

Reference
Guide

Version 1.0
July 2021

Agent for Service in Alberta Fast Company[®]



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1. Introduction

As of March 29th, 2021, Alberta corporations need to provide an authorized Corporate Registry service provider with agent for service updates as soon as they occur. We are pleased to announce that we have provided a way for you to appoint an agent or alternate agent for service easily within Fast Company.

2. Getting Started

2.1 Upgrade to Version 23.1A or Higher

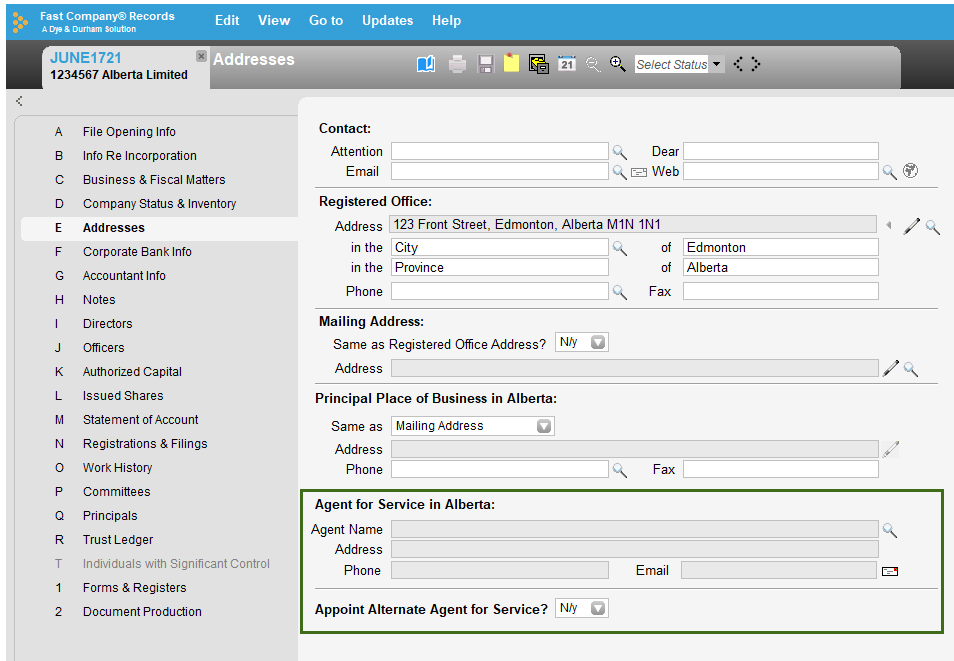
Your firm must be on version 23.1A or higher to start using the Agent for Service functionality in Alberta.

3. Agent for Service in Alberta Tab E

Once you have opened a new or existing record for the first time after upgrading, you see the new **Agent for Service in Alberta** fields on Tab E along with the new **Appoint Alternate Agent for Service** fields.

The information stored by Fast Company in relation to the Agent for Service of a corporation consists of:

- Agent Name
- Address
- Phone Number
- Email Address



Fast Company® Records
A Dye & Durham Solution

JUNE1721
1234567 Alberta Limited

Addresses

Contact:
Attention: _____ Dear: _____
Email: _____ Web: _____

Registered Office:
Address: 123 Front Street, Edmonton, Alberta M1N 1N1
in the City: _____ of Edmonton
in the Province: _____ of Alberta
Phone: _____ Fax: _____

Mailing Address:
Same as Registered Office Address? My
Address: _____

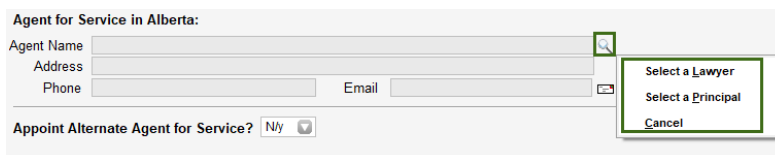
Principal Place of Business in Alberta:
Same as: Mailing Address
Address: _____
Phone: _____ Fax: _____

Agent for Service in Alberta:
Agent Name: _____
Address: _____
Phone: _____ Email: _____

Appoint Alternate Agent for Service? My

4. Appointing an agent for service for the first time

To appoint an agent for service for the first time, click on the **magnify glass** next to the Agent Name. You have the option to **Select a Lawyer**, **Select a Principal**, or **Cancel**.



