

Quick
Reference
Guide

Version 1.0
October 2021

Filing Articles of Incorporation through the eCore Integration in Fast Company®

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1 About ecore

Trusted by firms across Canada for over 20 years, ecore is an intuitive solution that makes it easy to automate your records and filing processes and improves speed and accuracy in data and records management.

2 Sign up for an ecore account

We have been working in conjunction with ecore to update our systems to allow for the new Articles of Incorporation, Initial Returns, Notice of Change and Annual returns.

If you do not have an ecore account, email us at sales@dyedurham.com for more information or click the button below to open a deposit account.

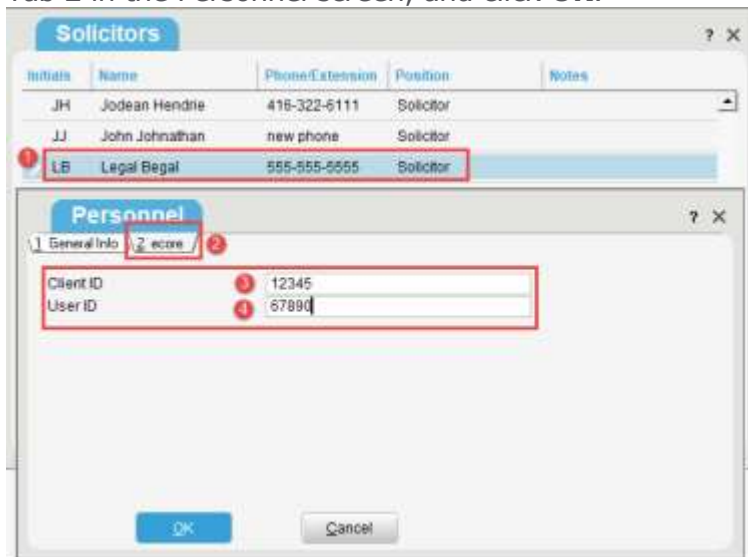
[Open an ecore account](#)

3 Fast Company and ecore integration benefits

- All data from within Fast Company will populate into the ecore E-File Data screen when choosing to file your Articles of Incorporation, Initial Returns, and Notice of Change electronically. You simply have to complete the additional field in the on-screen form, click to initial ecore filing, and comply with any messages regarding missing data or acknowledgements.
- Details of the incorporation are automatically updated in Fast Company including the Corporate Name, Date of Incorporation and Ontario Corporation Number. The Certificate of Incorporation or Form 1 Confirmation of Filing is displayed and stored with the Corporate Record.

4 Entering your ecore credentials in Fast Company

To start using ecore from within Fast Company, simply select the solicitor or law clerk with ecore credentials from the **Solicitors database** or **Support Staff** database by clicking on the **magnify glass** next to the Solicitor or Law Clerk field on Tab A of a record. Highlight the Solicitor or Law Clerk and click **Edit**. Enter the solicitor's or law clerk's Client ID and User ID on Tab 2 in the Personnel screen, and click **OK**.



You are now able to file all your Incorporations and Form 1's from within the Forms & Registers tab of Fast Company when selecting electronic registration and clicking on the **ecore** Validate button.



Note: If you do not know your ecore credentials, log into ecore and they will be appear in the account box.



5 UI Changes to accommodate ecore filings

5.1 NAICS (North American Industry Classification System)

What is a NAICS code?

The North American Industry Classification System (NAICS) is an industry classification system developed by the statistical agencies of Canada, Mexico and the United States. NAICS has been designed for statistical purposes. Government departments and agencies and other users that use it for administrative, legislative and other non-statistical purposes are responsible for interpreting the classification for the purpose or purposes for which they use it.

Some of the new corporate filings require a NAICS Code. We have provided you with the ability to lookup a corporation NAICS code based on a keyword lookup by simply entering keywords that most closely describes the primary line of business for a corporation and then searches for proper NAICS code. A full directory can be found [here](#).

On Tab B you will now see the new NAICS (North American Industry Classification System) section.

