Reference
Guide

Version 3.0

March 2021

# Virtual Minute Books in Fast Company®

![DoProcess - Practice Made Perfect]

**Table of Contents**

# 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 **UnityC**.

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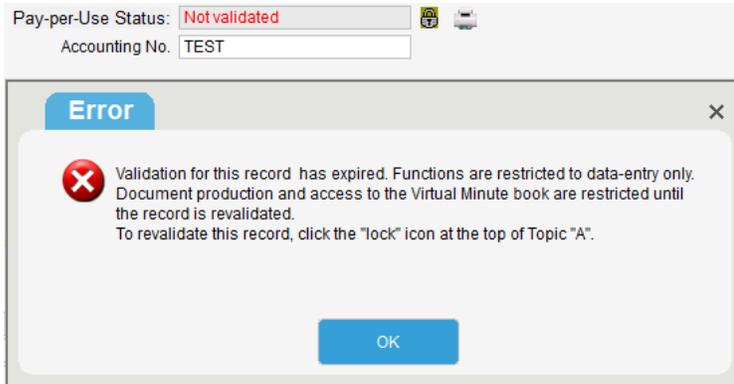
You will need to go to Tab A and validate the record in order to use the Virtual Minute Book functionality.

## 2.3 Accept the EULA

The DoProcess End User License Agreement (EULA) has been updated to include Unity and the UnityC functionality required for Virtual Minute Books. The first time you click on Upload or Upload VMB, 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.

## 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 **Learn More**. 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 ![icon] 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.
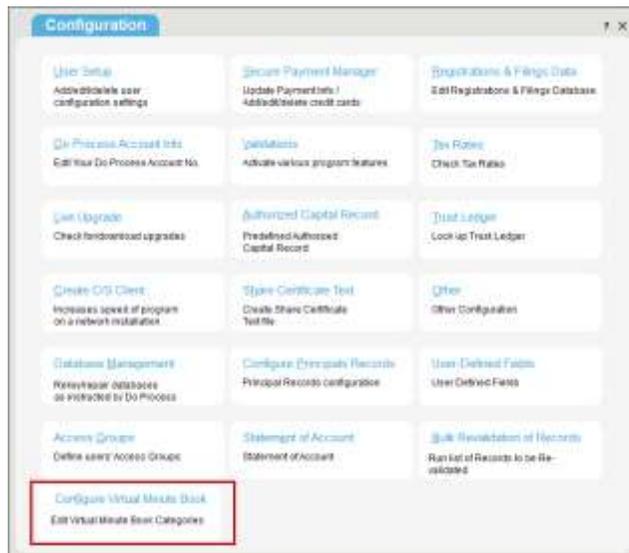


Click  **Configure Virtual Minute Book**. The **Virtual Minute Book Categories** window will appear with all preset categories.  You are able to **Edit, Delete, Add** and **Reset** these categories (with the exception of the Registers categories which appear in pale grey). The Registers categories have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

## 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.
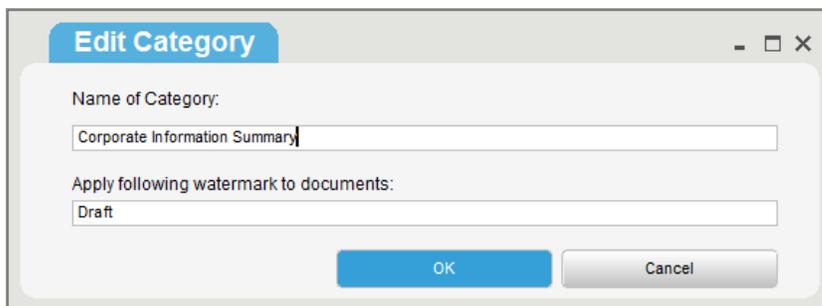


## 4.2 Delete a Category

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**.
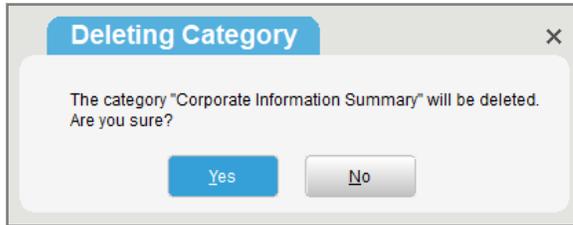
## 4.3  Add a Category

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.



## 4.4  Reset the Categories

To reset the categories back to default, click **Reset** and the message shown below will appear. Click **Yes** to confirm the reset .
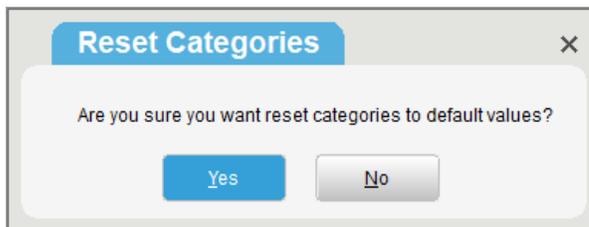


## 4.5  Reorganize the Categories

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 📖 on the top menu bar.
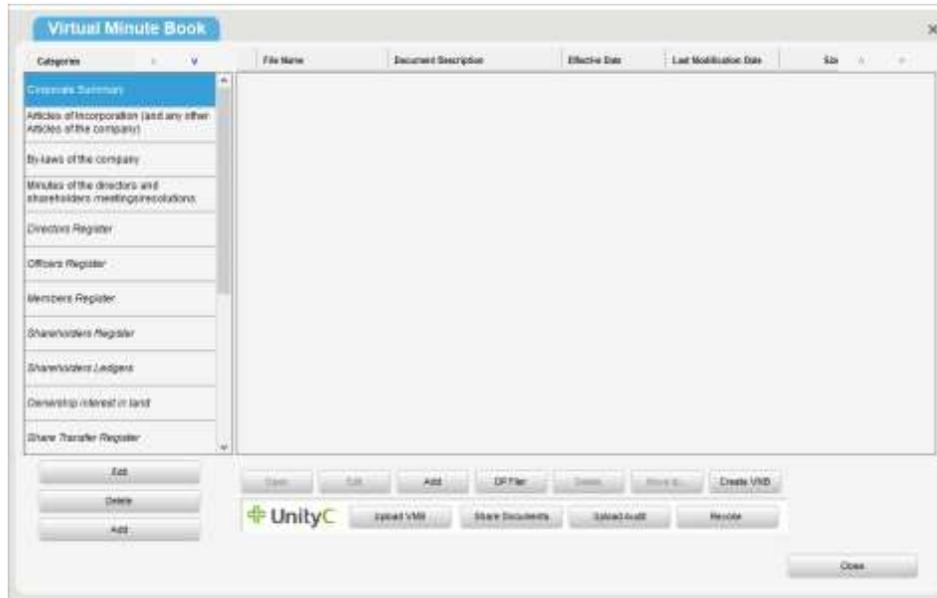


## 6.   Working with the Virtual Minute Book Window

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.
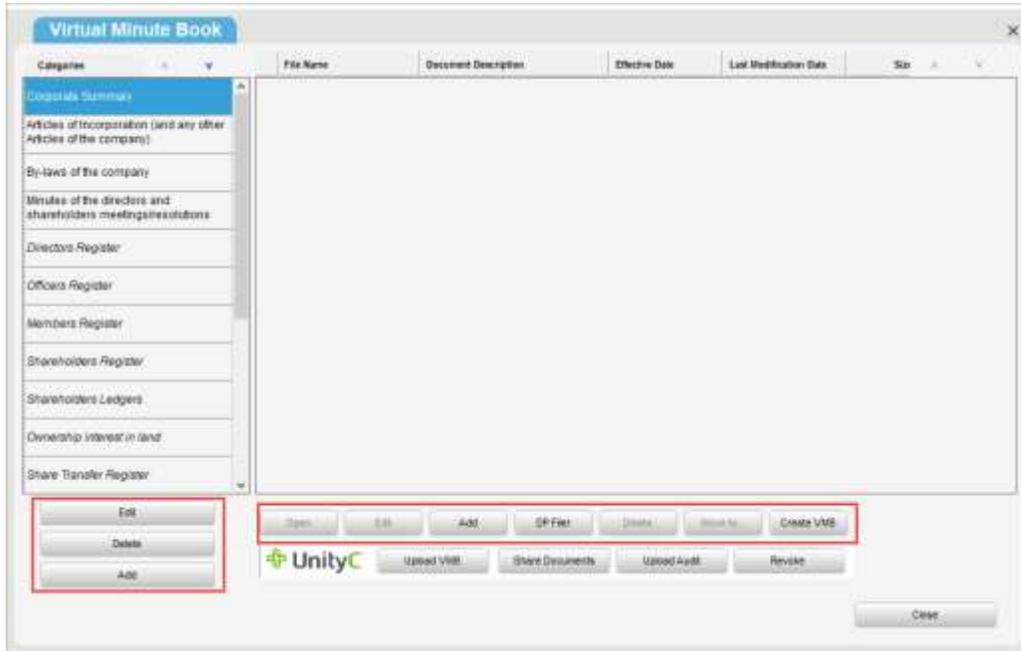
## 6.1  Add a Document

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**.
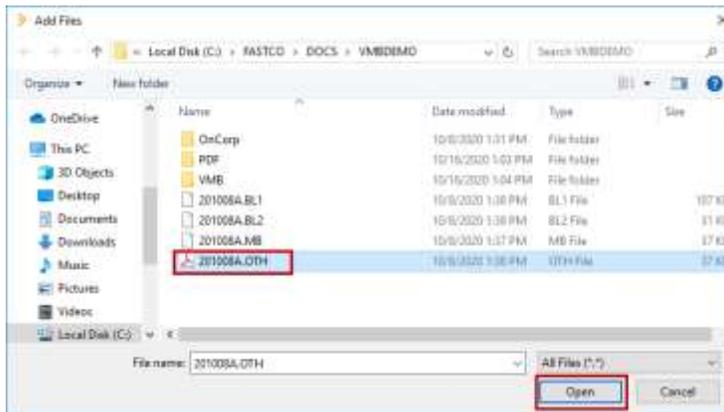


