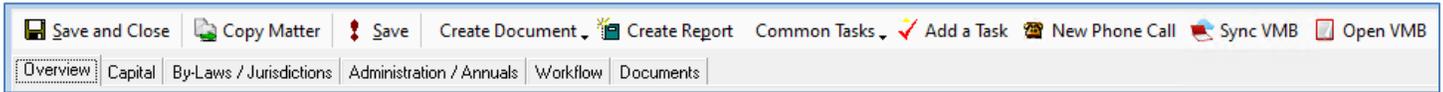


Creating The Virtual Minute Book

Once The Legal Kiosk™ has been created, clicking the **Sync VMB** button from a new record for the first time will allow you to add a new Corporate Virtual Minute Book ("VMB") to The Legal Kiosk™.



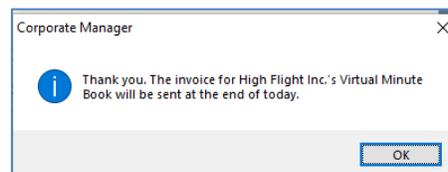
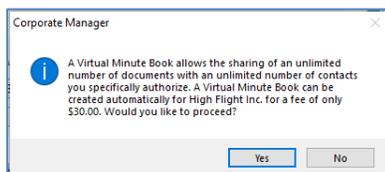
Corporate Name and File/Matter Number

The File Name, Client Number and Home Jurisdiction fields are auto-populated from the Corporate record in Emergent Corporate Manager.

The File/Matter Number is a combined field in the VMB. If the File Number field is used in Corporate Manager, the number will auto-populate here. If only the Matter Number is used in Corporate Manager, the number will have to be entered in the File/Matter Number manually. Some firms use both File and Matter Number. In this case, the Matter Number will need to be entered in the File/Matter Number field manually. The File Number and Matter Number is shown as entered in the Corporate Record for reference. These numbers can be copy/pasted from there into the File/Matter Number field.

Note: The numbers must match to ensure proper syncing of documents in the future.

Depending on your Agreement with Emergent, you may be asked to confirm the creation of the Virtual Minute Book and agree to the fee. Click **Yes** and you will receive a message that you will receive the invoice by the end of today. Click OK to continue to the next step. There are no fees for future syncing of this record.



Timekeepers and Client Contact

The Responsible Lawyer, Paralegal/Clerk, and Client Contact fields will pre-select based on the Timekeepers and Client Contact on the Corporate record in Corporate Manager. If there is more than one of any type, the dropdown selection can be changed. If there are no Timekeepers or Client Contact entered in Corporate Manager, the Wizard can be cancelled at this point and they can be added in Corporate Manager. If the Wizard is cancelled to add the missing Types, the Sync VMB button will then commence on the Ledgers/Registers step, and the Back button can be used to return to this step. If they are added later in the VMB, they should also be entered in Corporate Manager to keep the data current and for document production.

TIMEKEEPERS ON THE FILE

In High Flight Corp.'s Virtual Minute Book, the following will be displayed to any viewer for easy reference:

Responsible Lawyer: Adam Sample Smith

Paralegal/Clerk: Alison Sample Reed

Client Contact: Joseph Sample Ritchie

Note: If you would like to provide any of these individuals with access to the Virtual Minute Book, please go into "User Access" once High Flight Corp.'s Virtual Minute Book has been created.

Please select the people you would like to be identified in the Virtual Minute Book as points of contact at the firm. For convenience, we have filled in the people we think you'll want shown for this Company.

Next Cancel

Once the VMB has been created in The Legal Kiosk™, the **Sync VMB** button will take you directly to the Reports – Ledgers and Registers step.

Reports – Ledgers and Registers

When the VMB is created, it is recommended that all Reports be generated. The Reports will automatically upload to the proper Groups in the VMB. In subsequent syncs, you can select any specific Reports to be generated.

LEDGERS/REGISTERS

In High Flight Corp.'s Virtual Minute Book, the following will be displayed to any viewer for easy reference.

Select All Unselect All

Document Description

- Corporate Information Sheet
- Directors Register
- Officers Register
- Shareholders Register
- Shareholders Ledger
- Register of Individuals with Significant Control

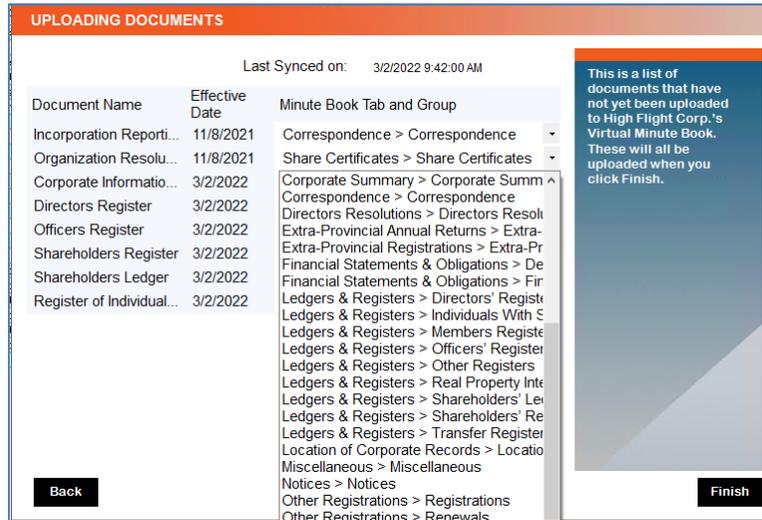
We recommend you include updated versions of each Report shown here in the Virtual Minute Book. Select those you wish to include.

Back Next Cancel

Uploading Documents to the Virtual Minute Book

When a document/file is linked using the **Add Document** button in Corporate Manager* it will appear in the list of documents available to be synced to the VMB. If this is the first sync, all documents that have been linked to the record will be visible. Afterwards, only new, unsynced documents will be visible and the Last Synced date will be displayed.

Note: Documents not linked or missing the EBook Tab or the EBook Group will not be synced.



If any documents were assigned to the wrong EBook Tab or EBook Group in Corporate Manager, it can be changed using the dropdown and the document will appear in the proper Group and Sub-Group in the VMB. Any changes made during this step will also be made to the document in Corporate Manager.

Depending on the number of documents, it may take a few minutes to sync. Once the document upload has started, it's possible to continue working in Corporate Manager in a different record.

[* Instructions to Add a Document can be found here.](#)

Fine-Tuning the New Virtual Minute Book

Once the new Virtual Minute Book has been created in The Legal Kiosk™, there will be some fine-tuning needed*.

1. The first time a Timekeeper is added to a record in Corporate Manager and synced to a VMB, they will need to be added in the **User Admin** area of The Legal Kiosk™ and complete the registration process. After registration, they will automatically be granted access to all Virtual Minute Books in The Legal Kiosk™ and no further steps need to be taken.
2. Any other outside Users, such as Client Contacts or Accountants, will need to be granted access to this specific VMB. The first time an outside User is added to a record in Corporate Manager and synced to a VMB, they will need to be added in the **User Admin** area of The Legal Kiosk™ and complete the registration process. After registration, access to any other Virtual Minute Books can be granted in the usual manner.

[* Instructions on how to manage Users can be found here.](#)