UNITY® LENDER CENTRE
CONFIGURATION GUIDE

Last Updated December 2023

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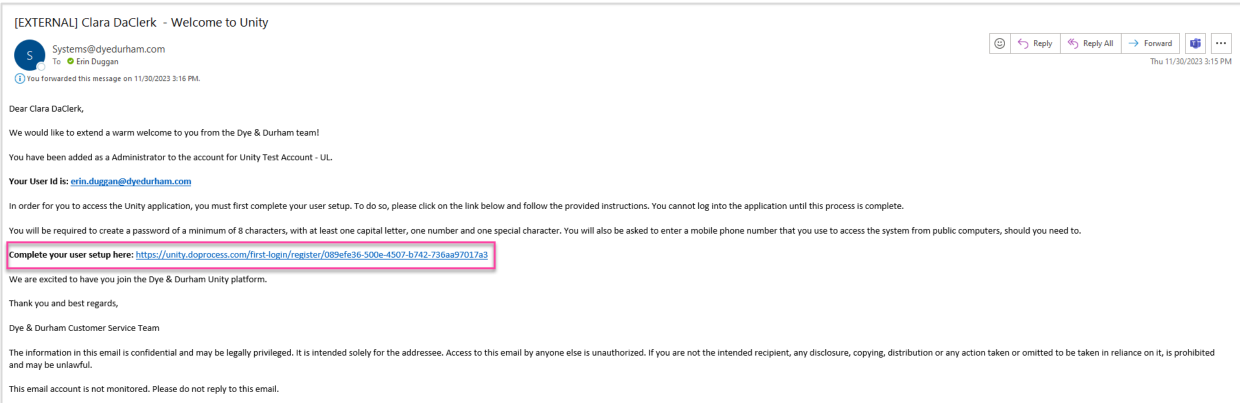
1. RECEIVING THE FIRST LOGIN EMAIL AT UNITY® ACCOUNT CREATION

Upon the creation of your Unity® Account, you will receive an auto-generated email containing your new account details and an encrypted link. Clicking the encrypted link will launch the Unity® login page in your browser. Please bookmark the Unity® login page


[EXTERNAL] Clara DaClerk - Welcome to Unity

Systems@dyedurham.com
To Erin Duggan
You forwarded this message on 11/30/2023 3:16 PM.

Reply | Reply All | Forward
Thu 11/30/2023 3:15 PM

Dear Clara DaClerk,

We would like to extend a warm welcome to you from the Dye & Durham team!

You have been added as a Administrator to the account for Unity Test Account - UL.

Your User Id is: erin.duggan@dyedurham.com

In order for you to access the Unity application, you must first complete your user setup. To do so, please click on the link below and follow the provided instructions. You cannot log into the application until this process is complete.

You will be required to create a password of a minimum of 8 characters, with at least one capital letter, one number and one special character. You will also be asked to enter a mobile phone number that you use to access the system from public computers, should you need to.

Complete your user setup here: https://unity.doprocess.com/first-login/register/089efe36-500e-4507-b742-736aa97017a3

We are excited to have you join the Dye & Durham Unity platform.

