ESTATEABLY

# Vault Quick Start Guide V1.0

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# 1. Introduction

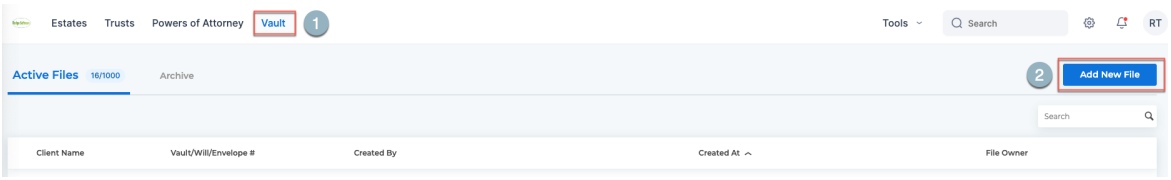
Vault allows you to store and manage your Vault of Wills digitally. By moving your Vault to a digital solution, it provides you with 24/7 secure online access to all your estate planning files and bank of Will at any time of the day or night.

# 2. Autogenerate Vault Number

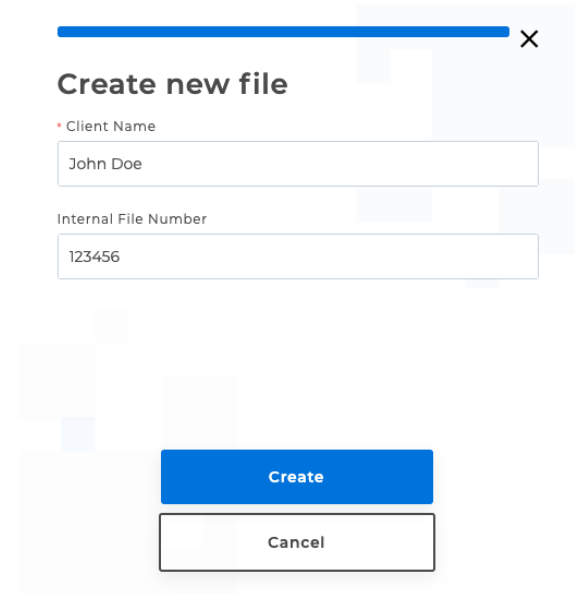
If you currently use or would like to start auto generating Vault numbers, Click here to get started.

# 3. Add New File

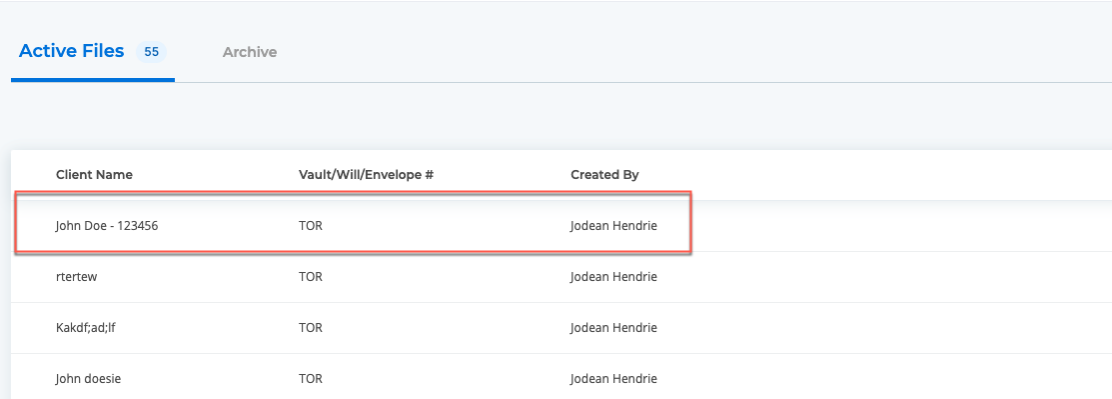
a) To get started click on the Vault product on the top menu bar and then Add New File.




b) On the Create new file window enter the Client/File Name, the matter file number, and click **Create**.



c) Your created Vault file will appear at the top of the Active Files list. Open the file to continue.




# 4. Intake Tab

The Intake section is where you enter all information regarding your client. Should your client's information change easily update the information by returning to this section.