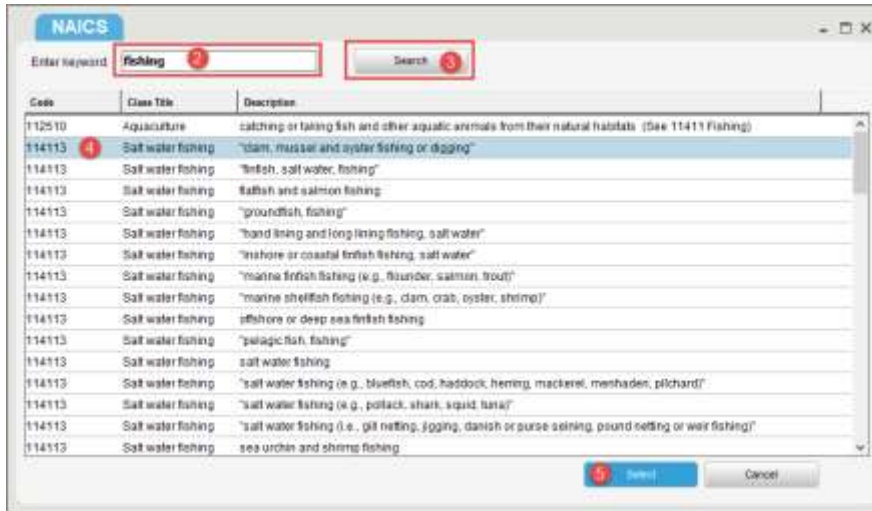
To complete a NAICS search complete the following steps:

1. Click on the **Keyword Lookup** button

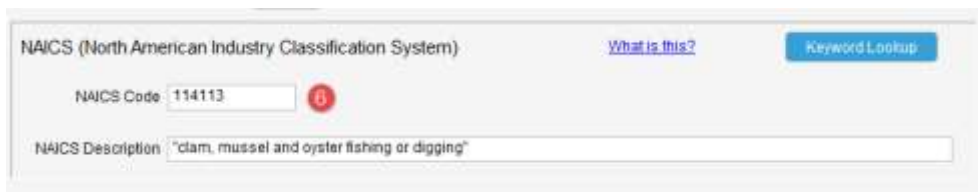


The screenshot shows a web interface for the NAICS (North American Industry Classification System) search. At the top left, it says "NAICS (North American Industry Classification System)". To the right of this text are two links: "What is this?" and a red circle with a white exclamation mark. Further right is a button labeled "Keyword Lookup" which is highlighted with a red rectangular box. Below the header, there are two input fields: "NAICS Code" and "NAICS Description".

2. Enter a key word
3. Click **search** button
4. Highlight the code that best describes the corporation's primary line of business
5. Click **select**



6. The NAICS Code and the NAICS Description will populate on Tab B



This data will pass to ecore and paper filings.

5.2 Company Key

New field on Tab B **Company Key** allows you to store the corporations Company Key. The Company key is required for post-registration management of the corporation and is required on corporate filings. This data will pass to ecore and paper filings.

5.3 Principal Records

For any principal whose status is a Corporation, you are now able to validate their Ontario Corporation No. by clicking on the **Validate OCN** button on the Principal record. This validation may be required for some corporate filings. This data will pass to ecore.



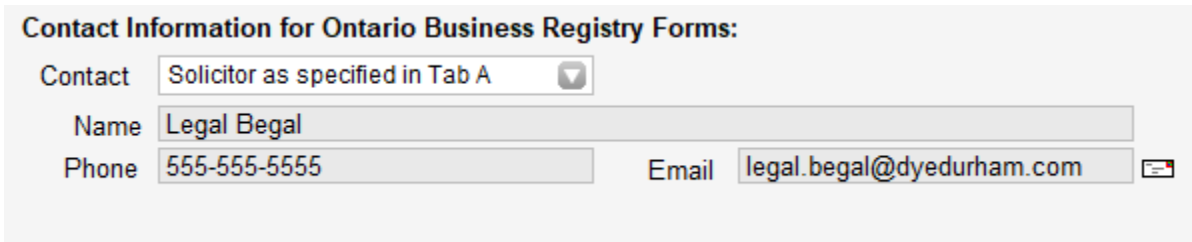
5.4 Corporation's Official Email Address

On Tab E a new field **Corporation's Official Email Address** has been added. You are now required to enter the corporation official email address on corporate filings. This data will pass to ecore and paper filings. At this current time, the Official Email Address must belong to the corporation.

5.5 Contact Information for Ontario Business Registry Forms

On Tab E new fields have been added to allow you to enter the Contact Information for Ontario Business Registry Forms.

