Reference Guide

Version 3.0 March 2021

Virtual Minute Books in Fast Company[®]



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1. Introduction

The Virtual Minute Book is our most innovative feature in Fast Company yet.

The Virtual Minute Book feature provides the following benefits (among others) to your firm and your clients:

- Maintain and share any Minute Book virtually with your client through <u>UnityC</u>.
- Once the Virtual Minute Book has been shared with your client, the client will be able to access it on any computer, tablet, or phone at any time of the day or night.
- Access to the Virtual Minute Book by any of your internal staff without having to locate the physical Minute Book or file.
- Update the Virtual Minute Book by adding any document, resolution or updated register easily.
- Reduce or eliminate costly physical Minute Book storage and repurpose expensive office space for activities that increase billings.
- Document delivery sharing through UnityC is completely secure, unlike email.
- Control access rights to share specific documents with accountants, bankers, or other parties easily.
 - The Virtual Minute Book is absolutely **FREE** to use within Fast Company.

2. Getting Started

2.1 Upgrade to Version 22.3C or Higher

Your firm must be on version 22.3C or higher in order to start using the many benefits of Virtual Minute Books.

2.2 Validate Records

In order to use Virtual Minute Books, your records must be validated. If your record is not validated and you try to access the Virtual Minute Book, you will see the following message:



Pay-per-Use Status: Not validated 🔐 📛 Accounting No. TEST	
Error	×
Validation for this record has expired. Functions are restricted to data-entry only. Document production and access to the Virtual Minute book are restricted until the record is revalidated. To revalidate this record, click the "lock" icon at the top of Topic "A".	
ок	

You will need to go to Tab A and validate the record in order to use the Virtual Minute Book functionality.

2.3 Accept the EULA

The DoProcess End User License Agreement (<u>EULA</u>) has been updated to include Unity and the UnityC functionality required for Virtual Minute Books. The first time you click on <u>Upload</u> or <u>Upload VMB</u>, the EULA window will appear. To accept the EULA check **I agree** and then click the **Accept** button. You are now ready to start using the Virtual Minute Book functionality.



123 Front Street West, Suite 700, Toronto, ON M5J 2M2 2416.322.6111 21.866.367.7648 📾 416.322.6106 🔤 inquiries@doprocess.com



3. Banner on Tab A

Once you have opened a new or existing record for the first time after upgrading, you will be presented with the following banner on Tab A. The banner provides quick access to a link where you can learn more about Virtual Minute Books by clicking <u>Learn More</u>. To close this banner, click on the **X**. This banner will appear again on the next launch of Fast Company. To no longer see this banner, click **No, thanks**. If you would like to see this banner again, click on the top menu bar.



4. Configure Virtual Minute Book Categories

The Virtual Minute Book works with default categories. These categories represent the individual tabs in a Minute Book. We have provided you with a set of defined categories.

It is recommended that you review these categories before you start using the Virtual Minute Book to ensure that the category names match the individual tabs that your firm currently uses for your Minute Books. Taking the time to review and set up your default categories will ensure that each record will have your desired categories available.

To change or edit these categories, log in as the **Default user**. On the **Configuration** page you will see the **Configure Virtual Minute Book** option.

Unier Settup	Secure Payment Manager	Temperature & Filings Data
Addividiately pow configuration settings	Lipdate Paymentints / Addied/delete credit cards	Ediffregistratione & Filege Catabas
De Principal Accused Infe	(pandabilis	Jan Rizten
Edit Waar Do Process Account No.	Adicate various program features	Chied Tax Ratio
Civil Obgrade	Automated Capital Record	Tuntione
Check forstownload upgrades	Predefined Authorpet Capital Record	Lock up Trust Ledger
Greate O'S Client	Spine Geisticare Text.	Oter
Increases severil of program on a network installation	Create Share Celtificate Text.file	Other Configuration
Contatuous Managamente :	Configure Drivenado Recordo	User-Debred Fales
Ponythoar databases as instructed by Do Process	Principal Records cantigurative	User Delived Faxes
Access Groups	Statumient of Account	Bulk Reconcidence of Nectoria
Owline server Access Groups	Statement of Acciliant	Ran list of Records to be Re- validated
Cordigues Wheel Means Block		
Entry Vetual Manufa Esset: Categories		

Click **Configure Virtual Minute Book**. The **Virtual Minute Book Categories** window will appear with all preset categories. You are able to **Edit, Delete, Add** and **Reset** these categories (with the exception of the Registers categories which appear in pale grey). The Registers categories have extra functionality (explained in <u>Section 7</u> below) and therefore cannot be configured.