## 4.1 File Information

a) **Client Name** and **File number** are carried over to this section from step 4 above.

b) **Marital Status** – enter your client's marital status from the drop down.

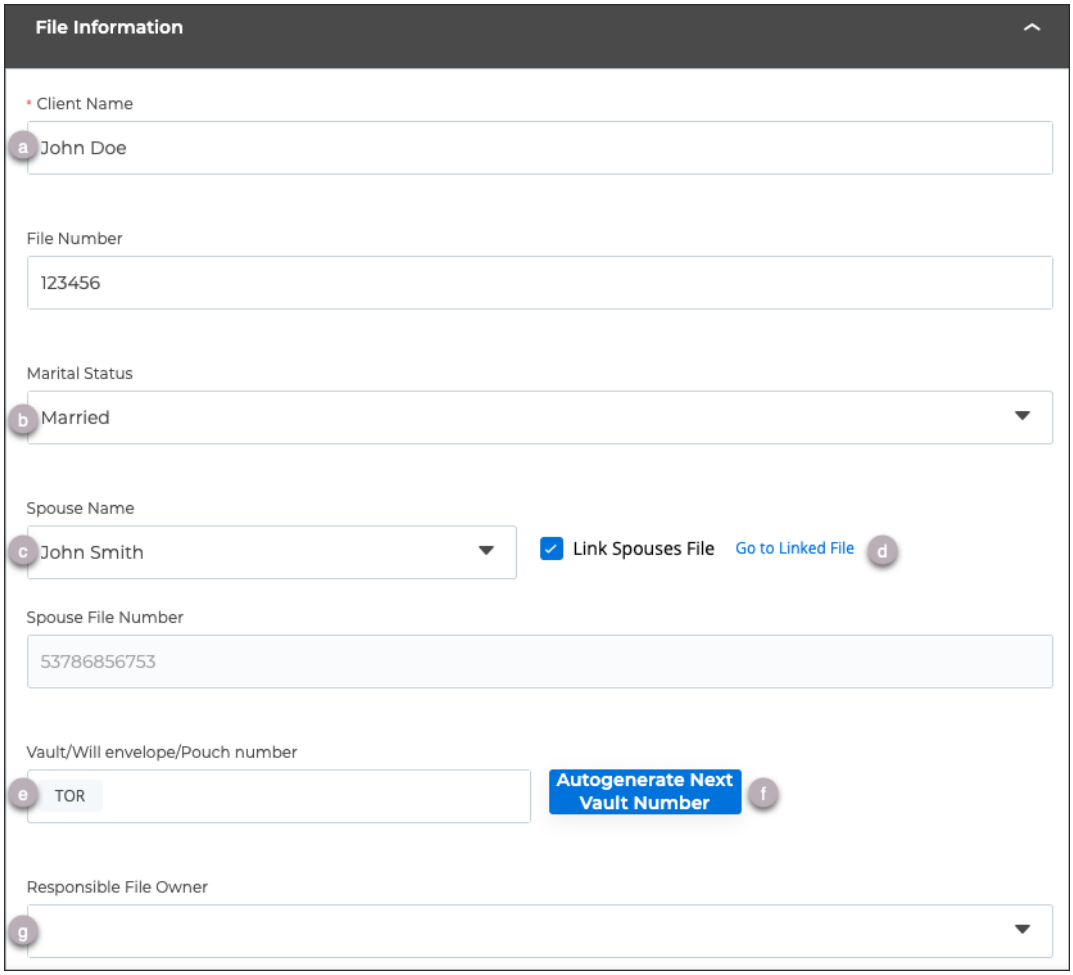
c) **Spousal Name and Spouse File Number** - If you select **Married** as the marital status, a Spousal Name and Spouse File Number field will appear. Enter the name of the Spouse in the Spouse Name field. If you have previously created the spouses file, their name will be displayed in a condensed list of matches. Select the correct spouse from the list and their name and file number will appear in the fields.

d) **Link spouses File** – Click **Link Spouses File** to link the spouses' files to one another. Once the files are linked, a Go to Linked File will appear in each spouse's file. If you click on **Go to Linked File**, the spouses file will open and vice versa.

e) **Vault/Will envelope/Pouch Number** – Enter the Vault/Will/Pouch number, if any.

f) **Autogenerate Next Vault Number** – If you have set up the Autogenerate Next Vault Number feature, click Autogenerate Next Vault Number and your number next available number will appear.

g) **Responsible File Owner** – Select the responsible lawyer from dropdown or enter the name of the lawyer manually. **NOTE:** Only names of lawyers who have been entered in your saved contacts will appear from the dropdown. Contact your admin to enter saved contact.




