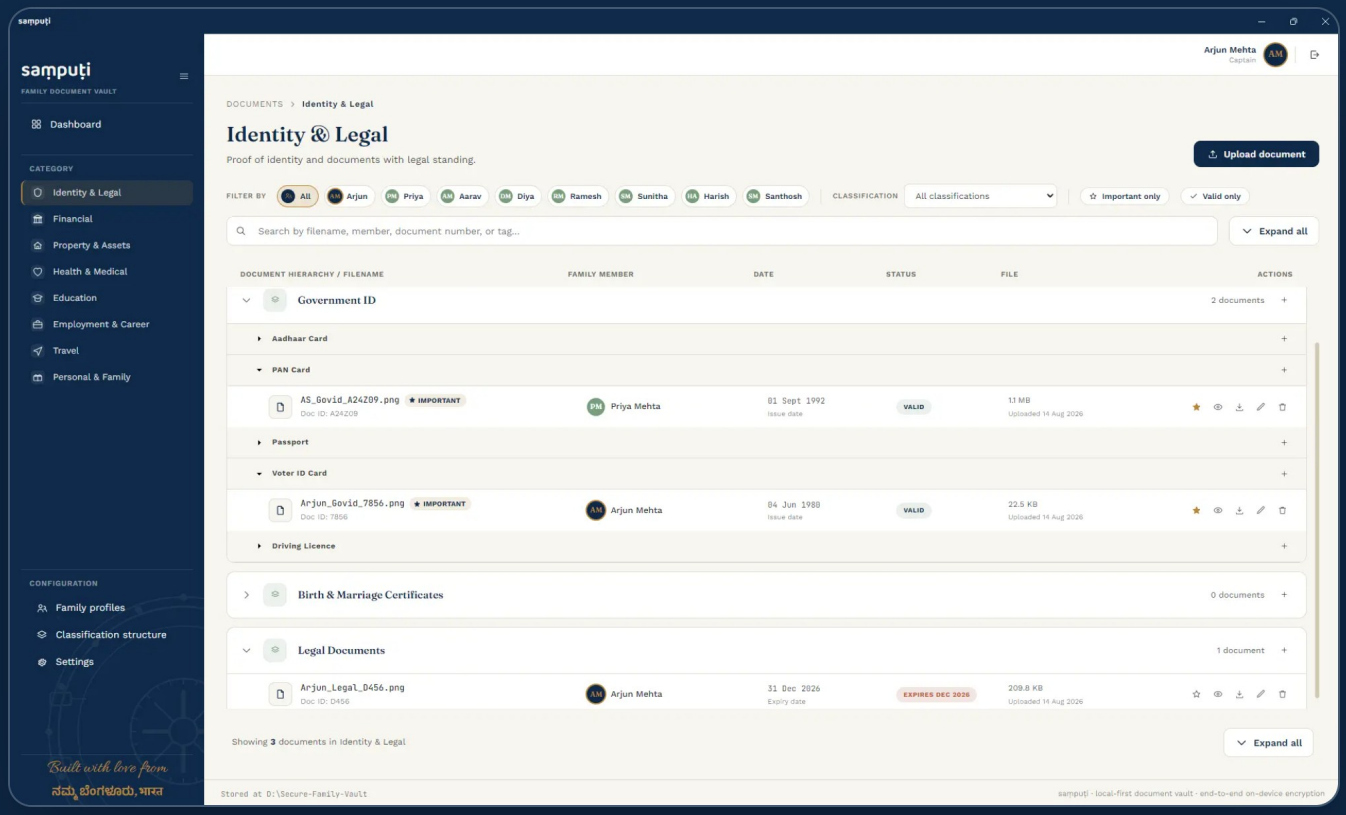
saṃpuṭi
A FAMILY DOCUMENT VAULT

by **Samputi Labs**

USAGE GUIDE

Your family vault, *set up in ten steps.*

A walkthrough for setting up saṃpuṭi for your family the first time — from activating your product to the habits that keep it useful for years.



