
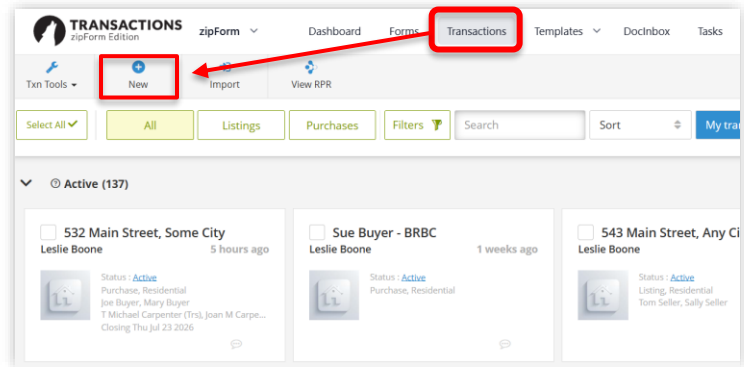


You have the option to create a new transaction in zipForm or in Transact, the new transaction management system, launched on October 1, 2025, which runs alongside the zipForm platform. Follow the steps in this guide to learn how to create a new transaction in zipForm.

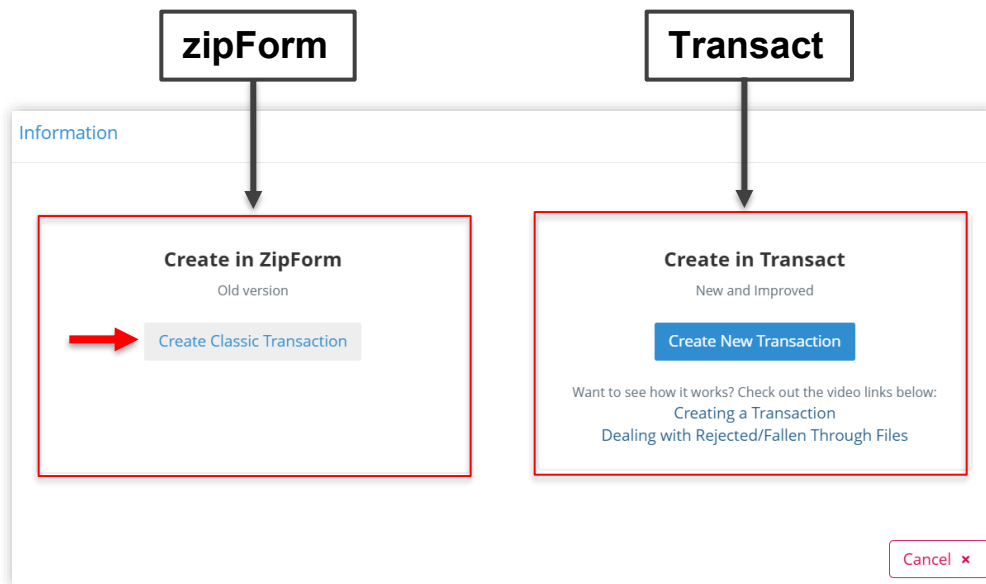
Create a new transaction in zipForm


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

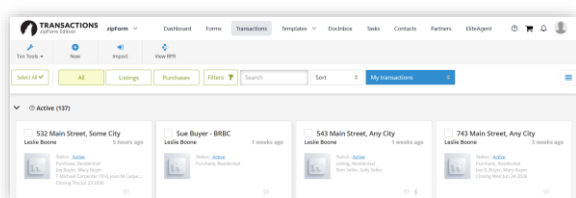
2. Click  at the top left to create a new transaction.




