Follow these steps to reserve a sequential group of order numbers for future use.

1. Click the **New Order** drop-down arrow > **Reserve Order Numbers**
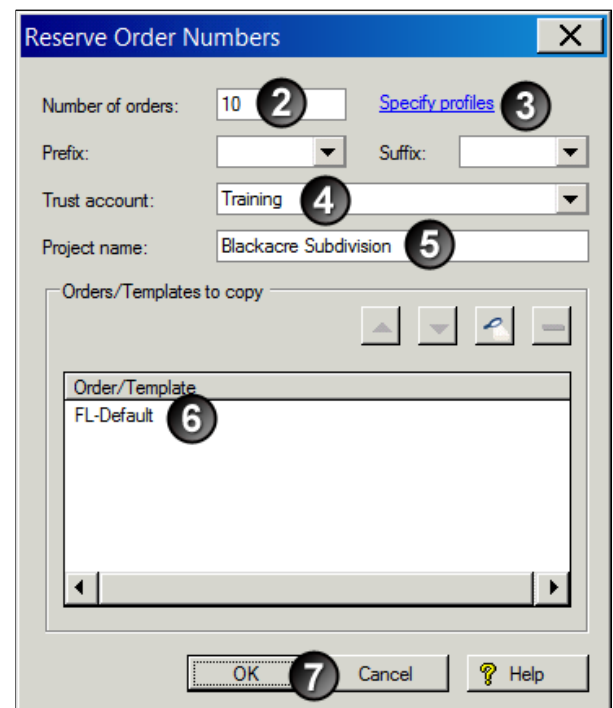

2. In the **Number of orders** field, enter the number of orders you wish to reserve

3. If applicable, click the **Specify profiles** link to designate more than one profile (multiple offices/departments)

4. Verify the **Trust** account

5. If applicable, in the **Project Name** field, enter a reference for all orders being reserved

   NOTE: You can search by this reference.

6. Search for and/or remove the appropriate template(s) to apply to this group of orders

   NOTE: oOrders/templates can also be applied later when the reserved order is selected for use.
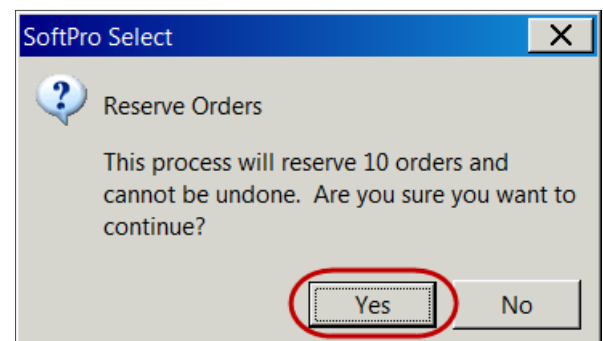
7. Click **OK**

8. Click **Yes** to confirm reserving these order numbers
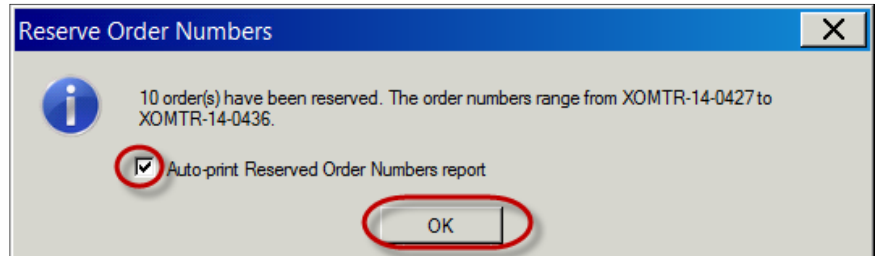
You have the option of printing the Reserved Order Numbers report as a quick reference of the range of order numbers.
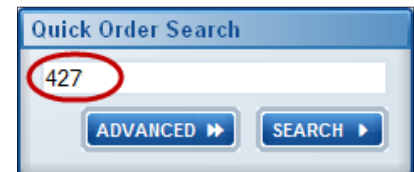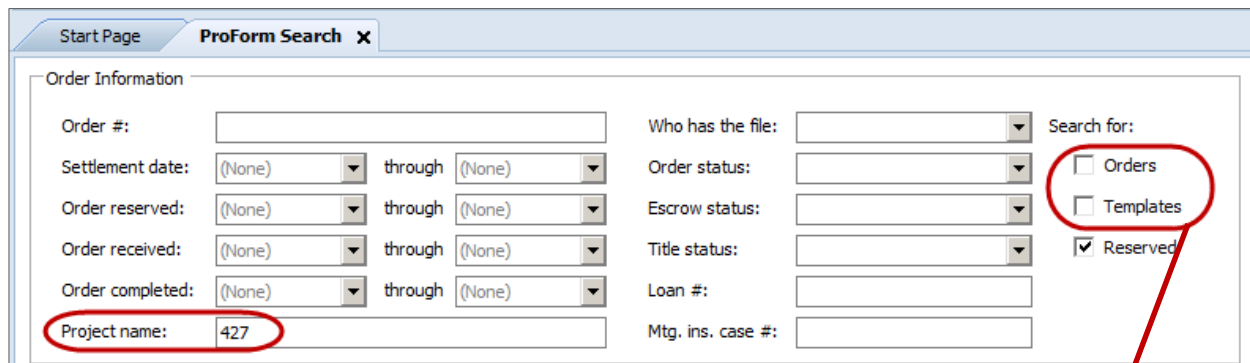

9. If you don't want the report, uncheck **Auto-print Reserved Order Numbers report**; click **OK**

Searching for Reserved Orders

There are two ways to search for Reserved Order Numbers.

〉 (Using the numbers from the Reserved Order Numbers report) in the **Quick Order Search**, enter a portion of an order number

〉 In the **Advanced Search**, enter a portion of the **Project name**

Uncheck **Orders** and **Templates** so that the results yield only reserved order numbers.