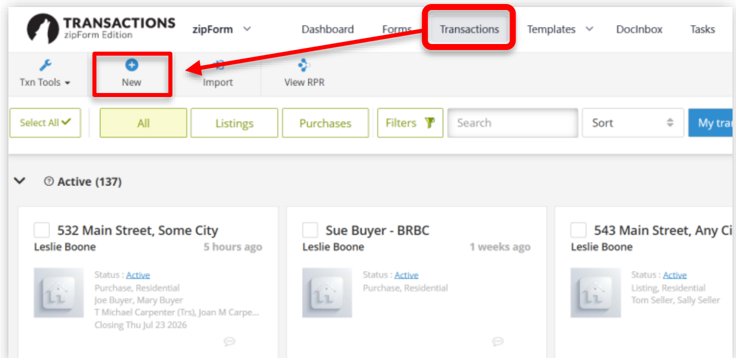
You have the option to create a new transaction in zipForm or in Transact, the new transaction management system, launched on October 1, 2025, which runs alongside the zipForm platform. Follow the steps in this guide to learn how to create a new transaction in zipForm.

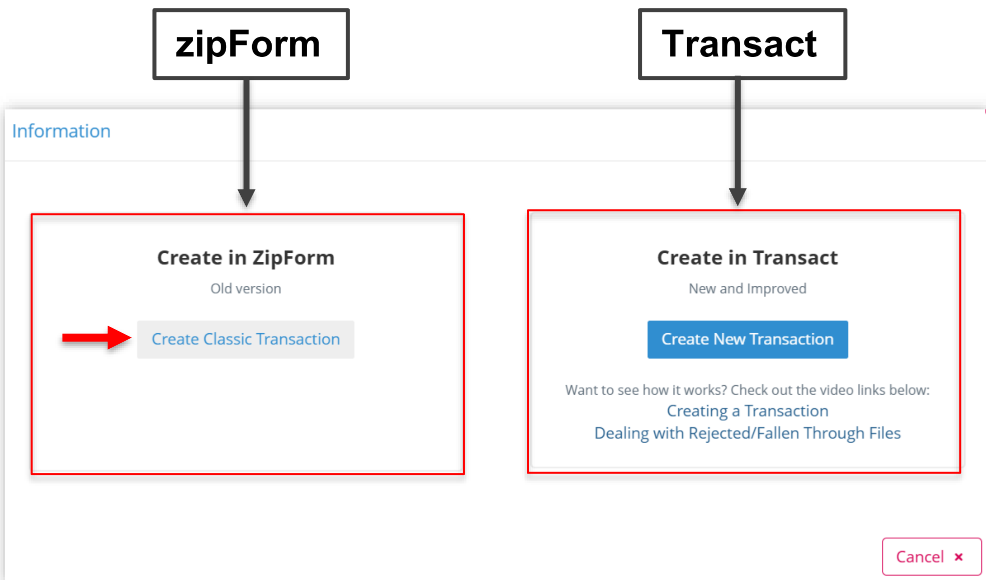
Create a new transaction in zipForm

1. Login to your zipForm account through [car.org](car.org) and click the **Transactions** tab at the top of the page.

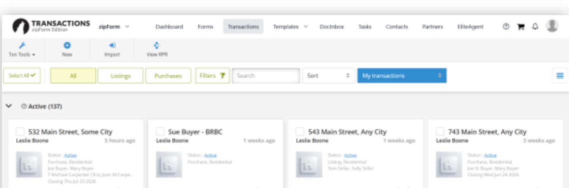
2. Click [New] at the top left to create a new transaction.



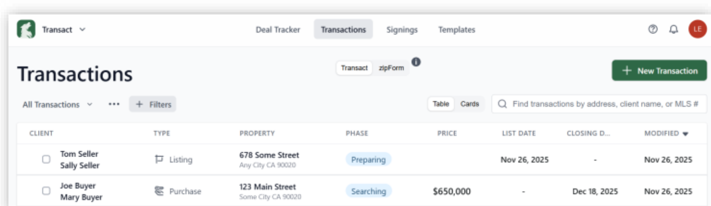
3. On the popup window, select [Create Classic Transaction] to create a new transaction in zipForm



Click [Create Classic Transaction] to create a new transaction in **zipForm**.