From the Contact field you can select between **Solicitor as specified in Tab A**, **Law Clerk as specified in Tab A** and **Principal**. If **Solicitor as specified in Tab A** or **Law Clerk as specified in Tab A** are selected, the Name, Phone number and email address of the selected Solicitor or Law Clerk will appear in the name, phone and email fields. If you select a **Principal**, you will be presented with the Select a Principal screen, highlight a principal and click **Select**.

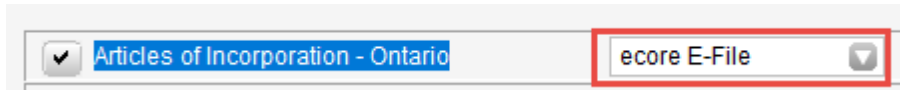


6 Accessing ecore E-File

Now that you have set up your ecore credentials within Fast Company for either the solicitor or law clerk, you are ready to start using the many time saving benefits of the ecore E-File integration.

6.1 ecore E-File on Forms & Registers

To access ecore filings for Articles of Incorporations, ensure that the **ecore E-File** option is selected beside the Articles of Incorporation on the Forms & Registers tab and click on the **check mark** beside the Articles of Incorporation.



6.2 ecore General window/Tab

The ecore window will open on the General Tab. All data populated from the Fast Company fields will be populated into the corresponding fields of the ecore window.

Note: The fields will be populated dependent on if number or named corporation is selected on Tab B.

You are able to make changes to any fields in white. You are also required to enter additional information not stored in Fast Company. i.e. Signature first and last name and Requested date of incorporation. These areas are identified with an exclamation mark.

core Validate Create XML for Filing Retire

General Directors Incorporators Restrictions on business powers Restrictions on share classes Restrictions on share rights Restrictions on share transfers Other provisions Files

Type of incorporation: Numbered Legal element for the number name: Limited

An English name: Proposed corporation name: NUANS report date: NUANS reported number:

A French name: Proposed corporate name: NUANS report date: NUANS reported number:

Registered office address

Type of address: Standard

Street Number: 700-123 Street name: Front Street West Lot/Concession:

City/Town: Toronto Province/State: ON - Ontario Postal code: M1N 1N1 Country: CA - Canada

Number of directors

Type of number of directors: Minimum/Maximum Minimum: 1 Maximum: 10

NAICS

Primary activity code: 114113 Description: "marine fish fishing (e.g. founder, salmon, trout)" Search

Effective date

Requested date of incorporation: None Date:

Signature

First name: Last name: Official email: jodean.hendrie@dyledatum.com

Contact information

Law firm: Lawyers R U LLP

First name: Legal

Middle name:

Last name: Begal

Email: jodean.hendrie@dyledatum.com

Contact telephone number

Country code: 1

Area code: 555

Phone number: 555-5555

Extension:

Select if you have a Legal opinion for an identical name

Legal opinion

Law firm:

Lawyer first name:

Lawyer middle name:

Lawyer last name:

Address

Type of address:

Street Number: Street name:

Lot/Concession:

City/Town:

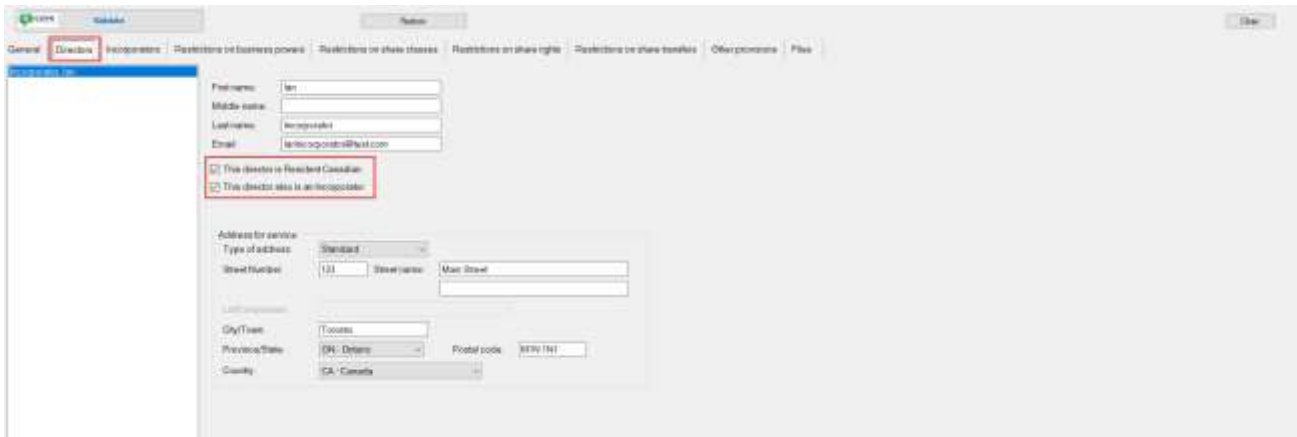
Status: Not submitted Userid:90394 Clientid:11428