Adding documents with **DP Filer** will open the DP Filer. You can add documents to the Virtual Minute Book in two ways with the DP Filer:

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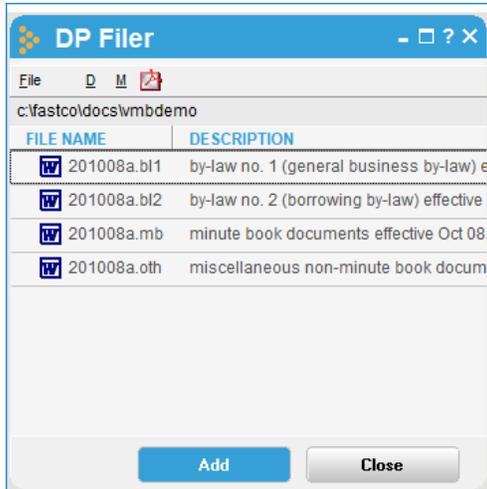
The following message appears: **Are you sure you want to add 1 file(s) to category 'Corporate Summary'?** Click **Yes** to add the file.
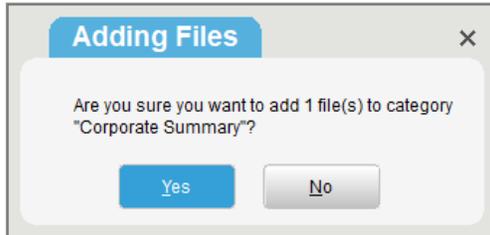


If you are adding a Word document, it will be automatically converted to PDF. When the document has been added, the **Document Information** window will appear where you enter a description and an effective date. If you enter the Document Description and Effective Date, this information will appear on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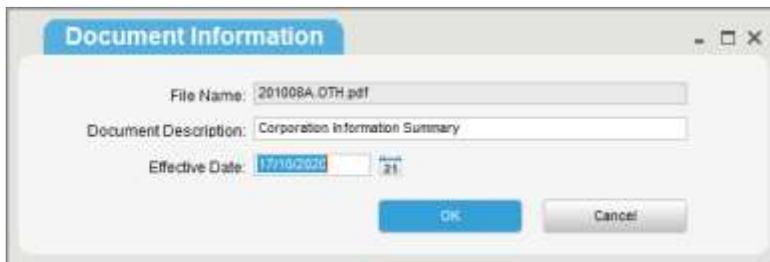


## 6.2 Open a Document

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:

## 6.3  Edit Document Information

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



## 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.
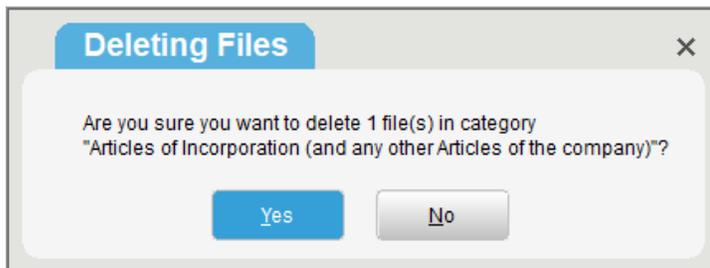


## 6.5  Move a Document to Another Category

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.

2. **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.
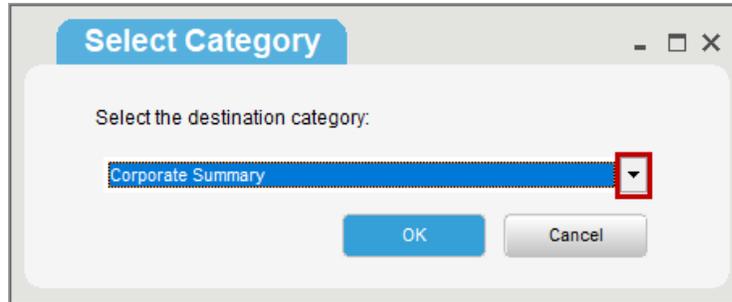
## 6.6 Edit Categories in a Record

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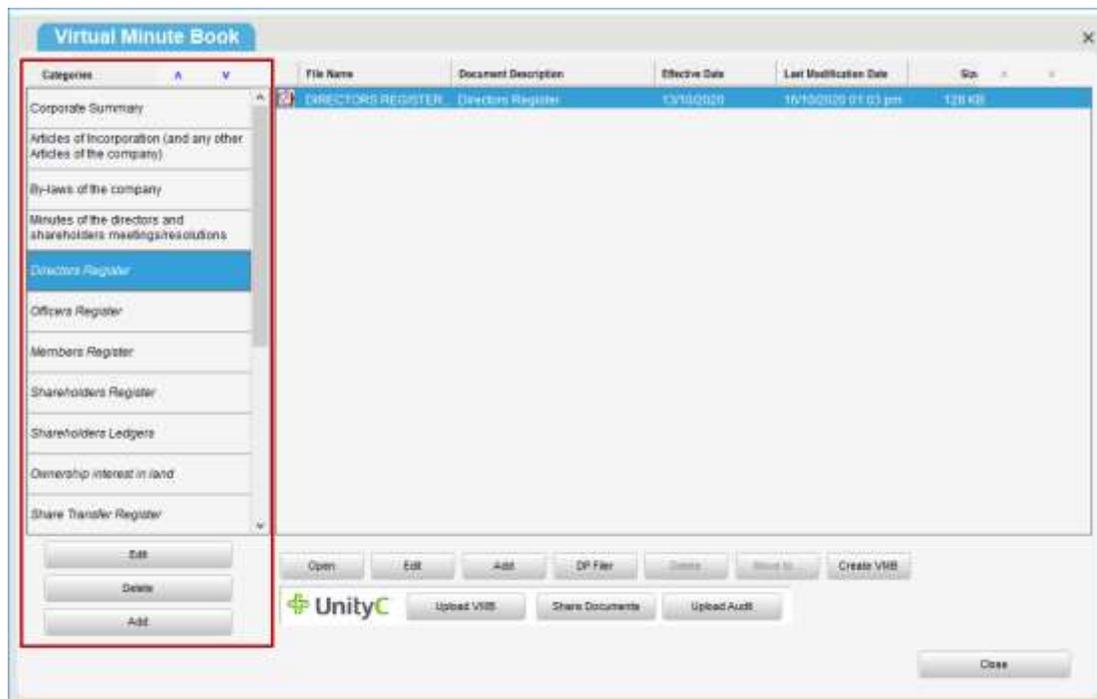


# 7. Adding Individual Registers or Ledgers to VMB Automatically

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.

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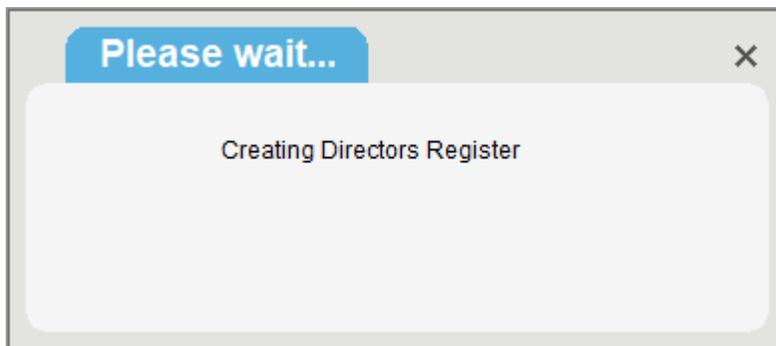


Once the register or ledger has been created, it will be added to the Virtual Minute Book in the corresponding category associated with that register or ledger. The following message will appearing indicating that the register or ledger has been successfully placed into the Virtual Minute Book and indicating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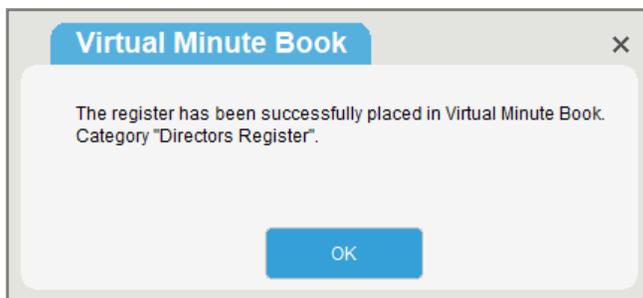


**Note:** Existing registers or ledgers will be replaced with the newly created and uploaded version in the Virtual Minute Book.