Thank you and best regards,

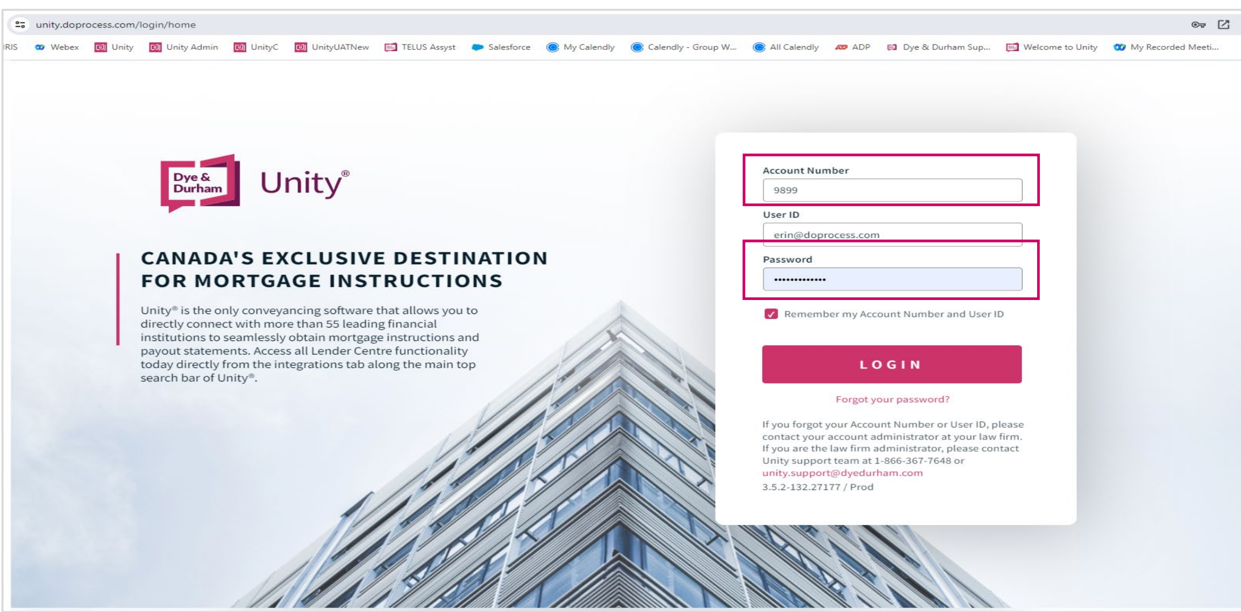
Dye & Durham Customer Service Team

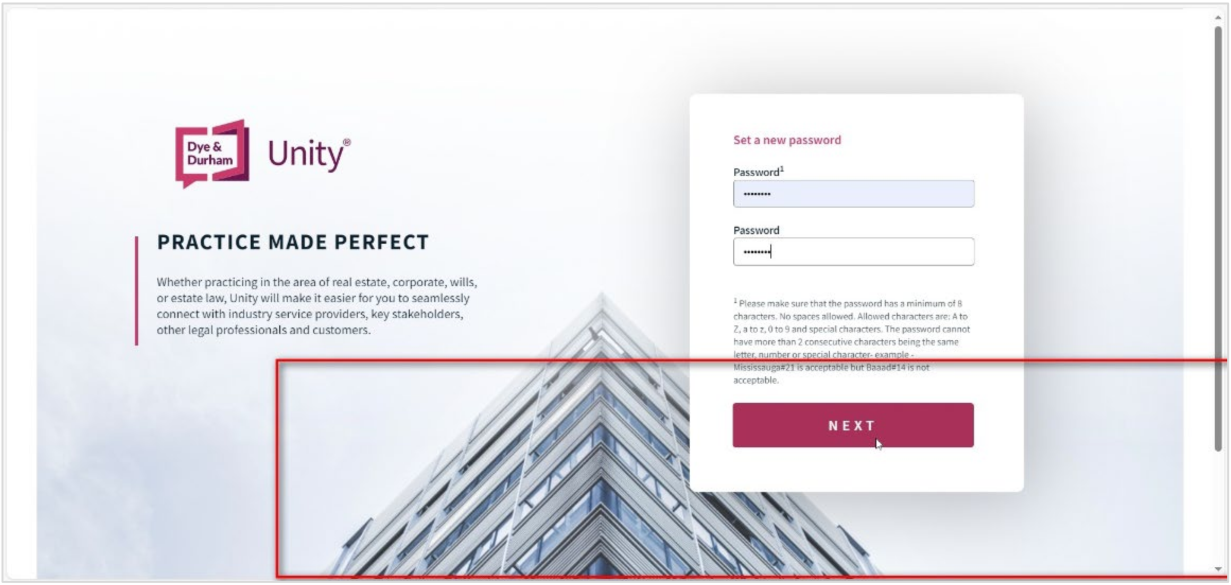
The information in this email is confidential and may be legally privileged. It is intended solely for the addressee. Access to this email by anyone else is unauthorized. If you are not the intended recipient, any disclosure, copying, distribution or any action taken or omitted to be taken in reliance on it, is prohibited and may be unlawful.

This email account is not monitored. Please do not reply to this email.

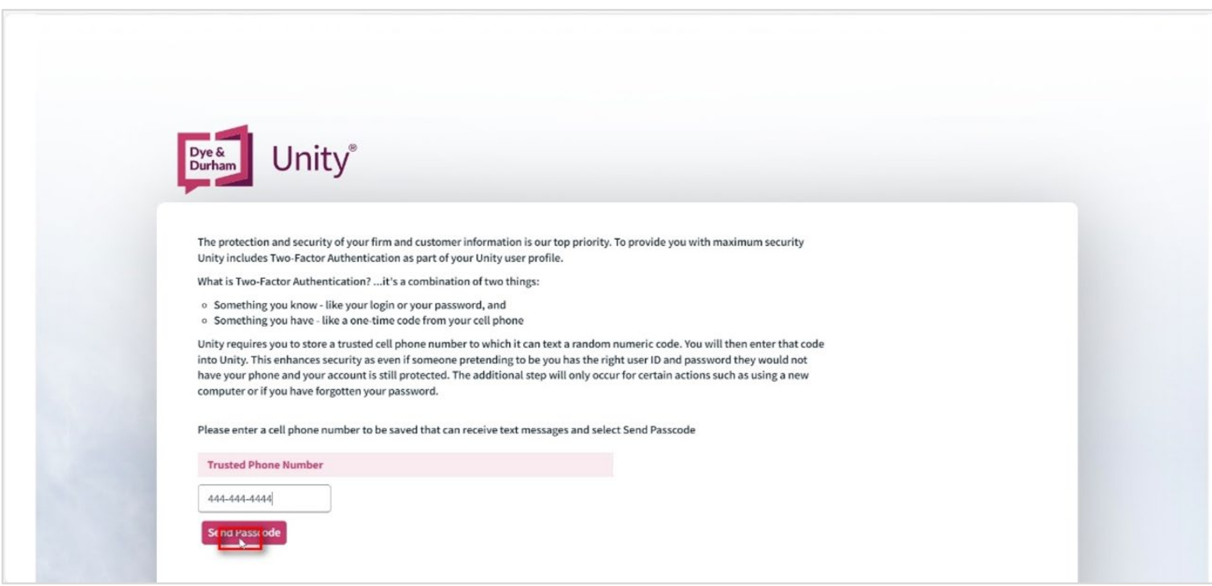
2. UNITY® ACCOUNT PROFILE SET-UP

a) Enter the numerical value of the account number provided in your first welcome to Unity® email.
b) Create, enter, and confirm a strong password and select **Next**.

