FAQs – Fast Company® Virtual Minute Books

Last Updated: March 15, 2021

1. **What are the benefits of using Virtual Minute Books?**
    The Virtual Minute Book (VMB) module provides many benefits to your firm and your clients including:
    - Maintain and share any Minute Book virtually with your client through UnityC, the secure connection between Unity law offices, clients, other legal professionals, and [stakeholders](#).
    - Once the VMB 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 VMB by any of your internal staff without having to locate the physical Minute Book or file.
    - Update the VMB by adding any document, resolution, or updated register easily.
    - Reduce or eliminate costly physical Minute Book storage and repurpose expensive office space for value-added 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.

2. **What is the cost to use the Virtual Minute Book?**
    The VMB is absolutely **FREE** to use within Fast Company as long as your record is validated.

3. **Why do I have to accept the new End User License Agreement (EULA)?**
    The DoProcess End User License Agreement (EULA) has been updated to include Unity and the UnityC functionality required for VMB's. 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 **Accept**.

4. **Are there instructions for using the Virtual Minute Book?**
    Yes, there is a [Virtual Minute Book Reference Guide](#) with full instructions for all VMB features.

5. **How do I configure the Virtual Minute Book Categories so that I do not have to update them on each record?**
    To configure the VMB Categories, log in as the **Default** user and click on **Configure Virtual Minute Book**. You are now able to **Edit**, **Delete**, **Add**, **Reset**, and apply **Watermarks** to your categories. Once the Default is updated, all records going forward will include the change. Previously created minute books will not be affected.

6.   How do I add documents to the Virtual Minute Book?
      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
      on the document or click **Open**.

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

      • 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.

7.   I added a document to the wrong category. How do I move it?
      If you added a document to the wrong category, you can move it to another
      category in two ways:

      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 **Select
      Category** window will appear. Select the required category from the
      dropdown menu. Click **OK** to move the document.

8.   How do I add a Register or Ledger to the Virtual Minute Book?
      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.

9.   Can I batch export Registers or Ledgers to the Virtual Minute Book?
      Yes, on the **Forms & Registers** tab you will see **Batch Export to VMB**.
      Click **Batch Export to VMB**, select the registers and ledgers to upload, and
      click **Upload**.
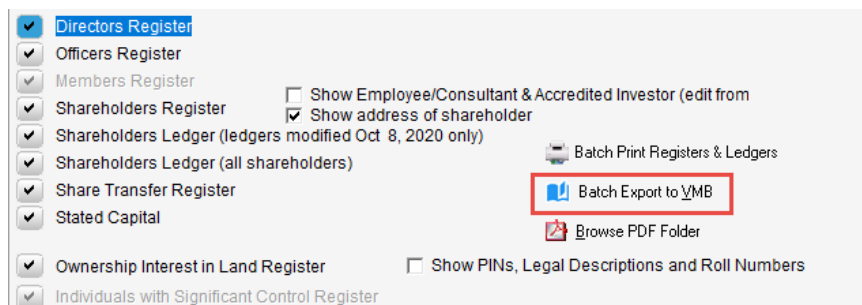
10. How do I create the Virtual Minute Book?

Once you have added all documents into the corresponding categories click **Create VMB**. A PDF version will open. The VMB 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 VMB was created. Your law firm information will appear on the cover page as "Prepared By".

11. How do I upload the VMB to UnityC?

Once you have created the VMB, click **Upload VMB**.

12. What are the benefits of using UnityC to share documents and the VMB with the Corporation principals or individuals?

Unlike emails, UnityC is a secure way to share documents with your client. Bank-grade access protocols, high-security cloud hosting infrastructure, and encrypted data transmission keep everything safe and secure – at every step.

13. What is the maximum file size for a Virtual Minute Book pdf?

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

14. Can I upload one-off documents to share with individuals such as bank officials and accountants?

Yes, to upload a single document go to the category with the document to be uploaded, right click on the document, and click **Upload**. Then select the required recipient?

15. Can I update the Virtual Minute Book?

Yes, the VMB can be updated with new content as necessary. If you have added new content to the VMB, click **Upload VMB**. The newest version of the VMB will automatically be updated in UnityC.

