



Unity®

UNITY® LENDER CENTRE CONFIGURATION GUIDE

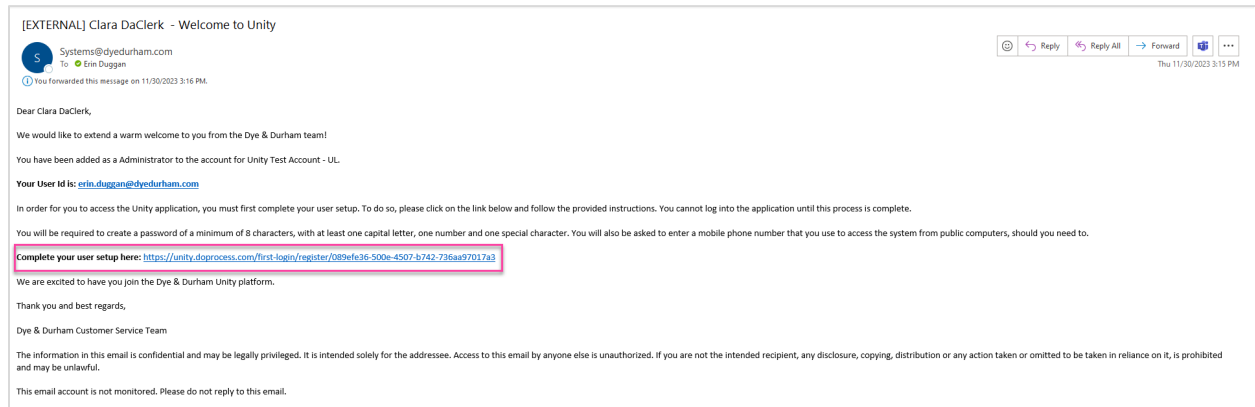
Last Updated December 2023

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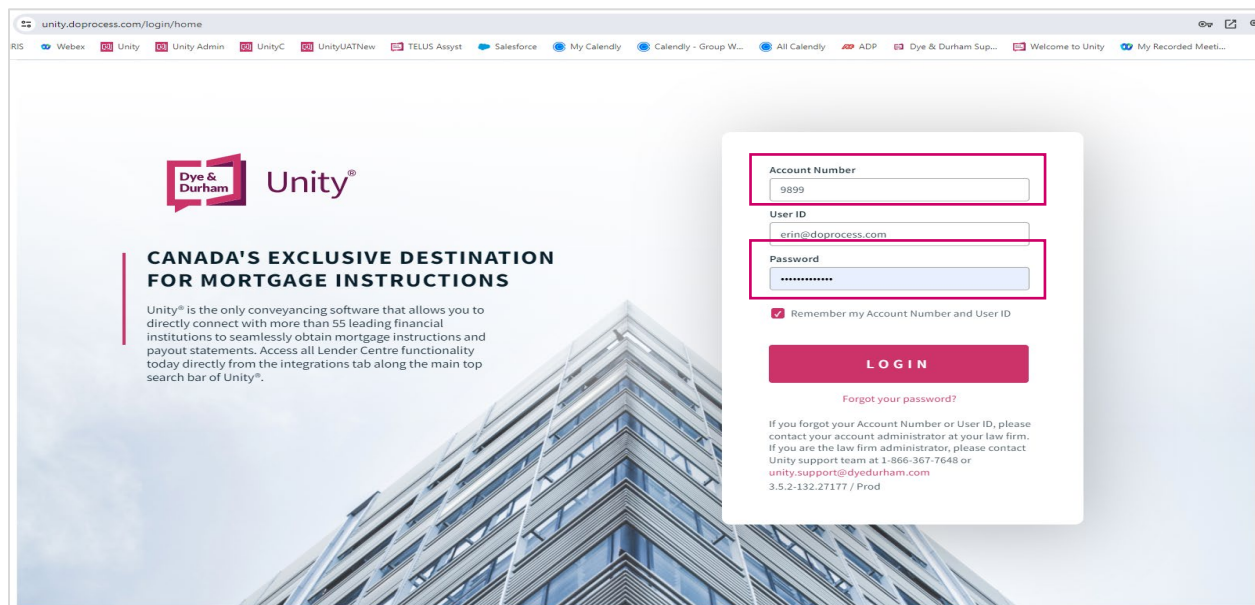
1. RECEIVING THE FIRST LOGIN EMAIL AT UNITY® ACCOUNT CREATION

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



2. UNITY® ACCOUNT PROFILE SET-UP

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



The screenshot shows the Unity login page with the Dye & Durham logo. A modal titled "Set a new password" is open, containing two password input fields. The first field is labeled "Password¹" and the second is labeled "Password". Below the fields is a "NEXT" button. A red rectangle highlights the bottom portion of the modal and the background image of a building.

