Creating a Template in zipForm® for Agent & Brokerage License Numbers on New TRID Compliant Forms

With the release of the new TRID forms on September 28th, you will notice there are additional fields to be filled out on the forms. In order to simplify the process of creating a transaction and filling out the forms, we recommend creating templates in zipForm. A template can be applied to every transaction created, whether it is for a purchase, lease, listing, etc. Since templates are reused on multiple transactions, specific information on a property or client should never be added to the template. Focus on information that remains static, such as your name, brokerage information, and agent ID#.

Creating a template for the Transaction Cover Sheet is a huge time saver. Once information is filled out on the Cover Sheet, the information auto fills on all the additional forms added to a transaction where it is applicable. Once the TRID forms are released, sections for the agent and broker license numbers will be added to the cover sheet as you see below.


To save time and prevent yourself from repeatedly typing out Agent ID#, Agent License#, Office ID#, and Brokerage License# on every transaction, we recommend creating a template for this new Cover Sheet.

Creating a template in zipForm is very easy. Once you are logged into your zipForm account, click on the "Templates" tab in the upper left corner of your screen. Then click "Create Template", name your template, and click "Ok".
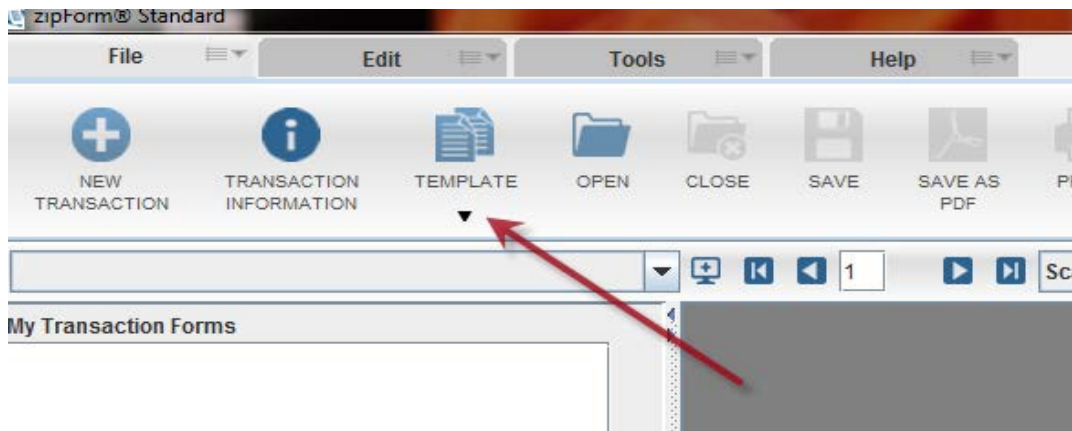
After clicking "Ok" you will be redirected to your forms library located on the left hand side of your screen. To add a form to your template, click once on the form you desire to add and it will be added to your template.

Now click on the form that was added to open it full size on your screen so that you may start filling in your information. Again, you do not want to add transaction specific information regarding a property or client. Only add information you will use on every transaction.
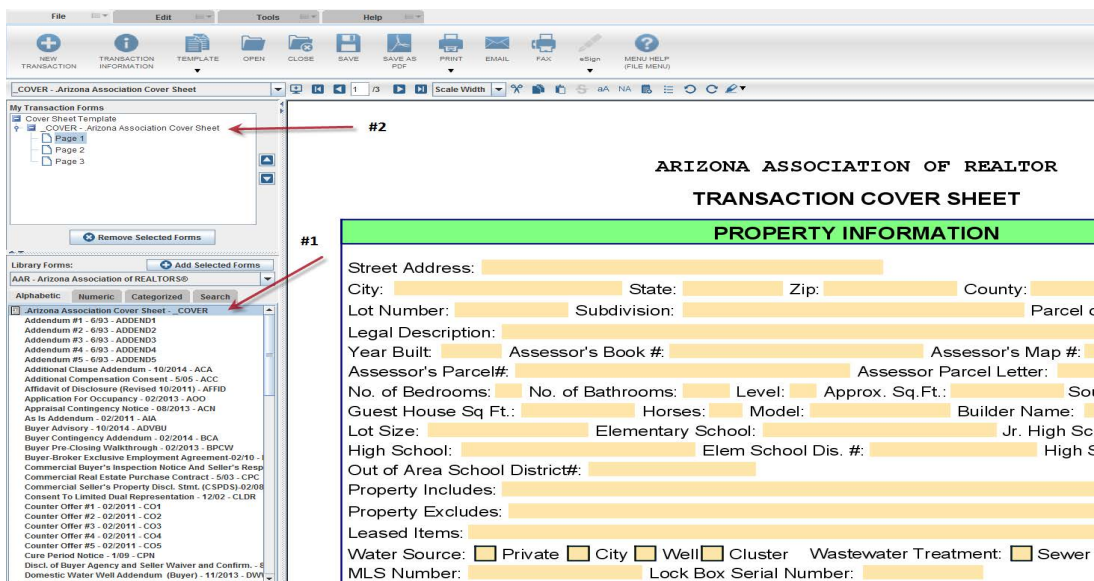

On the Cover Sheet, fill in the Listing Broker section, making sure to add Agent ID#, Agent License#, Office ID#, and Brokerage License#, to prevent having to retype this information on every single transaction you create.