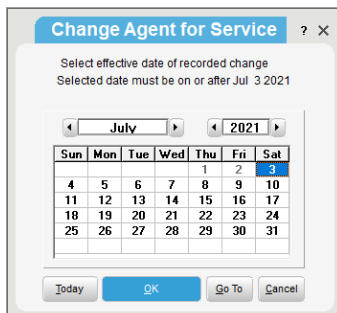
Agent for Service in Alberta:
Agent Name: _____
Address: _____
Phone: _____ Email: _____

Appoint Alternate Agent for Service? My

Select a Lawyer
Select a Principal
Cancel

4.1 Select a Lawyer

When you select a Lawyer, you will be presented with a calendar window **Change Agent for Service**. Select the effective date of the recorded change. Note: The date must be on or after the date of incorporation. Click **OK** to record the change.



Change Agent for Service ? x

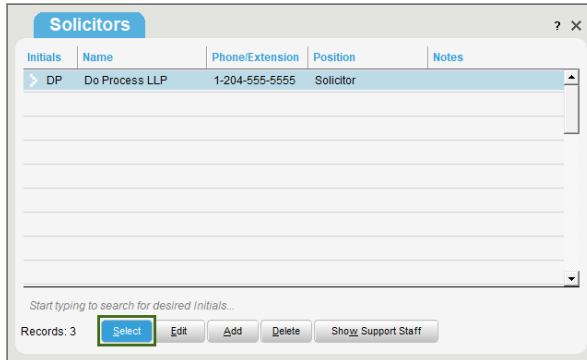
Select effective date of recorded change
Selected date must be on or after Jul 3 2021

July 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Today OK Go To Cancel

The **Solicitors database** will appear. Highlight a lawyer from **Solicitors database** and click **Select**.



All data from the Solicitors database and law firm data from user setup will populate into the Agent Name, Address, Phone, and Email fields.

Agent for Service in Alberta:

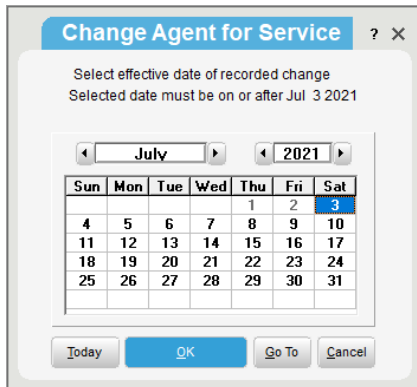
Agent Name

Address

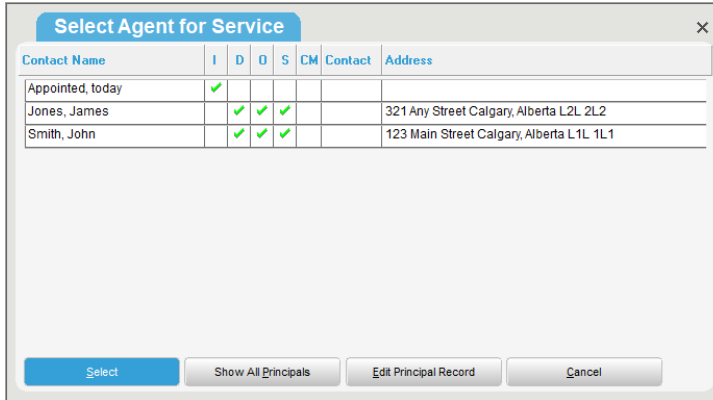
Phone Email

4.2 Select a Principal

When you select a Principal, you will be presented with a calendar window **Change Agent for Service**. Select the effective date of the recorded change. Note: The date must be on or after the date of incorporation. Click **OK** to record the change.