# 8. Batch Export to VMB Automatically

On the **Forms & Registers** tab you will see **Batch Export to VMB** .
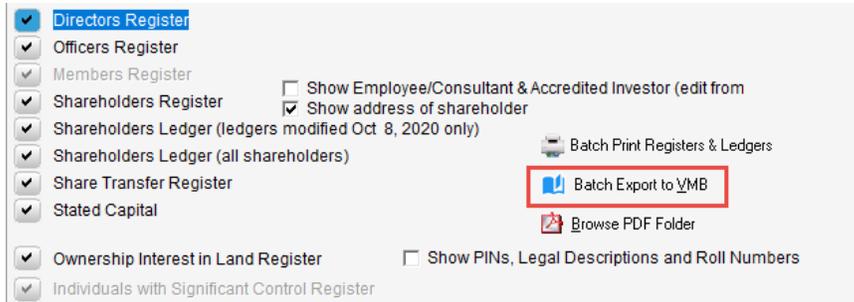
When the **Batch Export to VMB** is clicked, the following **Select Register(s) and or Ledger(s)** window will appear. You are able to select one, many, or all registers or ledgers and export them to the Virtual Minute Book by clicking **Export**.
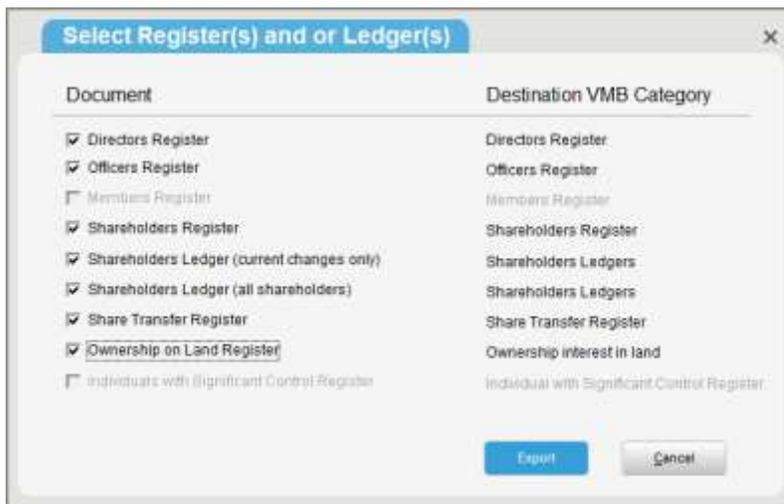
The following message will appear as each register or ledger is created.
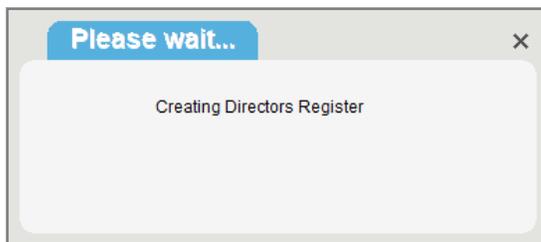
Once all registers and ledgers have been created, the following **Export to Virtual Minute Book** window appears showing a list of all registers or ledgers that have been successfully added and to which category they were added. Click **OK** to close this window. You are now able to see the registers 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"
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 land"

                              OK

**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 "Section 7 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
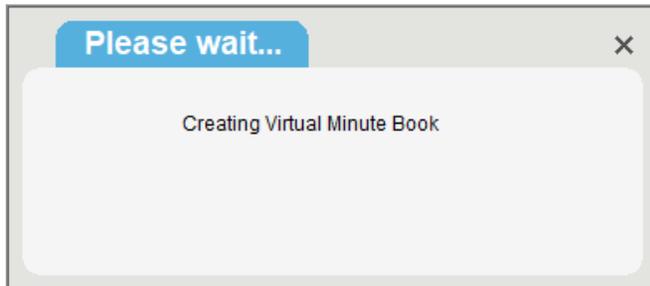
Once your Virtual Minute Book has been created, a PDF version will open. The Virtual Minute Book will include a professional-looking cover page and a table of contents. The cover page will include the name of the corporation, the heading "Virtual Minute Book" and the date the Virtual Minute Book was created. Your law firm information will appear on the cover page as "Prepared By".

**Ryleigh's Flowers Inc.**

Virtual Minute Book

As of October 17, 2023

**Prepared By:**

Legal Segar
123 Front Street West, Suite 700
Toronto, Ontario M5N 1N1
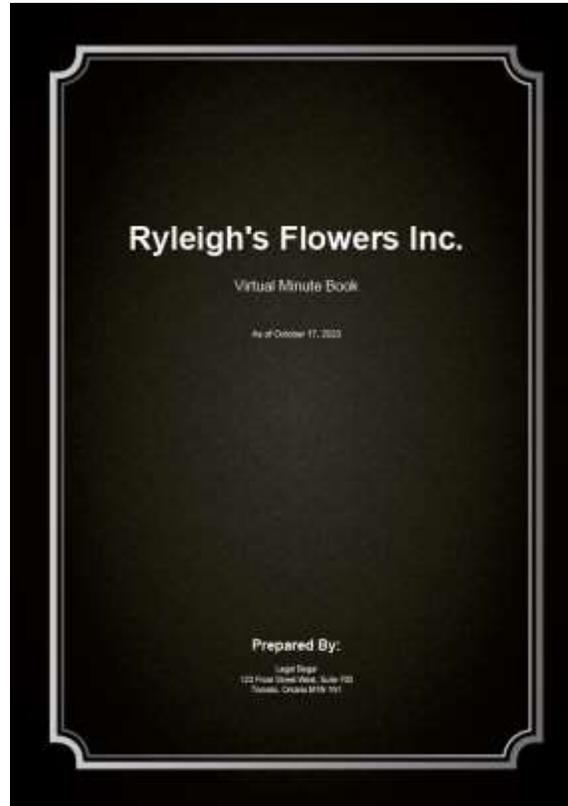
Cover page example.

**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**

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**.
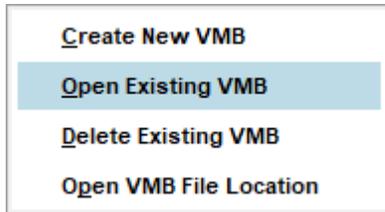


# 10. Uploading VMB to UnityC

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 Section 16 below for additional Unity functionality.

To upload the Virtual Minute Book, click **Upload VMB**.
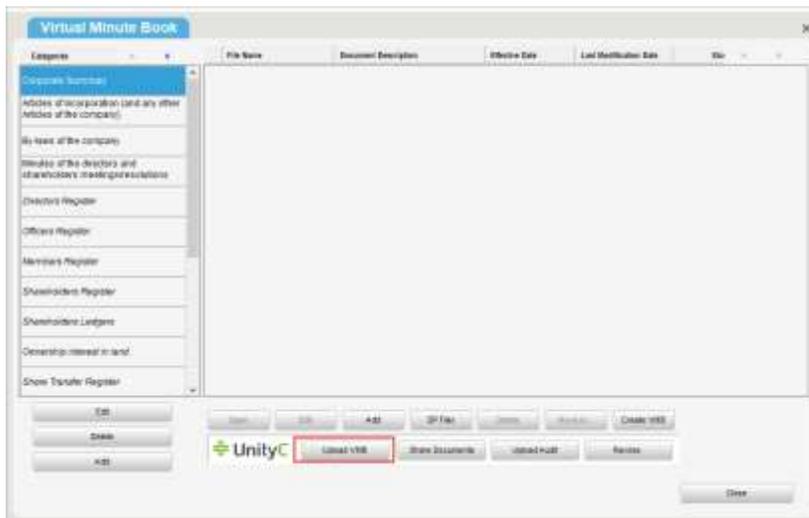


The following message appears: **You are about to upload the PDF version of Virtual Minute Book to UnityC. Are you sure?** Click **Yes** to upload the PDF of the Virtual Minute Book.
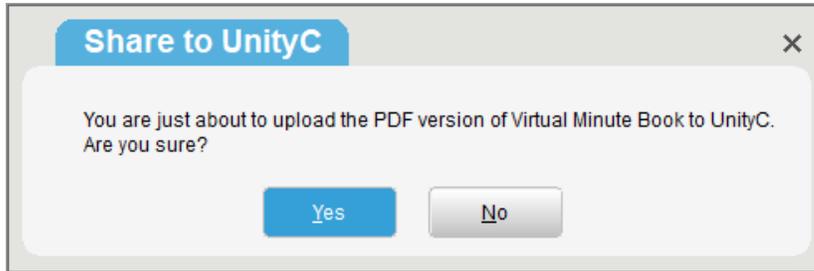
The following UnityC connection window will appear and will show the status as 'Done' once the upload has been completed. Click **Close**.
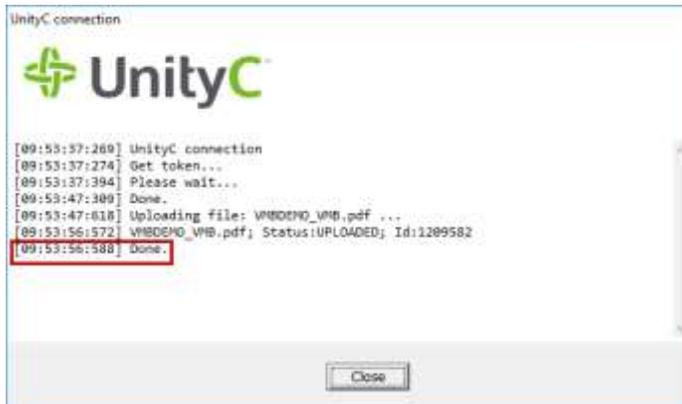


**NOTE:** The maximum file size for a Virtual Minute Book pdf is 250 MB. If your Virtual Minute Book is larger than 250 MB, you will receive a timeout error after 10 minutes. If this happens, please contact DoProcess Customer Service at inquiries@doprocess.com or 1-866-367-7648 to report the timeout 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**.
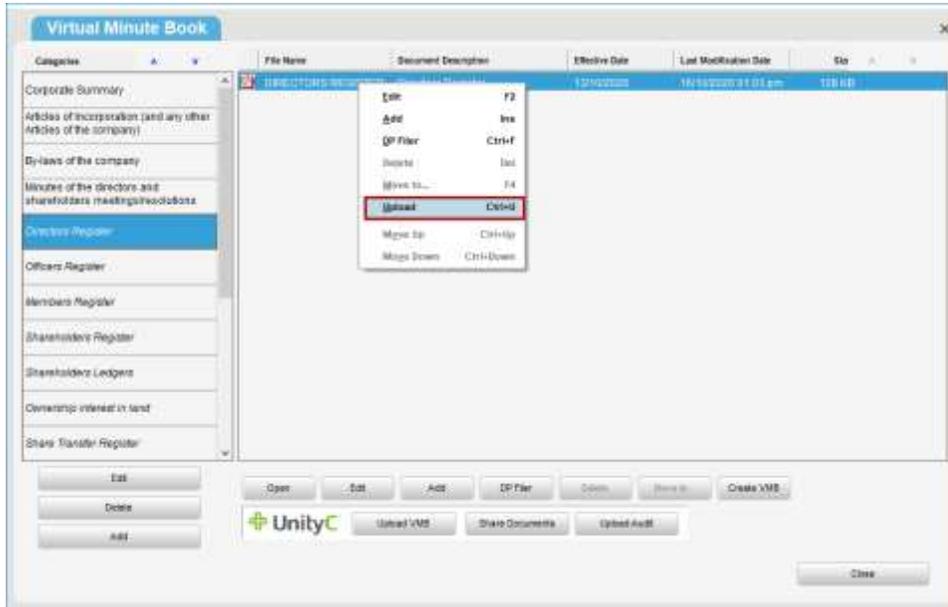
The following message will appear: **You are about to upload selected files to UnityC. Are you sure?** Click **Yes** to upload the document.
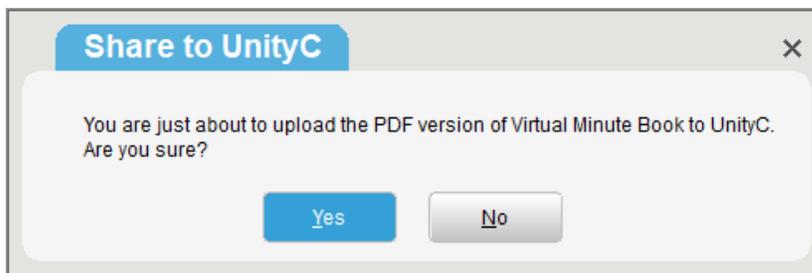