## 4.2 Client Information

a) **Name –** Enter your client's First Name, First Middle Name, if any, Second Middle Name, if any and Last Name. NOTE: only the First Name and Last Name are mandatory fields.

b) **Mailing Address** – Enter your client address manually or as you type a list of addresses will appear. Select your client's address from the list. **NOTE:** When you select your clients address from the list the City, State/Province, Zip/Postal Code and Country fields will be populated automatically.

c) **Date of Birth** – Enter your client's date of birth manually or select from the calendar icon.

d) **Place of Birth** – Enter place of birth manually.

e) **Date of Death** - Enter date of death manually or select from the calendar icon.

f) **Telephone Number** – Enter Telephone number.

g) **Email address** – Enter Email Address.

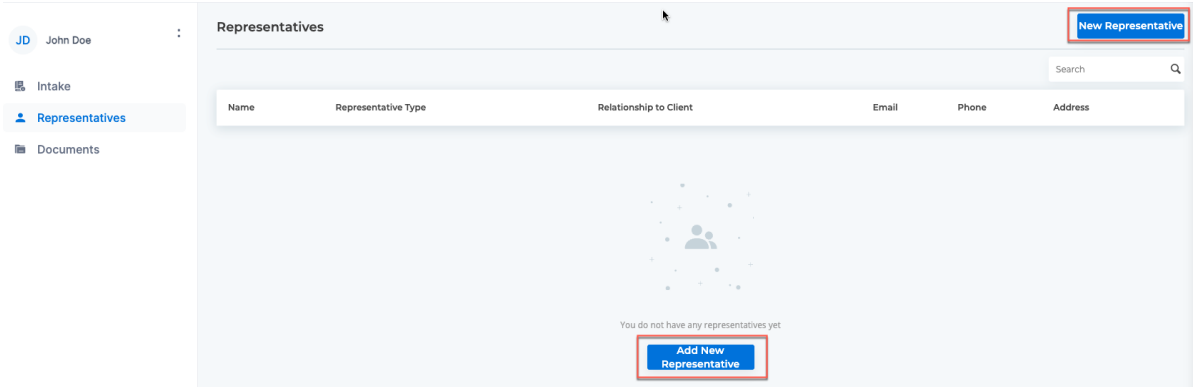
h) Click **Update** to save.

# 5. Representatives Tab

The Representative's Tab is where you add information about any individuals, organizations or charities associated with a document. i.e., Executor, Beneficiary, Attorney, Trustee etc.

## 5.1 Add New Representative

To add a representative, click either **New Representative** or **Add New Representative** (only if you have not added representatives yet).




## 5.2. New Representative Screen

a) **Representative Name** – enter the representatives Prefix, First Name, Middle Name (if any) and Last Name