Dye & Durham Unity®

PRACTICE MADE PERFECT

Whether practicing in the area of real estate, corporate, wills, or estate law, Unity will make it easier for you to seamlessly connect with industry service providers, key stakeholders, other legal professionals and customers.

Set a new password

Password¹

Password

¹ Please make sure that the password has a minimum of 8 characters. No spaces allowed. Allowed characters are: A to Z, a to z, 0 to 9 and special characters. The password cannot have more than 2 consecutive characters being the same letter, number or special character. Example: Mississauga23 is acceptable but basadP14 is not acceptable.

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.

The screenshot shows the Unity Two-Factor Authentication setup page. It includes a heading "What is Two-Factor Authentication? ...It's a combination of two things:" followed by a bulleted list. Below this is a paragraph explaining the requirement to store a trusted cell phone number. At the bottom, there is a form with a "Trusted Phone Number" label, a text input field containing "444-444-444", and a "Set no Passcode" button.

Dye & Durham Unity®

The protection and security of your firm and customer information is our top priority. To provide you with maximum security Unity includes Two-Factor Authentication as part of your Unity user profile.

What is Two-Factor Authentication? ...It's a combination of two things:

- Something you know - like your login or your password, and
- Something you have - like a one-time code from your cell phone

Unity requires you to store a trusted cell phone number to which it can text a random numeric code. You will then enter that code into Unity. This enhances security as even if someone pretending to be you has the right user ID and password they would not have your phone and your account is still protected. The additional step will only occur for certain actions such as using a new computer or if you have forgotten your password.

Please enter a cell phone number to be saved that can receive text messages and select Send Passcode

Trusted Phone Number

444-444-444

Set no Passcode

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

Canada's Anti-Spam Legislation Settings

Optional

☒ CASL Email Opt-in

Please click this button if you would like to continue receive marketing emails such as promotional material or industry related updates from Unity. I understand I can unsubscribe at any time by editing my profile.

☐ CASL Email Opt-out

Click this button if you would like to unsubscribe from receiving marketing emails such as promotional material or industry related updates from Unity. Please note you will continue to receive product-related communications as permitted by law.

Next

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

TERMS & CONDITIONS

Terms & Conditions have changed and must be accepted in order to utilize Unity

(g) The following Sections of the above Unity Terms of Use shall be applicable to your use of UnityC which sections are deemed modified to include reference to UnityC, as modified in this additional terms and conditions: 2.2, 2.4, 2.5, 2.6, 2.7, 3, 4 (excluding post-termination provision of UnityC Content or Transaction Participant Materials), 5, 6, 7, 8, 9, 11, 12, 13, 14, 15 and 16.

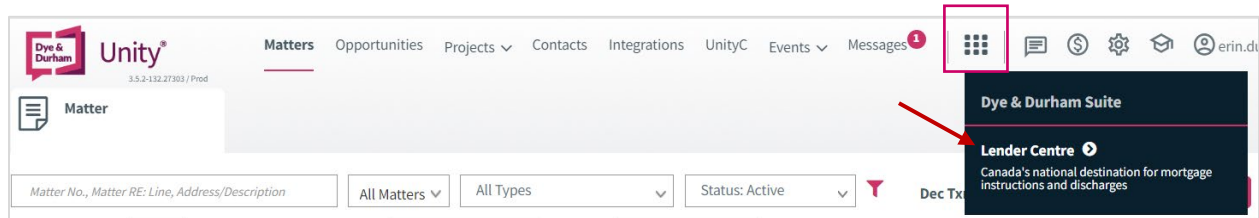
(h) These additional terms and conditions applicable to UnityC and the applicable Unity Terms of Use constitute the entire agreement between us and you with respect to the use of UnityC.