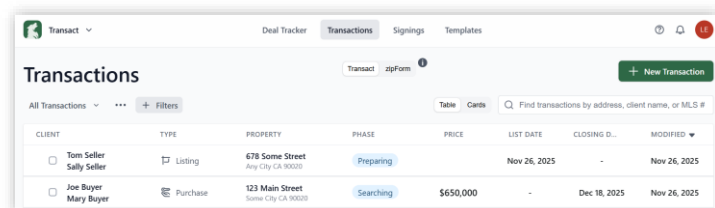
3. On the popup window, select  to create a new transaction in zipForm



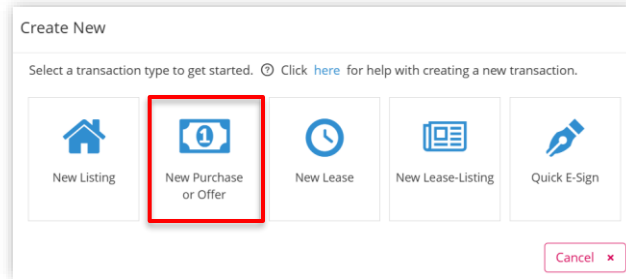
Click  to create a new transaction in **zipForm**.



Click  to create a new transaction in **Transact**.



4. Select a transaction type.



Create New

Select a transaction type to get started. Click [here](#) for help with creating a new transaction.

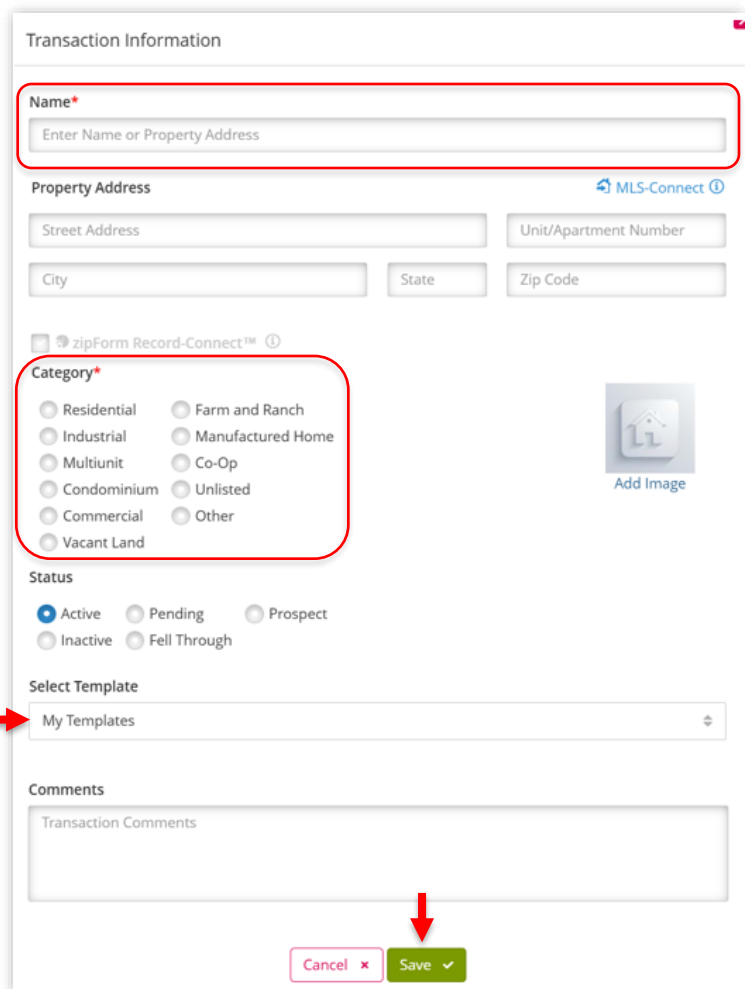
New Listing **New Purchase or Offer** New Lease New Lease-Listing Quick E-Sign

Cancel x

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  to continue.



Transaction Information

Name*
Enter Name or Property Address

Property Address MLS-Connect

Street Address Unit/Apartment Number

City State Zip Code

zipForm Record-Connect™

Category*

Residential Farm and Ranch
Industrial Manufactured Home
Multiunit Co-Op
Condominium Unlisted
Commercial Other
Vacant Land

Status

Active Pending Prospect
Inactive Fell Through

Select Template

My Templates

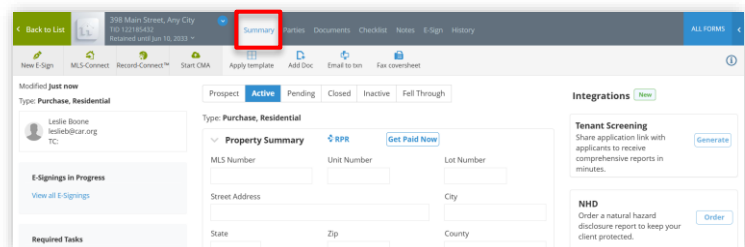
Comments

Transaction Comments

Cancel x **Save** ✓

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.



