



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.

LISTING BROKER INFORMATION			
Agent Name:			Agent ID#:
Email:			Agent License #:
Phone:	Fax:	Cell:	
Firm Name:			Office ID#:
Street Address:			Brokerage License #:
City:	State:	Zip:	

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.



This will bring you to your main templates page. From here, you will click on the “New” button located in the upper left corner of the screen in order to begin creating the new template.



After clicking “New” you will be redirected to your forms library located on the right 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.

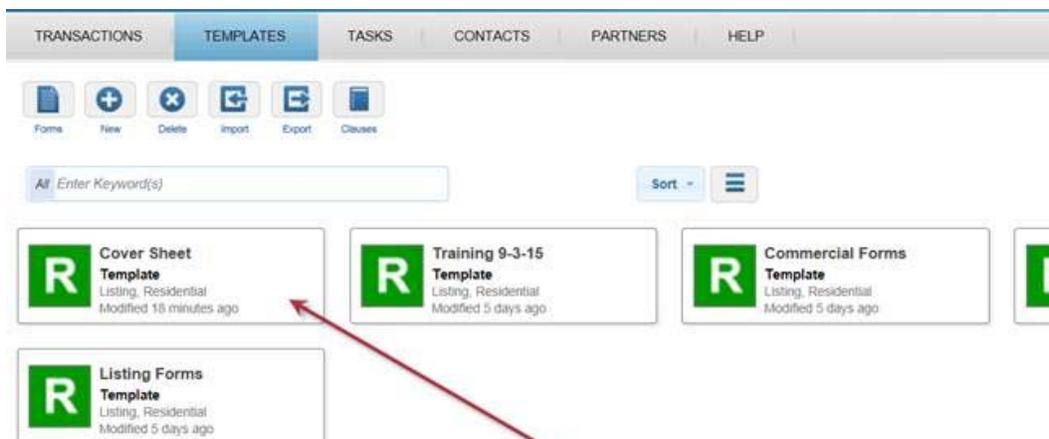
Keep in mind, the information filled out on the cover sheet will auto fill on all the other forms you add to the transaction.

LISTING BROKER INFORMATION			
Agent Name:		Agent ID#:	
Email:		Agent License #:	
Phone:	Fax:	Cell:	
Firm Name:		Office ID#:	
Street Address:		Brokerage License #:	
City:	State:	Zip:	

Once the template forms are filled out, click on the save button directly above the form.

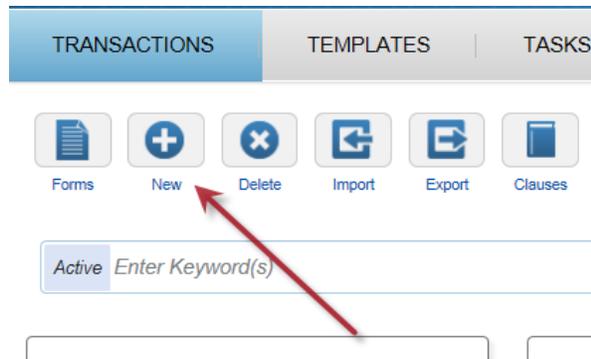


Click on the "Templates" tab located in the upper left corner of your screen to view the template you just created.

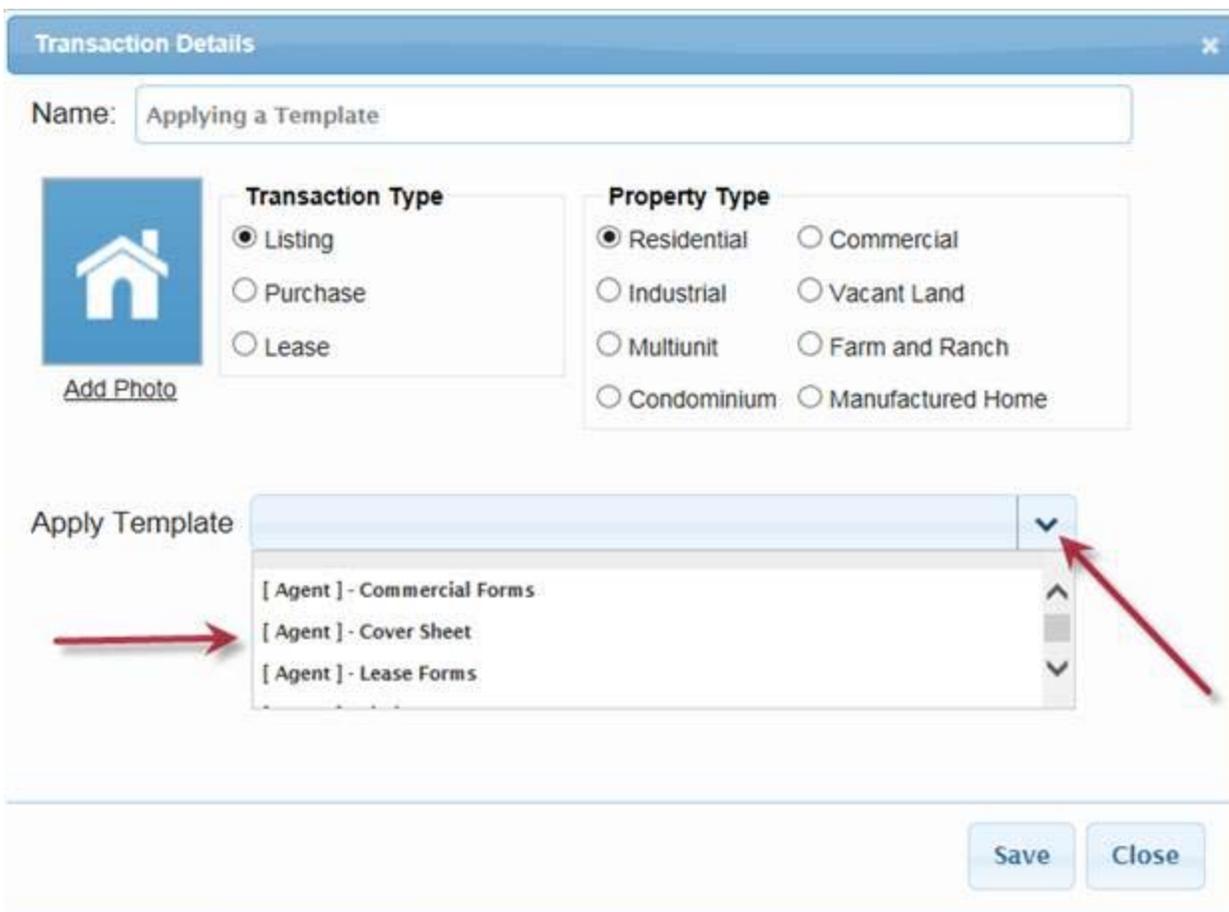


Your time saving template may now be used on many transactions to come! To apply your template to your transaction, you will first want to be on your main transactions screen. Click on the "Transactions" tabs located in the upper left hand corner of your screen.

Next, click on the “New” button located in the upper left corner of the screen to open up the Transaction Details box.



Once the Transaction Details box is up on your screen, click on the “Apply Template” arrow, then select the template from the drop down menu that you want to add by clicking on the template’s title



Finally, click the save button located at the bottom right corner of the Transaction Details box in order to apply the template and begin creating your transaction.

If you have any questions, please contact AAR Business Services Support at (866) 833-7357 or support@aaronline.com.