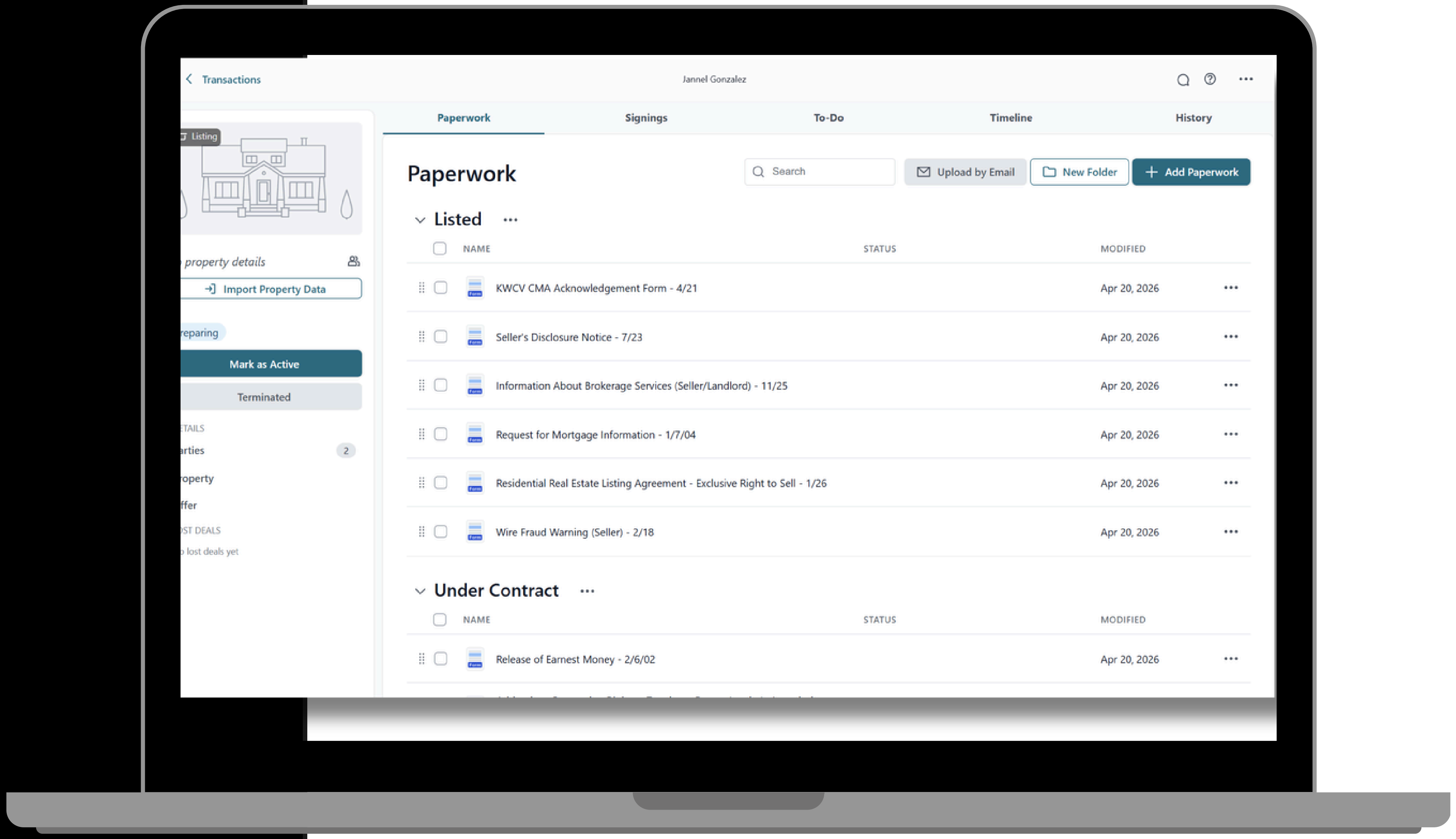
Lone wolf guide

LONE WOLF TRANSACT: COMMAND® EDITION



Keller Williams Realty

LONE WOLF TRANSACT REPLACES DOCUSIGN AS KW'S OFFICIAL PLATFORM

Lone Wolf Transact: Command® Edition (LWTCE) is the new integrated transaction management and e-signature platform built directly into KW Command.