☒ I Accept

Next

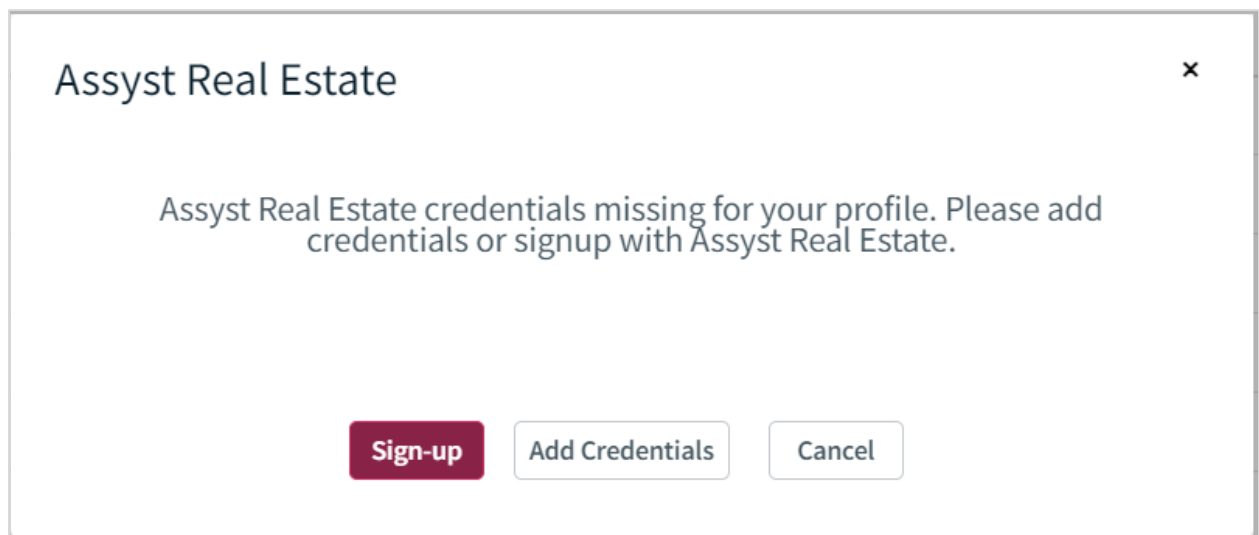
3. VAULTING YOUR LENDER CENTRE (FORMERLY ASSYST REAL ESTATE) CREDENTIALS OPTION #1 – IN THE LENDER CENTRE

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



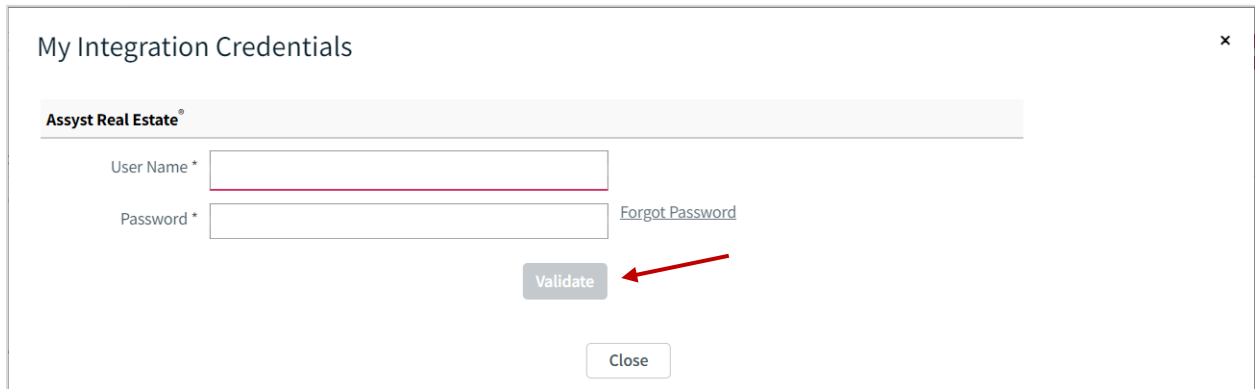
A new window will open, allowing you to either **Sign Up** for new Lender Centre credentials or **Add** your current Lender Centre Credentials.