Keep in mind, the information filled out on the cover sheet will auto fill on all the other forms you add to the transaction.

Once the template forms are filled out, click on the save button directly above the form.
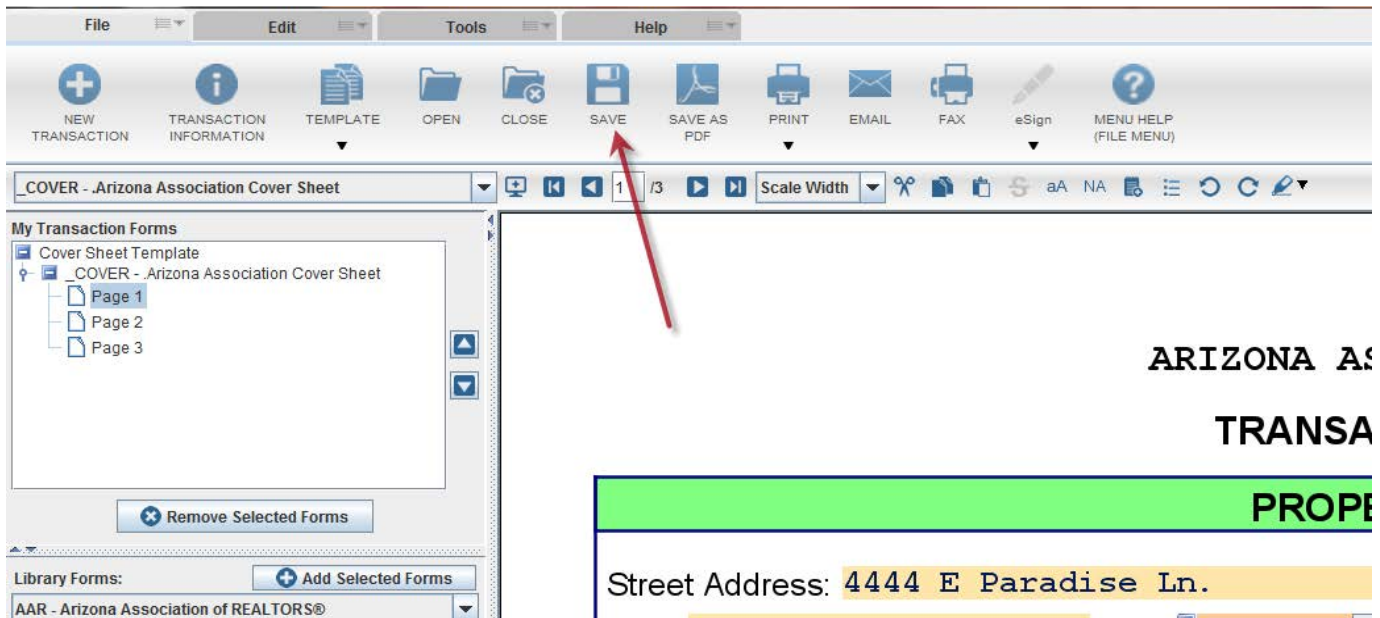
Your time saving template may now be used on many transactions to come! To apply your template to your transaction, click on the "New Transaction" tab located in the upper left hand corner of your screen.
