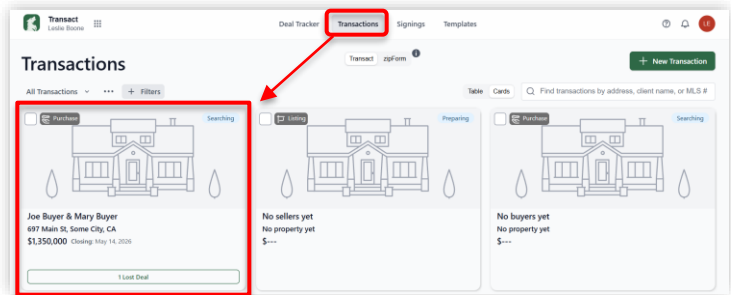


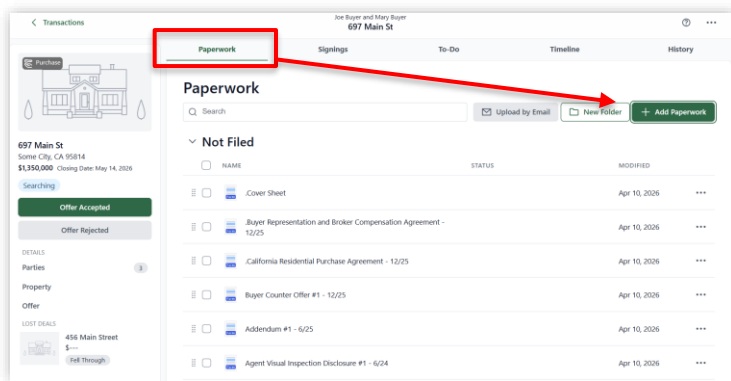
There are two ways to find C.A.R. forms in Transact and add them to your transaction. This guide shows the steps for the different methods to find and add forms in Transact.

## 'Add Paperwork' Button inside a Transaction

1. On the **Transactions** tab in your Transact account, click on a transaction to open it.





2. On the **Paperwork** tab, click **+ Add Paperwork**.



3. On the **Add Form or Document** menu, click **Form Libraries** at the top left, then select a library from the dropdown list.

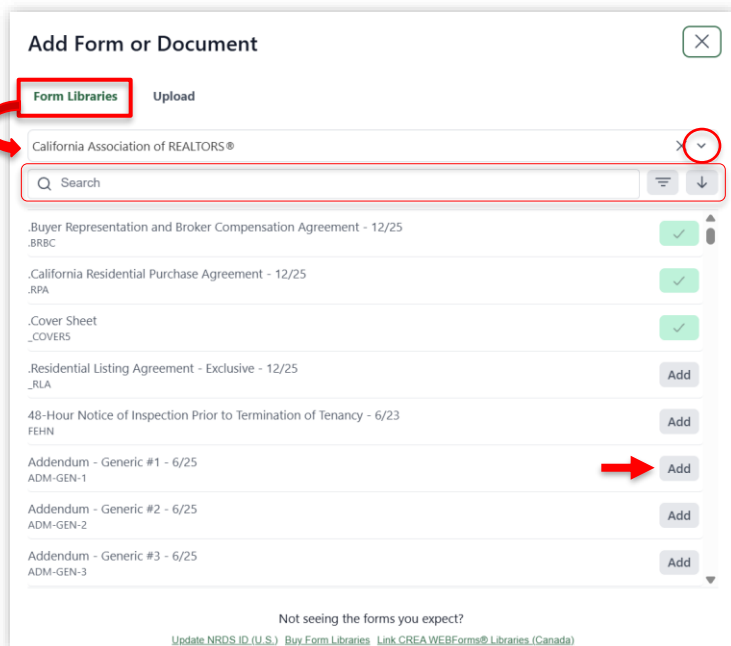
4. Use the following *optional* functions to find forms:

- **Search** – type a form name keyword or form acronym in the **Search** field to find specific forms
- **Filter** – click  on the right to filter forms in the selected library by transaction type
- **Sort** – click  on the right to sort forms in the selected library alphabetically or by form acronym