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02 Set your password
03 Sign in
04 Configure settings
05 Organize your vault
06 Set up your family
07 Upload a document
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09 Customize your dashboard
10 Habits worth building

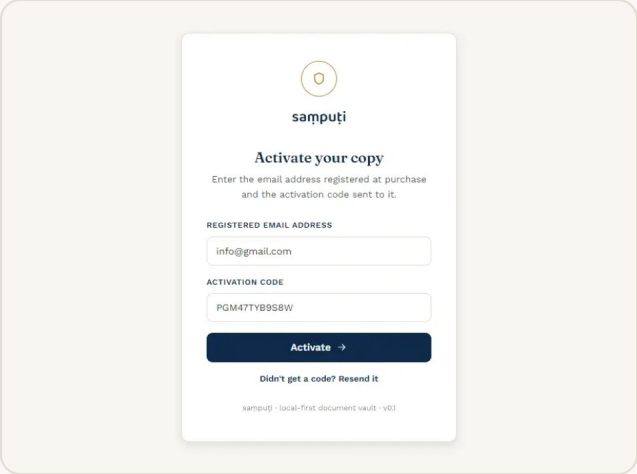
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STEP 1 OF 10

1 Activate your product

Turn your purchase into a working saṃputi on this computer.

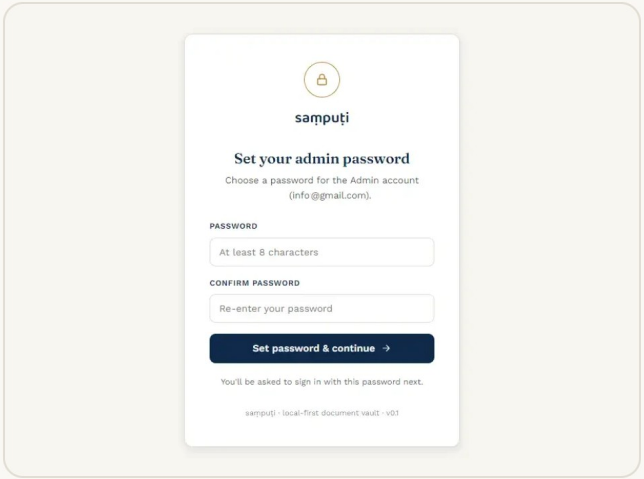


- Enter the email address registered at purchase and the activation code sent to it.
- Didn't get the code? Use **Resend it** on the same screen.
- Each activation is tied to the install it was done on — keep your code safe.

STEP 2 OF 10

2 Set your password

Create the password that protects your vault.