6.3 Directors Tab

The first director entered on Tab I will pass to the Directors Tab. Check the following boxes if they apply:

- This director is Resident Canadian
- This director also is an Incorporator

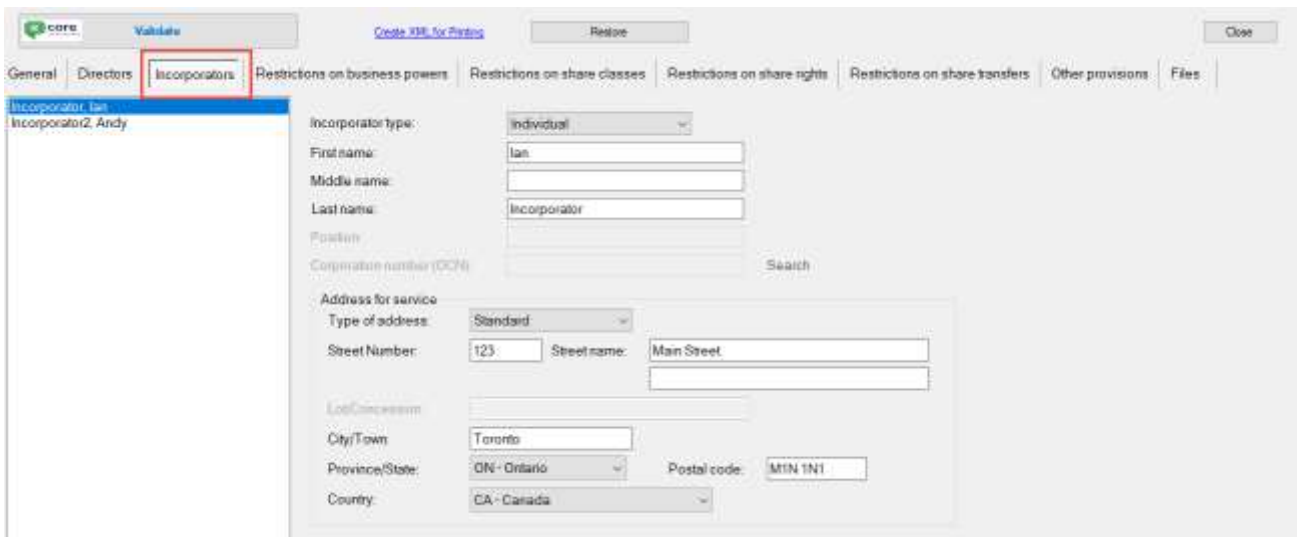
Ensure that all information is correct. If the director's information is not correct close the ecore window and make the updates in Fast Company. Note: Information changed in the ecore window will not pass back to the Fast Company fields.



6.4 Incorporators Tab

All Incorporators entered on Tab B will populate into the incorporators tab.

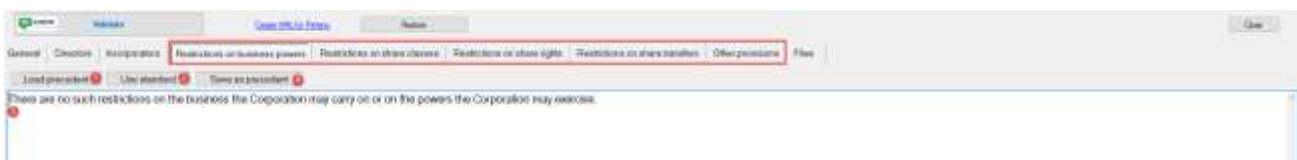
Ensure that all information is correct by clicking on each incorporator's name. If the incorporator's information is not correct close the ecore window and make the updates in Fast Company on Tab B Incorporators field. Note: Information changed in the ecore window will not pass back to the Fast Company fields.