Corporate Submary	Cat.
Acticles of Incorporation (and any other Articles of the company)	Delete
By lans of the company	Att
Minutes of the directors and strateholders meetings/resolutions	Read
Desctors Regulae	
Officers Register	
Nerder's Regular	
Darsholders Register	
Durshsiden Ladgeri	
Dumenthip interest in land	
Shara Transfer Regular	
there Gertification	
Transformed Shares Cartification	
Individual with Significant Cantrol Register	
A copy of all statutory forms required to be filed	
Shareholders Agreements	

4.1 Edit a Category

To edit a category, highlight the Category and click **Edit**. The **Edit Category** window will appear. Change the category name by typing a new category. You are also able to add a watermark to the documents in a category. If your firm would prefer to present the Virtual Minute Book as a draft, type in "Draft" and a watermark will appear on all documents added to that category. You are able to apply watermarks to any category, including the registers, by editing each category and adding the desired watermark. Click **OK** to save your changes.

Name of Category:		
Corporate Information	Summary	
Apply following water	rmark to documents:	
Dar H		

4.2 Delete a Category

To delete a category, highlight the category to be deleted and click **Delete**. The message shown below will appear. Confirm the deletion by clicking **Yes**. **X**.



Deleting Category	×
The category "Corporate Information Summary" will be del Are you sure?	eted.
<u>Y</u> es <u>N</u> o	

4.3 Add a Category

To add a category, highlight where you wish the category to appear and click **Add**. The following **Add a Category** window will appear. Enter the **Name of Category** and give it a watermark if you wish. Click **OK** and your category will be added.

Add a Categor	y J	- 0
Name of Category		
New Category		
Apply following waterma	rk ta documenta:	
	1	

4.4 Reset the Categories

To reset the categories back to default, click ${\bf Reset}$ and the message shown below will appear. Click ${\bf Yes}$ to confirm the reset .

Reset	Categorie	es	×				
Are you su	Are you sure you want reset categories to default value						
	<u>Y</u> es	No					

4.5 Reorganize the Categories

To reorganize the categories, highlight the category you wish to move and drag and drop it to the desired location.

4.6 Save Changes to the Categories

Once you have finished configuring your Virtual Minute Book categories, click **OK** to save your changes.

Virtual Minute Book categories will appear in your new records once you have completed this setup.



5. Accessing the Virtual Minute Book Window

You can access the new Virtual Minute Book window by clicking *Virtual Minute Book* in the **Document Production** tab, or clicking **I** on the top menu bar.

Virtual Minu	te Bo	ok 🛛							
Categories	1. C	v	FileMater	Decement Securities	Effective Date	Last Woshilitation Date	\$25	\mathcal{H}	(ϕ)
		1							
Articles of Incorporation (Articles at the company)	andlary	for							
ty laws of the company									
Wrutes of the directors a chareholders meetings?	nd ecolution	w							
Directors Regimer									
Officers Reposer									
Aersbere Repilder									
Shareholders Auguster									
Shareholders Ledgers									
Service of the servic	r								
lihere Register		4							
Let .			0am - 54	Add Differ		Director VND			
Delete	_		dt Halber	in the last					
A41.	_		" onityc			1000			
							5	Ces.	_

6. Working with the Virtual Minute Book Window

The Virtual Minute Book window is where you set up the Virtual Minute Book before it can be created/uploaded/shared using UnityC. From this window you have the ability to **Add, Open, Edit, Delete,** and **Move** documents in categories. You also have the ability to **Edit, Delete** and **Add** one-off registers for an individual record.



