

Creating The Virtual Minute Book

Once The Legal Kiosktm 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 Kiosktm.

📕 Save and Close	눹 Copy Matter	\$ Save	Create Document 🗸 🎦 Create Re <u>p</u> ort	Common Tasks 🗸 🗸 Add a Task	🖀 New Phone Call	💼 Sync VMB	🚺 Open VMB
Overview Capital B	y-Laws / Jurisdictions	Administrat	ion / Annuals Workflow Documents				

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.

VIRTUAL MINUTE	BOOK INFO:	This information will be	
File Name:	High Flight Inc.	accesses this	
File/Matter Number:	38253	Company's Virtual Minute Book.	
Client Number:	142	Please note:	
Home Jurisdiction:	Ontario	A unique File/Matter Number and the name of the Company are both required fields.	
CORPORATE MAI	AGER ET INFO:	Important!	
File Number:	38253	If your firm uses Matter	
Matter Number:	1	Number in Corporate	
lote: The File/Matter ne File Number field	Number field in the Virtual Minute Book must match you use in Corporate Manager.	Manager E I, copy the Matter Number (shown here) into the "File/Matter Number field for the Virtual Minute Book. Both numbers need to matcl in order for sync to be successful.	

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.

Corporate Manager	Corporate Manager
A Virtual Minute Book allows the sharing of an unlimited number of documents with an unlimited number of contacts poticilally autorized. A Virtual Minute Book can be created automatically for High Fight Inc. for a fee of only \$30.00. Would you lake to proceed?	Thank you. The invoice for High Flight Inc.'s Virtual Minute Book will be sent at the end of today.
Yes No	ОК





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.

displayed to any viewer	for easy reference:		Please select the people you would like
Responsible Lawyer:	Adam Sample Smith	v	to be identified in the Virtual Minute Book as points of contact at the
Paralegal/Clerk:	Alison Sample Reed	12	firm. For convenience, we have filled in the
Client Contact:	Joseph Sample Ritchie	~	want shown for this

Once the VMB has been created in The Legal Kiosktm, 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.



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.

UPLOADING DOCUM	ENTS			
Document Name	Las Effective	Synced on: 3/2/2022 9:42:00 AM		This is a list of documents that have not yet been uploaded
Incorporation Reporti Organization Resolu Corporate Informatio Directors Register Officers Register Shareholders Ledøer	11/8/2021 11/8/2021 3/2/2022 3/2/2022 3/2/2022 3/2/2022 3/2/2022	Correspondence > Correspondence Share Certificates > Share Certificates Corporate Summary > Corporate Summ Correspondence > Correspondence Directors Resolutions > Directors Reso Extra-Provincial Angular Returns > Extra- Extra-Provincial Registrations > Extra- Financial Statements & Obligations > D Evagarial Statements & Obligations > D	→ im ^ iolu 'a- .Pr De Fin	to High Fight Corp.'s Virtual Minute Book. These will all be uploaded when you click Finish.
Register of Individual	3/2/2022	Ledgers & Registers > Directors' Regis Ledgers & Registers > Individuals With Ledgers & Registers > Members Regist Ledgers & Registers > Officers' Regist Ledgers & Registers > Other Registers Ledgers & Registers > Real Property In Ledgers & Registers > Shareholders' Le Ledgers & Registers > Shareholders' Le Ledgers & Registers > Shareholders' Le Ledgers & Registers > Transfer Registe Location of Corporate Records > Locati Miscellaneous > Miscellaneous Notices > Notices	te S S S S S S S S S S S S S S S S S S S	
Back		Other Registrations > Registrations		Finish

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^{tm,} 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 Kiosktm and complete the registration process. After registration, they will automatically be granted access to all Virtual Minute Books in The Legal Kiosktm 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 Kiosktm 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.