



BULK REGISTRATION GUIDE

Field	Description	Notes
<i>first_name</i>	The testator's first name.	Mandatory
<i>alt_first_name</i>	An alternate first name (e.g., an alternate spelling or other name they went by.)	Optional
<i>middle_name</i>	The testator's middle name(s).	Optional
<i>last_name</i>	The testator's surname.	Mandatory
<i>alt_last_name</i>	An alternate surname (e.g., a maiden name or alternate spelling).	Optional
<i>date_of_birth</i>	The testator's date of birth.	Optional. Must be in YYYY-MM-DD format.
<i>date_of_death</i>	The testator's date of death.	Optional. Must be in YYYY-MM-DD format.
<i>telephone_number</i>	The testator's phone number.	Optional
<i>email_address</i>	The testator's email address.	Optional
<i>spouse_name</i>	The full name of the testator's spouse.	Optional
<i>document_date</i>	The date the document was executed.	Optional. Must be in YYYY-MM-DD format.
<i>document_type</i>	Whether the document is a will, codicil, power of attorney, or other.	Mandatory. Must be one of either "Will", "Codicil", "POA", or "Other."
<i>document_type_details</i>	Additional details about the document type (e.g., Primary Will).	Optional
<i>storage_location</i>	Description of where the physical will is stored (e.g., at the firm's vault or where the client said they stored it).	Mandatory
<i>secondary_storage_location</i>	Additional details about the storage location (e.g., Picked up by the client on 2024-05-01).	Optional

When being **certain** is everything



Field	Description	Notes
<i>notes</i>	Any other information about the document, client, or file.	Optional
<i>address_line1</i>	Testator's current address.	Optional
<i>address_line2</i>	Testator's current address, second line.	Optional
<i>city</i>	Testator's current city of residence.	Optional
<i>province</i>	Testator's current province of residence.	Optional
<i>postal_code</i>	Testator's current postal code of residence.	Optional
<i>country</i>	Testator's current country of residence.	Optional
<i>prepared_by</i>	Name of the person, lawyer, or firm that prepared the document.	Optional
<i>file_id</i>	The lawyer or firm's internal file or record number.	Optional
<i>executors</i>	The name and contact information of the executor(s).	Optional
<i>witnesses</i>	The name(s) of witnesses.	Optional
<i>affidavit_of_execution</i>	Whether an affidavit of execution is included with the will/codicil.	Optional. Leave the field blank or enter Yes or No.
<i>probated</i>	Whether the will was probated.	Optional. Leave the field blank or enter Yes or No.

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