	FileNane	Oversent Description	Difective Date	Last Medification Data	Su	1. 1.4
orophida Summary						
fictes of incorporation (and any other fictes of the company)						
y-laws of the company						
Index of the directors and hareholders meetingsitesolutions						
rectore Register						
ficers Register						
embers Register						
tereholders Register						
hareholders Ledgers						
wnership interest in rand						
hare Transfer Register						
	200	Add SP Feet	Distanti I	Create VVE		
Edit			and the second se			
Est Deleta	di UnibuC	Hannah Ball	in the second state	distant.		

6.1 Add a Document

To add documents to each category, highlight the category and click **Add** or **DP Filer**.

Adding documents with **Add** will open a File Explorer window in the record's Doc folder. Highlight the document to be added to the category. Double-click the document or click **Open**.

				1 convinter
Organida . Name folde	5		30	• 🗉 🛛
📥 OneDrive 🌱	Name	Date modified	Type .	Size
This PC	OnCorp	10/0/3020 1/31 PM	Fileholder	
The and the second	b.Dtt	16/16/2020 1-63 PM	File follows	
- so ogeca	VMB	15/16/2520 3-04 PM	File fishies	
Deittop	201006A.BL1	10/0/2020 1/38 PW	ELS File	107 83
Documenta	201008A.BL2	15/8/2020 1-38 PM	BL2 File	31.43
Downloads	201006A.MB	10/0/2020 1:37 PW	MØ File	17 83
A Music	201008A.0TH	10/8/2020 3:3E FM	UTH FM	12.63
Fictures				
Videoc				
🔛 Local Dek (C) 💚	¢			
Filen	eme: 201008A-07H	· 4	ALTING 2525	-

Adding documents with **DP Filer** will open the DP Filer. You can add documents to the Virtual Minute Book in two ways with the DP Filer:

1. Click once on the document and then click **Add** or drag and drop the document from the DP Filer to the white space beside the category.

Double-clicking the document in the DP Filer will open the document.



DP Filer	- □ ? ×
<u>File D M</u>	
c:\fastco\docs\vmbde	mo
FILE NAME	DESCRIPTION
w 201008a.bl1	by-law no. 1 (general business by-law) e
201008a.bl2	by-law no. 2 (borrowing by-law) effective
201008a.mb	minute book documents effective Oct 08
201008a.oth	miscellaneous non-minute book docum
	Add Close

The following message appears: Are you sure you want to add 1 file(s) to category 'Corporate Summary'? Click Yes to add the file.

Add	ing Files		×
Are you "Corpo	u sure you want to prate Summary"?	o add 1 file(s) to categ	ory
	<u>Y</u> es	No	

If you are adding a Word document, it will be automatically converted to PDF. When the document has been added, the **Document Information** window will appear where you enter a description and an effective date. If you enter the Document Description and Effective Date, this information will appear on the Table of Contents when the Virtual Minute Book is created. If you do not enter the Document Description and Effective Date, the Table of Contents.

File Name:	201008A.0TH	pdf			
Document Description:	Corporation in f	ormation Su	nmary		
Effective Date:	17/16/2020	21			

6.2 Open a Document

Once a document has been added to a category, view the document click **Open**. If the category has been set up with a watermark, the watermark will be appended to the document. The following message will appear briefly before your document is opened:



Please wait	×
Appending Watermark	
reporting recomment	

6.3 Edit Document Information

To edit the document description and effective date, click **Edit**. Click **OK** to save the document information.

File Manage	2010084 B	2 alt	10.0
Pud reamo:	(AND AND AND AND AND AND AND AND AND AND	24 (14)	
Document Description:	1		
Effective Date:	1.1	25	

6.4 Delete a Document

To delete a document in any category, highlight the document to be deleted and click **Delete**. The following confirmation window will appear. Click **Yes** to delete the document in the category.

Deleting	Files	×
Are you sure y "Articles of Inc	ou want to delete 1 file(s) in category orporation (and any other Articles of the co	mpany)"?
	Yes <u>N</u> o	

6.5 Move a Document to Another Category

If you have added a document to the wrong category, you can move it to another category in two ways:

- 1. **Drag and Drop**: The easiest way to move a document to another category is to highlight the document and drag it into another category.
- Move to: Highlight the document and click Move To. The following Select Category window will appear. Select the required category from the dropdown menu. Click OK to move the document.