16. Will the Virtual Minute Book be shared with the officers or directors of a corporation automatically?

No, to do so, click **Share Documents** and manually enter the email address of the officers or directors. If the email has been entered in their principal record, simply click on the principal and that person's email address will be populated in the email section. Select the document to be shared and click **send**.
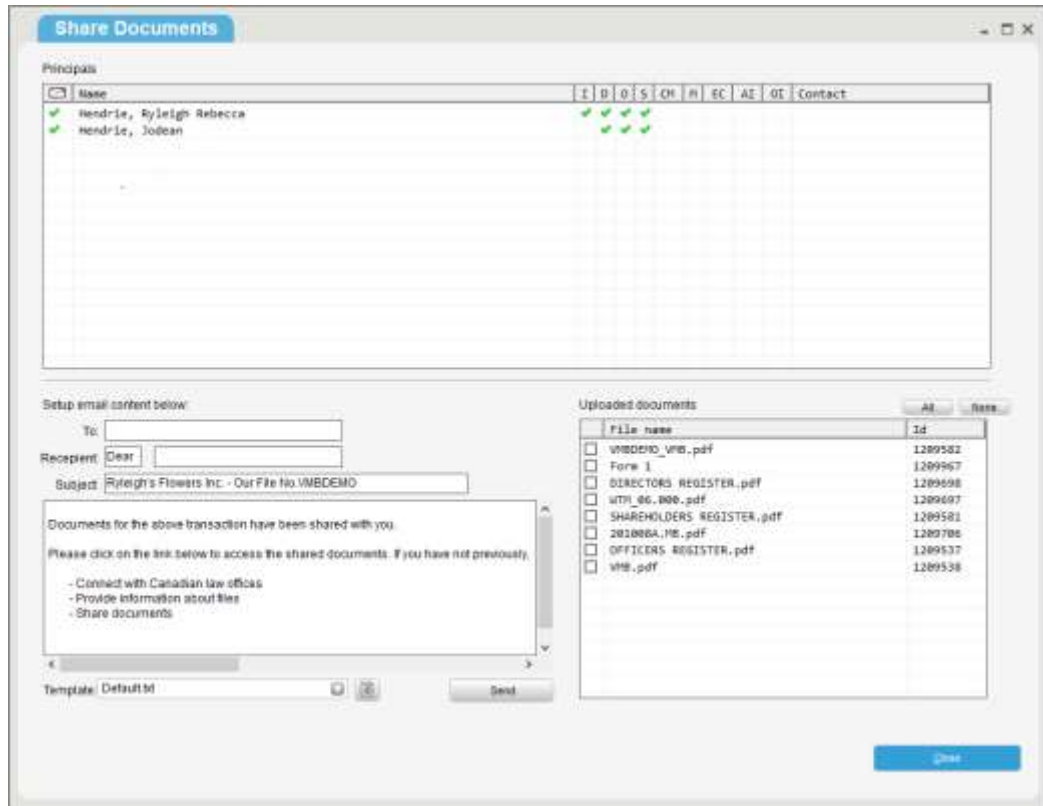
17. Can I change the default email in the Share Documents window?

Yes, 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 VMB.

To access the **Edit Email Template** window, click ![icon].
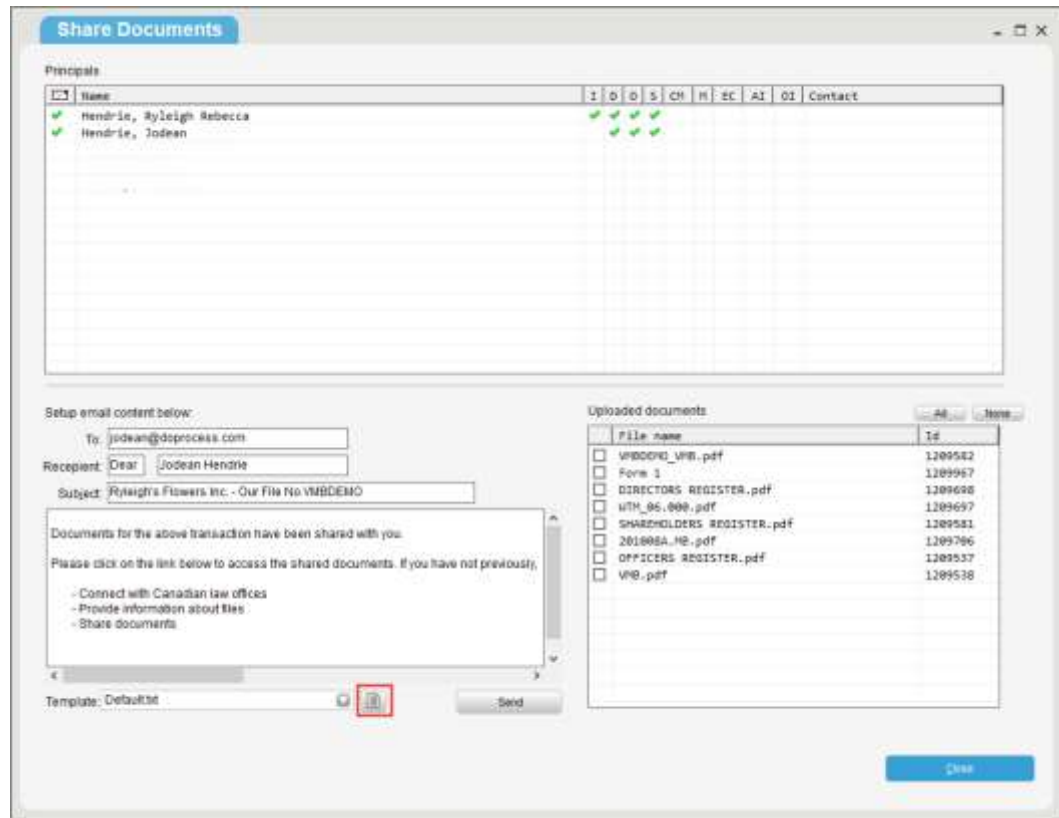
18. **Why does my client have to create UnityC credentials?**