6.5 Restrictions and other provisions tab

- On the Restrictions and other provisions tabs you can:
- Load Precedent
- Use standard
- manually enter any restrictions by copying and pasting into the white area
- Save as precedent by clicking on save precedent, entering a name before the '.A0#'

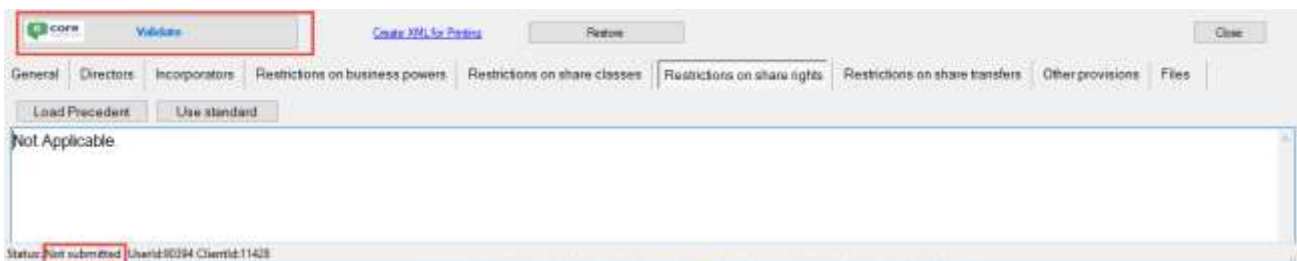
Note: The character limit in each of these fields is 10,000 characters. Any precedents that have been formatted i.e. paragraph number, indenting spacing etc. will be wiped out by the Ministry when submitting. This is a known issue by the Ministry and they will be working to update this in the future.



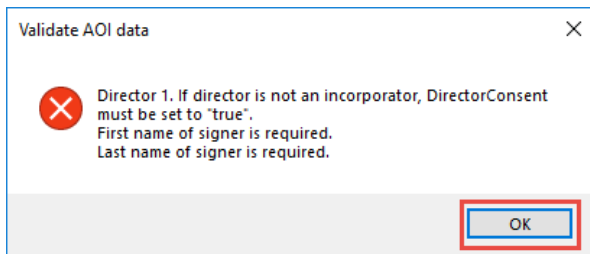
6.6 Validating and submitting ecore filings

When all information has been entered into the ecore window, you are now ready to validate your data before submitting to ecore.

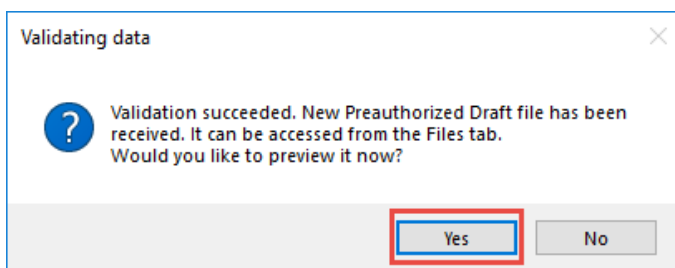
To validate click on the **Validate** button. Notice the status is set to not submitted.