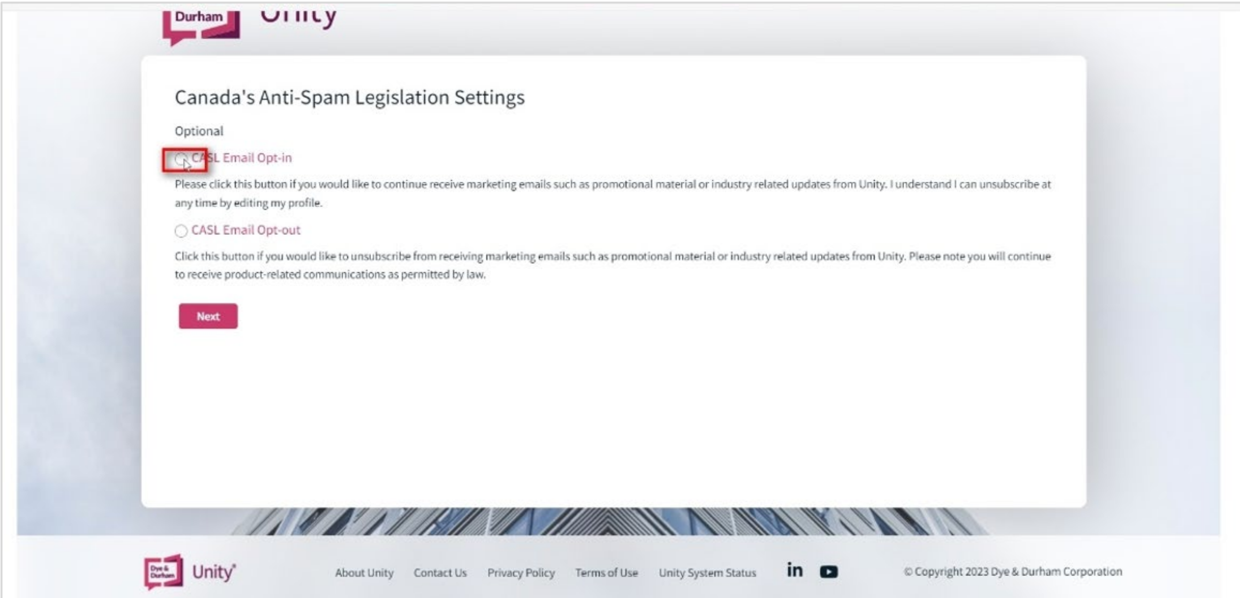




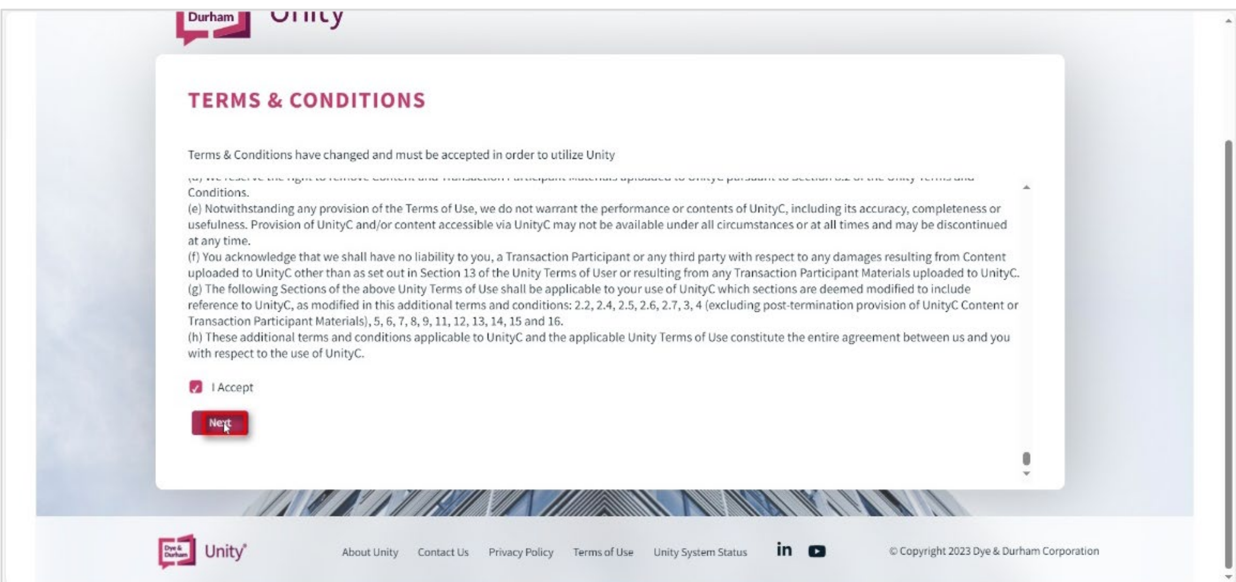
c) When the new window opens, enter your Trusted Cell Phone Number to initiate the 2-Step Verification for your Unity® account and select **Submit**. You will receive a text message from Dye & Durham, which will contain your passcode. Enter the passcode into the required field.



d) The Anti-Spam Legislation Settings window will populate - set your preferences and select **Next**.

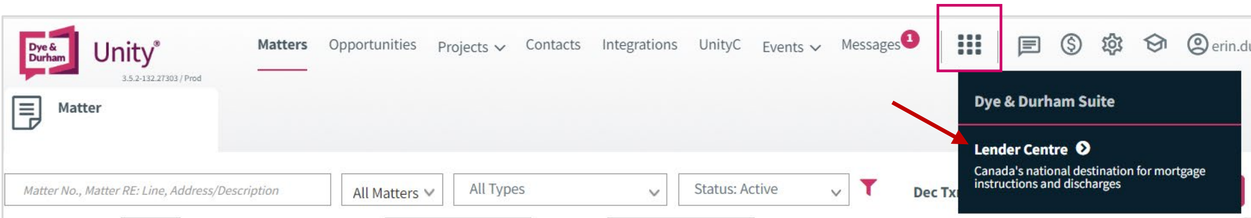


e) The Terms & Conditions page will load. **Accept** and **Submit**.



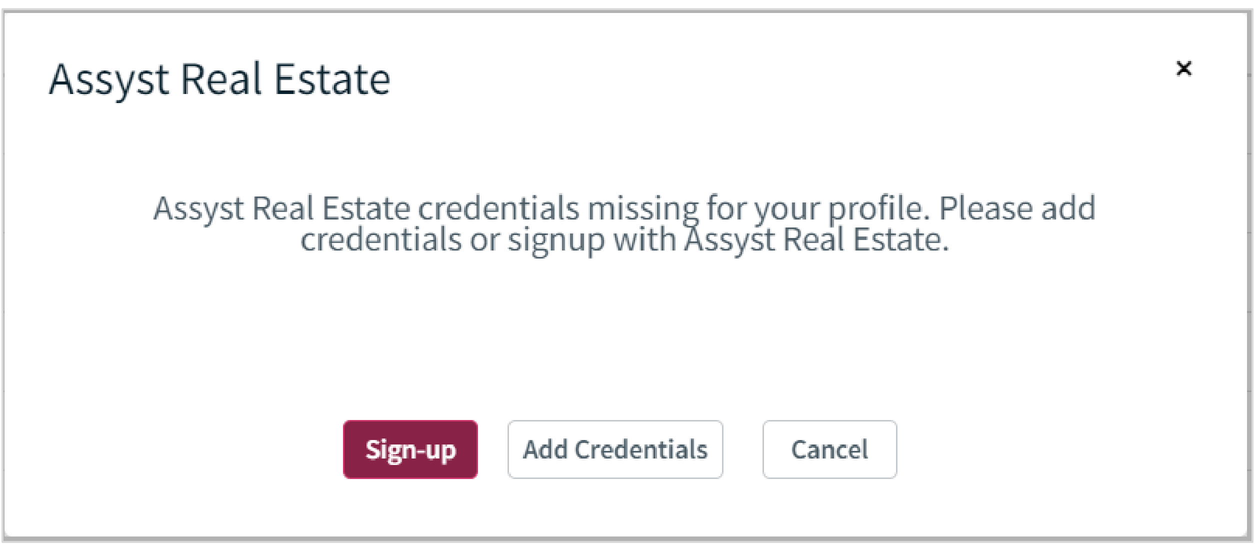
3. VAULTING YOUR LENDER CENTRE (FORMERLY ASSYST REAL ESTATE) CREDENTIALS OPTION #1 – IN THE LENDER CENTRE

a) Hover over the Lender Centre menu, then click on **Lender Centre**.



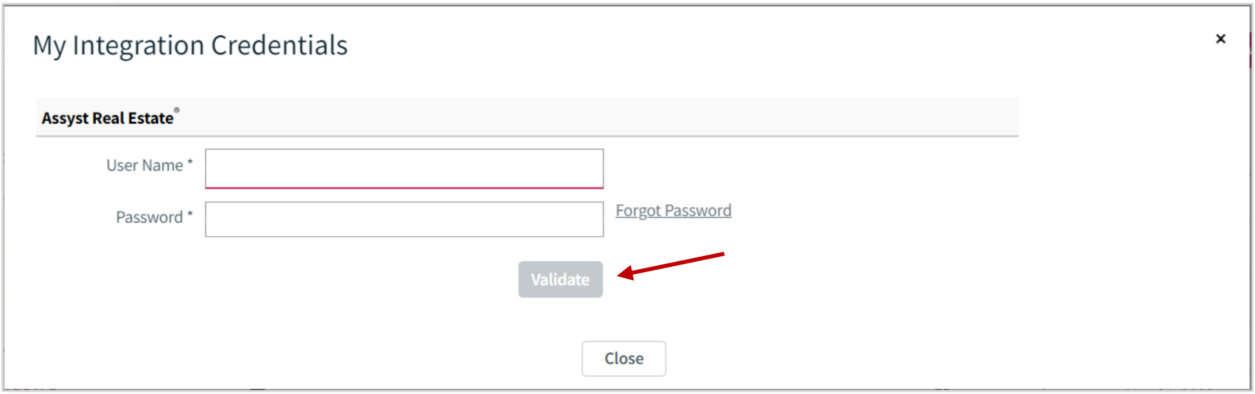
A new window will open, allowing you to either **Sign Up** for new Lender Centre credentials or **Add** your current Lender Centre Credentials.