You will be presented with the same UnityC connection upload page similar to uploading the Virtual Minute Book. Once the status has changed to 'Done', click **Close**.
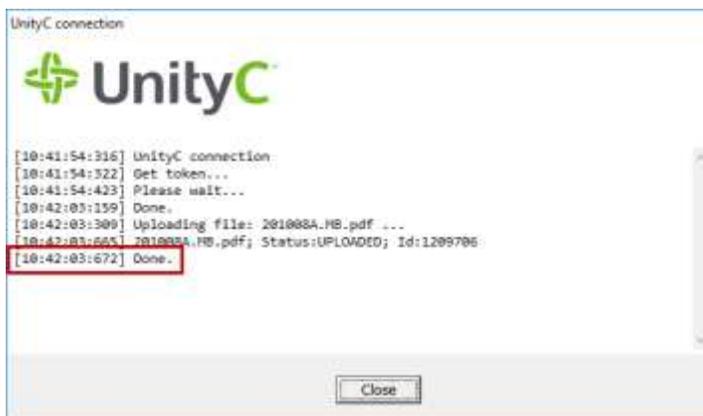
## 12. Updating the Virtual Minute Book

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.
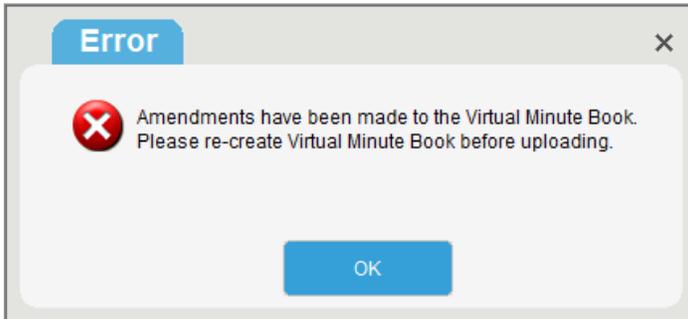


Click **OK** and **Create VMB.** After the **Virtual Minute Book** has been re-created click **Upload VMB**.

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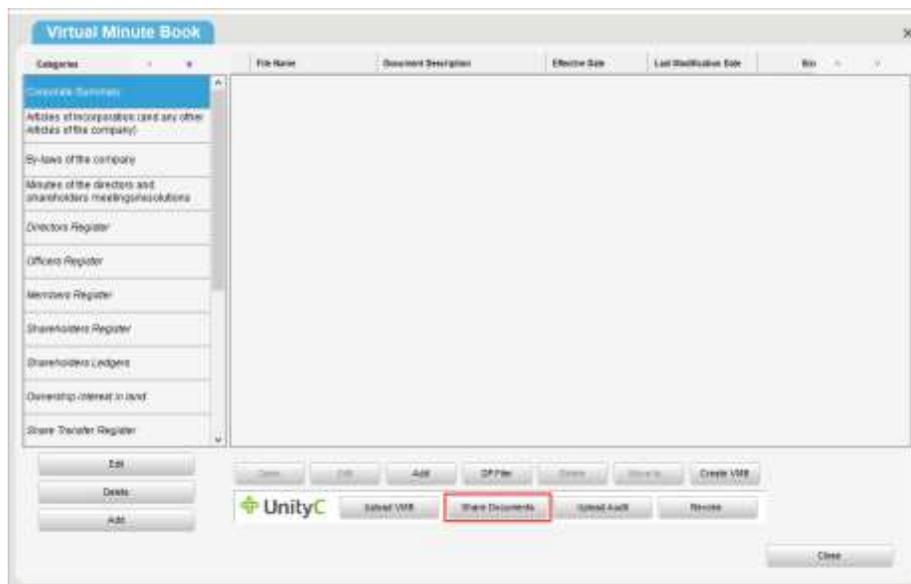
When **Share Documents** is clicked, the following **Share Documents** window will appear. The **Share Documents** window will display the names of all principals from Tab Q, an email section, and an Uploaded documents section.
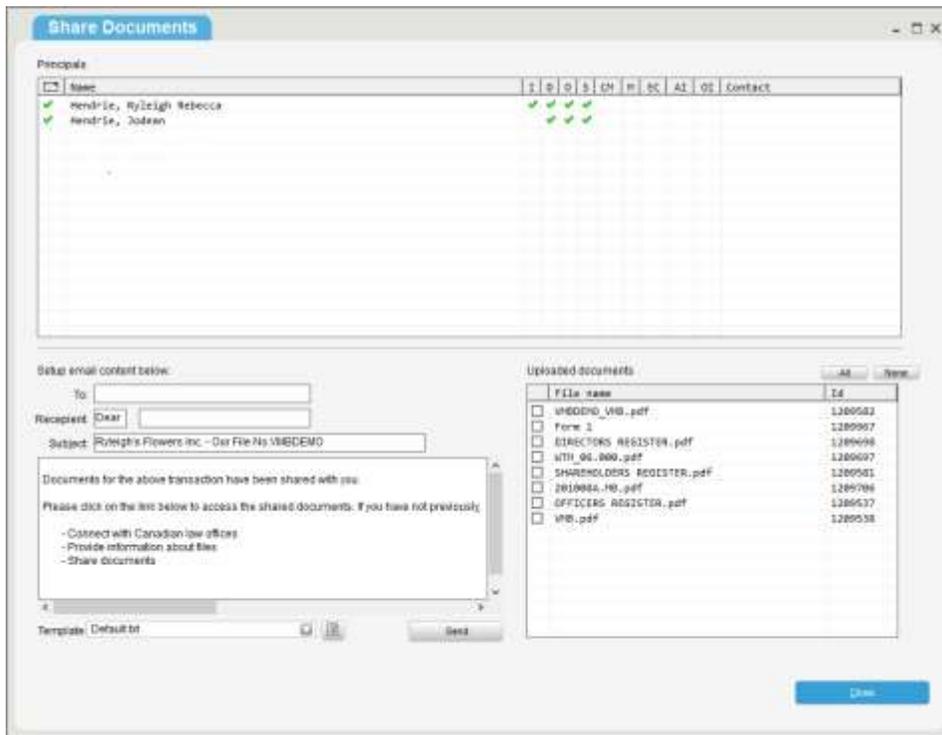


## 13.1  Share Documents with a Principal

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.
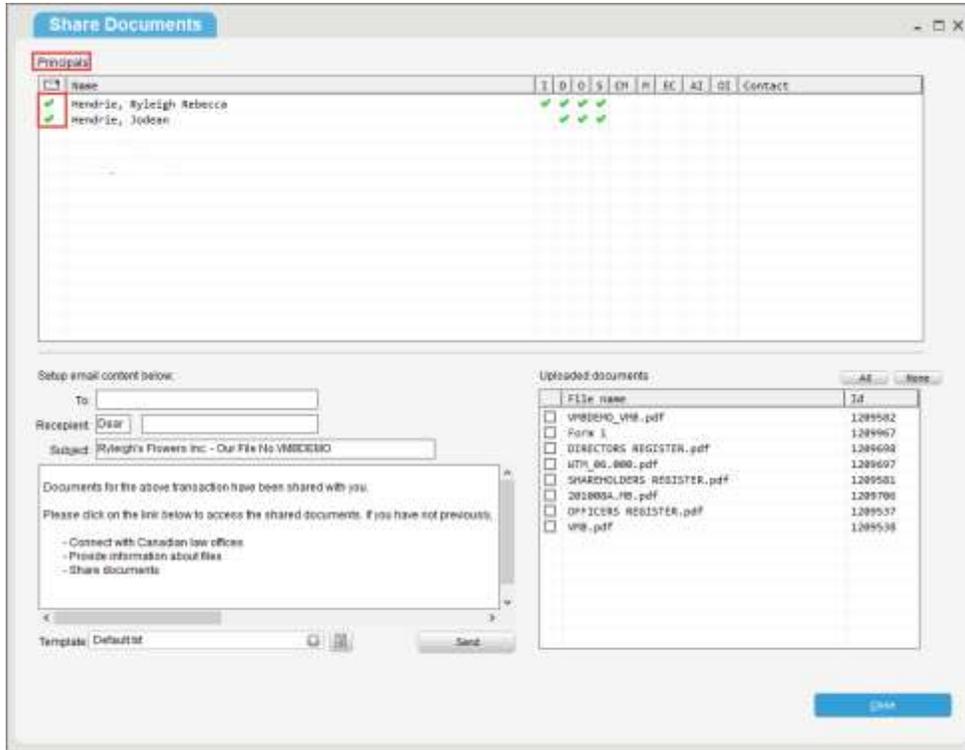
## 13.2 Setup Email Content Below