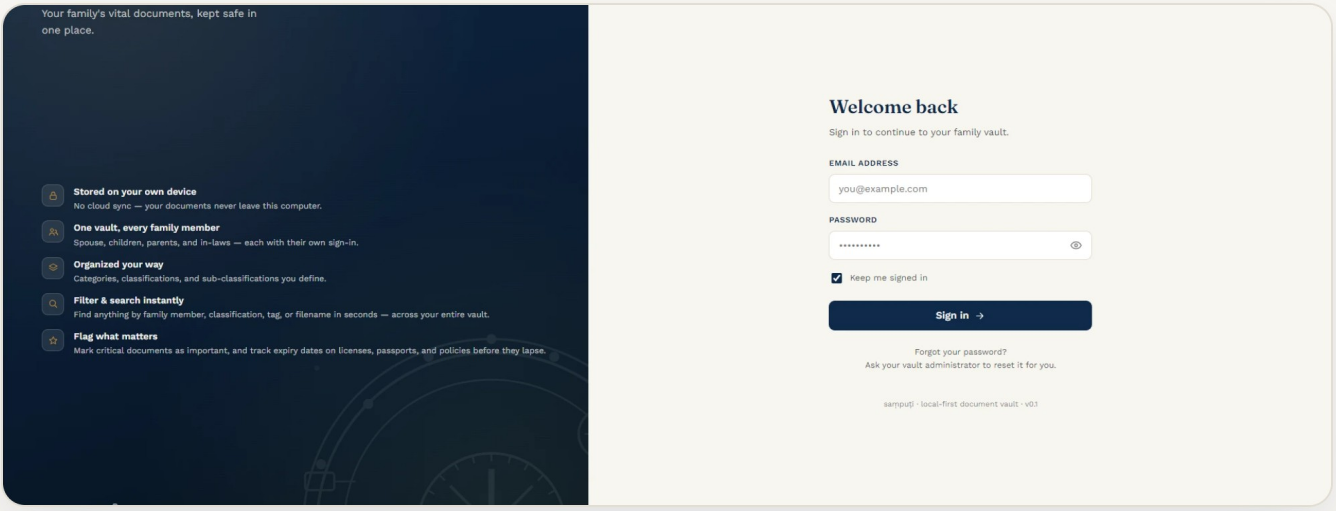


- Right after activation, set a password for the Admin account — the email registered at purchase.
- Use at least 8 characters, and enter it twice to confirm.
- You'll sign in with this password next.

STEP 3 OF 10

3 Sign in

Each family member signs in with their own email and password.



- The **Captain** — the primary account holder — sets up everyone else's credentials.

Tip: use "Keep me signed in" only on a personal, trusted device.

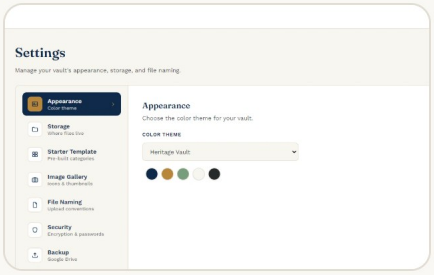
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STEP 4 OF 10

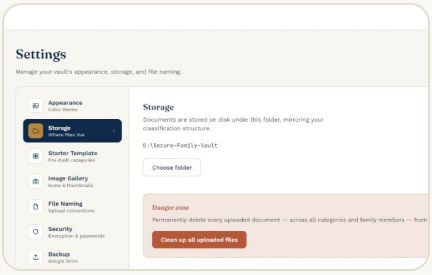
4 Configure settings

The one-time setup worth doing early.

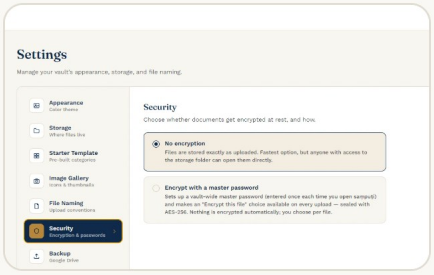
- Appearance, Storage, Image Gallery, File Naming, Security and Backup all live under **Settings**.
- None of it is permanent — but decide **Security** and **Storage** early, since changing them later affects how existing documents behave.