Note: Lender Centre is formally Assyst Real Estate. If you have Assyst Real Estate credentials, use those credentials to log in to Lender Centre.

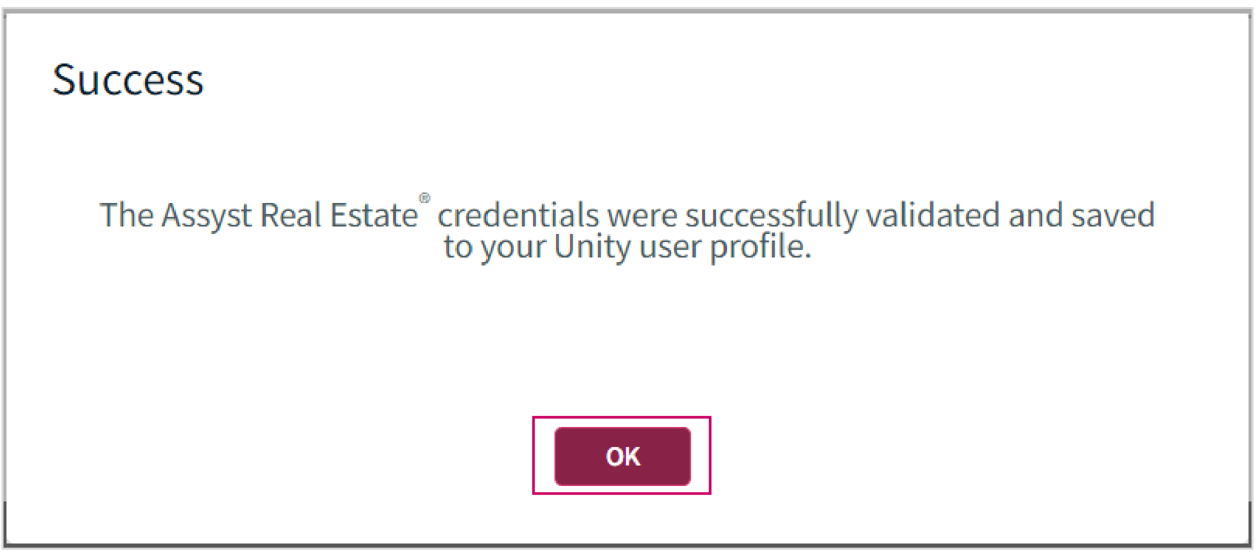


b) Selecting the **Sign-Up** option will prompt your browser to launch the Lender Centre Enrollment Page, initiating the enrollment process for the integration and obtaining your credentials, applicable to both Lawyers and Law Clerks/Support Staff.

c) If you select **Add Credentials**, the My Integration Credentials window will pop up, enabling you to vault your Username and Password. Select **Validate** once you add your credentials.

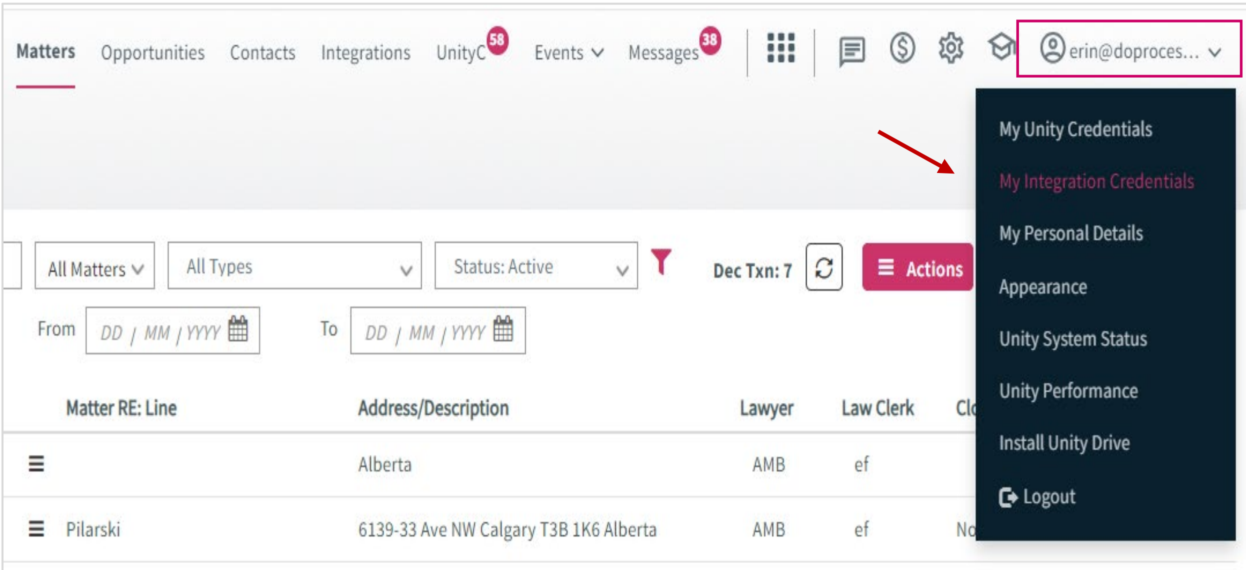


d) Once validated, a Success window will appear—select **Ok**.



4. VAULTING YOUR ASSYST CREDENTIALS OPTION #2 – IN YOUR UNITY® PROFILE

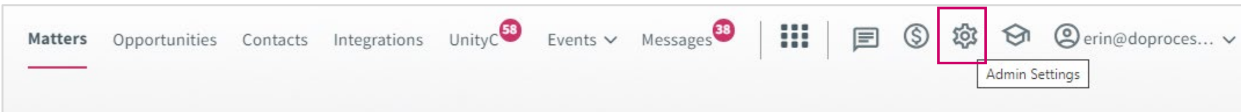
a) Hover over your Profile (top left) to reveal a drop-down menu—select **My Integrations Credentials**.