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.
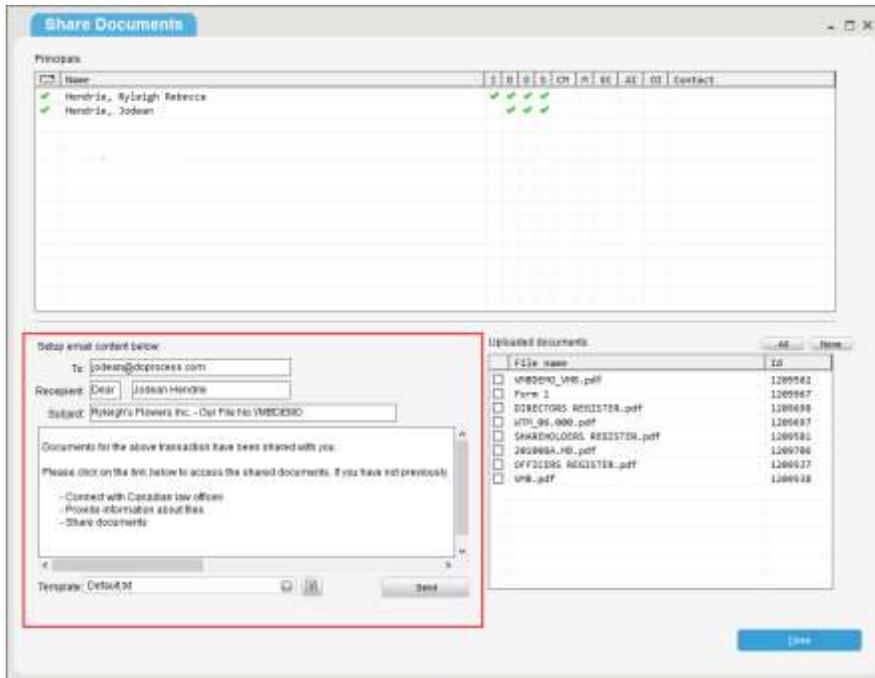
## 13.3 Uploaded Documents

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.
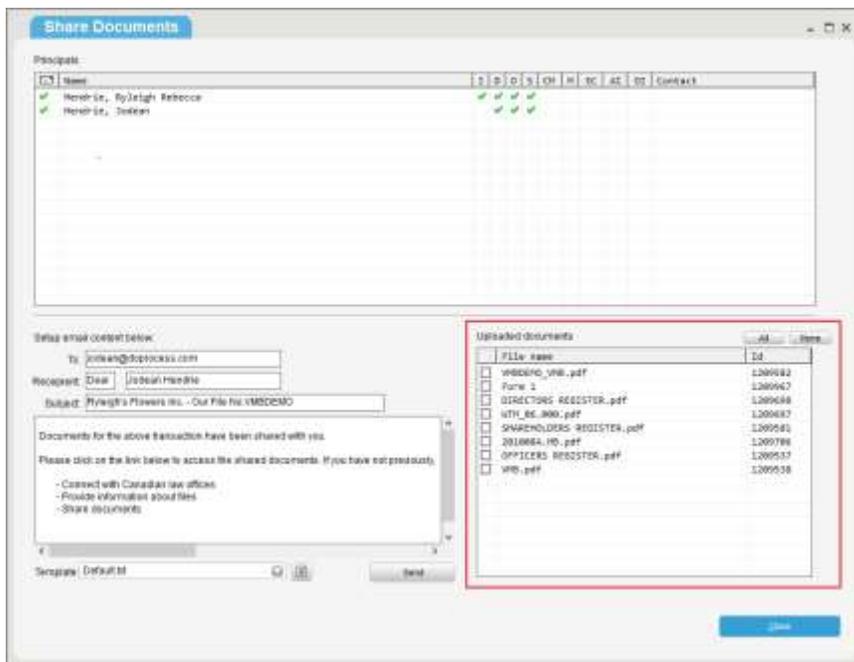
## 13.4  Send Email

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**.
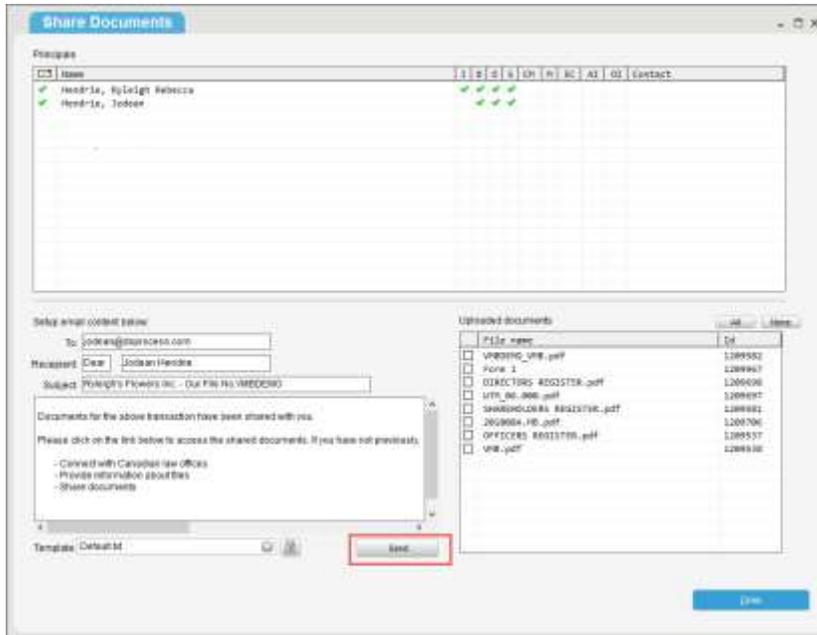


When you click **Send**, your default email will be displayed with an email to the principal. This email will include a unique link to UnityC for that principal. Send the email to the principal.
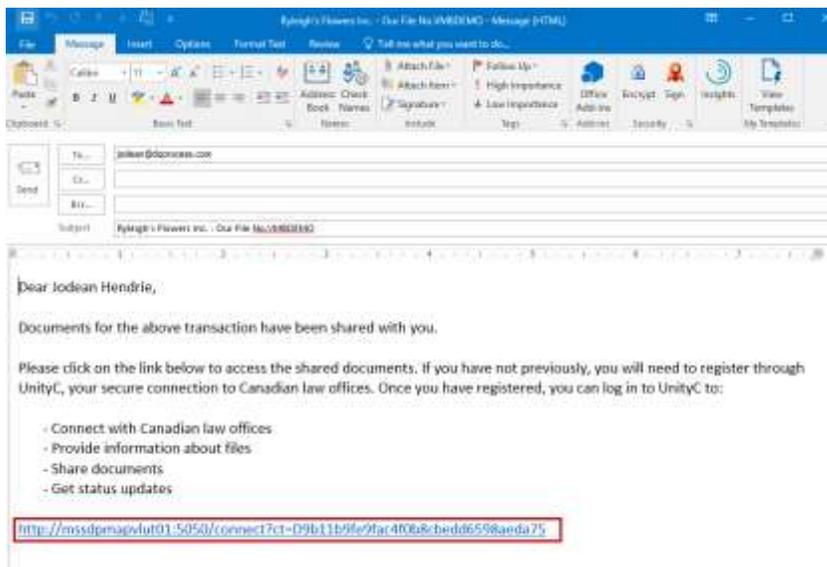


**Note:** Even if you are sharing documents with more than one principal or individual, you are required to send one email per principal or individual as each party will receive a unique link to UnityC.

## 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.

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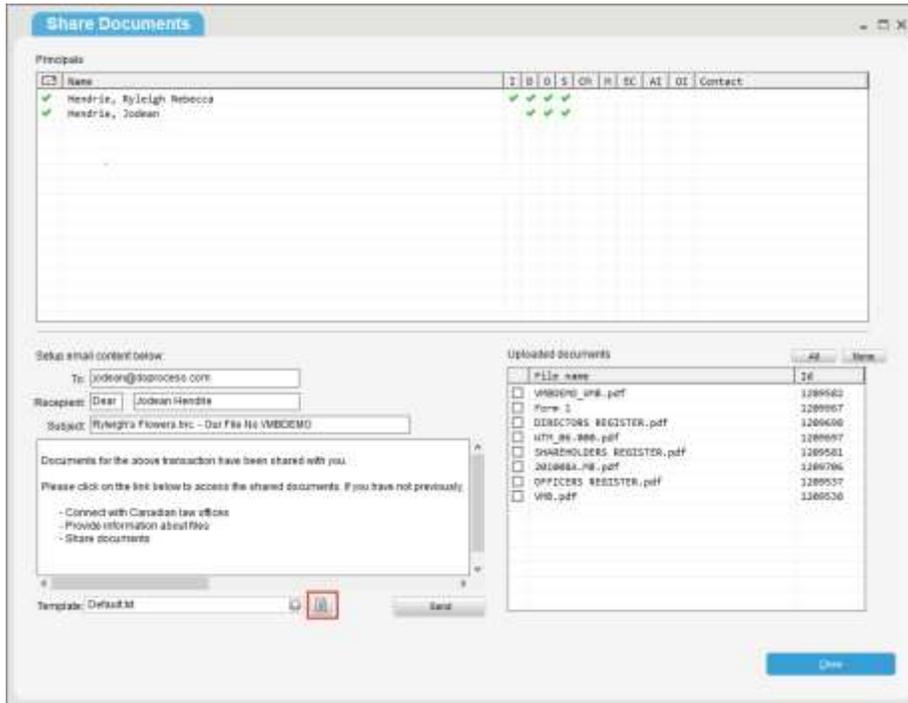