Appearance



Storage

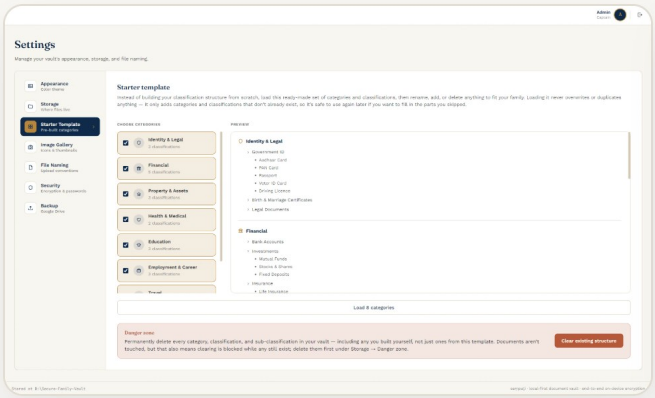


Security

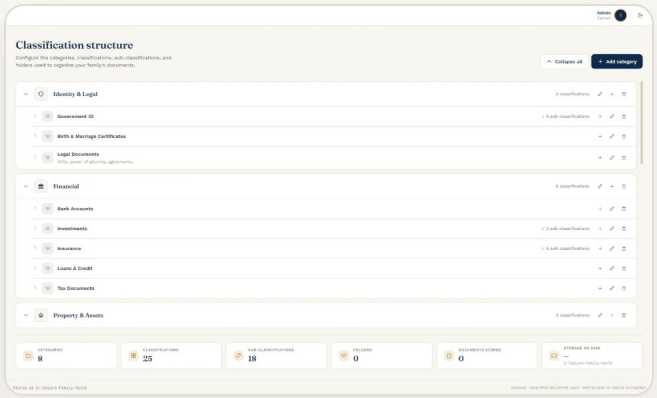
STEP 5 OF 10

5 Organize your vault

Build the category structure your family's documents will actually live in.



Fastest path: load the Starter Template for a ready-made set of categories and classifications.



Or build it yourself: Add category, then classifications and sub-classifications underneath.

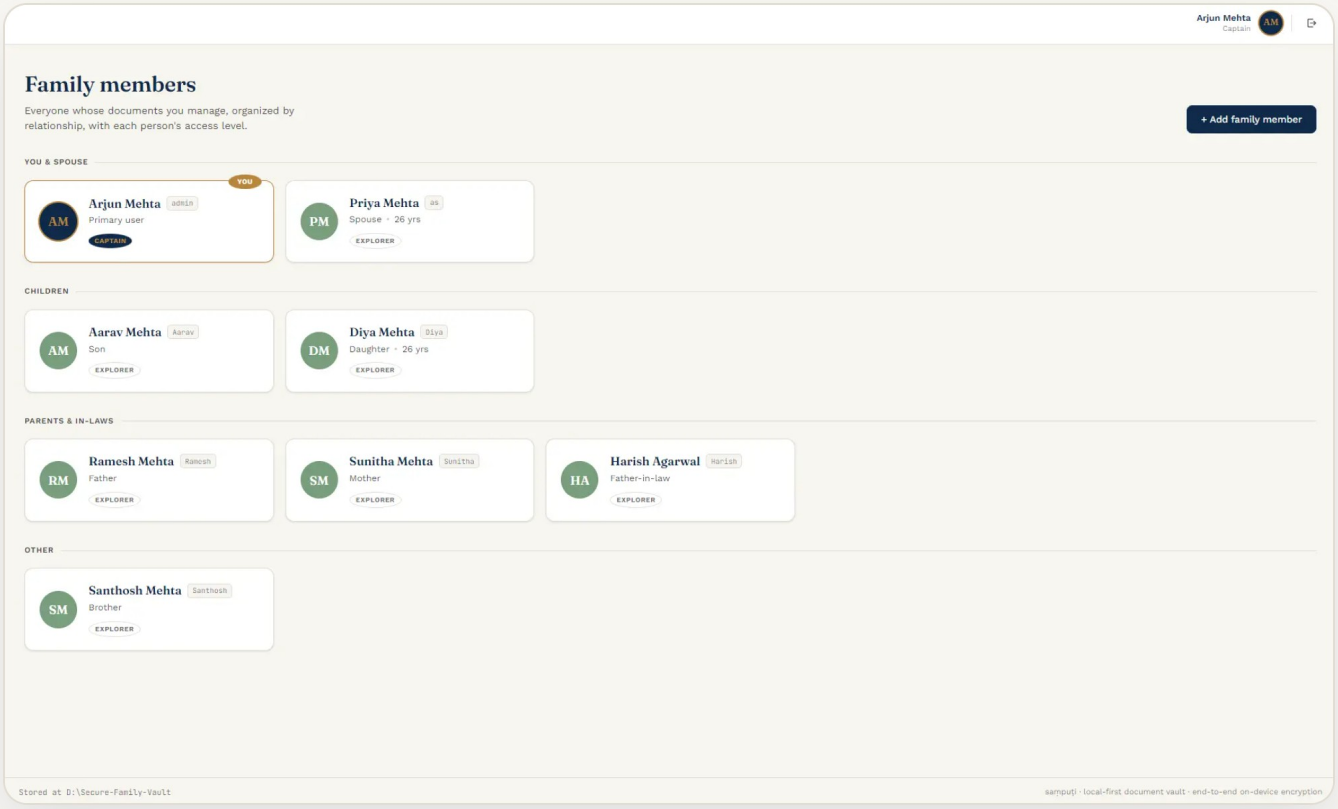
Either way: rename, add, reorder or delete anything afterward. Nothing here is permanent.