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



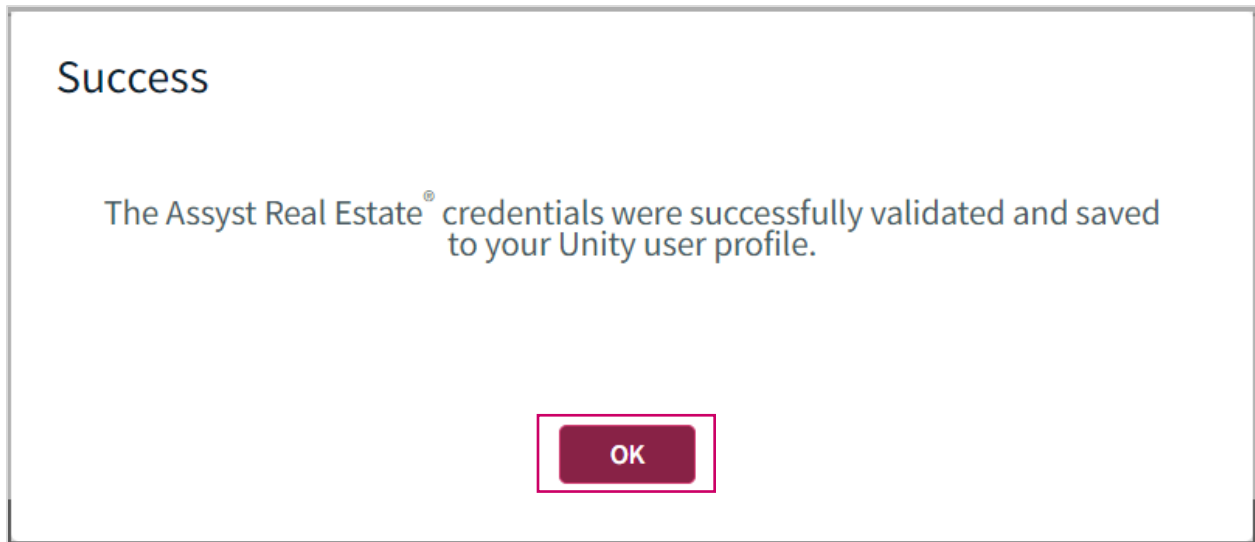
b) Selecting the **Sign-Up** option will prompt your browser to launch the Lender Centre Enrollment Page, initiating the enrollment process for the integration and obtaining your credentials, applicable to both Lawyers and Law Clerks/Support Staff.

- 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.



The image shows a dialog box titled "My Integration Credentials" with a close button (X) in the top right corner. Below the title bar, there is a header "Assyst Real Estate®". The main area contains two input fields: "User Name *" and "Password *". To the right of the password field is a link that says "Forgot Password". Below the input fields is a "Validate" button, which is highlighted with a red arrow. At the bottom center is a "Close" button.

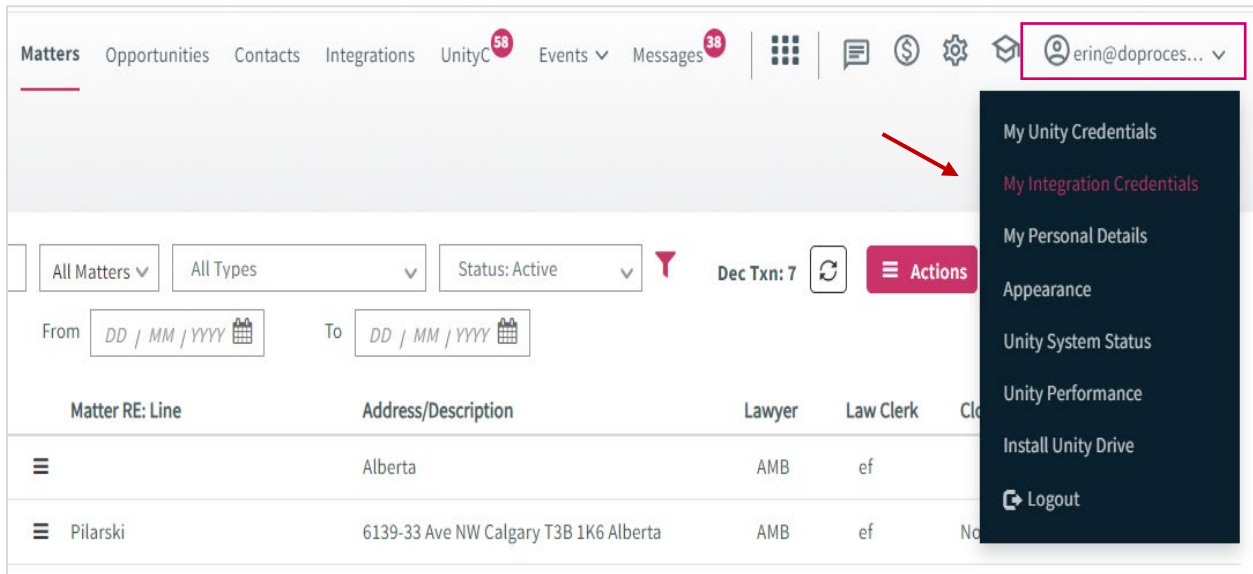
- d) Once validated, a Success window will appear—select **Ok**.