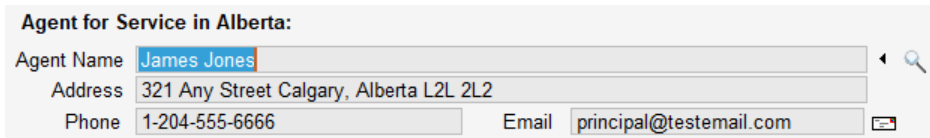
The **Select Agent for Service** window will appear. Highlight a principal from **Select Agent for Service** window and click **Select**. You also have the option to **Show All Principals**, **Edit Principal Record**, or **Cancel** to close the window.



Contact Name	I	D	O	S	CM	Contact	Address
Appointed, today	✓						
Jones, James		✓	✓	✓			321 Any Street Calgary, Alberta L2L 2L2
Smith, John		✓	✓	✓			123 Main Street Calgary, Alberta L1L 1L1

Buttons: Select, Show All Principals, Edit Principal Record, Cancel

All data associated with the Principal will populate into the Agent Name, Address, Phone, and Email fields.



Agent for Service in Alberta:

Agent Name: James Jones

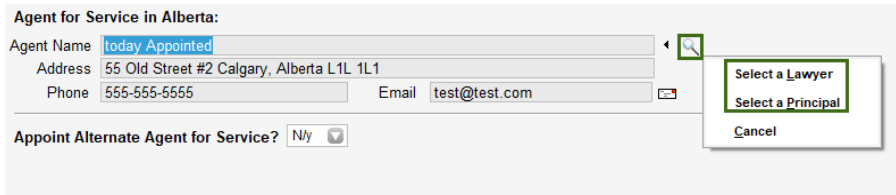
Address: 321 Any Street Calgary, Alberta L2L 2L2

Phone: 1-204-555-6666

Email: principal@testemail.com

5. Appointing a New Agent for Service

To record a change of agent for service after the first recorded change, click on the **magnify glass** next to the Agent Name. Select either a Lawyer or Principal.



Agent for Service in Alberta:

Agent Name: today Appointed

Address: 55 Old Street #2 Calgary, Alberta L1L 1L1

Phone: 555-555-5555

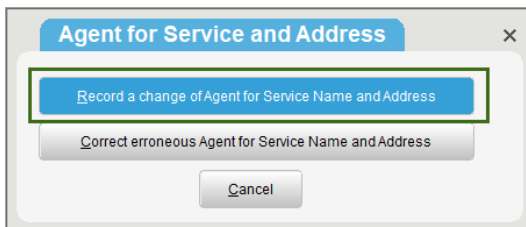
Email: test@test.com

Appoint Alternate Agent for Service? No Yes

Dropdown menu options: Select a Lawyer, Select a Principal, Cancel

The **Agent for Service and Address** window will appear with the following options:

- **Record a change of Agent for Service Name and Address**
- **Correct erroneous Agent for Service Name and Address**
- **Cancel**