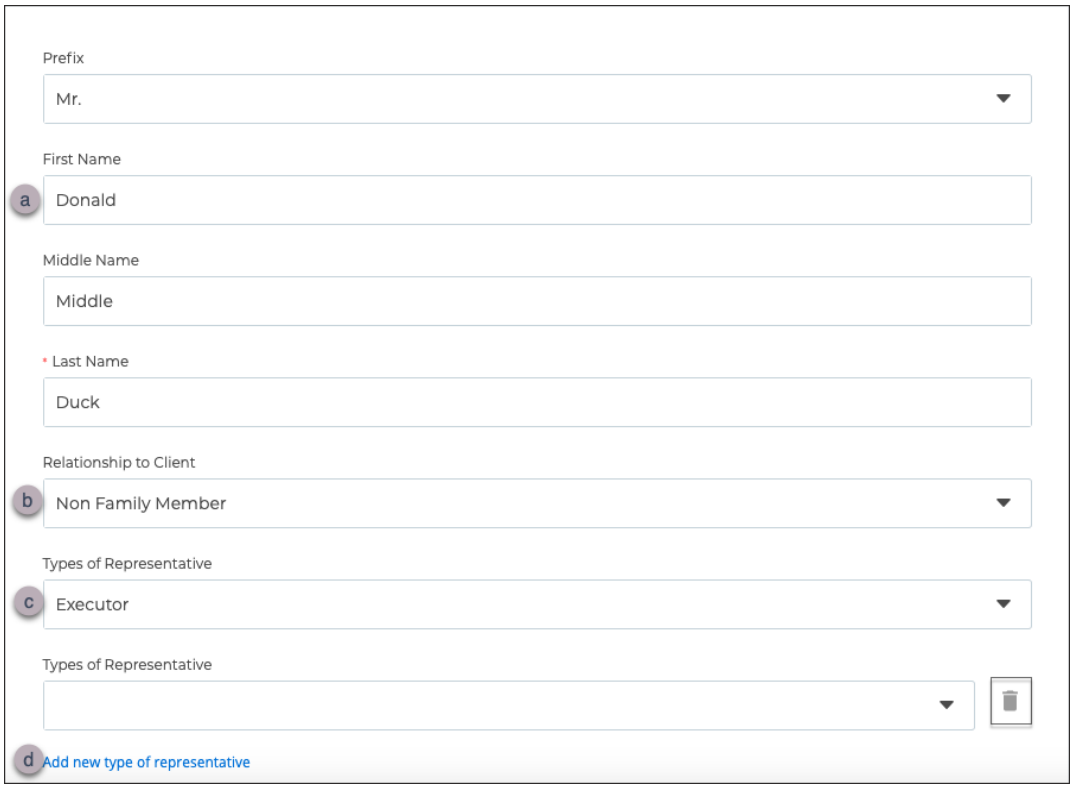
b) **Relationship to Client** – select the relationship to the client from the drop down, Family member, Non-Family Member, Trust, or Organization of Charity

- If **Family Member** selected – select Family Member Type from Drop down i.e., Husband, Wife, Son, Daughter etc.

- If **Organization or Charity** selected – enter the name of the Organization or Charity in the Organization/Charity Name field.

c) **Types of Representatives** – select a type of representative from the dropdown.

d) **Add new type of representative** link **–** When you click on the **Add New type of representative**, another **Types of Representatives** field will appear. Select a type of representative from the dropdown. NOTE: Continue to Add New Type of Representative fields as needed. You can delete any Type of Representative field by clicking on the trash can icon.



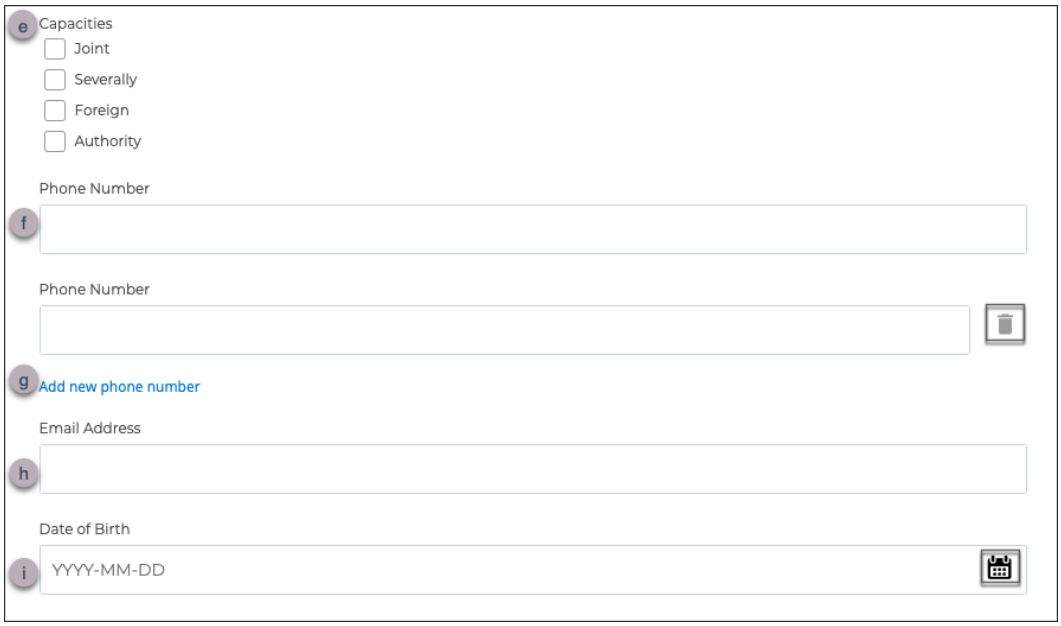

e) **Capacity** – check each capacity that applies (Joint, Severally, Foreign, Authority)

f) Phone Number – enter the representative's phone number.