The image shows a "Success" dialog box. The title "Success" is at the top left. The main text in the center reads: "The Assyst Real Estate® credentials were successfully validated and saved to your Unity user profile." At the bottom center is a red "OK" button, which is highlighted with a red rectangle.

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

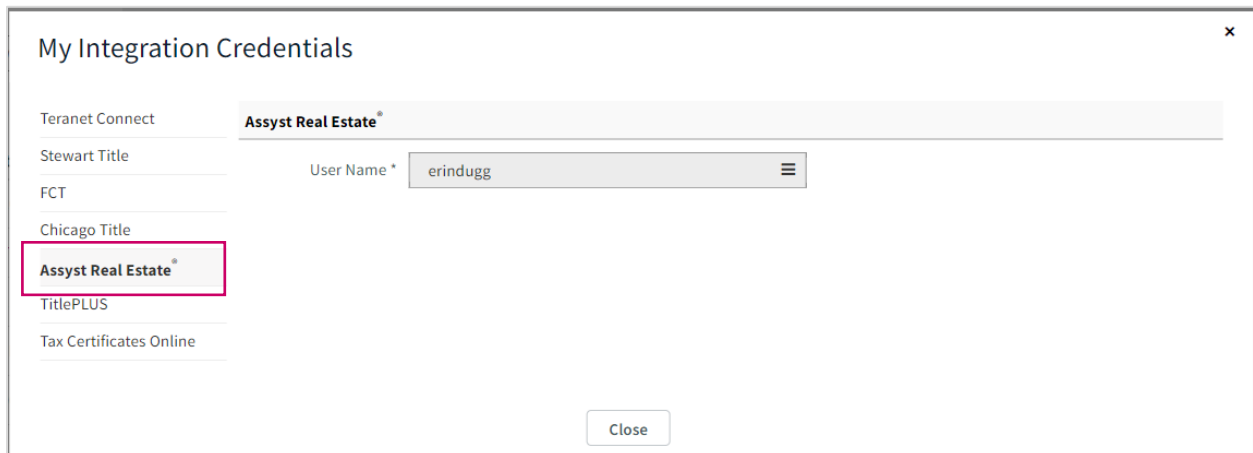
- a) Hover over your Profile (top left) to reveal a drop-down menu—select **My Integrations Credentials**.



The screenshot shows the Unity interface with a navigation bar at the top. The profile dropdown menu is open, showing options: My Unity Credentials, My Integration Credentials (highlighted with a red arrow), My Personal Details, Appearance, Unity System Status, Unity Performance, Install Unity Drive, and Logout. The main content area shows a table with columns: Matter RE: Line, Address/Description, Lawyer, Law Clerk, and Client. The table has two rows: one for 'Alberta' and one for 'Pilarski'.

Matter RE: Line	Address/Description	Lawyer	Law Clerk	Client
≡	Alberta	AMB	ef	
≡ Pilarski	6139-33 Ave NW Calgary T3B 1K6 Alberta	AMB	ef	No

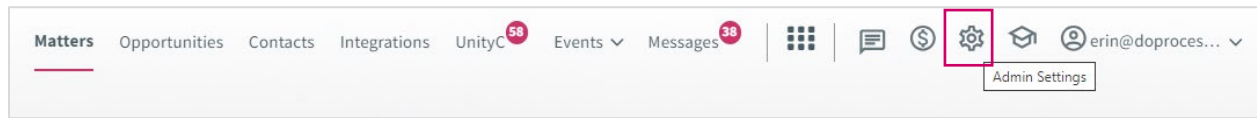
- b) Select the **Assyst Real Estate** tab and enter/validate your Lender Centre/Assyst Credentials.