Select Category		-	□ ×
Select the destination categ	ory:		
Corporate Summary			
	ОК	Cancel	

6.6 Edit Categories in a Record

You have the ability to edit, delete and add categories in an individual record similar to the initial setup outlined in <u>Section 4</u> above. This is useful if one corporation has a one-off category not used by other corporations.

Categooiee		v	File Name	Docament Description	Effective Data	Last Vedification Date	Sa.	
Corporate Summar	WG		M DRECTOR REG	STER. Directors Regime	13/102020	16/10/2120 01:03 pm	120102	
vides of incorpora vides of the comp	ition (and an laty)	y other						
hy-laws of the comp	pany							
Anules of the direc inarcholders meet	tors and ingaireactual	ona						
Officera Register								
lembers Register								
ihareholders Regi	aler .							
Share/folders Ledg	era							
Dumerahip interest	in land							
Share Transfer Reg	nater							
			Cpm E	dt Ant DP	ier (Dente)	Create VMB		
De	wite /		de Uniby	Dobat VIII. Share Dr	internets linked Audit	and a second second second second		
A	01.		. Onleye					

7. Adding Individual Registers or Ledgers to VMB Automatically

You can add any register or ledger from the **Forms & Registers** tab automatically to the Virtually Minute Book. Open any register or ledger. Click 🗾 in the register or ledger window.



눩 🛛 Fast Company® Re	cords Edi	t View	Go to
VMBDEMO Ryleigh's Flowers Inc	i. Eo	rms & R	egisters
📲 🖄 🛛 🔟	🧷 Manu	ial Entry	
	DATE	DATE	
NAME OF DIRECTOR	ELECTED	RESIGNED	
RYLEIGH REBECCA HENDRIE 14888 King Road King, Ontario L1N 1N1	Oct 8, 2020		
JODEAN HENDRIE 24 Wrendale Crescent Keswick, Ontario L4P 4C4	0ct 8, 2020		

Clicking 🗾 will create the register or ledger. The following message will appear:

Please wait	×
Creating Directors Register	

Once the register or ledger has been created, it will be added to the Virtual Minute Book in the corresponding category associated with that register or ledger. The following message will appearing indicating that the register or ledger has been successfully placed into the Virtual Minute Book and indicating which category. Click **OK** to close this window. You will then see this register or ledger in the appropriate category in the minute book.



Note: Existing registers or ledgers will be replaced with the newly created and uploaded version in the Virtual Minute Book.

8. Batch Export to VMB Automatically

On the Forms & Registers tab you will see Batch Export to VMB .



•	Directors Register		
	Members Register Shareholders Register	Show Employee/Consultant &	Accredited Investor (edit from
	Shareholders Ledger (ledgers Shareholders Ledger (all shar Share Trapefor Degister	s modified Oct 8, 2020 only) reholders)	Batch Print Registers & Ledgers
	Stated Capital	I	Batch Export to VMB
	Ownership Interest in Land Re	egister 📃 Show PINs, Le	egal Descriptions and Roll Numbers
	Individuals with Significant Co	ntrol Register	

When the **Batch Export to VMB** is clicked, the following **Select Register(s) and or Ledger(s)** window will appear. You are able to select one, many, or all registers or ledgers and export them to the Virtual Minute Book by clicking **Export**.

Document	Destination VMB Category
P Directors Register	Directors Register
🗭 Officers Register	Officers Register
🖵 Mersham Register	Members Register
Shareholders Register	Shareholdera Register
P Shareholders Ledger (current changes only)	Shareholders Ledgers
🕫 Shareholders Ledger (all shareholders)	Shareholders Ledgers
🕫 Share Transfer Register	Share Transfer Register
Ownership on Land Register	Ownership interest in land
🗖 individuals with Bignificant Control Register	Individual with Significant Control Registe

The following message will appear as each register or ledger is created.



Once all registers and ledgers have been created, the following **Export to Virtual Minute Book** window appears showing a list of all registers or ledgers that have been successfully added and to which category they were added. Click **OK** to close this window. You are now able to see the registers and ledgers in their corresponding category in the Virtual Minute Book window.