g) **Add new phone number** link – Click **Add new phone number** to add an additional phone number.

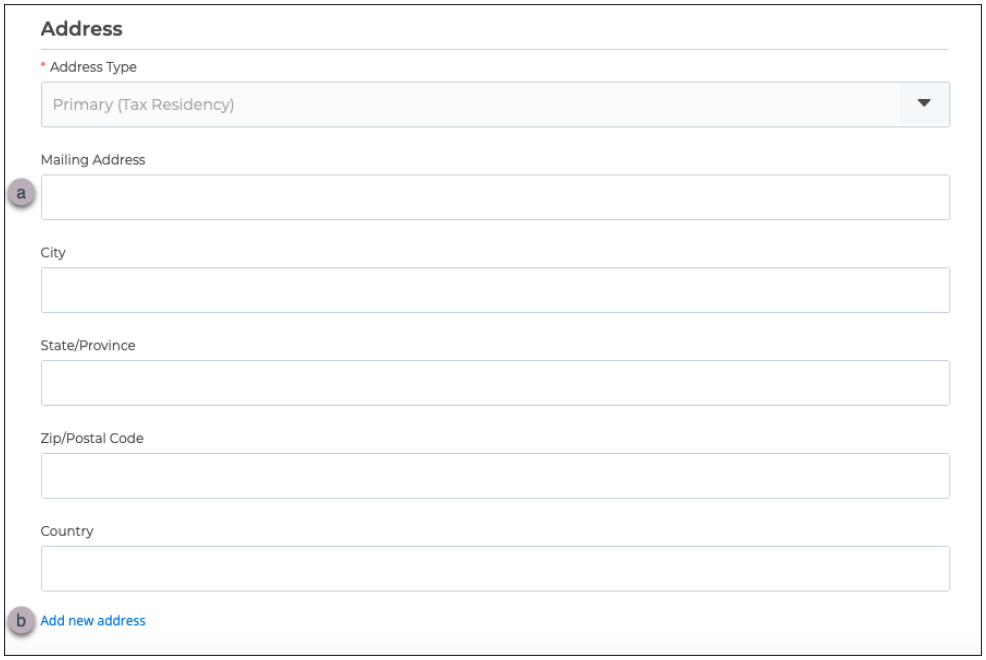
h) **Email Address** – enter the representative's email address.

i) **Date of Birth** – enter the representatives date of birth or select from the calendar.




i) **Address** - Enter the representatives address manually or as you type a list of addresses will appear. Select the representatives address from the list. **NOTE:** When you select the address from the list the City, State/Province, Zip/Postal Code and Country fields will be populated automatically.

j) **Add New Address** link – Click **Add New Address** link to add an additional address. NOTE: Select the address type from the dropdown (Mailing or Secondary)




k) Click **Save**

l) Click **New Representative** to add another representative. Repeat data entry.

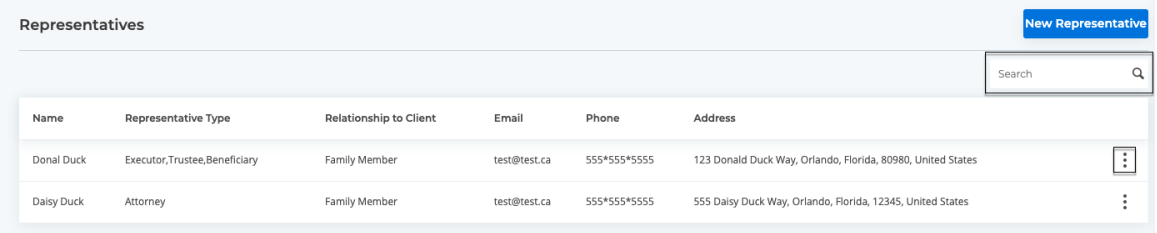
## 5.3 List of Representatives

All representatives will appear on the Representatives tab. Each representative's information will appear in the following columns if entered. Name, Representative Type, Relationship to Client, Email, Phone and Address.