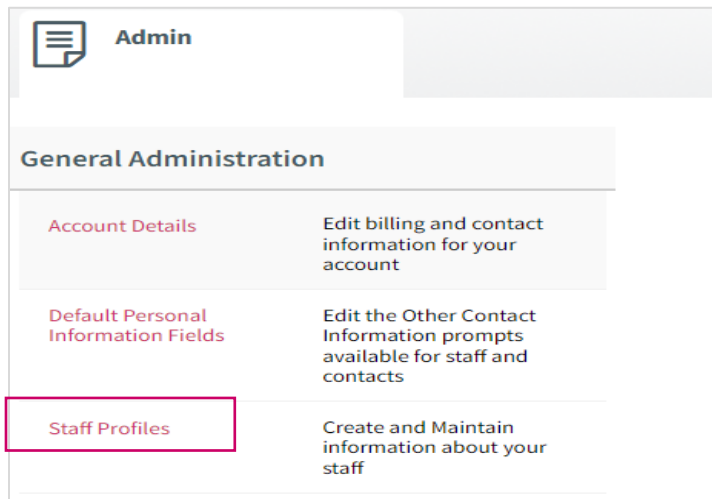
The screenshot shows the 'My Integration Credentials' form. On the left is a list of integration options: Teranet Connect, Stewart Title, FCT, Chicago Title, Assyst Real Estate® (highlighted with a red box), TitlePLUS, and Tax Certificates Online. The 'Assyst Real Estate®' tab is selected, showing a 'User Name *' field with the value 'erindugg' and a dropdown menu icon. A 'Close' button is at the bottom right.

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

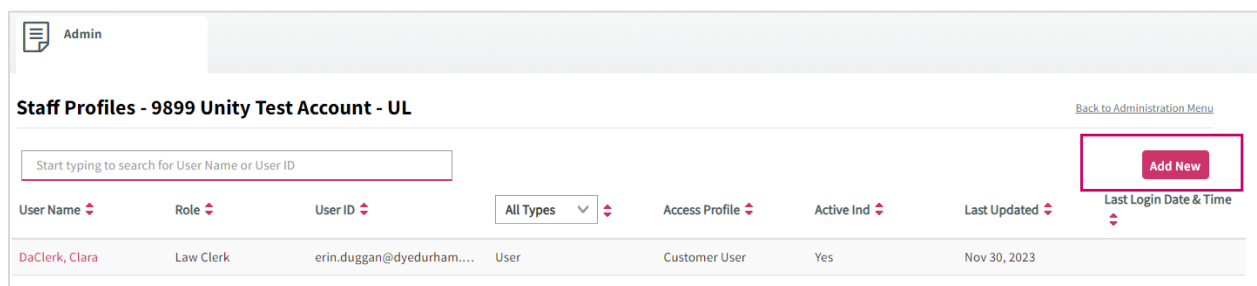
- a) Click the gear icon on your Unity® tool bar to access the Account Administration page:



- 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.

Admin Admin x

Personal Details Personal Details Save

Global Information

Business Role Law Clerk Lawyer Other

Surname* First Name* Middle Name

Firm Name Unity Test Account 9899

Mailing Address Same as Account 199 Bay Street (Commerce Court West), Suite 4610, Toronto, Onta...

Work Phone 780-242-2362

Cell Phone

Fax

Email Address* Dear

Last Updated

Last Updated By

- 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.

Admin Admin x

Personal Details Personal Details Save

Private Information

Gender Initials

Jurisdiction Start typing to search for desired name of Jurisdiction

City Municipality

Notes

Other Contact Information (0/4)

Notes Website Notes Other

Is record active? Y/n

CASL Email Opt-in CASL Email Opt-out

If staff member requires access to Unity select "Add Unity User" Button

Add Unity User

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.