Export to Virtual Minute Book	×
DIRECTORS REGISTER.pdf successfully added to the category "Directors Register" OFFICERS REGISTER.pdf successfully added to the category "Officers Register" SHAREHOLDERS REGISTER.pdf successfully added to the category "Shareholders Register" SHAREHOLDERS LEDGER (Current).pdf successfully added to the category "Shareholders Ledgers SHAREHOLDERS LEDGER.pdf successfully added to the category "Shareholders Ledgers" SHAREHOLDERS LEDGER.pdf successfully added to the category "Shareholders Ledgers" SHAREHOLDERS LEDGER.pdf successfully added to the category "Shareholders Ledgers" SHARE TRANSFER REGISTER.pdf successfully added to the category "Share Transfer Register" OWNERSHIP INTEREST IN LAND.pdf successfully added to the category "Ownership interest in Ian	s" d"
ОК	

Note: The ability to automatically add registers and ledgers to the Virtual Minute Book is the reason why these category names are not editable from default configuration or on the Virtual Minute Book window. Changing the names of these categories will cause the automatic upload to the category not to work as outlined in "<u>Section 7</u> Adding Individual Registers or Ledgers to VMB Automatically".

Note: Existing registers or ledgers will be replaced with the newly created and uploaded version in the Virtual Minute Book.

9. Creating the Virtual Minute Book

Now that you have set up the Virtual Minute Book by adding the documents to their corresponding categories, you are ready to create the Virtual Minute Book by clicking **Create VMB**. The following message will appear to indicate that your Virtual Minute Book is being created. Depending on the size of the Virtual Minute Book, this may take some time.

Please wait	×
Creating Virtual Minute Book	
-	

Once your Virtual Minute Book has been created, a PDF version will open. The Virtual Minute Book will include a professional-looking cover page and a table of contents. The cover page will include the name of the corporation, the heading "Virtual Minute Book" and the date the Virtual Minute Book was created. Your law firm information will appear on the cover page as "Prepared By".





Cover page example.

Note: Ryleigh's Flowers Inc. is not a valid corporation but for demonstration purposes only.

In the table of contents you can click on any category or document and will be taken to that document in the minute book.

TABLE OF CONTENTS

1. ARTICLES OF INCORPORATION (AND ANY OTHER AR' COMPANY).	TICLES OF THE
1.1 OBCA Form 1 - Articles of Incorporation.PDF	
2. BY-LAWS OF THE COMPANY	
2.1 RyLaw1	
2.2 Bylaw2	
2.3 test reupload.	
2.4 tost	
3 MINUTES OF THE DIRECTORS AND SHARRING DERS.	
MEETINGS/RESOLUTIONS	
3.1 Initial Resolutions	
4 DIRECTORS REGISTER	47
4.1 Directors Repider	48
5. OFFICERS REGISTER	
5.1 Officers Register	
6 SHAREWY DERS DECISIER	41
6 4 SMADEWAY DEBS DECUSTED will	43
s. rommenoebena neora rengan	
7. SHARE CERTIFICATES	
7.1 Alex Nevekiy Share Certificate pdf	54
	11
8 MISCELLANEOUS	
8.1 Initial Notice.	

Table of contents example.



Note: Each time you make a change to the minute book, you will have to recreate the minute book.

The next time you click **Create VMB**, you will have the option to **Create New VMB**, **Open Existing VMB**, **Delete Existing VMB** or **Open VMB File Location**.

Create New VMB
Open Existing VMB
Delete Existing VMB
Open VMB File Location

10. Uploading VMB to UnityC

Now that you have successfully created the Virtual Minute Book, you are able to upload the VMB to the UnityC platform. UnityC is where shared documents will be securely stored. All functionality in the UnityC platform is available in Fast Company for law firms that do not use our real estate application, Unity[®], for their real estate files. For law firms that have been set up on Unity, see <u>Section 16</u> below for additional Unity functionality.

To upload the Virtual Minute Book, click Upload VMB.