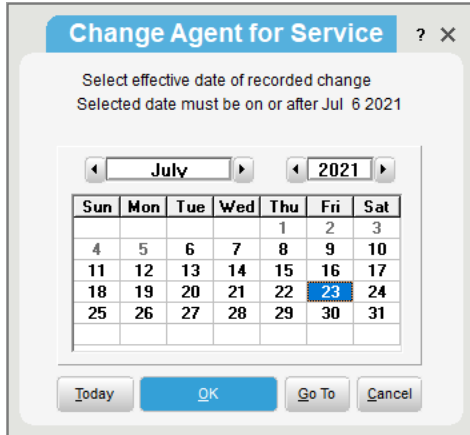
Agent for Service and Address

Record a change of Agent for Service Name and Address

Correct erroneous Agent for Service Name and Address

Cancel

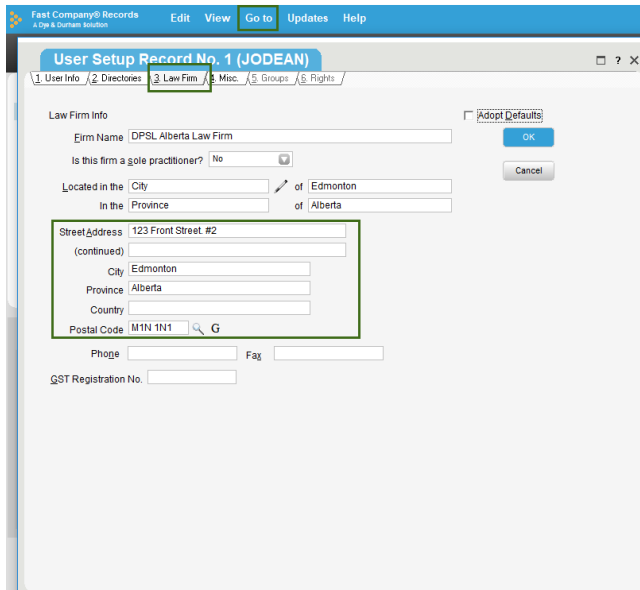
Select **Record a change of Agent for Service Name and Address**. The **Change Agent for Service** calendar will appear. Select effective date of recorded change. Note: The date of the recorded change must be after the date of the last change. Select **OK**.



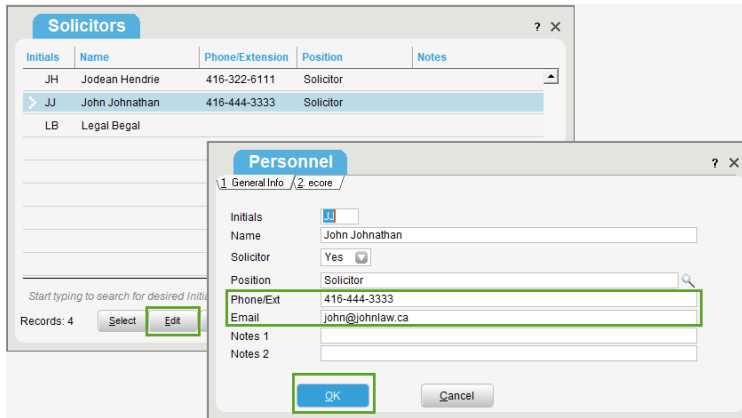
Select a lawyer from the lawyers' database or a principal from the Select Agent for Service window. Your change will now be recorded.

6. Change of Address of Lawyer as Agent for Service

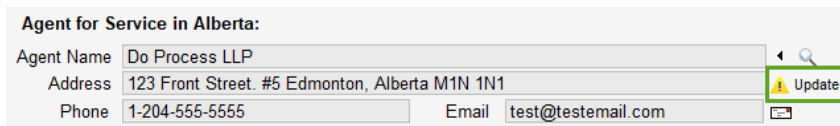
To record a change of Address for the lawyer as Agent for Service, you must first update the law firm address from **Go to > User Setup > Law Firm**.



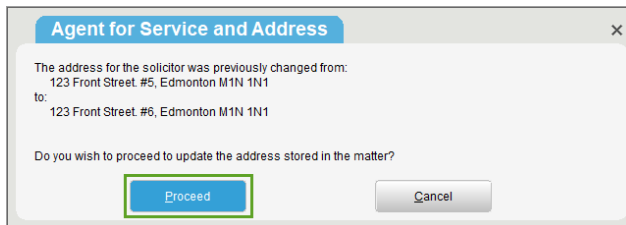
To change the phone and email information, click on the **Solicitors Database**, highlight the solicitor whose phone and email information has changed, and click **Edit**. Make the necessary changes and click **OK**.



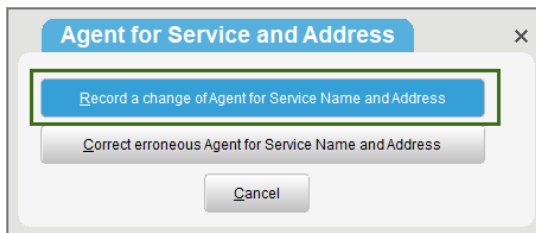
Once the address, phone or email has been updated, open any and all records where the lawyer is the Agent for Service. You will see the **Update warning** button next to the address field of the **Agent for Service in Alberta**.