    Virtual Minute Books are shared using UnityC as it is the most secure document sharing option. In order to access UnityC and the VMB, clients are required to create unique login credentials as part of UnityC's security protocols.

19. **Can I revoke access to a shared Virtual Minute Book or individual document?**

    If at any point you wish to revoke shared access to a VMB or shared documents, click **Revoke**. Click ≡ next to the recipient name to revoke all documents or click ≡ beside the individual File Name/document name to revoke individual documents.

20. **Changes have been made to the Corporation (i.e. new directors). Will the Virtual Minute Book be updated automatically?**

    No, any register or ledger that has changed will need to be uploaded to the VMB again. The older version will be overwritten.

21. **In the VMB table of contents, the documents appear with the document's file name and end with ".PDF". How do I fix this to show the correct document description without PDF?**

The Document Description will appear in the table of contents if you have entered the description. If you have not entered a document description the File Name will be used. You can give the document a more descriptive name by highlighting the document to be edited, clicking **Edit**, and entering a Document Description Name and Effective Date. Click **OK**.
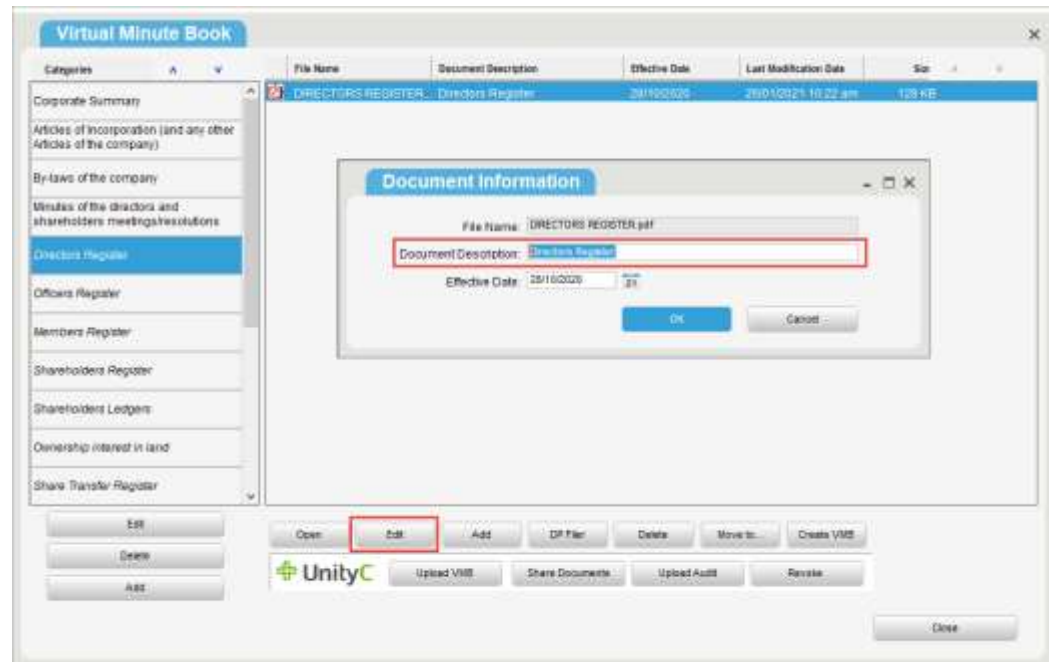
22.   If I upload an updated version of the VMB to UnityC, will my client receive the newly updated version?

Yes, the VMB will be updated in their UnityC portal.