TO GET MI	num Book								
Langeron	-	The Same	Descent fo	eratur.	Effettes Eals	Loid Meditication Ears	The	-	Υ
Conversion of the local division of the loca	Company and								
etides d'acceptorit Vitides all'he compa	ion land any rither rec								
is have all the carries	49								
multip of the desce disarchicitary manage	es and god waschaltene								
telectric ringular									
officers Repailor									
Arrent Report									
Namiolan Nepa	÷								
Shanin site water	÷								
Provide state	and .								
Show Transite Hage	w)								
	ti l	and a second sec	10 Add	Plat	1	CAME VIE			
54		- the last	-	1 martine	1	ALL ALL ALL			
	6)	- UnityC	Canial VIII	- see dimension	- Sector Aug				

The following message appears: You are about to upload the PDF version of Virtual Minute Book to UnityC. Are you sure? Click Yes to upload the PDF of the Virtual Minute Book.



Share to UnityC	×
You are just about to upload the PDI Are you sure?	version of Virtual Minute Book to UnityC.
<u>Y</u> es	No

The following UnityC connection window will appear and will show the status as 'Done' once the upload has been completed. Click **Close**.

[09:53:57:260] UnityC connection [09:53:37:274] Get token [09:53:37:394] Please wait [09:53:47:306] Done. [09:53:47:18] Uploading file: WMDENO_WM.pdf [09:53:47:18] Uploading file: WMDENO_WM.pdf [09:53:55:572] WMDENO_WM.pdf; Status:UPLOADED; Id:1209582 [09:53:55:588] Done.	
Close	

NOTE: The maximum file size for a Virtual Minute Book pdf is 250 MB. If your Virtual Minute Book is larger than 250 MB, you will receive a timeout error after 10 minutes. If this happens, please contact DoProcess Customer Service at inquiries@doprocess.com or 1-866-367-7648 to report the timeout issue.

11. Uploading Individual Documents

Often firms are asked to provide one-off documents such as Directors and Officers Registers to bank officials or accountants. To upload a single document, go to the category with the document to be uploaded, right click on the document, and click **Upload**.



	File Neve		Decorrect Dec	engine -	Effective Date	Last M	otRader Date	Sta:	AL.	1.0
Corporate Summary		t.		n	12/10/2010	ANTS		tinin		
récles of incorporation (and any officer récles of the somplany)		A-	td Filor	bra: Ctrief						
y-laws of the company			outsi :	Lini.						
nutes of the directors and uppfolders meetings/resolutions		1	ret 11	T4						
mana Masaler			pe te	DHH						
ficers Aeguler			tes Down	Ciri+Down						
embers Register										
harahuidere Repater										
harakaldera Ledgera										
whereings interest in land										
and Transfer Constant										
starts currante megicine			-	DPitter	20m	(free in-	Crede XVII			
1at	Oper	101	10000							
Eas Deter	Care	-1at	ad VMB	Diale Corporate	OrbeitAu	10 II				

The following message will appear: You are about to upload selected files to UnityC. Are you sure? Click Yes to upload the document.

Share to	UnityC	×
You are just ab Are you sure?	out to upload the PDF version of Virtual Minute Book to	o UnityC.
	Yes <u>N</u> o	

You will be presented with the same UnityC connection upload page similar to uploading the Virtual Minute Book. Once the status has changed to 'Done', click **Close**.

[10:41:54:316] UnityC connection [10:41:54:322] Get token [10:42:03:159] Done. [10:42:03:159] Uploading file: 201008A.MB.pdf [10:42:03:209] Uploading file: 201008A.MB.pdf [10:42:03:209] Uploading file: 201008A.MB.pdf [10:42:03:209] Opne.	1
Close	

123 Front Street West, Suite 700, Toronto, ON M5J 2M2 2416.322.6111 21.866.367.7648 📾 416.322.6106 🔤 inquiries@doprocess.com



12. Updating the Virtual Minute Book

When you update the contents of the VMB and click **Upload VMB** or **Share Documents**, the newest version of the VMB will automatically be updated in UnityC.

If you have added or deleted documents in the **Virtual Minute Book** window and click **Upload VMB** the following message will appear.



Click **OK** and **Create VMB.** After the **Virtual Minute Book** has been re-created click **Upload VMB**.

13. Share Documents

Now that you have uploaded your documents to UnityC, you are able to share documents with clients, bank officials, accountants, or other parties. To do so, click **Share Documents**.