Click [Create New Transaction] to create a new transaction in **Transact**.



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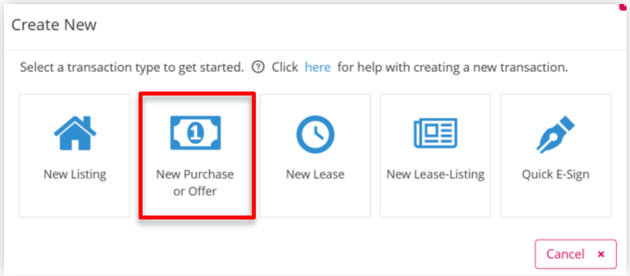
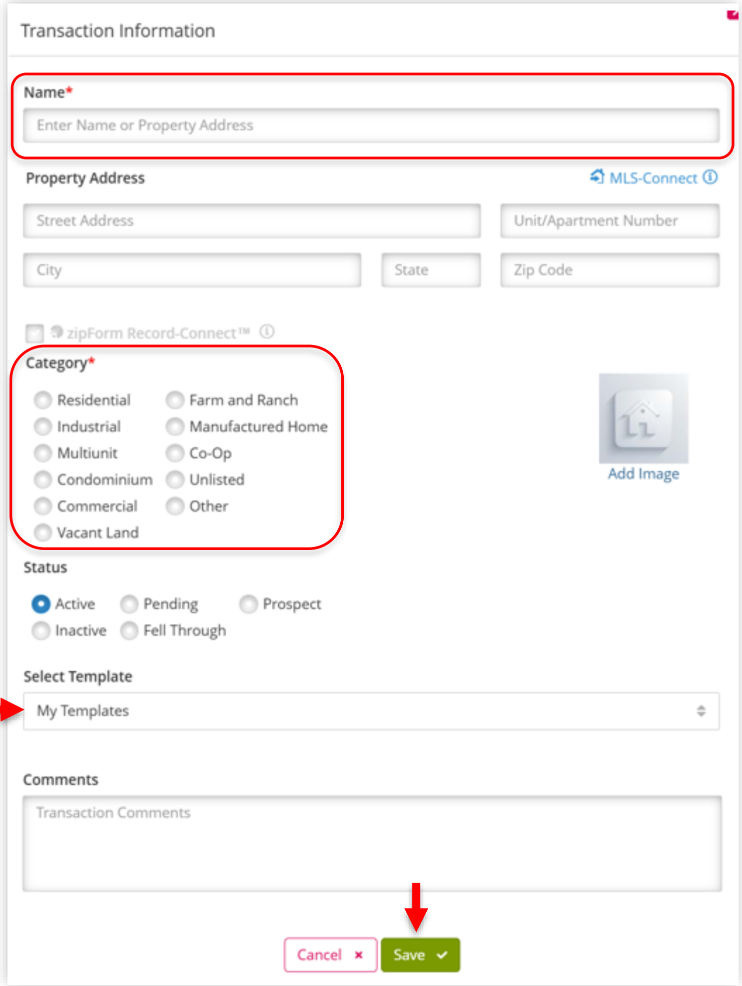
4. Select a transaction type**.**



5. On the **Transaction Information** window, complete the following fields:

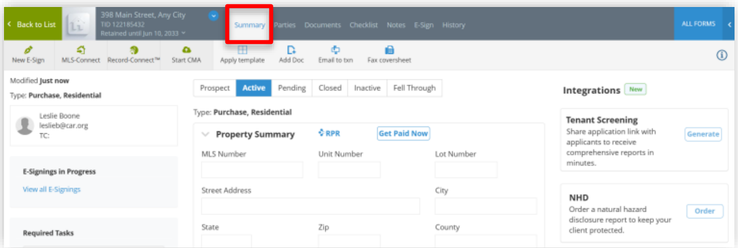
- **Name** *(required)* = give your transaction a name, usually the client's name or property address
- **Property Address** *(optional)* = complete these fields if you'd like to use Record Connect to pull owner information from the tax roll
- **Category** *(required)* = select a property type
- **Status** = the default is "Active" – you may change the status if desired
- **Select Template** *(optional)* = click the dropdown menu to select a template if applicable
- **Comments** *(optional)* = type any transaction comments or leave blank

6. Click Save ✓ to continue.



The transaction opens on the **Summary tab** by default.