It replaces DocuSign for all e-signature and document management needs, and is available to all Market Centers and Agents as of April 13, 2026.

10–15 Mins
SETUP TIME

6 Steps
TO CONNECT

April 13th 2026
AVAILABLE

July 14th 2026
DOCUSIGN ENDS

AGENDA

01 The "Why" Behind the Change

02 Initial Setup & Connection

03 The 7-Step Daily Workflow

04 Support & Resources

THE TRANSITION IS STRAIGHTFORWARD — MOST OF YOUR WORKFLOW REMAINS INTACT

WHAT'S CHANGING

- DocuSign access removed July 14th, 2026.
- E-signatures now handled through Authentisign (built into Lone Wolf)
- Documents and forms prepared within Lone Wolf Transact, not DocuSign
- New workflow steps (3, 4, 5) replace the DocuSign process
- Export any Docusign room documents not attached to Compliance items in Command before July 14th, 2026. If it's in Command, it's safe. If it's only In your Docusign Room, you may lose that data.

WHAT STAYS THE SAME

- You still create Contacts and Opportunities in Command first
- Compliance review and submission process remains the same
- Your Market Center still reviews and approves documents
- Signed documents are still uploaded to the Compliance Checklist

ACT BEFORE MID-JULY 2026 TO AVOID LOSING ACCESS TO DOCUSIGN DOCUMENTS

APRIL 13, 2026	LWTCE Available in Command for all Market Centers & Agents
NOW – MID-JULY	MCAs and Database Managers review compliance checklists and form mapping
MID-JULY 2026	**DocuSign access permanently removed**

ACTION REQUIRED

Before mid-July 2026, export any important documents from DocuSign. After this date, DocuSign Rooms will no longer be accessible. Contact your Market Center for support.

UNDERSTANDING THE NEW TERMINOLOGY PREVENTS CONFUSION IN THE WORKFLOW

DOCUSIGN EQUIVALENT		LONE WOLF TRANSACT
~~Room~~	→	**Transact**
~~Envelope~~	→	**Signing**
~~People~~	→	**Parties**

Get Familiar

These terms are the translation for the old Docusign terms

SEVEN KEY ADVANTAGES OF LONE WOLF TRANSACT

UP TO 4 BUYERS & 4 SELLERS

Handle complex deals with full party support directly within the platform.

BETTER SYNCING

One-way sync from Command for property details, dates, and contacts.

THE "MYSELF" TOOL

Pre-sign documents effortlessly without needing to send envelopes to yourself.

FLEXIBLE TRANSACTIONS

Manage multiple offers easily; reuse details if a deal falls through.

BETTER USER EXPERIENCE

A modern, intuitive interface explicitly designed for real estate agents.

REAL-TIME VISIBILITY

Instant transaction status updates without waiting or refreshing.

24/7/365 SUPPORT

Around-the-clock technical help via lwolf.com/support or 1-866-279-9653.

THE ONE-TIME CONNECTION (~3 MINUTES)

CAUTION: This connection is permanent. Make sure you utilize a good email.

1 LOG IN

Go to agent.kw.com with your KW credentials.

2 OPEN SETTINGS

Navigate to Profile > Settings > Connected Applications.

3 CONNECT

Find Lone Wolf and click "Connect Account".

4 SIGN IN/UP

Use an existing Lone Wolf account or create a new one.

5 ENTER EMAIL

Use any business email

6 VERIFY

Enter the 5-minute email verification code.

Pro Tip: Sharing a computer? Lone Wolf does not auto-log you out. Always log out manually.

ADDING YOUR NRDS ID (FOR FORMS ACCESS)

1 ACCESS INTEGRATIONS

Inside Lone Wolf Transact, click the gear icon (Settings) in the left menu, then select "Integrations".

2 ADD NRDS ID

Scroll down to the National Association of REALTORS® section and click "Add NRDS ID".

3 VALIDATE

Enter your 9-digit NRDS ID and your last name, then click "Validate".

Pro Tip: This step is crucial. Without your NRDS ID validated, you will not have access to your state and local association forms within Lone Wolf Transact.