VIII CURAN IN	nnute Bo	ok								
Cangeries		•	File Barlet	Descript 3+	ergime	Electre Sale	Last MacHuston Sole	80	10	30
		÷1								
italies attecorper italies attecorper	stee und any o pany!	the								
v-laws of the costs	eany									
knutes of the size mansholders mee	ders and Brigsmasolution									
vectors Register										
Micero Register										
erzine Register										
havensizers Rep	uw									
hareholders Ledg	phe									
han managa conservat	in land									
bure Dalater Rep	per :	μ.								
3	6H (1			of the local	Constant in the	Creete Ville			
De	0.01	1	A Hather	and the second	-	1	in the second se			
	at l	2.1	- Unityc	pares (or	and belowers	and a set	THE OWN			
									HE CO	



When **Share Documents** is clicked, the following **Share Documents** window will appear. The **Share Documents** window will display the names of all principals from Tab Q, an email section, and an Uploaded documents section.

encipala		
23 Mare	1 0 0 5 0H = 65 A1 01 Contact	
endrie, Ryleigh Rebecca		
and the owners		
itus email contunt below.	Uploated documents	Link Sea
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13.1 Share Documents with a Principal

The **Principals** section displays all principals associated with the record and is populated from Tab Q. If a principal has an email address entered in their principal record, a green checkmark will appear next to the name.

Note: You have the ability to enter an email address manually if one is not saved to the principal record.



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13.2 Setup Email Content Below

When you double-click any principal, that person's email address and salutation will be displayed in the **Setup email content below** of the Share Documents window. To share a document with an individual (i.e. bank official, accountant, etc.) manually enter the email address and salutation in the **Setup email content below** section.

The body of the email section is editable.



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13.3 Uploaded Documents

The **Uploaded documents** section displays all documents that have been uploaded to UnityC. Select one or many documents to be shared with the principal or individual.

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13.4 Send Email

Once you have selected the principal with whom to share documents, set up the email content, and selected documents to share, you can send an email to the principal by clicking **Send**.

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When you click **Send**, your default email will be displayed with an email to the principal. This email will include a unique link to UnityC for that principal. Send the email to the principal.

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Note: Even if you are sharing documents with more than one principal or individual, you are required to send one email per principal or individual as each party will receive a unique link to UnityC.



13.5 Email Templates

You have the ability to add, delete or edit email templates. With this functionality you will be able to create email templates that can be retrieved and used when sharing a document or Virtual Minute Book.

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✓ Hendriz, Jodean ----Setus amail content below Uploated decuriverts 44 10 Uppealed documents File aver Unstanding unit, petf Units Croats #EGISTER, petf Units, Croats #EGISTER, petf Selection_res, petf Selection_res, petf Units, petf VR0, petf 24 TE (indeprocess com 1289563 1289067 1289608 Raceptett Dear Jodean Hendle Subject: Ryleights Flowers by: - Our File No WIBDEMD 1260697 1209581 1209581 1209796 1209537 1300530 nts for the above transaction have been shared with you. Please click on the link below to accent the shared documents. If you have not previo - Connect with Carcellan law effices - Provide information about files - Sitare documents io IA Terrariate: Default to land

To access the **Edit Email Template** window, click 🔳.

The **Edit Email Template** window opens. In this window you have the option to **Add**, **Delete**, **Save Template**, or **Save Template** as.

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To add a template, click **Add**. The **Create Template** window will appear. Enter the name of the template and click **OK**.



Create template	×
Please enter new template name:	
New Template_1	
OK Cancel	

Your template's name will be displayed in the templates section. Enter the email template content in the panel and click **Save Template**.

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Add	Del	Save Template Save Template

To delete a template, highlight the template to be deleted and click **Del**. The following warning message will appear. Click **OK** and the template will be deleted.



To copy a template, highlight the template to be copied and click **Save Template as**. The **Save template** window will appear. Enter a new template name and click **OK**. Your copy's template name and contents will appear in the list of templates. You can amend or update the content. To save the new content for the copied template, click **Save Template**.



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If you navigate to any other template, the following message will appear indicating that the template has been modified and confirming if you would like to save the template. Click **Yes** to save the template.

Warning!		×
<u>^</u>	Template updated VMB2 has been modified. Save?	
	Yes No Cancel	

14. Revoking a Shared Document from Fast Company

If at any point you wish to revoke shared access to a Virtual Minute book or document, click **Revoke.**



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The **Revoke Documents** window will appear. From this window you are able to see the name/email addresses of all recipients of the shared document, the filename, Description and Date Last Accessed.