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STEP 6 OF 10

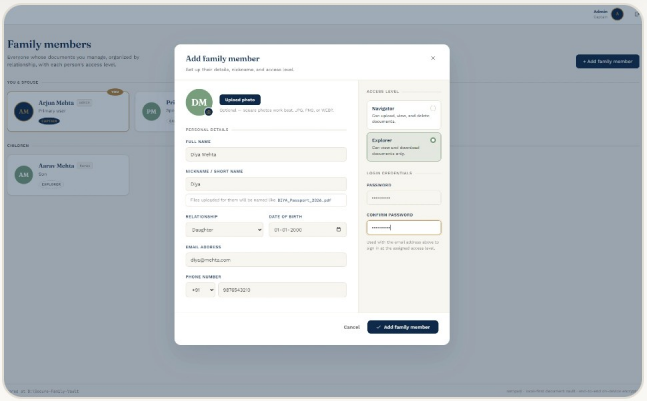
6 Set up your family

Add every family member whose documents you'll be managing.



- From **Family profiles**, add each person: name, nickname, relationship, date of birth, contact info and access level.
- **Nicknames matter** — they become the filename prefix for every document that person owns, e.g. DIYA_Passport_2026.pdf.

Worth knowing: changing a nickname later doesn't rename files already uploaded under the old one — decide nicknames before uploading in bulk.



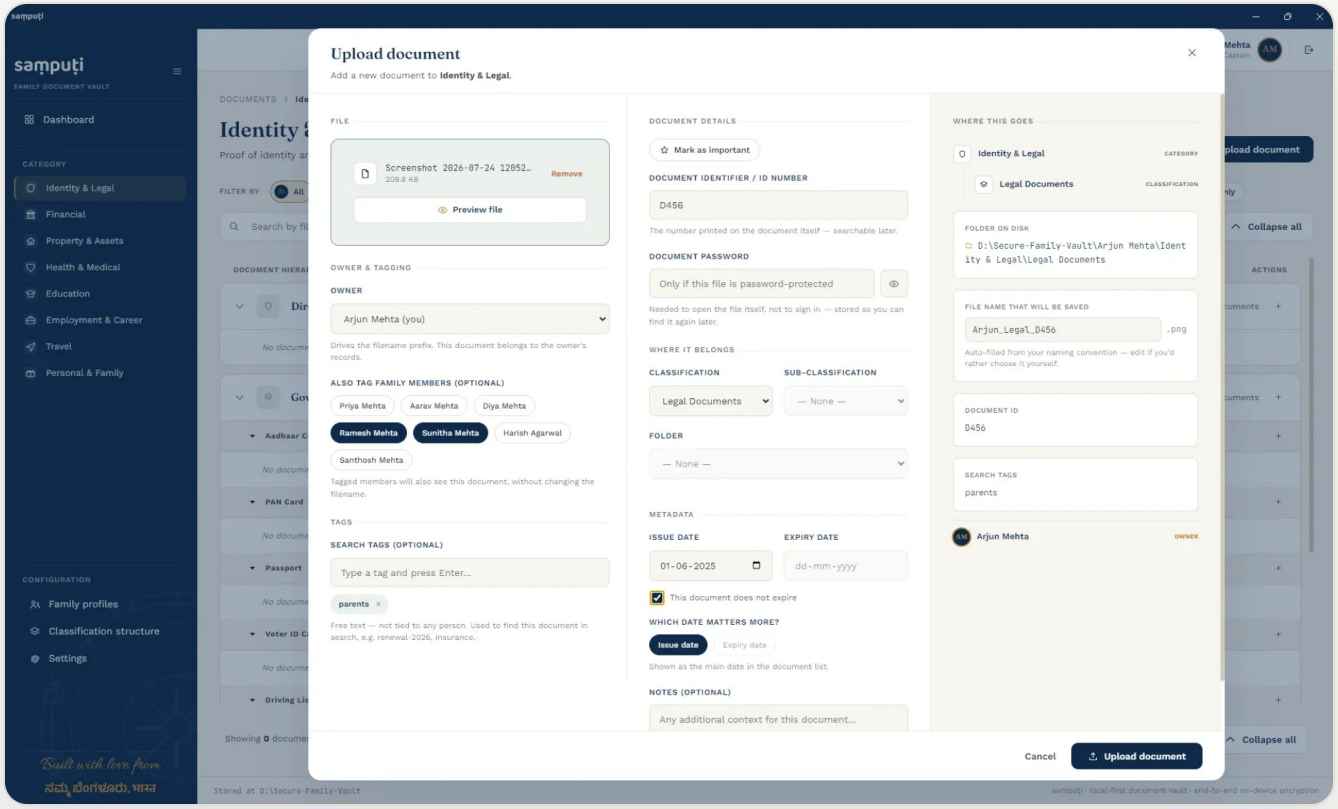
CAPTAIN	Primary account holder
NAVIGATOR	Anyone who should upload
EXPLORER	Anyone who should only view