The **Edit Email Template** window opens. In this window you have the option to **Add, Delete, Save Template**, or **Save Template as**.
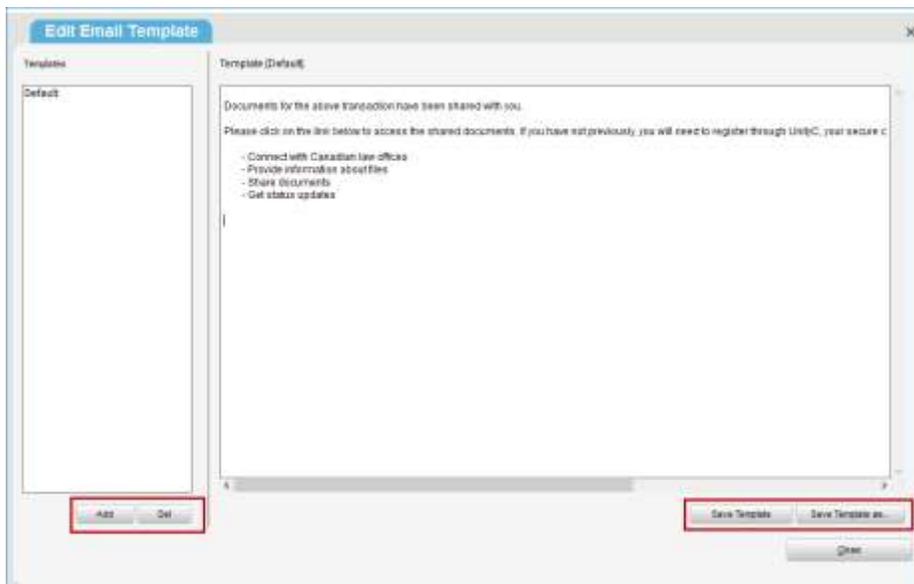


To add a template, click **Add**. The **Create Template** window will appear. Enter the name of the template and click **OK**.
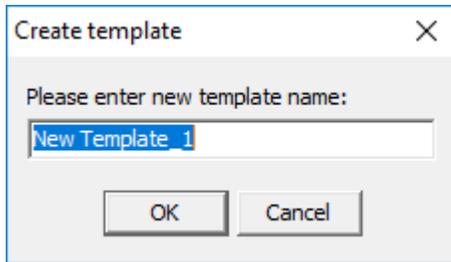
Your template's name will be displayed in the templates section. Enter the email template content in the panel and click **Save Template**.
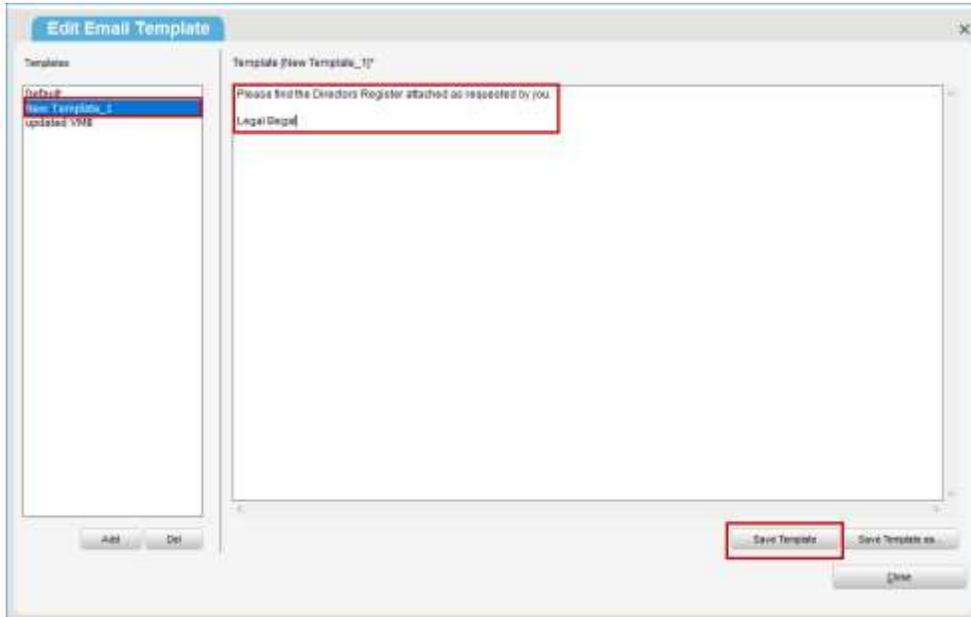


To delete a template, highlight the template to be deleted and click **Del**. The following warning message will appear. Click **OK** and the template will be deleted.
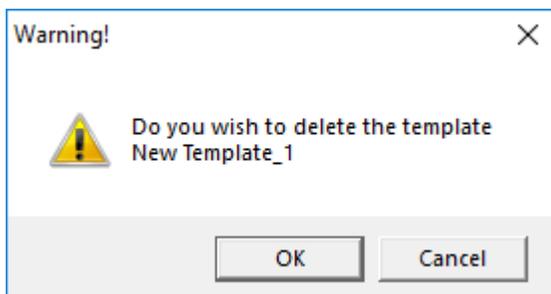


To copy a template, highlight the template to be copied and click **Save Template as**. The **Save template** window will appear. Enter a new template name and click **OK**. Your copy's template name and contents will appear in the list of templates. You can amend or update the content. To save the new content for the copied template, click **Save Template**.
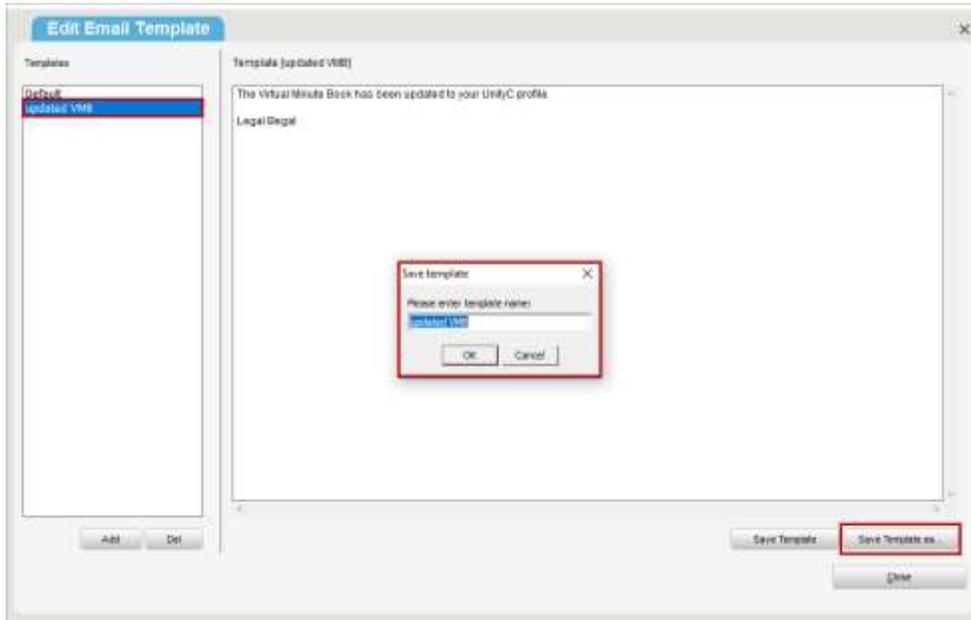
If you navigate to any other template, the following message will appear indicating that the template has been modified and confirming if you would like to save the template. Click **Yes** to save the template.
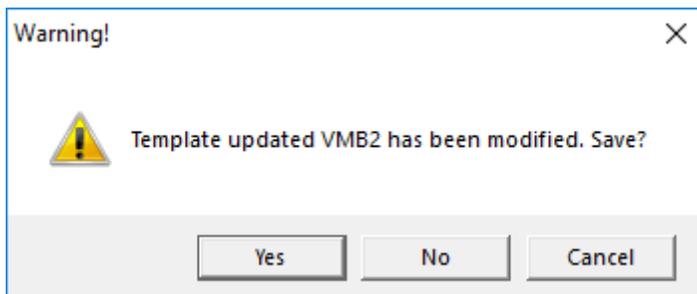


## 14. Revoking a Shared Document from Fast Company

If at any point you wish to revoke shared access to a Virtual Minute book or document, click **Revoke.**
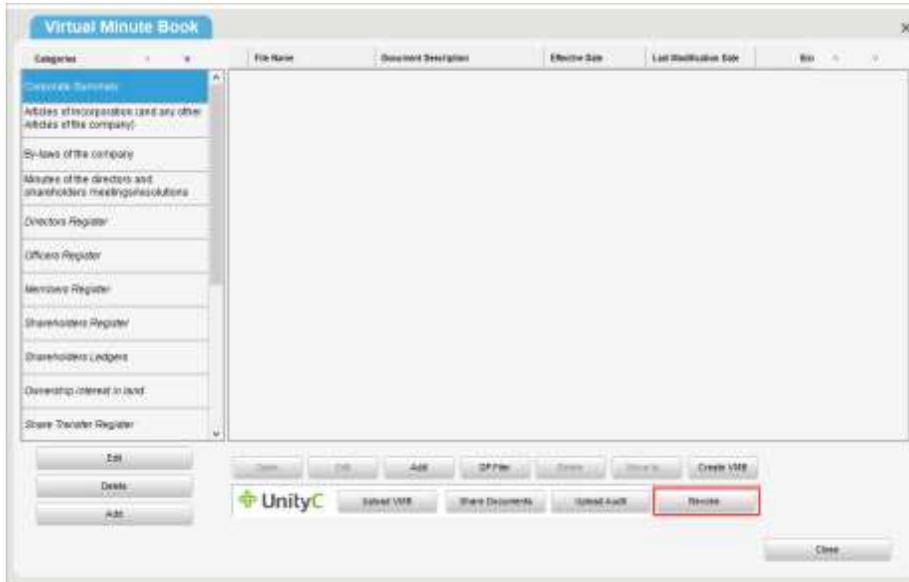
The **Revoke Documents** window will appear.  From this window you are able to see the name/email addresses of all recipients of the shared document, the filename, Description and Date Last Accessed.