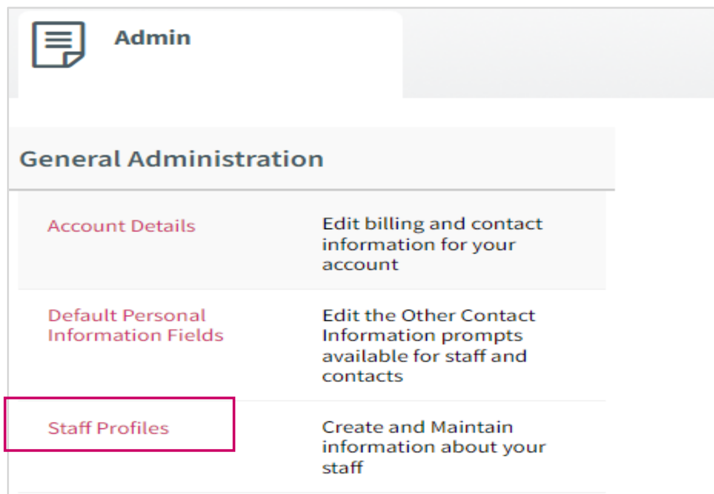
b) Select the **Assyst Real Estate** tab and enter/validate your Lender Centre/Assyst Credentials.

5. ADDING STAFF PROFILES TO UNITY® FOR LENDER CENTRE ACCESS

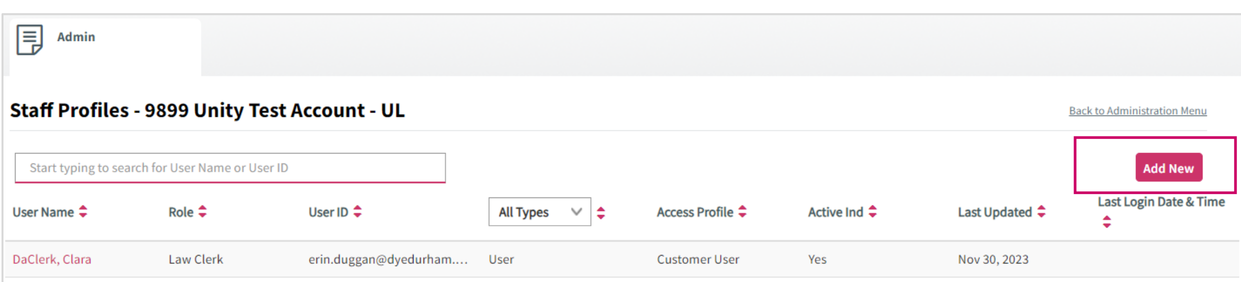
a) Click the gear icon on your Unity® tool bar to access the Account Administration page:



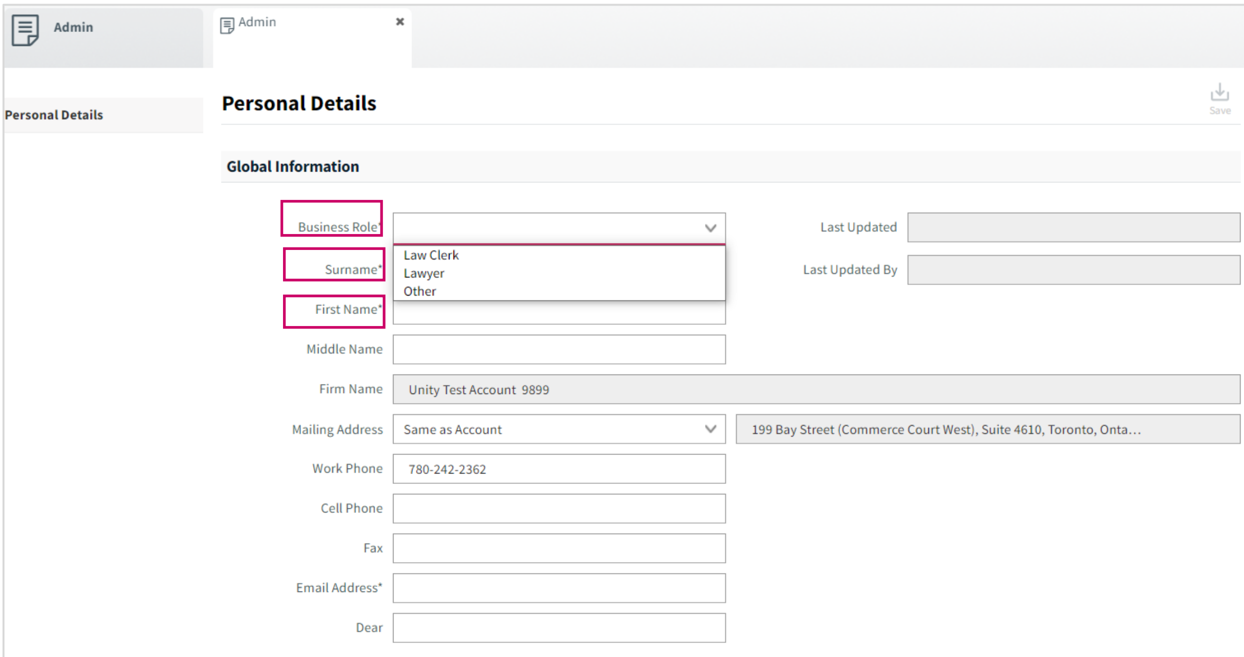
b) Under the General Administration side, select **Staff Profiles**.



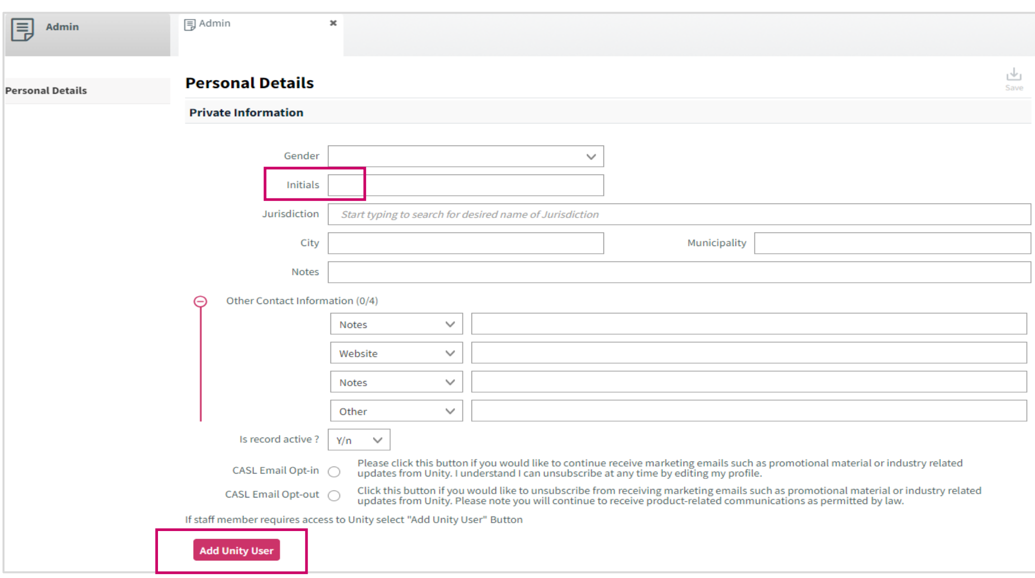
c) Select **Add New**.



d) Determine the Business Role and select either Lawyer or Law Clerk. Continue adding details to each required field as indicated by the asterisk (*)—Last and First Name, and Email Address.