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STEP 7 OF 10

7 Upload your first document

Get a real document into the vault, properly tagged. Open a category or classification, then choose **Upload document.**



a **Assign an owner**
This drives the filename. Optionally tag others who should also see it.

b **Add the details**
Document ID, issue and expiry dates, and any search tags.

c **Mark it important**
If it matters, flag it so it surfaces in filters and on the dashboard.

d **Check the preview**
Confirm the live filename and folder before you upload.

EXAMPLE · WHAT GETS SAVED

Folder	`D:\Secure-Family-Vault\Arjun Mehta\Identity & Legal\Legal Documents`
Filename	`Arjun_Legal_D456.png`

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STEP 8 OF 10

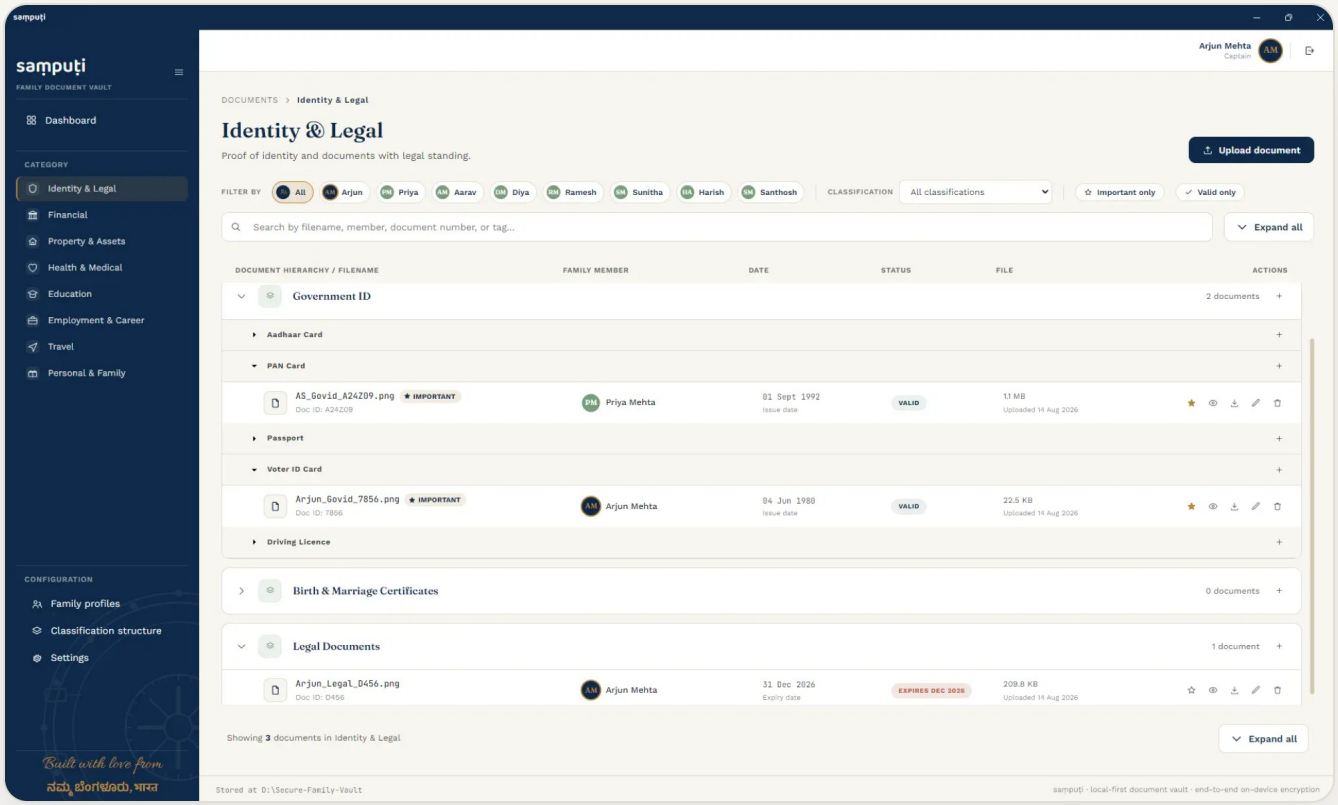
8 Find anything fast

The payoff for tagging things properly in step 7.

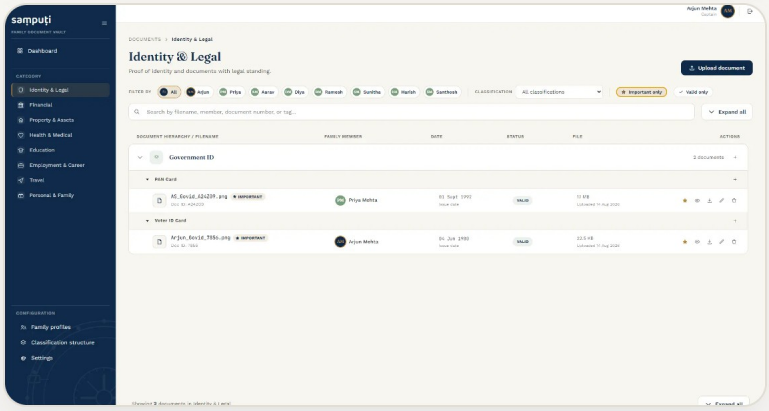
Filter
Use the filter bar to narrow by family member or classification.

Toggle
Important only or Valid only cuts straight to what matters.

Search
Filenames, document numbers and tags are all indexed together.



Filtered document list — owner, date, status and file size at a glance.



Important only
One click narrows the vault to the documents you've flagged — the papers you reach for first.

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STEP 9 OF 10

9 Customize your dashboard

Make the landing screen show what actually matters to you.

Use **Customize dashboard** to choose which widgets appear. The overview stats and category breakdown are always there for a quick pulse-check.

WIDGETS YOU CHOOSE

- Needs attention
- Recent uploads
- Important documents
- and more

ALWAYS SHOWN

- Overview stats
- Category breakdown

STEP 10 OF 10

10 A few habits worth building

Small things that pay off over months, not minutes.

Decide nicknames before bulk uploads

Filenames are generated once — changing a nickname later won't rename existing files.

Tag a little more generously

Tags cost nothing to add and save real time searching six months from now.

Check "Needs attention" monthly

It only helps if someone looks — put a reminder on your own calendar, not just saṃputi's.

Decide on encryption early

Turning encryption on later doesn't encrypt documents already uploaded.

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Every vital document, *in its place.*

66 classifications across 8 categories, up to 4 levels deep. Short codes feed into the file names saṃputi generates.