To revoke all documents click ☰ beside the name of the recipient and click **Revoke All Documents**.  To revoke individual documents click ☰ beside the individual Filename/document name and click **Revoke This Document**.
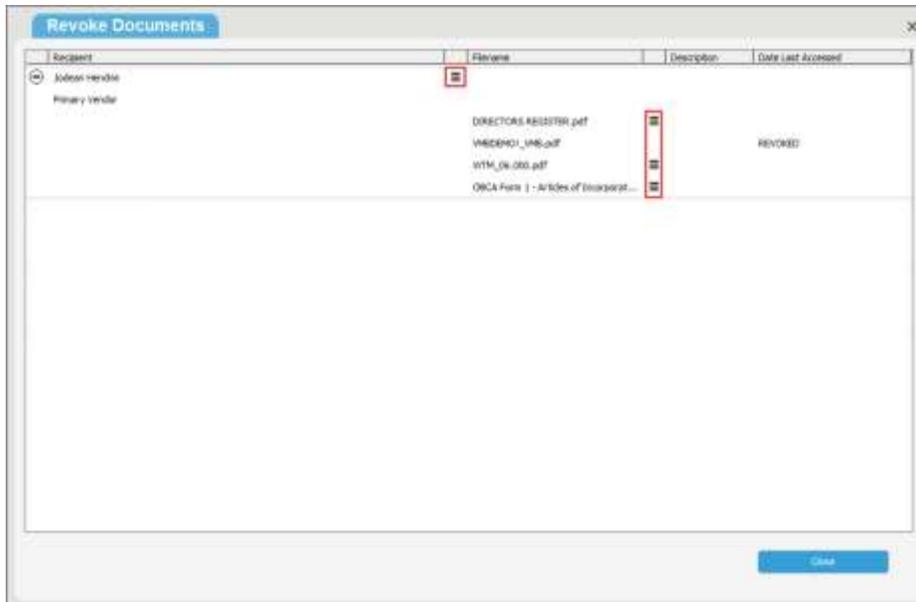


The following **Revoke Documents** email window will appear with a message to the recipient "Access to the following document has been withdrawn.  It will no longer be available for your review. <NAME OF DOCUMENT.pdf>".

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

.
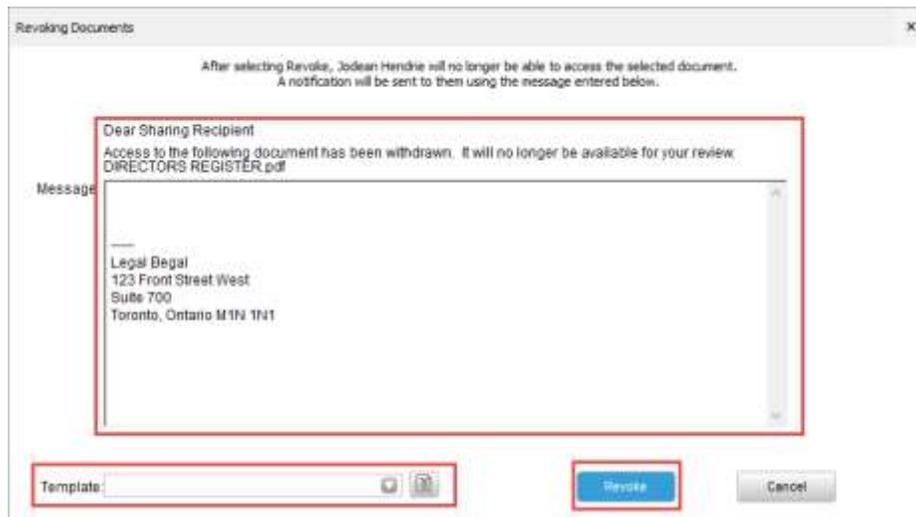


**NOTE:** The email template feature is available in this window. Refer to "13.5 Email Templates" on page 23 for instructions.

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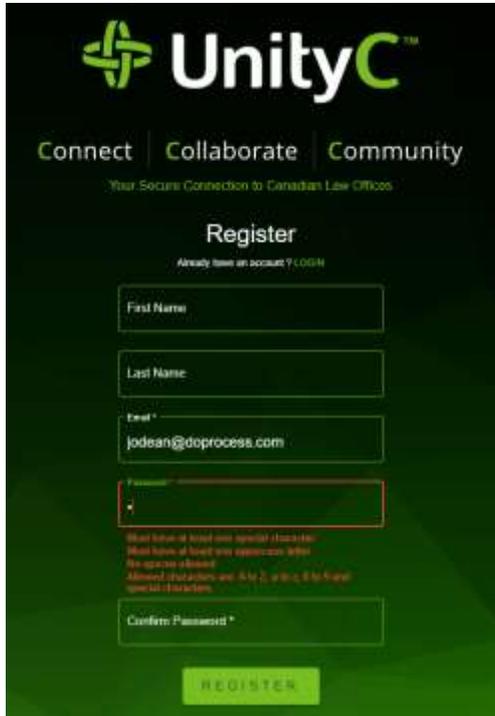
Once they have created their UnityC credentials they will have access to corporate matters and documents shared with them by your firm.

**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.



When the principal or individual opens a corporate file, they will see all documents shared with them for that corporation.
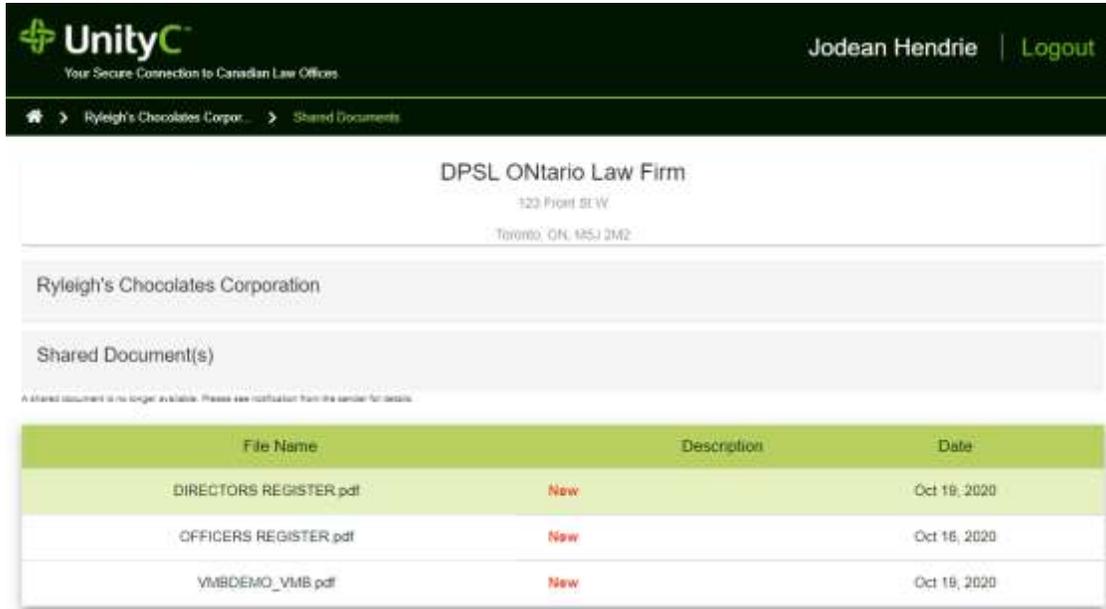
When the principal or individual clicks on a shared document, it will be downloaded and opened as a PDF in a separate browser window.
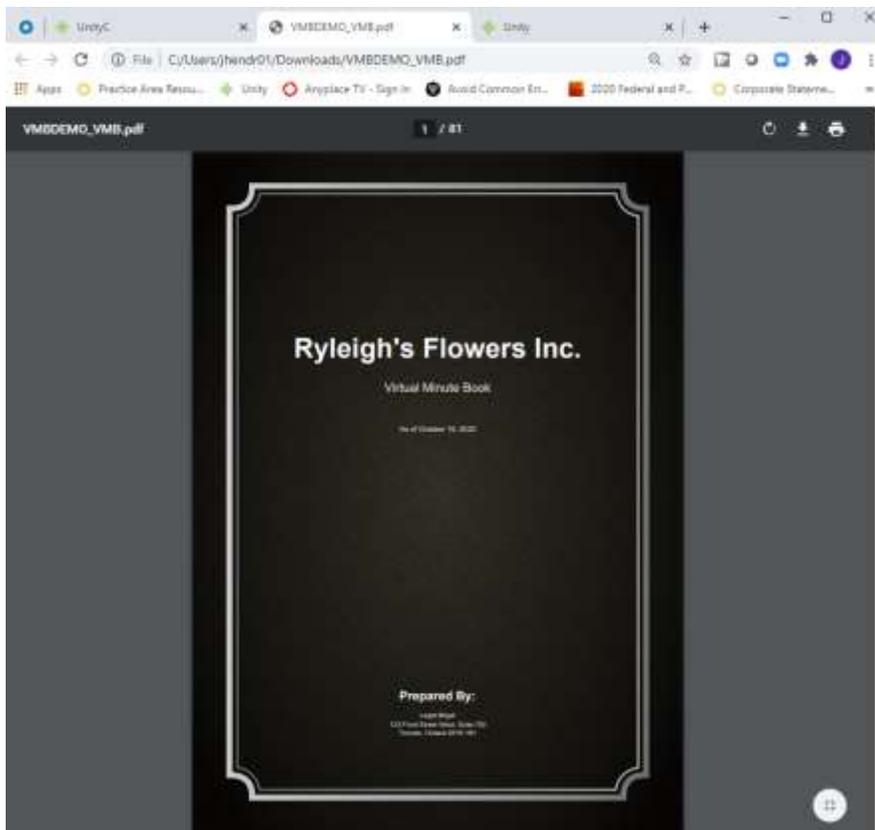
# 16. Existing Unity Users

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.