SYNCING YOUR OPPORTUNITY TO LONE WOLF CREATES THE TRANSACTION FOUNDATION

WORKFLOW STEPS

1. **Create a test Opportunity and navigate to the Documents tab**
2. **Select a Checklist Type, then click "Sync with E-Sign Provider"**
3. **Select Lone Wolf — once selected, you cannot switch back to DocuSign or Dotloop**
4. **If DocuSign/Dotloop is not connected, you will only see "Sync with Transact"**
5. Enter as much Opportunity information as possible — Lone Wolf's sync is powerful!
6. **Click "Go to Transact" to open Lone Wolf Transact: Command® Edition**

FIELDS THAT SYNC FROM COMMAND

- Property Information: Address, Type, Year Built, Zoning
- Listed Date and Listing Expiration Date
- Contact Information for Sellers/Buyers
- Vendors (populates in the Parties tab of Lone Wolf)

LONE WOLF'S PAPERWORK TAB IS WHERE COMPLIANCE PREPARATION BEGINS

Review the Parties and Property pages — information synced from Command appears here

Parties are not Lone Wolf users; they are people who can be chosen as Signers later

The sync is one-way: updates in Command must be re-synced to reflect in Lone Wolf

Add Lone Wolf forms from the Paperwork tab (populated by the Market Center)

If forms are missing: authenticate your NRDS ID under "Add Form"

Forms have pre-populated signature fields that correspond to pre-tagged roles

Filling out a field in one form automatically populates that field across all forms

Lets sample
Walk through adding a form and filling in details together as a class.

AUTHENTISIGN REPLACES DOCUSIGN ENVELOPES — THE PROCESS IS FASTER AND MORE FLEXIBLE

BEST PRACTICES BEFORE SENDING

- Select forms in the Paperwork tab using checkboxes, then click "Sign" at the bottom
- Add all Parties who may need to sign before starting a Signing to save time
- Rename the Signing title to the listing address for easy organization
- Select the correct folder for signed documents (links to "Working Folders" in Opportunity)
- Use Signing Order to control the sequence of signatures (advanced option)
- Use the "Myself" tool to sign documents before sending to clients

SIGNER TYPES

REMOTE SIGNER

Signs the document electronically

VIEWER

Can view but not sign

CC

Receives a copy when complete

Note: Unlicensed Associates will see a red watermark when preparing a Signing — this does NOT appear for Signers or on completed documents.

SIGNED DOCUMENTS MUST BE UPLOADED TO COMMAND TO COMPLETE THE COMPLIANCE CYCLE

1. Navigate to the Signings tab in your Transact
2. Confirm the Signing shows as "Complete" — click in to view dates/times of signatures
3. Return to the Paperwork tab — signed documents appear as PDFs with "Signed" marked in green
4. Navigate back to the Opportunity in Command
5. Select "Upload Multiple Files" and select the signed documents from the Transact
6. Upload to the corresponding folder you selected when creating the Signing

PRO TIP

Agents can create folders using "New Folder" — useful for organizing all forms, separating contracts that fell through, etc.

SUBMITTING TO THE MARKET CENTER TRIGGERS THE OFFICIAL COMPLIANCE REVIEW PROCESS

THE REVIEW PROCESS

- Select "Submit to MC" in the Opportunity to send documents to the Market Center
- The Market Center will review and either accept or reject the documents
- Agents receive compliance notifications in Command and on the Command App when compliance events are approved

COMPLIANCE NOTIFICATION CHANNELS

- KW Command (desktop)
- KW Command App (mobile)

Submitting Documents

is a required step. Documents are not automatically sent to the Market Center after uploading.

SEVEN STEPS COVER EVERY TRANSACTION FROM FIRST CONTACT TO FINAL COMPLIANCE APPROVAL

STEP	ACTION	PLATFORM
01	Create or Find Your Contact	COMMAND
02	Create Your Opportunity	COMMAND
03	Sync with Lone Wolf Transact	COMMAND + TRANSACT
04	Prepare Documents & Forms	TRANSACT
05	Create & Send for Signature (Authentisign)	TRANSACT
06	Upload Signed Documents	COMMAND
07	Submit for Compliance Review	COMMAND

Steps 3, 4, and 5 are new to your workflow — they replace what you previously did in DocuSign.

DOWNLOAD ACTIVE DOCUSIGN DOCUMENTS BEFORE MID-JULY 2026

ACTION REQUIRED

DocuSign access will be permanently removed in mid-July 2026. Any documents not downloaded before this date will be lost.