Use the tabs in the gray navigation bar at the top – Parties, Documents, Checklist, E-Sign, etc. – to enter data in your transaction and on forms and send documents for signature.



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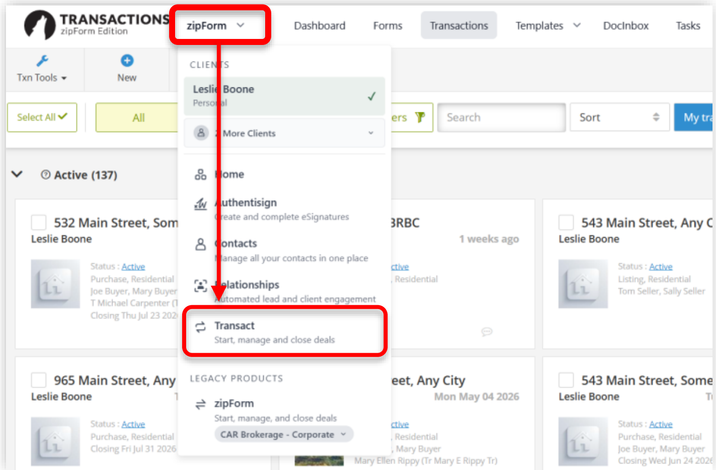
Toggle between zipForm and Transact

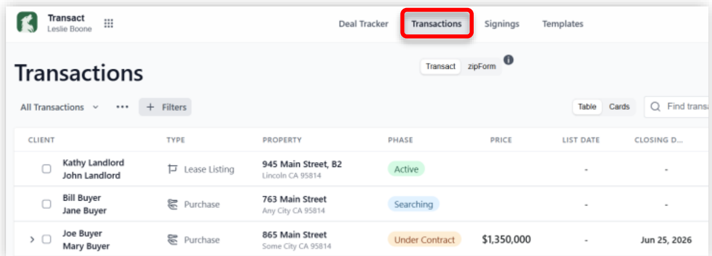
zipForm → Transact

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

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



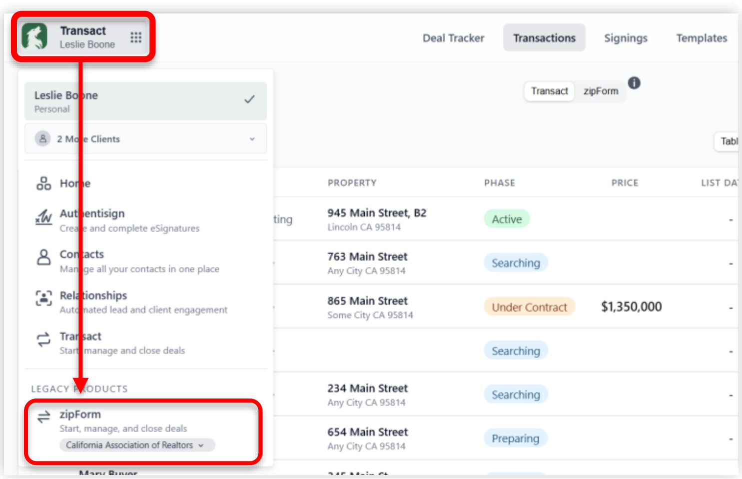
3. Click **Transactions** at the top of the page to view your transactions in Transact.



Transact → zipForm

4. In Transact, click the app switcher at the top left.

5. Select **zipForm** at the bottom of the menu.



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