5. Click **Add** to the right of a form name in the list to add it to your transaction.

*NOTE: Forms with a checkmark in a green box are already in your transaction.*

6. Click  at the top right to close the menu.

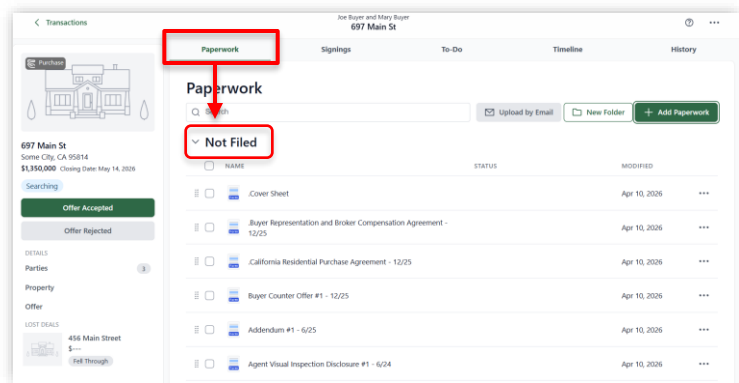


# Transact: Finding Forms in Transact



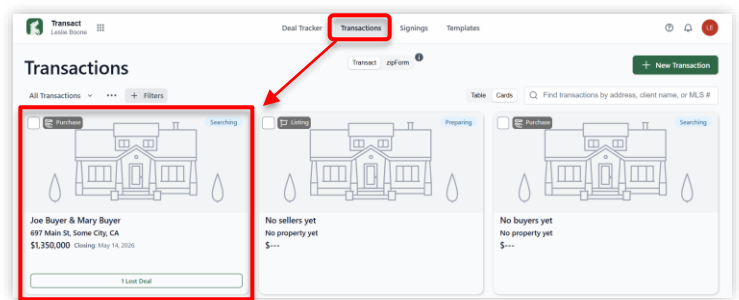
Forms added to the transaction using this method display in the **Not Filed** folder on the Paperwork tab by default.

You can move forms into other folders for better organization or simply leave them in the Not Filed folder and continue working.

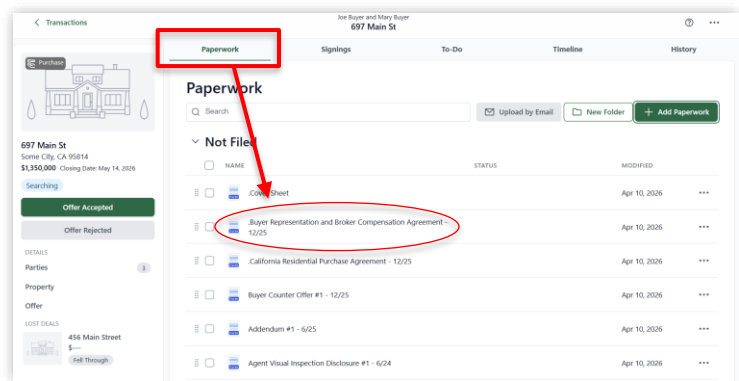


## '+ADD' Button in the Form Editor inside a Transaction

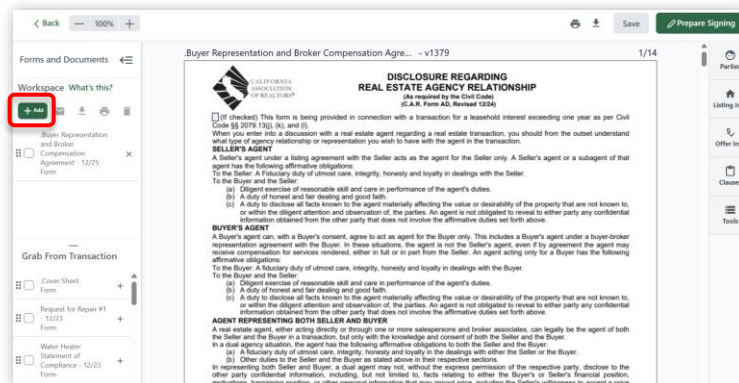
1. On the **Transactions** tab in your Transact account, click on a transaction to open it.



2. On the **Paperwork** tab, click on a form to open it in the Form Editor.





3. Click **+ Add** in the **Workspace** on the left.




4. On the **Form Libraries** tab, select a library from the dropdown list.

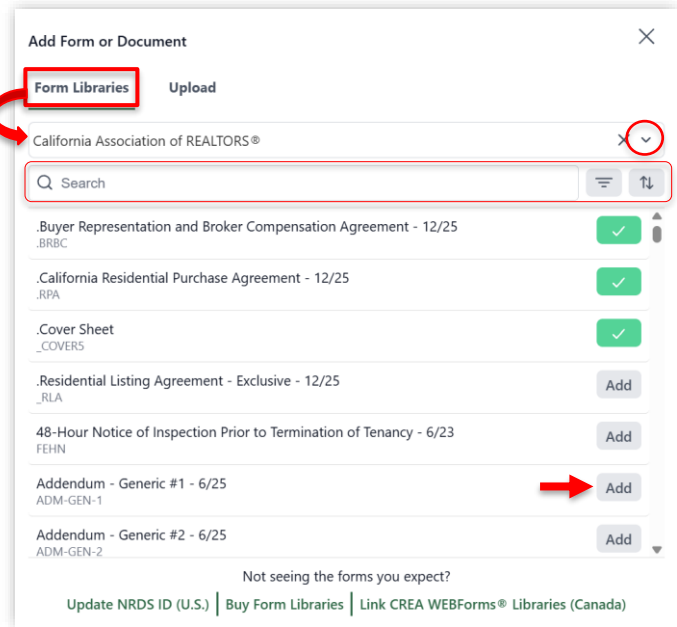
5. Use the following **optional** functions to find forms:

- **Search** – type a form name keyword or form acronym in the **Search** field to find specific forms
- **Filter** – click  on the right to filter forms in the selected library by transaction type
- **Sort** – click  on the right to sort forms in the selected library alphabetically or by form acronym

6. Click **Add** to the right of a form name in the list to add it to your transaction.

*NOTE: Forms with a checkmark in a green box are already in your transaction.*

7. Click  at the top right to close the menu.



**Add Form or Document**

**Form Libraries** Upload

California Association of REALTORS®

Q Search

Buyer Representation and Broker Compensation Agreement - 12/25 _BRBC	✓
California Residential Purchase Agreement - 12/25 _RPA	✓
Cover Sheet _COVERS	✓
Residential Listing Agreement - Exclusive - 12/25 _RLA	Add
48-Hour Notice of Inspection Prior to Termination of Tenancy - 6/23 FEHN	Add
Addendum - Generic #1 - 6/25 ADM-GEN-1	Add
Addendum - Generic #2 - 6/25 ADM-GEN-2	Add

Not seeing the forms you expect?

Update NRDS ID (U.S.) | Buy Form Libraries | Link CREA WEBForms® Libraries (Canada)

Forms added to the transaction using this method display in the **Workspace** by default.

You can click the **X** to the right of any form in the Workspace to move it down to the Grab from Transaction section or simply leave it in the Workspace and continue working.



Workspace What's this?

Buyer Representation and Broker Compensation Agreement - 12/25

Addendum - Generic #1 - 6/25

Cover Sheet

Request for Repair #1 - 12/23

Grab From Transaction

Buyer Representation and Broker Compensation Agreement - v1379

DISCLOSURE REGARDING REAL ESTATE AGENCY RELATIONSHIP (As required by the Civil Code)

(If checked) This form is being provided in connection with a transaction for a leasehold interest exceeding one year as per Civil Code §§ 2071.1(a), (b), and (c). When you enter into a discussion with a real estate agent regarding a real estate transaction, you should from the outset understand what type of agency relationship or representation you wish to have with the agent in the transaction.

**SELLER'S AGENT**  
A Seller's agent shall enter a listing agreement with the Seller, acts as the agent for the Seller only. A Seller's agent or a subagent of that agent has the following affirmative obligations:  
To the Seller: A fiduciary duty of utmost care, integrity, honesty and loyalty in dealings with the Seller.  
To the Buyer and the Seller:  
(a) Diligent exercise of reasonable skill and care in performance of the agent's duties.  
(b) A duty of honest and fair dealing and good faith.  
(c) A duty to disclose all facts known to the agent materially affecting the value or desirability of the property that are not known to, or within the diligent attention and observation of, the parties. An agent is not obligated to reveal to either party any confidential information obtained from the other party that does not involve the affirmative duties set forth above.

**BUYER'S AGENT**  
A Buyer's agent can, with a Buyer's consent, agree to act as agent for the Buyer only. This includes a Buyer's agent under a buyer-broker representation agreement with the Buyer. In these situations, the agent is not the Seller's agent, even if by agreement the agent may receive compensation for services rendered, either in full or in part from the Seller. An agent acting only for a Buyer has the following affirmative obligations:  
To the Buyer: A fiduciary duty of utmost care, integrity, honesty and loyalty in dealings with the Buyer.  
To the Buyer and the Seller:  
(a) Diligent exercise of reasonable skill and care in performance of the agent's duties.  
(b) A duty of honest and fair dealing and good faith.  
(c) A duty to disclose all facts known to the agent materially affecting the value or desirability of the property that are not known to, or within the diligent attention and observation of, the parties. An agent is not obligated to reveal to either party any confidential information obtained from the other party that does not involve the affirmative duties set forth above.

**AGENT REPRESENTING BOTH SELLER AND BUYER**  
A real estate agent, either acting directly or through one or more salespersons and broker associates, can legally be the agent of both the Seller and the Buyer in a transaction, but only with the knowledge and consent of both the Seller and the Buyer.