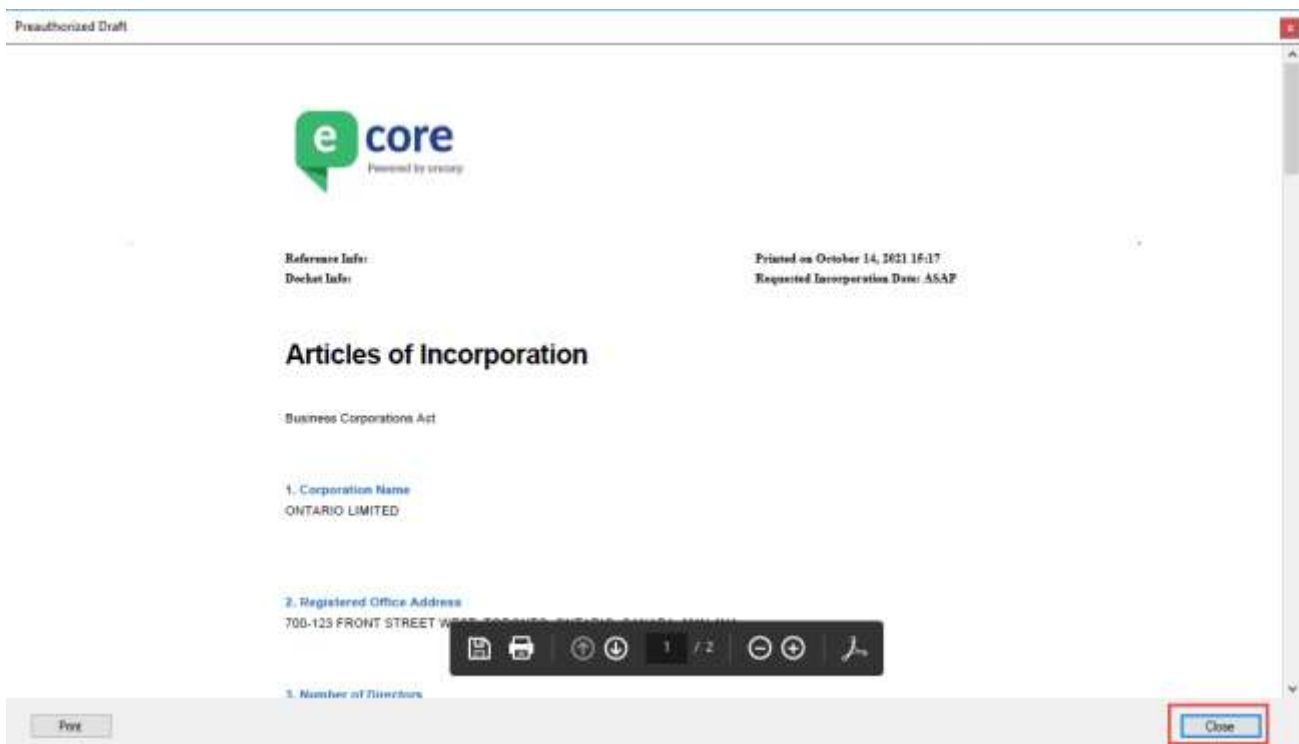
If any information is missing from the validation, the Validate AOI data window will appear to inform you as to what information is missing. Click **OK** to close this window and go back to ecore window to enter the missing information. Click **Validate** again.



When all of the data has been validated, the following window will appear indicating that validation was successful and that a draft file has been added to the **File** tab. You have the option to preview the file now by clicking **Yes**.



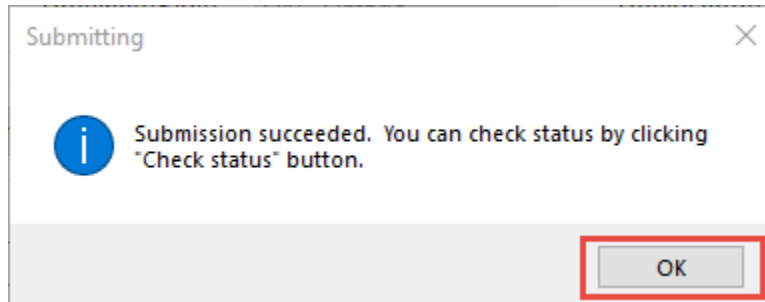
When you click yes to open the file from the **File** tab, a preview of the file will appear. Click **Close** after you have previewed the file to ensure all information is accurate.



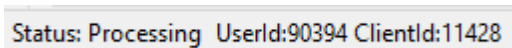
If you are satisfied with the preview, click **Yes** to submit the incorporation request now. If you click **No** the window will close and you will have the ability to make changes to the ecore window and submit later by clicking Submit on the ecore window.



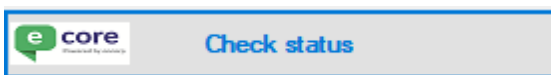
You will receive a submission succeeded window. Click **OK** to close the window.