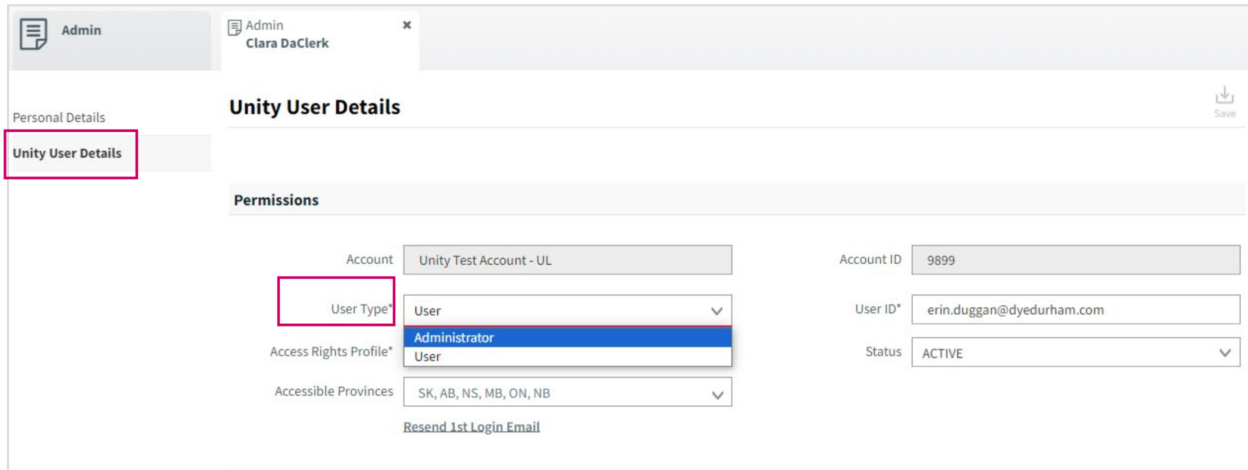


e) When the required field for "Initials" has been completed, select **Add Unity® User**. This will autogenerate a first "login email" sent to the new user, who will follow the steps to set-up their profile.

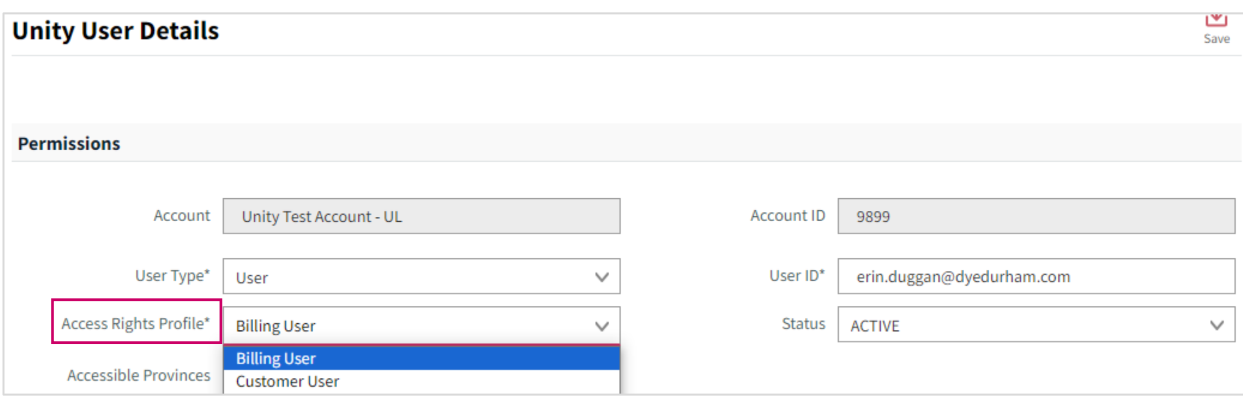


f) Once the new user has been added, a new tab will appear on the left menu: Unity® User details. Selecting this tab will bring you into the permissions area where you will set the new Unity® Profile access preferences:

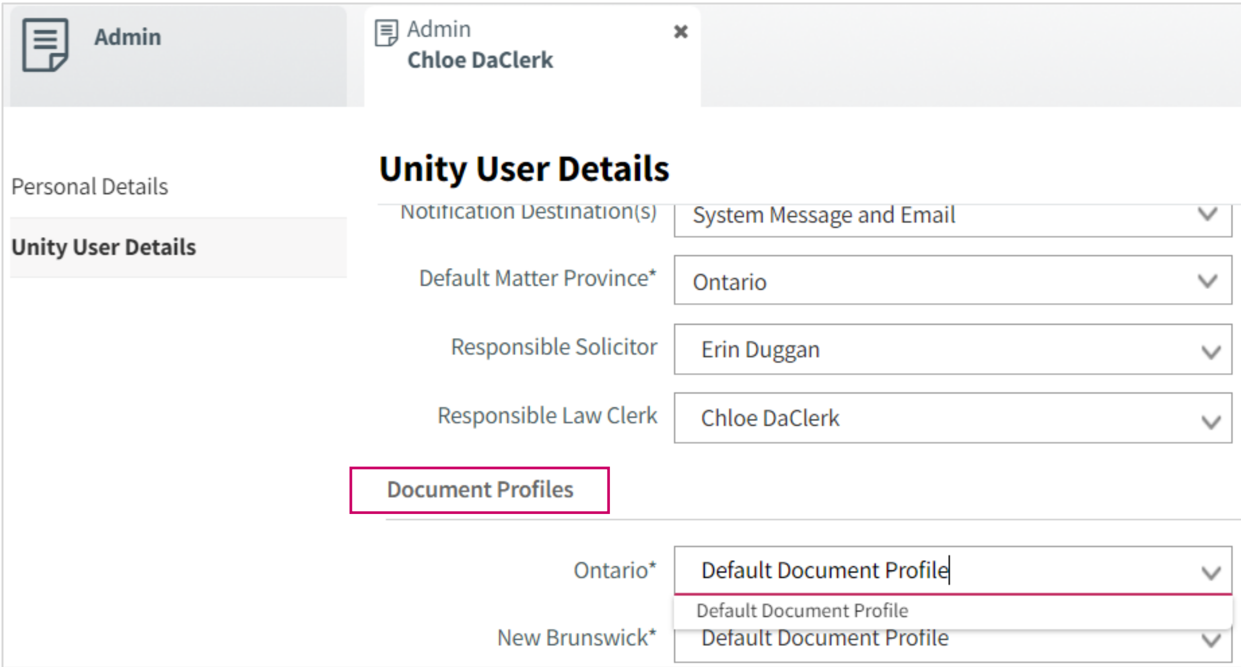
a. Account Administrator (full access to Unity®); or
b. User.



g) The User selection will require the additional step of selecting either Customer User or Billing User, within the "Access Rights Profile" field as seen below.