## 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.
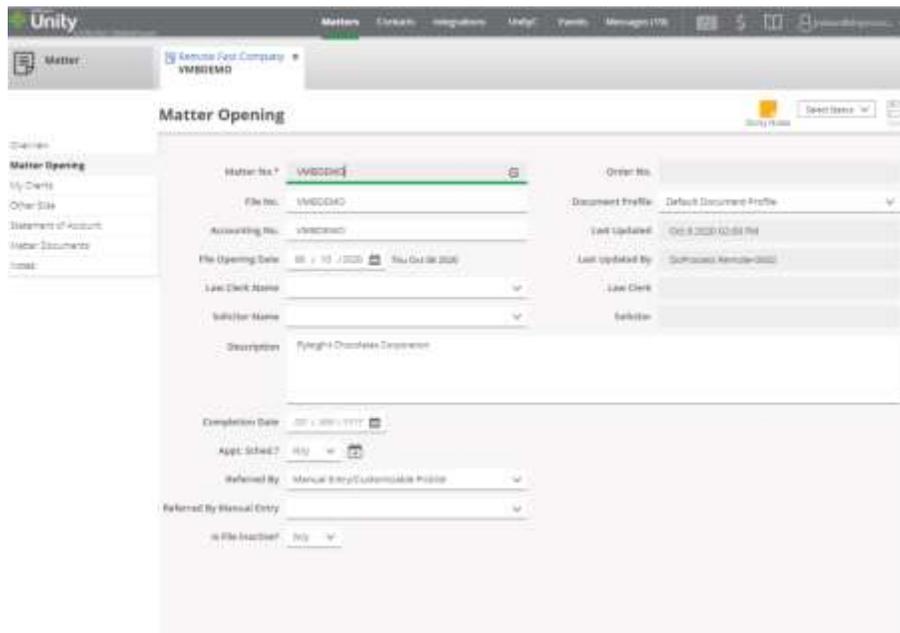


## 16.2 Filter Matter Type

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

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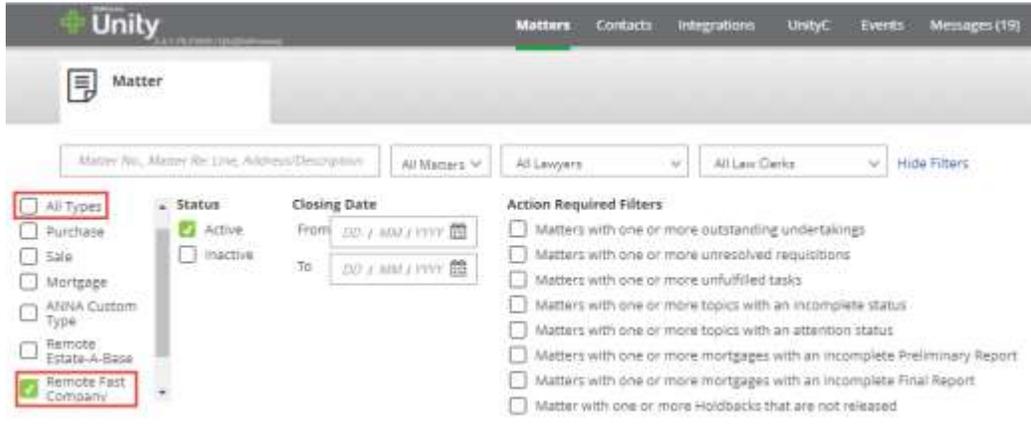


## 16.3  Search for RFC Matter

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.
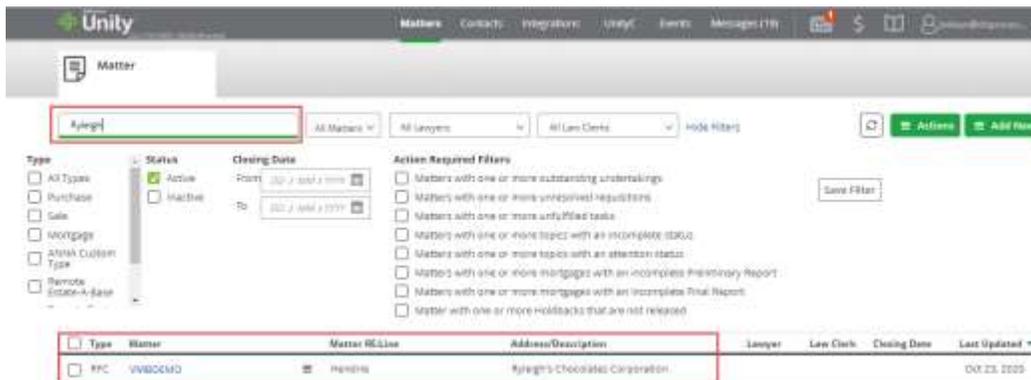


## 16.4  Matter Documents Tab

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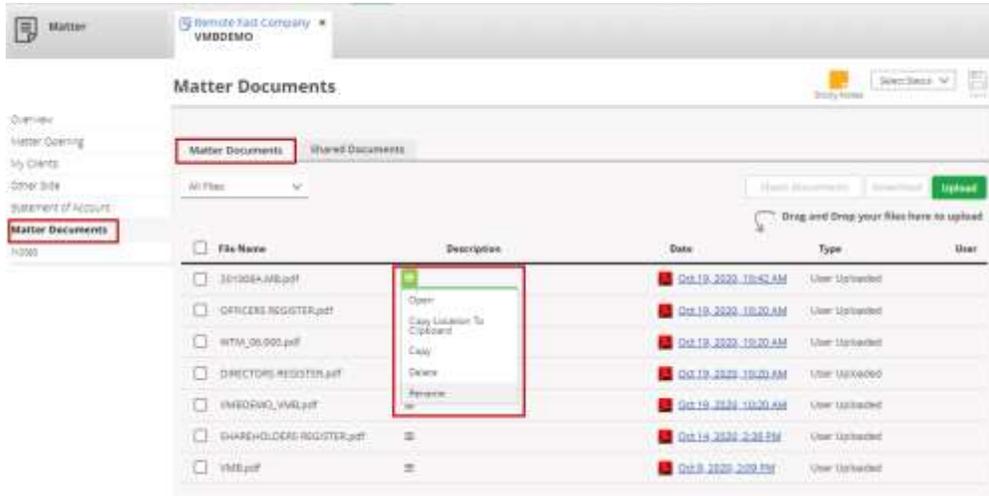
## 16.5 Shared Documents Tab

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 ⊕ or collapse the list by clicking on ⊖. 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.
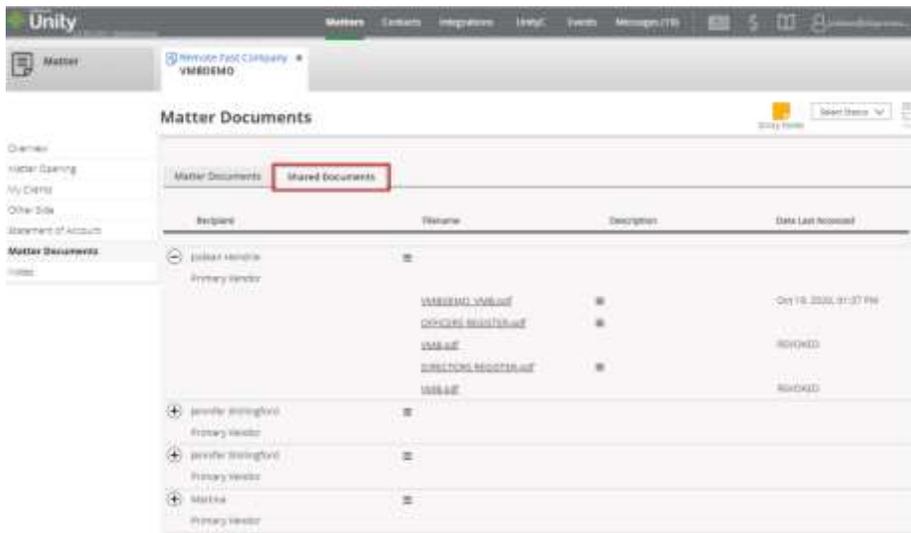


## 16.6 Revoking a Shared Document from Unity

From the **Shared Documents** screen, you have the ability to revoke a shared document by clicking on ≡ and **Revoke This Document**.
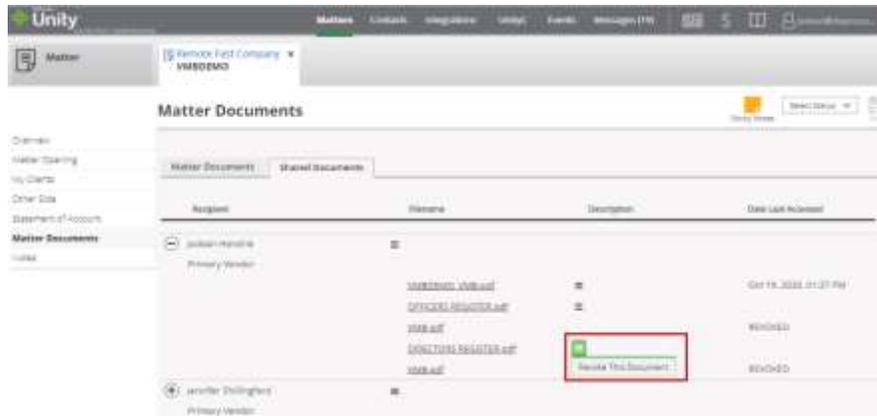
The **Revoking Documents** window will appear with a message to the recipient advising that their access to the following document has been withdrawn and they will no longer be able to view the document.
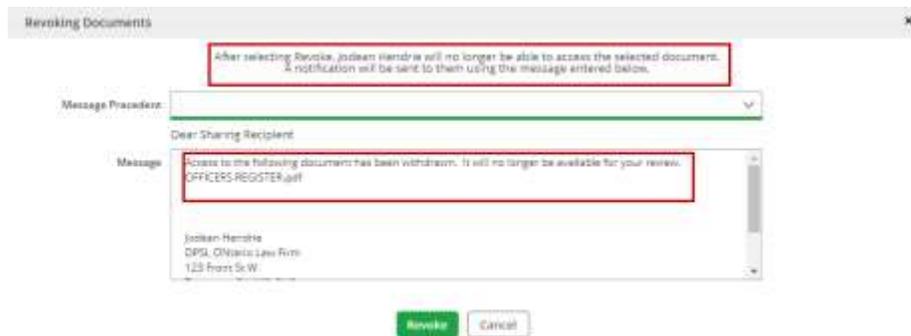


When the **Revoke** button is clicked, the recipient will receive an email advising that access to the shared document has been withdrawn.