To revoke all documents click \equiv beside the name of the recipient and click **Revoke All**

Documents. To revoke individual documents click \equiv beside the individual Filename/document name and click **Revoke This Document**.

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The following **Revoke Documents** email window will appear with a message to the recipient "Access to the following document has been withdrawn. It will no longer be available for your review. <NAME OF DOCUMENT.pdf>".

When you click **Revoke** the email will be sent to the recipient.



.

	After selecting Revoke, Jodean Hendrie will no longer be able to access the selected document. A notification will be sent to them using the ressage entered below.		
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	Access to the following document has been withdrawn. It will no longer be available for your review, DIRECTORS REGISTER.pdf		
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NOTE: The email <u>template</u> feature is available in this window. Refer to "13.5 Email Templates" on page 23 for instructions.

15. UnityC Credentials

When the principals or individuals receive your email, they should click on the link provided to be taken to the **UnityC** application. If they have never accessed UnityC before, they will create their UnityC credentials by entering their first name and last name, confirming their email, and creating a password.

Note: Password requirements will be shown if the selected password does not meet them.



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Once they have created their UnityC credentials they will have access to corporate matters and documents shared with them by your firm.

Note: You are able to share many corporations and documents with any principal or individual.

When the principal or individual logs into their **UnityC** account they will see the name of the corporation under the Description header.

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Rtc	DPSL ONtario Law Firm		
RIL	DPSL ONtario Law Firm		Ryleigh's Chocolates Corporation

When the principal or individual opens a corporate file, they will see all documents shared with them for that corporation.



Your Secure Connection to Canadian Law Offices.		Jodean Hendrie Log	out
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OFFICERS REGISTER.pdf	New	Oct 16, 2020	
VMBDEMO_VMB pdf	New	Oct 18, 2020	

When the principal or individual clicks on a shared document, it will be downloaded and opened as a PDF in a separate browser window.





16. Existing Unity Users

If your firm is using Unity for your real estate matters, you will have access to Remote Fast Company (RFC) type matters in Unity along with purchase, sale, and mortgage matters.

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16.1 RFC Matters Created in Unity

When you open any RFC matter, you will see limited data to create this Fast Company record in Unity. Data from Fast Company will be imported into the RFC matter when documents are uploaded.

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16.2 Filter Matter Type

To Filter RFC matter types, click on **Show Filters**



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Uncheck All Types under Type column and check Remote Fast Company. All RFC files will appear.

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16.3 Search for RFC Matter

To search for an RFC matter, enter the Matter No. or the first 7 characters of the corporate name in the **Matter No., Matter Re: Line, Address/Description box**. A list of matters will appear. Click on the matter to open.

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16.4 Matter Documents Tab

When you click on **Matter Documents**, you will see all documents uploaded to Unity. When you click on **E** beside any document, you will be able to **Open, Copy Location to Clipboard, Copy, Delete** or **Rename** the document.



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16.5 Shared Documents Tab

When you click the **Shared Documents** tab, you will see the name of the Recipient, Filename of the document shared with the recipient, Description, and the Date Last Accessed. You can expand the list by clicking on C or collapse the list by clicking on \boxdot{C} . You can open the document by clicking on the document filename. A PDF of the document will be downloaded and will appear in a separate browser window.

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16.6 Revoking a Shared Document from Unity

From the **Shared Documents** screen, you have the ability to revoke a shared document by clicking on and **Revoke This Document**.



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The **Revoking Documents** window will appear with a message to the recipient advising that their access to the following document has been withdrawn and they will no longer be able to view the document.

	After selecting Revolus, Jodisan Handrie will no longer be able to access the selected document. A notification will be sent to them using the message entered below.	
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	Jositan Hensista GPD, Oktobio Law Firm 125 Front St. W.	

When the **Revoke** button is clicked, the recipient will receive an email advising that access to the shared document has been withdrawn.



123 Front Street West, Suite 700, Toronto, ON M5J 2M2 2416.322.6111 21.866.367.7648 @ 416.322.6106 Singuiries@doprocess.com