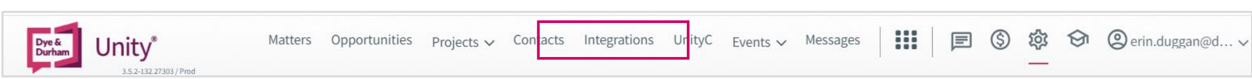


h) The final step is to assign the "Default Document Profile" to the User Profile. Once selected, save the page.

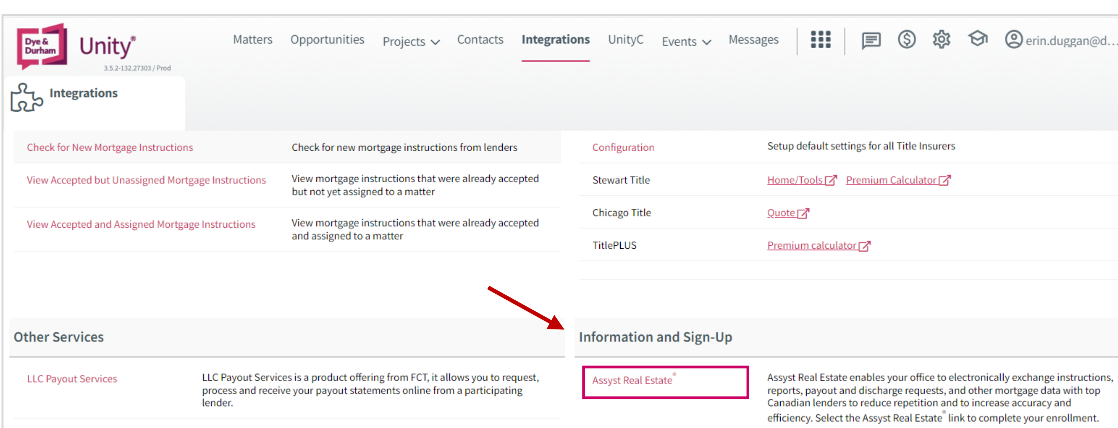


6. OBTAINING LENDER CENTRE/ASSYST CREDENTIALS FOR SUPPORT STAFF

a) Every member of the firm engaging with the Lender Centre must have their Lender Centre/Assyst Credentials. To obtain credentials, users can select the **Integrations** anchor page on the anchor bar:



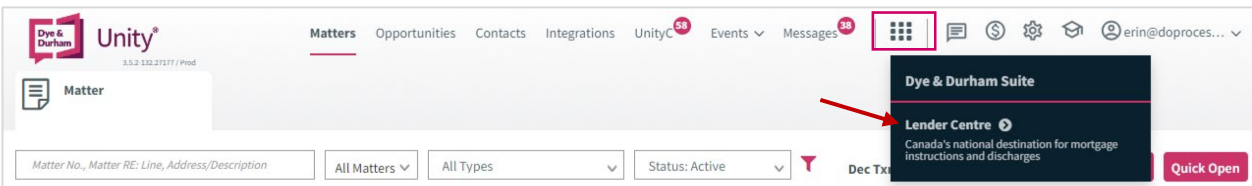
b) Within the Integration page, users can choose the Lender Centre/Assyst Real Estate portal link under "Information and Sign Up":



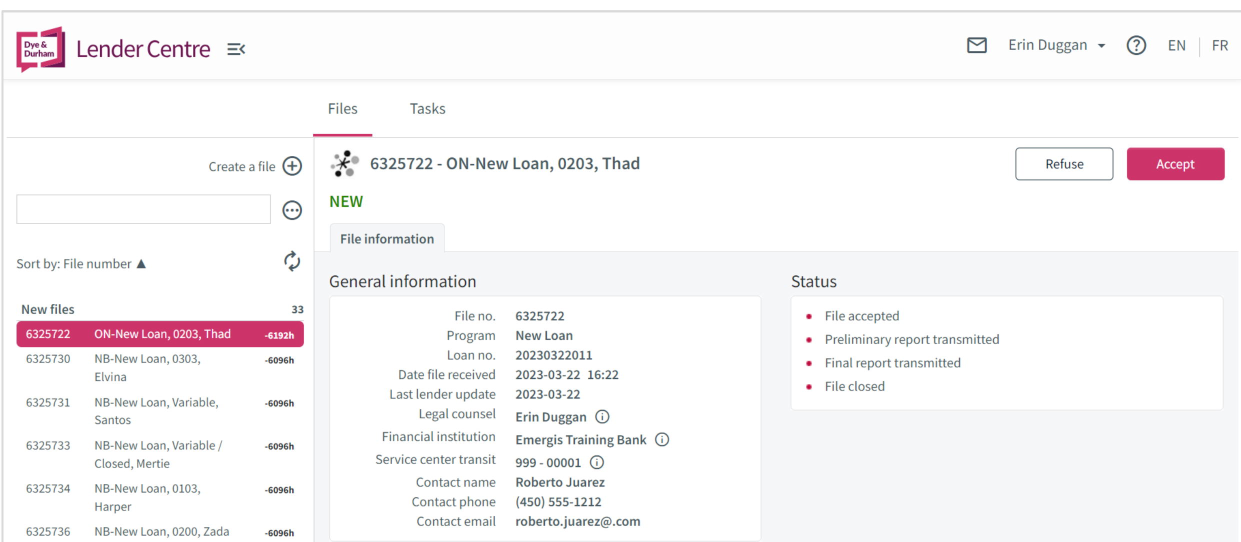
c) Selecting the Lender Centre/Assyst Portal link brings users to the Lender Centre/Assyst Enrolment page in their browser, initiating the enrollment process to obtain credentials. Once obtained, add them to the user's profile as outlined in Step #3.