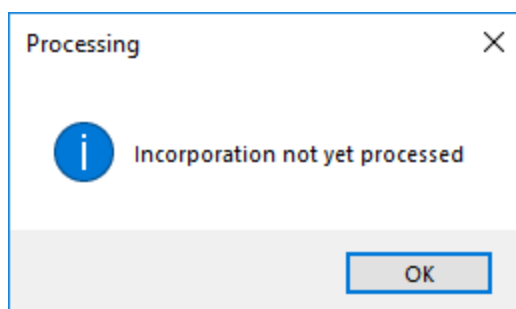
The status will change to processing on the bottom left hand corner



You can also check the status by clicking on the **Check status** button on the ecore window. Note: filings can take some time.



The following window will appear if incorporation has not yet been processed. Click **OK** to close.



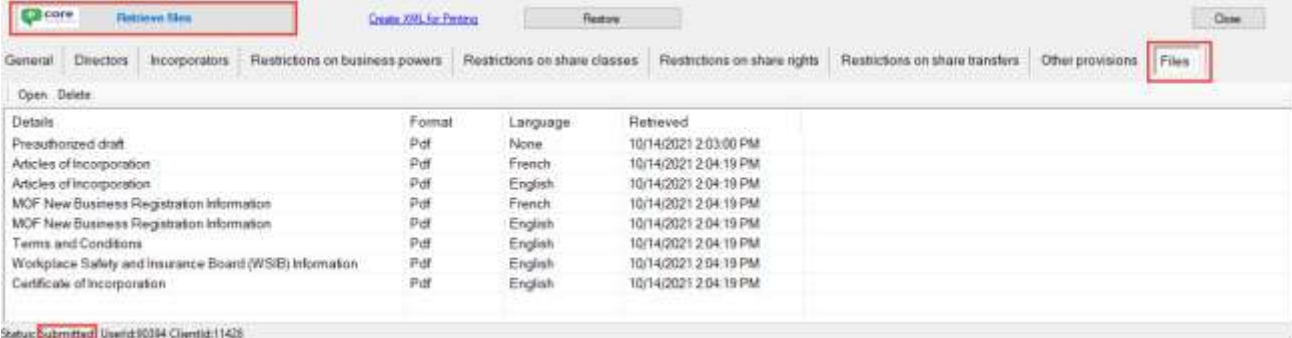
6.7 Successful Filing and Retrieve Files

Once the status has been updated to Retrieve Files, the following documents will also be appear on the **Files** tab and the status will change to **submitted**.

- Certificate of Incorporation
- Articles of Incorporation in English and French
- Terms and Conditions
- Workplace Safety and Insurance Board (WSIB) Information
- MOF New Business Registration Information in English and in French.

Note: The Corporation will receive an email to their **official email address** noted on Tab E containing the above documents.

Once the status has been updated to Retrieve Files, the above documents will also be appear on the **Files** tab and the status will change to **submitted**.



The screenshot shows the 'Retrieve Files' status in the software interface. The 'Files' tab is selected, and a table lists the retrieved documents. The status is 'Submitted'.

| Details | Format | Language | Retrieved |
|---------------------------------------------------------|--------|----------|-----------------------|
| Preauthorized draft | Pdf | None | 10/14/2021 2:03:00 PM |
| Articles of Incorporation | Pdf | French | 10/14/2021 2:04:19 PM |
| Articles of Incorporation | Pdf | English | 10/14/2021 2:04:19 PM |
| MOF New Business Registration Information | Pdf | French | 10/14/2021 2:04:19 PM |
| MOF New Business Registration Information | Pdf | English | 10/14/2021 2:04:19 PM |
| Terms and Conditions | Pdf | English | 10/14/2021 2:04:19 PM |
| Workplace Safety and Insurance Board (WSIB) Information | Pdf | English | 10/14/2021 2:04:19 PM |
| Certificate of Incorporation | Pdf | English | 10/14/2021 2:04:19 PM |

Status: **Submitted** UserID: 60394 ClientId: 1426

6.8 Retrieving the company key

The corporation will receive an email to their **official email address** noted on Tab E containing the company key. Have your client forward you a copy of that email and copy and paste the company from the email into the Company Key field on Tab B.



NOTE: Majority of businesses in Ontario have been registered through Dye & Durham meaning Dye & Durham has delegated authority on all businesses registered through them and a company key is not required.

If I don't know how or when the company was registered, you can proceed with the filings and if you receive an error asking for the company key, email us at clientcare@dyledurham.com and we will help you retrieve the company key. The company key has a turnaround of 3 business days from the Ministry.

6.9 Frequently Asked Questions

Click [here](#) to access our FAQ's.