a) **Edit** – to edit a representative click any representative or click on the eclipse next to the representative name.

b) **Delete** - click on the eclipse next to the representative name and select **Delete.** You will be presented with a message **Are you sure you want to remove this representative?** Click **Proceed** to remove and **No** to close the message.

c) **Search** – to for a representative by name enter a name in the search field.

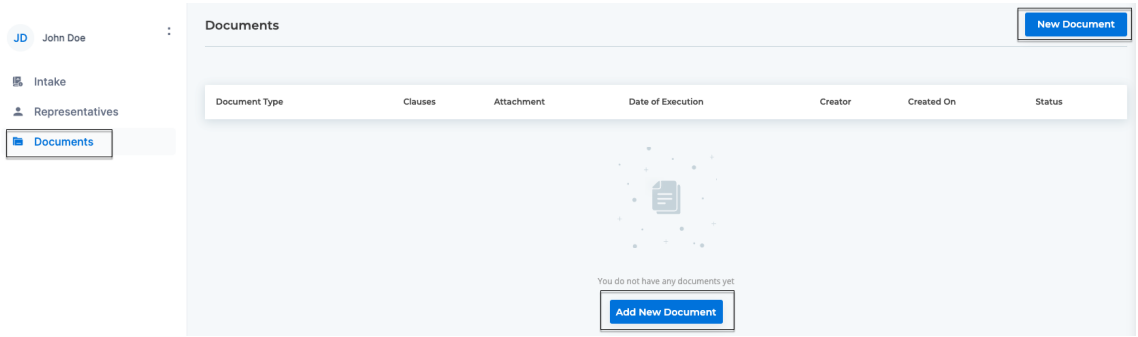



# 6. Documents Tab

The documents tab is where you add information about each estate planning document that you have prepared for your client. Know the location of each original document and if the document is current or revoked. Keep track of clauses in Wills to easily identify the Wills with a certain clause affected by legislative changes.

## 6.1. Add New Document

To add a new document, click either **New Document** or **Add New Document** (only if you have not added a document yet).




## 6.2 New Document Screen

a) **Document Type** – select a document type from the dropdown i.e. Will, POA, etc. **NOTE:** If you choose Other an Other Document Type Description field will appear. Manually type the document description.

b) **Number of Originals** – select the number of original documents from the dropdown.

c) **Location #** - select the location of the original document from the dropdown. Client, File, Vault, Other.

d) **Description** – the description field is where you can add notes for the location of the document.

**NOTE:** For Location # and Description, depending on the number of originals you select, you will have the same number of Location # and Description fields for each original.

e) **Release on Request** – if your client has indicated that the original document can be released on request, check the checkbox as an indicator.

f) **Description** – this description field is where you can add additional notes for this document.

g) **Date of Execution** – enter the date of execution manually or from the calendar.

h) **Current/Revoked** – select the radio button to indicate if this document is current or revoked . NOTE: If the client updates their Will or any other document in the future make sure you edit this document by indicating that it has been revoked and add another document for the new Will or document.