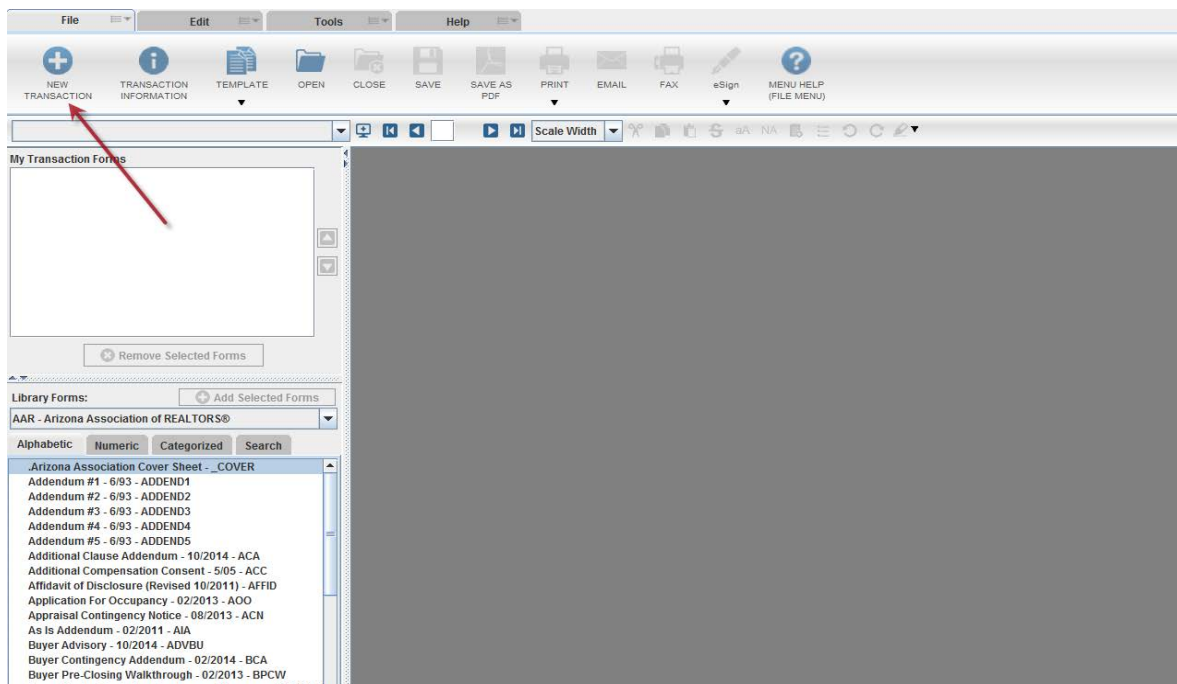
Clicking "New Transaction" will direct you to your Transaction Header screen where you will name your transaction, click on the Apply Template drop down arrow, select the template you would like to apply to your transaction, then click "Ok". You have now applied your template to your transaction.
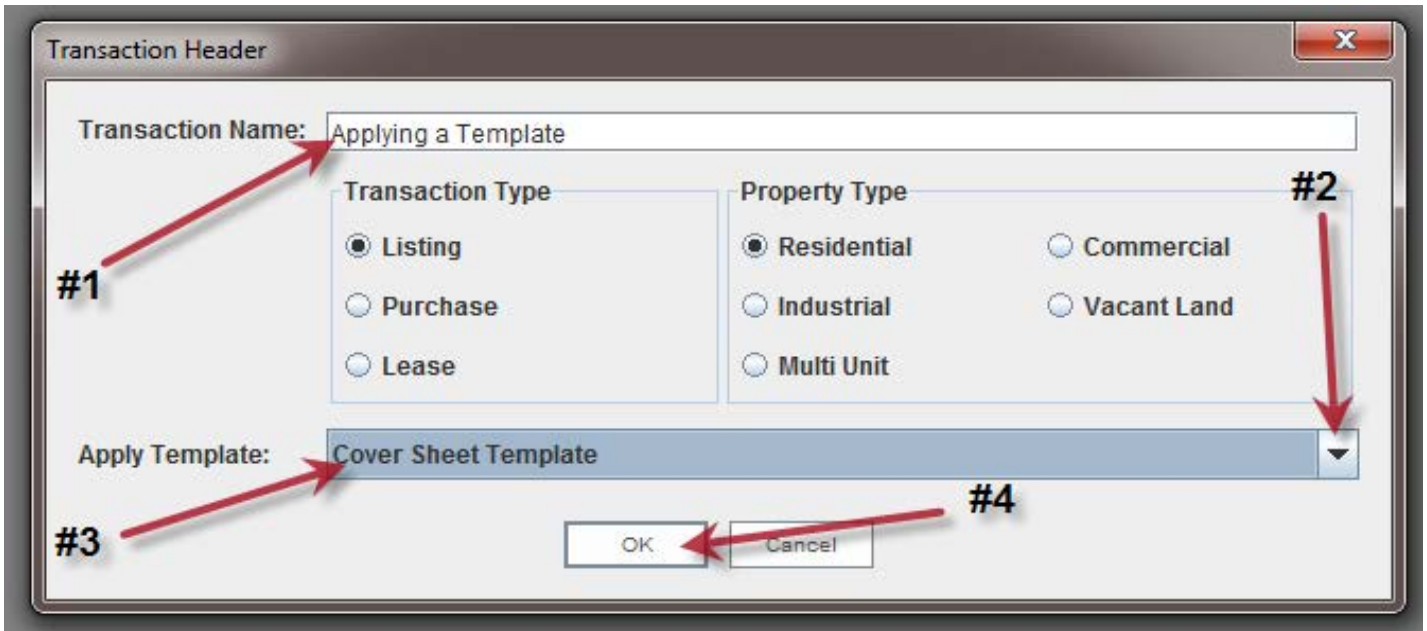
If you have any questions, please contact AAR Business Services Support at (866) 833-7357 or support@aaronline.com.