

Lone Wolf Transact

The client-first transactions software for real estate.



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.

The screenshot shows the Lone Wolf Transact interface with several numbered callouts:

- 1** Paperwork: Points to the 'Paperwork' tab in the top navigation bar.
- 2** Signings: Points to the 'Signings' tab in the top navigation bar.
- 3** To-Do: Points to the 'To-Do' tab in the top navigation bar.
- 4** Timeline: Points to the 'Timeline' tab in the top navigation bar.
- 5** History: Points to the 'History' tab in the top navigation bar.
- 6** Add Documents: Points to the '+ Add Documents' button in the Paperwork tab header.
- 7** Overview: Points to the property overview card on the left side of the Paperwork tab.
- 8** Offer Accepted/Rejected: Points to the 'Offer Accepted' and 'Offer Rejected' buttons in the overview card.
- 9** Lost Deals: Points to the 'LOST DEALS' section in the overview card.

The main content area shows the 'Paperwork' tab with a search bar, 'New Folder' button, and 'Add Documents' button. It lists documents under 'Buyer Documents' and 'Offer Documents' with columns for NAME, STATUS, and MODIFIED.

NAME	STATUS	MODIFIED
Purchase and Sale Agreement - 7/24		Oct 10, 2024
Addendum		Oct 10, 2024
Residential Purchase Agreement.pdf		Oct 10, 2024
Purchase and Sale Agreement - 7/24	Signed	Oct 9, 2024
Addendum	Signed	Oct 9, 2024
Residential Purchase Agreement	Signed	Oct 9, 2024

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.