7. ACCESSING THE LENDER CENTRE

With credentials added, users can access the Lender Centre by hovering over the waffle menu and selecting **Lender Centre**:

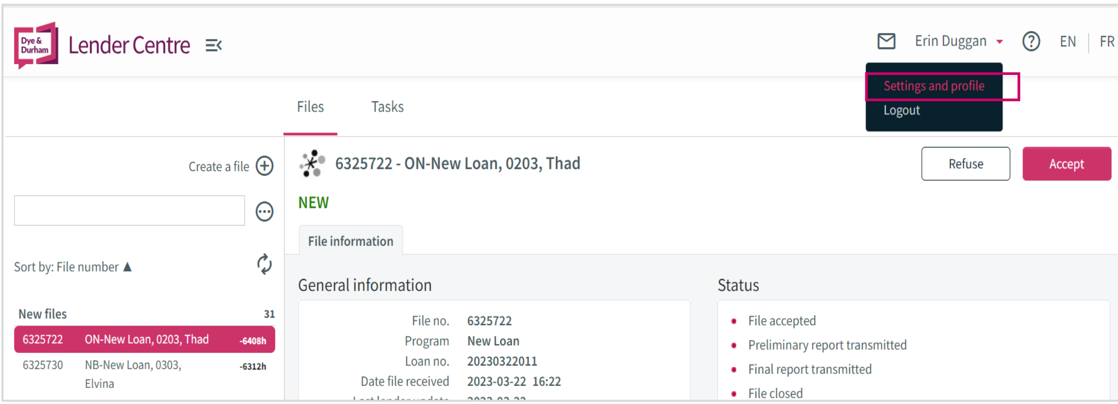


This action brings users to the Unity® Lender Centre page, allowing them to continue transactions in the same manner as before (through the standalone Assyst Real Estate portal).

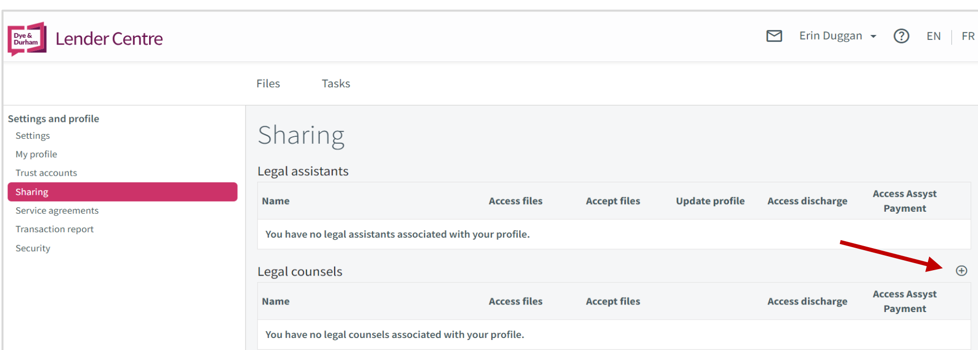


8. SETTING UP SHARING IN THE LENDER CENTRE

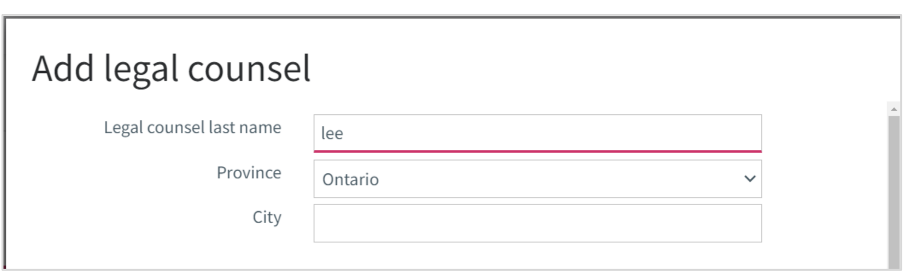
a) If law clerks and support staff are transacting on behalf of the lawyers in the Lender Centre, they need to set up sharing by selecting **Settings & Profile** from the drop-down (note that the lawyer must vault their credentials beforehand):



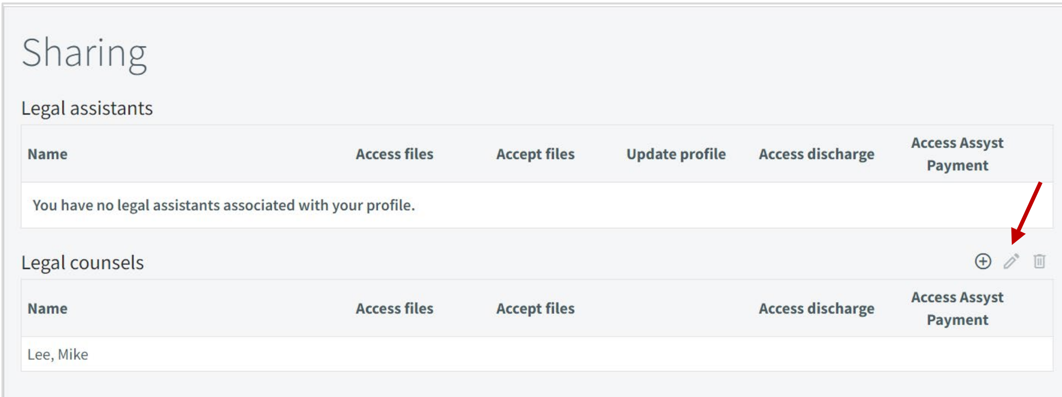
b) From the side bar, select **Share** and then click on the ⊕ sign on the Legal Counsel section:



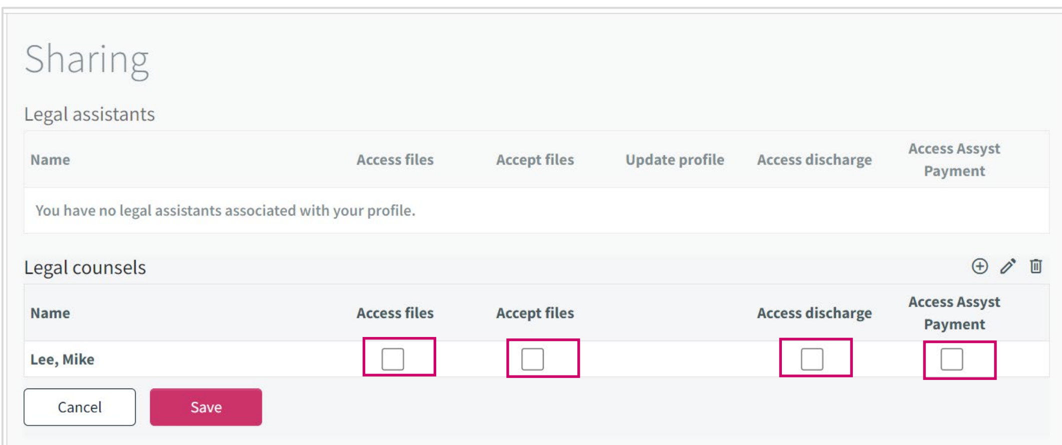
c) Enter the last name of the lawyer, and a list of lawyers will populate. Click on the lawyer's name from the list and press **Select** to add them to Sharing:



d) Once added, click on the lawyer’s name and then the **pencil icon** to set up file-sharing accesses:



e) Now, select each of the options for Access Files, Accept Files, Access Discharge, and Access Assyst Payment and click **Save**.



f) After setting up the share under the support staff profile in the Lender Centre, each lawyer in the firm will follow the same steps to allow access to the support staff profiles under “Legal Assistance”.