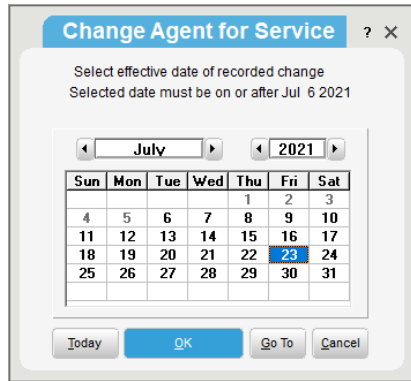
When you click on the **Update warning**, you will be presented with **the Agent for Service and Address** window indicating that the address for the **solicitor** has changed from <display previous address> to <display new address>. You will be asked "Do you wish to proceed to update the address stored in the matter?" Click **Proceed** to update the address in this matter or **Cancel** to close the window.



Click **Record a change of Agent for Service Name and Address**, then **Select effective date of recorded change**, click **OK**.

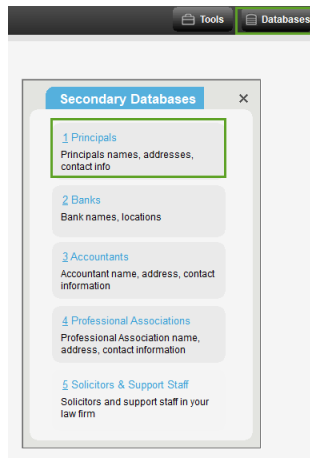


Select **Record a change of Agent for Service Name and Address**. The **Change Agent for Service** calendar will appear. Select **Effective date of recorded change**. Note: The date of the recorded change must be after the date of the last change. Select **OK**.

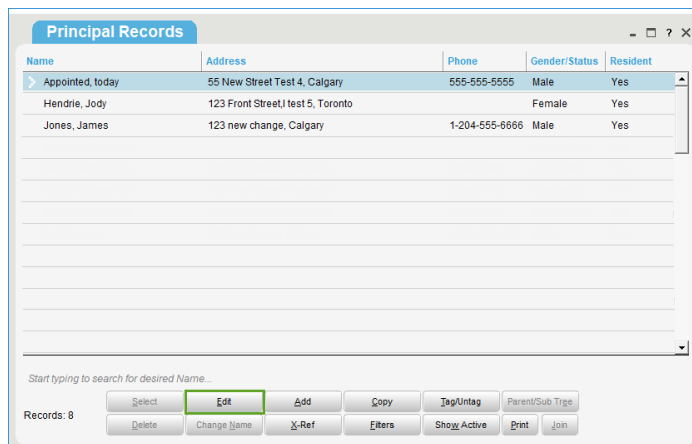


7. Change of Address of Principal as Agent for Service

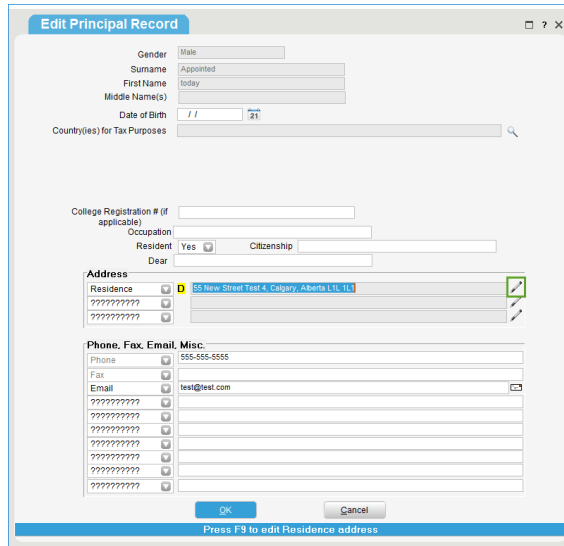
To change an address for the Agent for Service, who is a Principal, click **Databases** and select **Principals**.



