

zipForm: Migrate Personal Templates from zipForm to Transact

Templates can be migrated from zipForm to Transact for convenience. Follow the steps in this guide to migrate personal templates from your zipForm account to your Transact account.

Before you migrate templates...

IMPORTANT: You must create a Transact account *before* you migrate templates.

- If you have not yet created your Transact account, please refer to the training guide or zipTips video to create your Transact account [here](#).

What data migrates from zipForm templates to Transact templates?

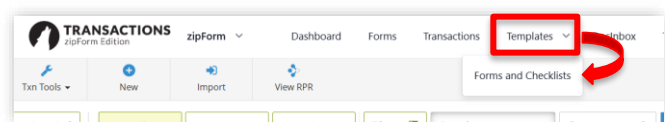
Parties	No	You can add parties inside Transact templates.
Forms	Yes	The forms may be out of order in Transact templates, so they will need to be reorganized.
Forms inside Folders	Yes	The forms may be out of order in Transact templates, so they will need to be reorganized.
Data on Forms	No	You can type data on forms inside Transact templates.
Folders	No	You can create new folders inside Transact templates.
Checklists and Tasks	No	You can create new to-do lists and tasks inside Transact templates.
Placeholders	No	Placeholders are not available in Transact.
PDF Documents	No	You can upload PDF documents inside Transact templates.

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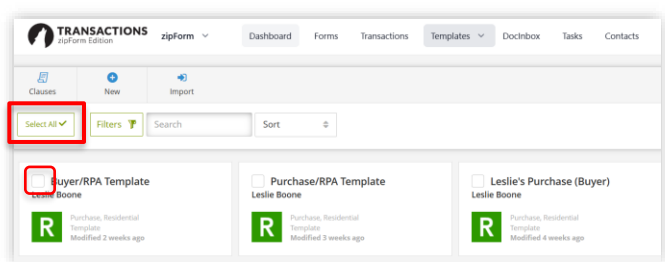
1. Open a browser and login to your zipForm account at www.car.org.



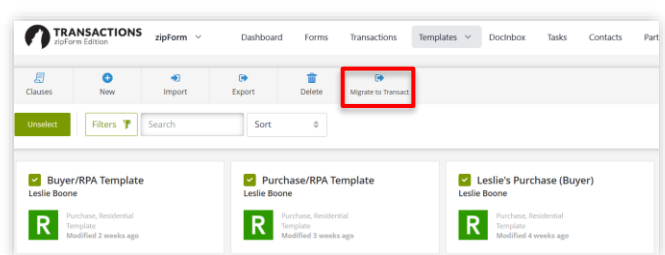
2. Click **Templates** in the top navigation bar, then click **Forms and Checklists** in the dropdown menu.



3. Check the box(es) for the template(s) you'd like to migrate to Transact or click Select All ✓ to select all templates.



4. Click Migrate to Transact on the top toolbar.



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5. Click  to continue.

A popup message will display at the top of the screen stating your templates are in process of being transferred to Transact.

→ **Continue with Personal Templates in Transact** [here](#).