Summary Parties Documents Checklist E-Sign History

Modified just now
Type: Purchase, Residential

Leile Boone
leileb@car.org

Type: Purchase, Residential

Property Summary

MLS Number Unit Number Lot Number

Street Address City

State Zip County

Integrations

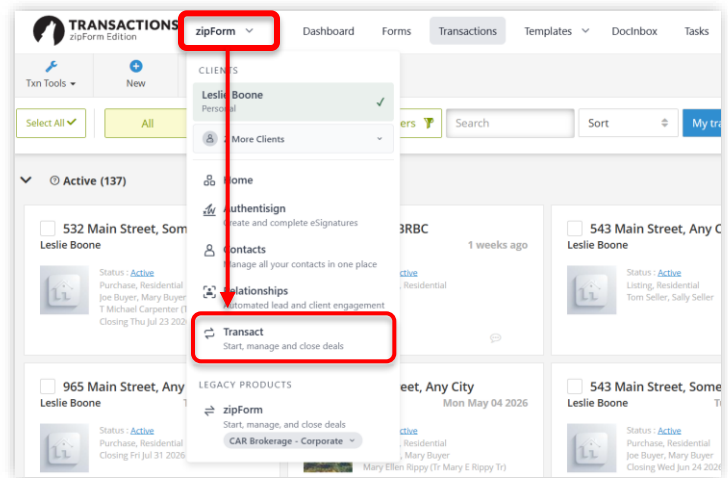
Tenant Screening
Share application link with applicants to receive comprehensive reports in minutes.

NHD
Order a natural hazard disclosure report to keep your clients protected.

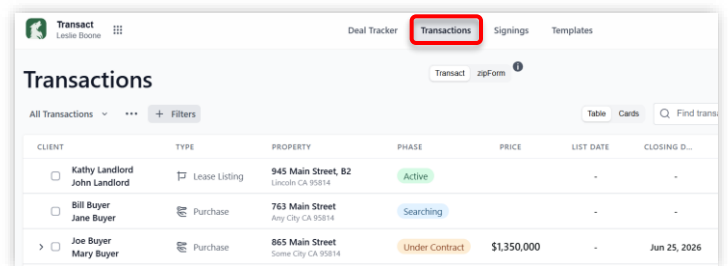
Toggle between zipForm and Transact

zipForm → Transact

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

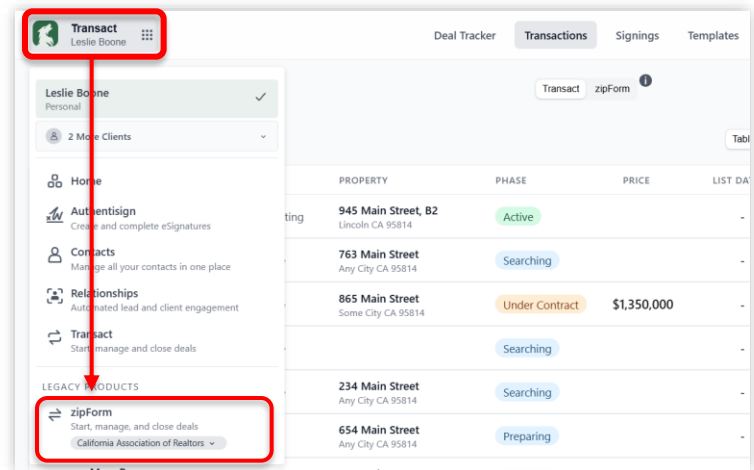


3. Click **Transactions** at the top of the page to view your transactions in Transact.



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.

