



TASK FOR OPEN MATTER	ACTION
Amalgamation – New	Add New File>Amalgamation Wizard
Amalgamation – Resume	Common Tasks>Amalgamation Wizard
Balance Forward of Shares (Historic Share Transactions)	Common Tasks>Issue Shares using last share transaction date, make notes in Notes section. eg “Brought Forward – See MB for prior Share Transactions”
Beneficial Ownership	Common Tasks>Beneficial Ownership
Cancel Share Certificate (ie because of loss)	Capital Tab/Principals/Shares/ on specific of transaction and select “Cancel”
Change Organization Date	Common Tasks>Change Organization Date
Clean Up the Minute Book (Extracts current information from Onbis for review) (where available)	Common Tasks>Clean Up the Minute Book
Close Share Class	Capital Tab/Share Structure/ beside Class Name, enter date
Consolidate (Combine) Share Certificates	Common Tasks>Share Consolidation
Convert (Rename/Redesignate) Share Class to a different/new Class	Common Tasks>Share Conversion
Create “New” Corporation using Existing Corporation Information as Template	Open existing Matter> Copy Matter , answer prompt (yes) re D/O/SHs after copy, update specific information for new Matter
Create “New” Corporation using Existing Corporation Information as Template, retaining only Share Structure	Open existing Matter> Copy Matter , answer prompt (no) re D/O/SHs after copy, use Organization Wizard to enter new info
Create New Contact	Add New File>Contact
Create New Share Class	Capital Tab>Share Structure>Add Share Class button
Delete from Grid (Table) to correct errors	Highlight desired line with mouseclick and Delete on keyboard
Elect a Director	Common Tasks>Elect a Director
Elect an Officer	Common Tasks>Elect an Officer
Elect an Officer – Custom Office	Common Tasks>Elect an Officer>Select Custom Office in dropdown and enter title in textbox
Exchange Shares	Common Tasks>Share Exchange
File Initial Return/Notice of Change Online (where available)	Common Tasks> File Initial Return>Notice of Change
Generate Ledgers and Reports – Current Date	Create Documents Quick Pick
Generate Ledgers and Reports – Specific Date	Create Documents> Reports Change As of date
Generate Specific Documents/Packages not in Quick Pick	Create Documents>All Documents>“Folder”
Generate Specific Documents/Packages not in Quick Pick with different signing date	Create Documents>“Folder” Change “As of” and/or “Signing Date”
Incorporate a Company online (where available)	Fourth step of Incorporation Wizard
Name Change – Corporate	Common Tasks>Corporate Name Change, answer prompt re reissuing shares to S/Hs after name change. If Corporation is S/H in another matter, 2 nd prompt reissuing shares in new name
Name Change – Individual	Contact Card>Name Change button, answer prompt re reissuing shares in new name
Name Change - Typo	Contact Card>Full Name button, change name, save & close
New Record – Before Incorporation	Add New File>Corporate>Corporate Assistant>Select Province answer “No” to prompt for Incorporation Wizard
New Record – After Incorporation	Add New File>Corporate>Corporate Assistant>Select Province answer “Yes” to prompt for Organization Wizard
New Record – Partnership	Add New File>Corporate>Partnership Wizard
Organize a Company (after Incorporation Wizard)	Common Tasks>Organize this Company
Resign a Director – Single Corporation	Common Tasks>Resign a Director
Replace Director or Resign a Director in Multiple Corporations at once	Common Tasks>Resign a Director> Global Resign tickbox>Save
Resign an Officer	Common Tasks>Resign an Officer
Section 85/86 Rollover	Create new Matter, enter Assets, click s.85/86 on Capital Tab>then “New Transaction” on
Share Transaction Edit – <i>Note simple transactions only</i>	Common Tasks>Edit Share Transaction
Split Shares	Common Tasks>Share Split
Transfer Shares	Common Tasks>Transfer Shares
Transfer/Return Shares to Treasury	Capital Tab>Principals>Shares> on specific line of transaction and select “Transfer to Treasury” and the Transfer Type from dropdown