

# 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.

100 Wellington St.  
London, ON N5N 5N9  
\$800,000 Closing Date: Aug 22, 2024  
MLS Number: 35467

Searching

Offer Accepted

Offer Rejected

DETAILS

Parties

Property

Offer

LOST DEALS

100 Wellington St.  
\$998,500  
Fell Through

Paperwork

Search

New Folder

Add Documents

Buyer Documents

NAME	STATUS	MODIFIED
Working with a Realtor.pdf	Signed	Feb 5, 2025

Offer Documents

NAME	STATUS	MODIFIED
Purchase and Sale Agreement.pdf	Signed	Feb 5, 2025
Addendum		Feb 5, 2025
Purchase and Sale Agreement - 1/25		Feb 5, 2025

### 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.