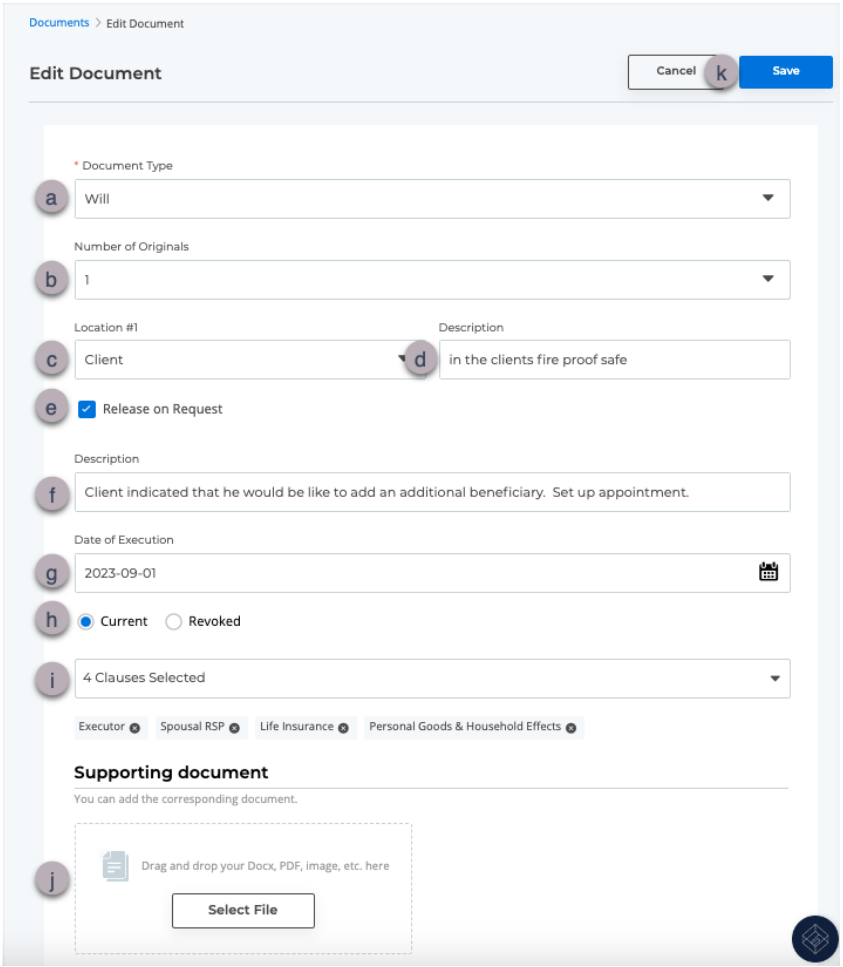
i) **Will Clauses** – the Will Clauses field allows you to select specific Will clauses from the dropdown. i.e., Executor, Spousal RSP, Life Insurance etc. **NOTE:** Click **Add New** clause and enter a brief description of the clause in the **Add new Clause** window. Select **Add** and your clause will be added to the dropdown list. Select **Cancel** to close the Add new Clause window.

j) Supporting Document – Add a copy of the executed document by dragging and dropping the document into the **Drag and drop your Docx, PDF, image, etc. here** box. You can also select the file by clicking **Select File** and selecting the document from any folder on your computer.

The benefit of having copies of the executed documents attached to the file allows you to have access to the document at any time of day or night. No need to pull the physical document from your Vault or storage to review the document allowing you to answer client questions promptly.

k) **Save** – Save the document by clicking **Save.**

l) Click **New Document** to add another document. Repeat data entry.

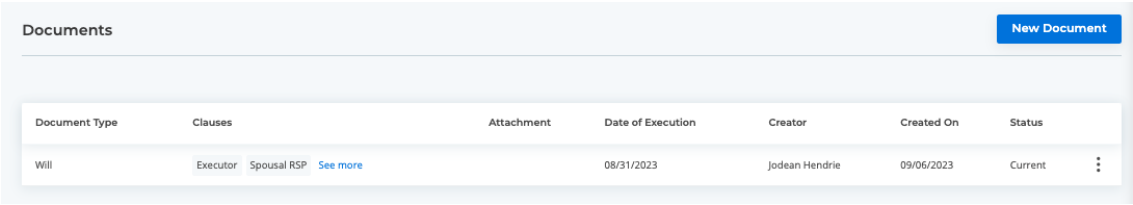



## 6.3. List of Documents

All Documents will appear on the Documents tab. Document information will appear in the following columns if entered. Document Type, Will Clauses, Attachment, Date of Execution, Creator, Created On, Status.

a) **Edit** – to edit a document click any document or click on the eclipse next to the document status.

b) **Delete** - click on the eclipse next to the document status and select **Delete.** You will be presented with a message **Are you sure you want to remove this document?** Click **Proceed** to remove and **No** to close the message.


Documents
New Document
Document Type
Clauses
Attachment
Date of Execution
Creator
Created On
Status
Will
Executor
Spousal RSP
See more
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Current