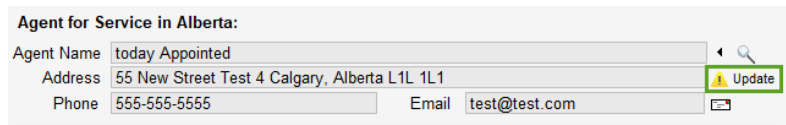
Highlight the Principal whose address has changed from the **Principal Record** screen and click **Edit**.



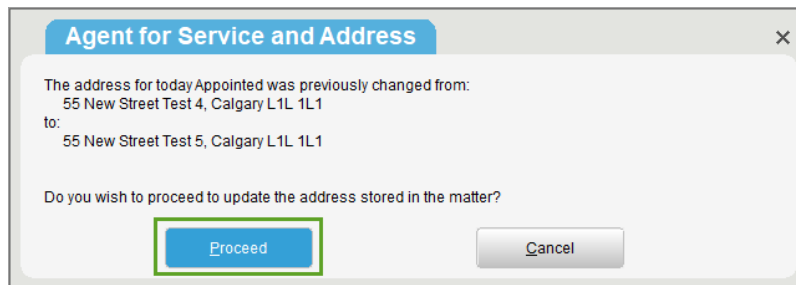
Update the address by clicking on the **pencil icon** and **OK** after the change has been made.



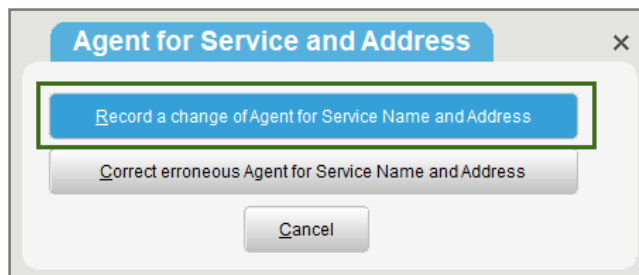
When you return to any record where the Principal whose address has changed, you will see an **Update warning** button next to the **Address for the Agent for Service in Alberta** field.



When you click on the **Update warning**, you will be presented with **the Agent for Service and Address** window indicating that the address for the **principal** has changed from <display previous address> to <display new address>. You will be asked "Do you wish to proceed to update the address stored in the matter?" Click **Proceed** to update the address in this matter or **Cancel** to close the window.



Click on **Record a change of Agent for Service Name and Address**.



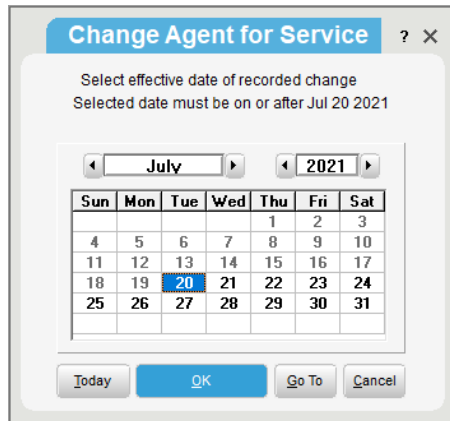


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Select an **Effective date of recorded change** from the calendar window in the **Agent for Service and Address** window and click **OK**. Your record has now been updated and the **Update warning** has been removed.

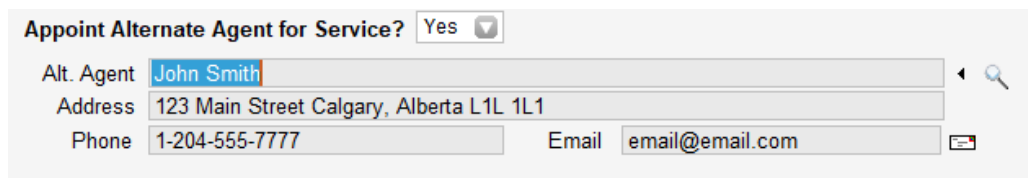
Reminder: Update all records that have the same principal by following the above steps.



