

Lone Wolf Transact and Command Workflow

[KW Answers Article](#)

Keller Williams has partnered with Lone Wolf to begin a new partnership to provide Lone Wolf Transact, a real estate specific solution for e-signatures and compliance, to Market Centers in the United States and Canada. With Lone Wolf Transact: Command Edition, you will be able to go to Command Settings and create/connect your free Lone Wolf Transact account, and start linking your Opportunities to LW transactions.

Once an Opportunity is linked to a LW transaction, you will be able to sync new Opportunity info with the transaction, use Lone Wolf Transact to get forms signed, and then pull the signed forms into the Documents tab of the Opportunity where you can submit for review.

Below, you will see the start to finish workflow for using Lone Wolf Transact: Command Edition, including links to KW and Lone Wolf training content:




Set Up Lone Wolf Transact in Command



1. Create/Connect Lone Wolf Transact in Command

In Command Settings, once you have access to Lone Wolf Transact, you will be able to either [create your free LW account, or connect your existing account](#) if you have already used their products before. Once created/connected, you will be able to immediately start using Lone Wolf Transact to manage your forms and get documents signed.




Opportunity & Transaction Flow

	<p>1. Create/Find Your Contact Within Command</p> <p>Identify or add your Contact into Command. Once added, begin the transaction and manage the Opportunity applet within Command.</p>
	<p>2. Create and Prepare Your Opportunity for Compliance</p> <p>Manage the Opportunity from start to finish within the Opportunities applet. First create the Opportunity for your transaction and add as much detail as possible as this will assist in later steps. Include dates, people, property information and dollar amounts.</p>
	<p>3. Sync the Opportunity with Lone Wolf Transact (Create the LW Transaction)</p> <p>Once the Opportunity is created, you will access the Documents tab, select a checklist type, and sync the Opportunity with Lone Wolf Transact. This will create a new Transaction in LW, linked to the Opportunity.</p> <ul style="list-style-type: none">• Once synced, you can access that specific LW Transaction through the Documents tab of the Opportunity.• As you update information in the Opportunity (Command), you will need to sync the new information with LW.

4. Prepare Your Documents and Forms for Compliance

Working within the LW Transaction you created, prepare your documents and forms for signatures. Select and pull in the appropriate forms whether from a form library or template. This is where you'll make updates and edits to your forms prior to getting signatures. The forms might already be pulled in, depending on whether your Market Center has the form linked to the compliance checklist you selected in the Opportunity. Review these, ensure everything has been added correctly, and use Lone Wolf Transact to prepare your forms for signing:

- [Update listing information](#) and [add more parties to your transaction](#) (contacts, vendors, etc.) in LW.
 - It is recommended to keep the information updated in Command Opportunities and [sync updated information with the LW transaction](#). You can then fill in gaps directly in LW.
- [Add a document or form to your transaction](#).
 - [Create a transaction template](#) and [apply a template to a transaction](#).
 - A transaction template defines a standard set of forms, documents, to-dos, and parties that simplify the process of creating a transaction. For example, when it comes to a residential listing you have certain forms and documents that are required; and you might even have the same parties you typically need to involve, such as an appraisal company.
 - Any templates an agent creates are personal templates, and are only displayed to the agent that created them. Office level templates are displayed to an entire brokerage or office, and can only be created by the MC admin account.
- [Fill in a form](#), in LW Transact, completing as much of the unsigned form as possible to prepare for signing.
 - [Create a custom clause for your forms](#).
 - Clauses are pre-written statements that are used in specific situations, and can be added to any text field in a form. Create a custom clause when you have a statement you know you will need to

	<p>reuse in the future, so you don't need to enter it manually each time. You can update or delete a custom clause at any time.</p>
	<p>5. Create and Send Your Documents for Signature</p> <p>Once you've completed filling out the primary information, Create a signing for your transaction paperwork (Authentisign for Transact) to send the documents out for signature via email. Within the Signing, you will be able to assign recipients and make any final edits to the document before sending for signature or review.</p>
	<p>6. Upload Your Signed Documents to Your Opportunity</p> <p>Once the signed documents are returned within your transaction, you are ready to return to your Opportunity within Command and upload the signed PDFs to the Compliance Checklist.</p>
	<p>7. Submit Your Signed Documents to Your Market Center</p> <p>After uploading the signed documents to the Opportunity within Command, submit your documents to your Market Center for Compliance review. Once submitted, you can check the status of the documents to see if they have been approved, returned or rejected.</p>