

Vault – Autogenerate Vault Number Quick Setup Guide

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Objective

This document will outline all steps required to successfully set up any organization to use the autogenerate vault numbers feature to suit their needs.

Which setup works best for your organization?

To successfully setup the autogenerate vault number, your organization will need to determine which setup works best before you proceed.

There are two ways to set up your organization as an,

- [Organization](#) → Recommended for a single firm with one office. This will allow for a single set of vault numbers.
- or -
- [Teams](#) → Recommended for a larger enterprise organization with many offices in different locations. This allows each office to have their own set of vault numbers but allows the organization to keep one centralized vault system across all individual organizations or teams.

Choose which set up best works for your organization and continue.

Setting up your organization to use autogenerate vault numbers.

1. Have your organization administrator log into settings, select Organization Details, select Organization from the Vault Setup dropdown.

The screenshot displays the 'Organization Details' page in a legal software interface. The left sidebar contains a navigation menu with the following items: Management, Members and Teams, Roles and Permissions, Compensation Fees, Saved Contacts, Organization, Organization Details (highlighted with a red box), Billing Management, Theme Preferences, Single Sign-On, and Organization Integrations. The main content area shows the following fields:

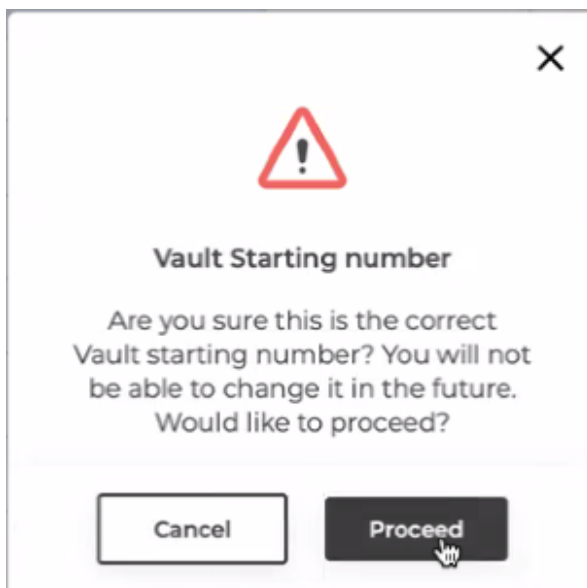
- VZL ID
- Country: Canada
- Phone Number: (123)456-7998 (ext: 8888)
- Fax Number: (888)888-8888
- Sales Tax Registration Number: Sales Tax Registration Number
- Additional Sales Tax Registration Number: ert
- Vault Setup: Organization (selected from a dropdown menu that also shows 'None' and 'Team')

2. Enter your **Vault Number Starting Number** and click **Save**. Starting numbers cannot have any special characters i.e., '/' '-' '.' Etc.

Note: This will be the next available number if you currently assign Vault/Envelope/Pouch numbers today. Or, if you would like to start using Vault/Envelope/Pouch numbers enter the number you would like your Vault numbers to start at.

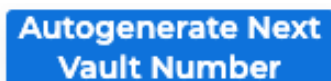
Vault Number Setting (Starting number)

3. Ensure that you have entered the correct number as you will be unable to change it in the future. Click **Proceed** to use the number. Click **Cancel** to change the number.



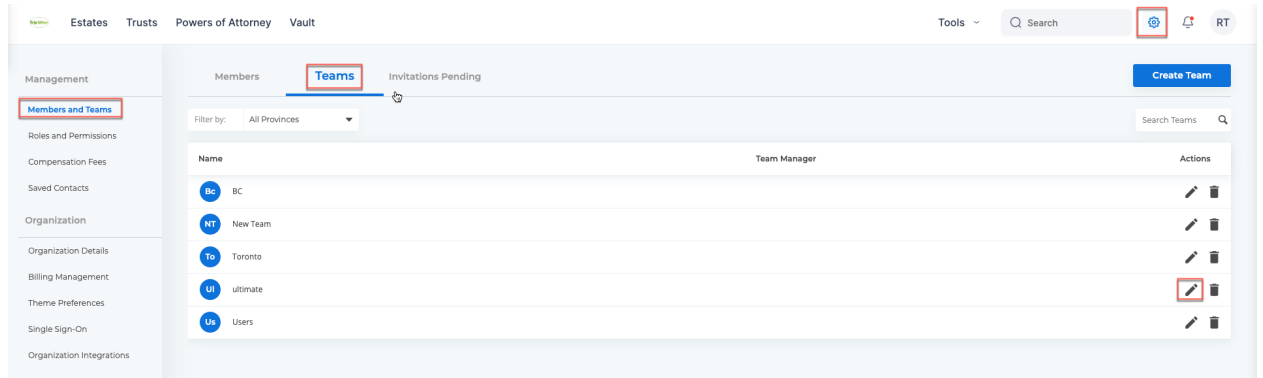
4. Your organization setup is now complete, and the Autogenerate Next Vault Number button is now active on your vault files

Note: The autogenerate next vault number will remain disabled on your vault files until such time as you have setup your organization to use the autogenerated a number.



Setting up your teams to use autogenerate vault numbers.

1. Create a team for each office location. (If not already set up)
2. Have your organization administrator log into settings, click **Members and Teams**, click **Teams** and click the **pencil** icon beside each team to set up their autogenerate vault numbers.



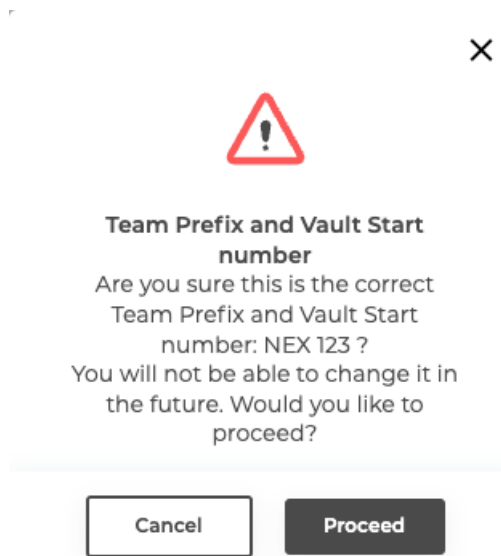
3. Enter a 3-character Team Prefix i.e., TOR
4. Enter your **Vault Number Starting Number** and click **Save**. Starting numbers cannot have any special characters i.e., '/' '-' '' Etc.

Note: This will be the next available number if you currently assign Vault/Envelope/Pouch numbers today. Or, if you would like to start using Vault/Envelope/Pouch numbers enter the number you would like your Vault numbers to start at.

Team Information

Team Name <input type="text" value="BC"/>	Postal Code <input type="text"/>
Address <input type="text" value="British Columbia 4"/>	Country <input type="text" value="Canada"/>
City Type <input type="text" value="City"/>	Phone Number <input type="text" value="Phone Number"/>
City <input type="text" value="Port Alberni"/>	Fax Number <input type="text" value="Fax Number"/>
County Type <input type="text" value="County"/>	Team Prefix <input type="text"/>
Province <input type="text" value="British Columbia"/>	Vault Number Setting (starting number) <input type="text"/>

5. Ensure that you have entered the correct number as you will be unable to change it in the future. Click **Proceed** to use the number. Click **Cancel** to change the number.



6. Repeat for each team.
7. Your teams are now setup, and the Autogenerate Next Vault Number button is now enabled on your vault files for each team.
Note: The autogenerate next vault number will remain disabled on your vault files until such time as you have setup your team to use the autogenerated a number.

**Autogenerate Next
Vault Number**