8. Appoint Alternate Agent for Service

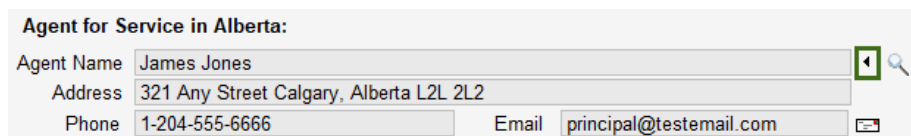
To appoint an Alter Agent for Service, click **Yes** from the dropdown next to **Appoint Alternate Agent for Service?** on Tab E.

The Appoint Alternate Agent for Service functionality is the same as appointing an Agent for Service outlined above.

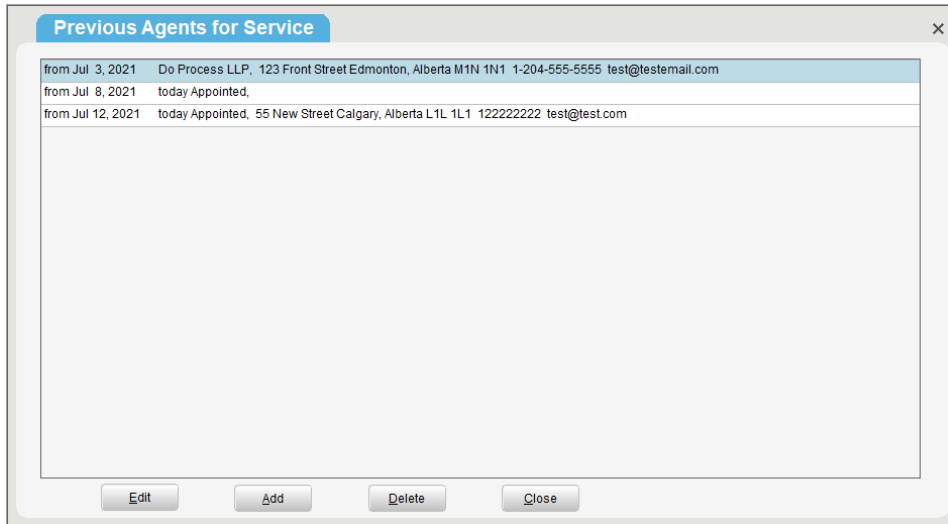


9. History of Changes for Agent for Service

To see a history of your changes, click on the **arrow** beside the **magnify glass**.



You will be presented with the **Previous Agents for Service** window showing a list of changes including the date of the change and the Agents for Service. From this window you can **Edit**, **Add**, **Delete**, or **Close** the window.



10. Forms & Registers

Once you have selected an Agent for Service for the first time, the **Notice of Agent for Service** form will be enabled on the Forms & Registers tab.



When you effect a change of Agent for Service, the **Change of Agent for Service** and **Resignation of Agent for Service** forms will be enabled and the **Notice of Agent for Service** will be disabled.



When you have selected an Alternate Agent for Service for the first time, the **Notice of Alternate Agent for Services** form will be enabled on the Forms & Registers tab.



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- Notice of Agent for Service
- Change of Agent for Service
- Resignation of Agent for Service
- Notice of Address Change for Agent
- Notice of Alternate Agent for Service
- Change of Alternate Agent for Service
- Resignation of Alternate Agent for Service
- Notice of Address Change for Alternate Agent

When you effect a change of the Alternate Agent for Service, the **Change of Alternate Agent for Service** and **Resignation of Alternate Agent for Service** forms will be enabled and the **Notice of Alternate Agent for Service** will be disabled.

- Notice of Attorney for Service
- Notice of Agent for Service
- Change of Agent for Service
- Resignation of Agent for Service
- Notice of Address Change for Agent
- Notice of Alternate Agent for Service
- Change of Alternate Agent for Service
- Resignation of Alternate Agent for Service
- Notice of Address Change for Alternate Agent

When you effect a change of address for the Alternate Agent for Service, the **Notice of Address Change for Alternate Agent** will be enabled on the Forms and Registers Tab.

- Notice of Agent for Service
- Change of Agent for Service
- Resignation of Agent for Service
- Notice of Address Change for Agent
- Notice of Alternate Agent for Service
- Change of Alternate Agent for Service
- Resignation of Alternate Agent for Service
- Notice of Address Change for Alternate Agent