Note: Your mc may be able to help and documents in command mc will not dissapear. This warning only applies to documents still sitting in DocuSign Rooms.

HOW TO DOWNLOAD YOUR DOCUMENTS

1 ACCESS DOCUSIGN

Log into your DocuSign account and navigate to your active Rooms.

2 SELECT DOCUMENTS

Select all the documents you need to keep from each Room.

3 DOWNLOAD AS ZIP

Click the download icon to save the documents to your computer as a ZIP file.

FREQUENTLY ASKED QUESTIONS

CAN I STILL USE DOCUSIGN?

Yes, but only temporarily. You can continue using DocuSign for active transactions until mid-July 2026.

After that date, the DocuSign integration will be permanently removed from Command, and you will lose access to your DocuSign Rooms. All new transactions should be started in Lone Wolf Transact immediately to ensure a smooth transition.

FREQUENTLY ASKED QUESTIONS

IS LONE WOLF TRANSACT INCLUDED?

Yes. Lone Wolf Transact: Command® Edition is included in your standard KW tech fee.

It completely replaces the need for a paid DocuSign or Dotloop account for your KW transactions, providing a powerful, integrated solution at no additional cost to you.

Major Benefit

Agents are getting a premium tool at no additional cost, which helps offset the friction of learning a new system.

FREQUENTLY ASKED QUESTIONS

CAN I USE DOTLOOP INSTEAD?

Yes. The Dotloop integration will remain active in Command.

However, unlike Lone Wolf Transact, Dotloop is not included in your KW tech fee. If you choose to use Dotloop, you will need to maintain and pay for your own separate Dotloop subscription.

Dotloop in command

While Dotloop is an option, Lone Wolf Transact is the recommended, fully integrated, and not an additional cost for the agent to use or join.

FREQUENTLY ASKED QUESTIONS

CAN I USE LONE WOLF ON MY PHONE?

Yes. While there is no dedicated mobile app for Lone Wolf Transact, the platform is fully mobile-responsive.

Access it through your phone's browser; the interface adapts to fit your screen so you can manage transactions on the go.

Add to home screen

IOS users click share -Add to home screen
Android-Click three dots on google and then click add to home screen

THE 7-STEP DAILY WORKFLOW

The transaction process still begins and ends in Command. Only the middle steps — preparing forms and getting signatures — move to Lone Wolf Transact.

KW COMMAND

STEP 1: CONTACTS

Create or find your contact.

STEP 2: OPPORTUNITIES

Create the Opportunity.

STEP 6: UPLOADS

Upload signed docs to Checklist.

STEP 7: COMPLIANCE

Submit to Market Center.

LONE WOLF TRANSACT

STEP 3: SYNCING

Sync Command data to Transact.

STEP 4: FORMS PREP

Prepare documents and forms.

STEP 5: E-SIGNATURES

Send for signature via Authentisign.

STEP 1: CREATE OR FIND YOUR CONTACT

Your database remains the starting point for every deal.

Ensure your client's contact information is up-to-date in Command before moving forward. This data will eventually sync to Lone Wolf Transact.

STEP 2: CREATE YOUR OPPORTUNITY

Open the Opportunity in Command and navigate to the Documents tab.

Select your Checklist Type to ensure the correct placeholders are generated for your transaction.

ONCE YOUR OPPORTUNITY IS CREATED, YOU ARE READY TO CROSS OVER INTO LONE WOLF.

FREQUENTLY ASKED QUESTIONS

DO I NEED TO CREATE A NEW ACCOUNT?

No. Lone Wolf Transact uses Single Sign-On (SSO) directly through Command.

When you click "Sync with E-Sign Provider" and select Lone Wolf for the first time, your account is automatically created and linked. There are no new passwords to remember or separate login pages to bookmark.

READY TO GET STARTED?

NEXT STEPS & RESOURCES

LOG INTO COMMAND

Start a test transaction today to familiarize yourself with the new workflow.

DOWNLOAD OLD DOCUMENTS

Remember to download any active DocuSign documents before mid-July 2026.

NEED HELP?

Visit **answers.kw.com** for detailed guides, or contact your tech drivers in leadership for technical assistance.

SCAN FOR THE FULL GUIDE

Point your phone's camera here to access the complete Lone Wolf Transact transition guide.