Category **Branch** Document type ADHR Short code – No short code yet

Identity & Legal
9 classifications · GOV_ID

- **Government ID** 5 GOV_ID
  - Aadhaar Card ADHR
  - PAN Card PAN
  - Passport PSPRT
  - Voter ID Card ECT_ID
  - Driving Licence DRVN_LCN
- Birth & Marriage Certificates CERT
- Legal Documents LEGAL
- Personal Profile PRF

Property & Assets
9 classifications · PROP

- **Real Estate** 3 PROP
  - Sale Deed DEED
  - Property Tax Receipts PRP_TAX
  - Registration Documents –
- **Vehicles** 2 VHC
  - Two Wheelers TWHEL
  - Four Wheelers FWHEL
- Utilities UTIL
- Commodities - Gold, Silver others ASTS

Health & Medical
5 classifications · MED

- **Medical Records** 3 MEDREC
  - Prescriptions PRESCP
  - Diagnostics - Lab Reports DIAG
  - Vaccination Records VACC
- Medical History MEDHX

Financial
22 classifications · FIN

- Bank Accounts BNK
- Demat Accounts DEMAT
- **Investments** 4 INV
  - Mutual Funds MF
  - Stocks & Shares EQT
  - **Debt Investments - RDs, Fixed De...** 2 DBT
    - Bonds BND
    - Public Provident Funds PPF
  - EPF & NPS EPNPS
- **Insurance** 4 INS
  - Life Insurance LFINS
  - Health Insurance HLTINS
  - Vehicle Insurance VHINS
  - Home Insurance HMINS
- **Loans & Credits** 4 LOAN
  - Home Loan HMLOAN
  - Car Loan CARLN
  - Gold Loan GLDLN
  - Personal Loan PERLN
- **Tax Documents** 2 TAX
  - Form - 16 FRM16
  - ITR - Filings ITR

Education
3 classifications · EDU

- Certificates & Degrees DEGREE
- Mark Sheets & Transcripts MARKS
- School & College Records SCHOOL

Employment & Career
4 classifications · EMP

- Offer & Appointment Letters OFFER
- **Payslips** 1 PAY
  - AY 20XX-YY PAYSLIP
- Experience & Relieving Letters EXP

Travel
3 classifications · TRVL

- Visa Documents VISA
- Travel Insurance TINS
- Bookings & Itineraries TRIP

Personal & Family
3 classifications · PERSONAL

- Photos & Memories PHOTO
- Family Events EVENT
- Miscellaneous MISC

EXAMPLE

Identity & Legal › Government ID › Aadhaar Card

Aadhaar Card

ADHR Document type

Aadhaar issued by UIDAI. Accepted proof of identity and address.

FILE NAME IT PRODUCES

Profile · Classification · Doc identifier

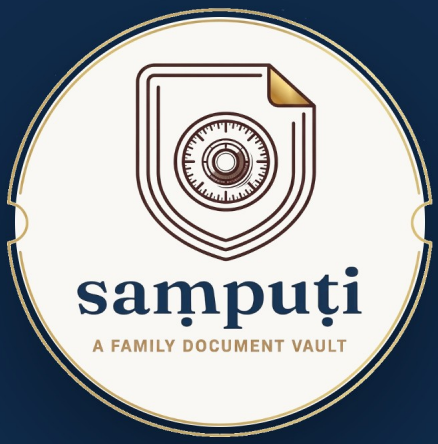
`ARJ_GOV_ID_1234`

Inherited from Identity & Legal

Sample family member Arjun, profile short name ARJ. 1234 is a sample document ID.

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Your setup *checklist*

Tick each one off as you go.

- [ ] 01 Activate your product
- [ ] 02 Set your admin password
- [ ] 03 Sign in
- [ ] 04 Decide Security and Storage
- [ ] 05 Load or build your categories
- [ ] 06 Add family, settle nicknames
- [ ] 07 Upload your first document
- [ ] 08 Try a filter and a search
- [ ] 09 Pick your dashboard widgets
- [ ] 10 Set a monthly reminder

Looking for a specific feature?

samputilabs.com/family-vault →

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