The screenshot shows the 'Unity User Details' form. On the left sidebar, the 'Unity User Details' tab is highlighted with a red box. The main form area has a 'Permissions' section. In this section, the 'User Type*' dropdown menu is open, showing 'Administrator' as the selected option, which is highlighted in blue. Other fields include 'Account' (Unity Test Account - UL), 'Account ID' (9899), 'User ID*' (erin.duggan@dyedurham.com), 'Status' (ACTIVE), and 'Accessible Provinces' (SK, AB, NS, MB, ON, NB). A 'Resend 1st Login Email' link is visible below the provinces field.

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.

This screenshot shows the 'Unity User Details' form with the 'Access Rights Profile*' dropdown menu open. 'Billing User' is selected and highlighted in blue. The 'User Type*' dropdown is set to 'User'. Other fields remain the same: 'Account' (Unity Test Account - UL), 'Account ID' (9899), 'User ID*' (erin.duggan@dyedurham.com), 'Status' (ACTIVE), and 'Accessible Provinces' (SK, AB, NS, MB, ON, NB). The 'Resend 1st Login Email' link is also present.

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

Admin

Admin
Chloe DaClerk

Unity User Details

Personal Details

Unity User Details

Notification Destination(s)

System Message and Email

Default Matter Province*

Ontario

Responsible Solicitor

Erin Duggan

Responsible Law Clerk

Chloe DaClerk

Document Profiles

Ontario*

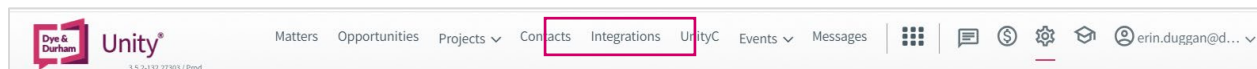
Default Document Profile

New Brunswick*

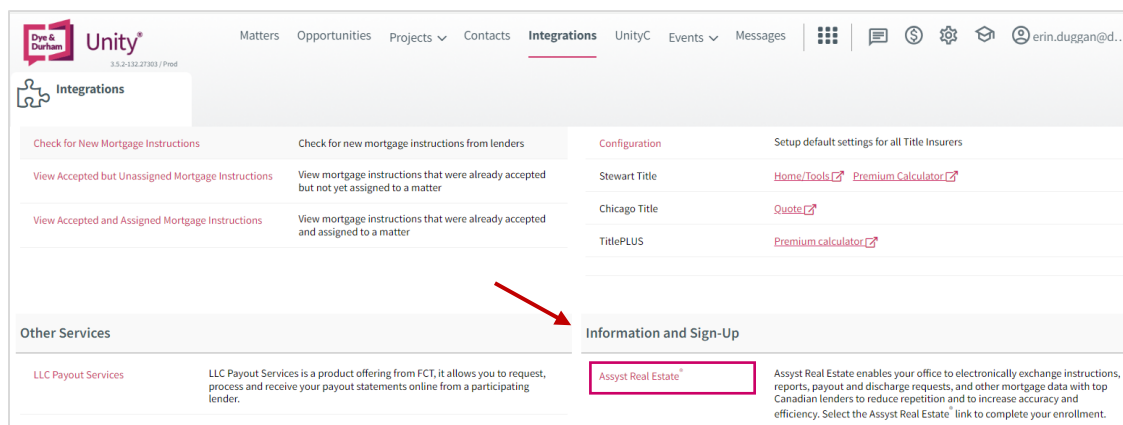
Default Document Profile

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:



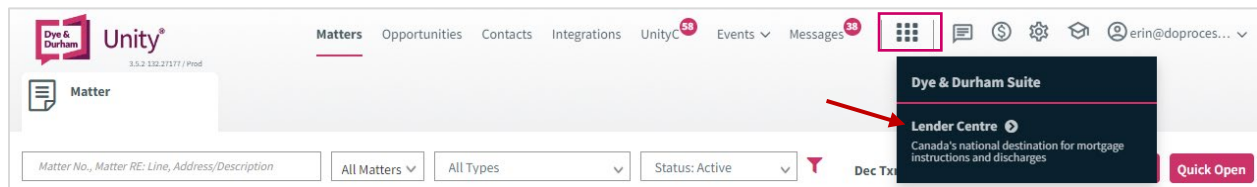
- b) Within the Integration page, users can choose the Lender Centre/Assyst Real Estate portal link under “Information and Sign Up”:



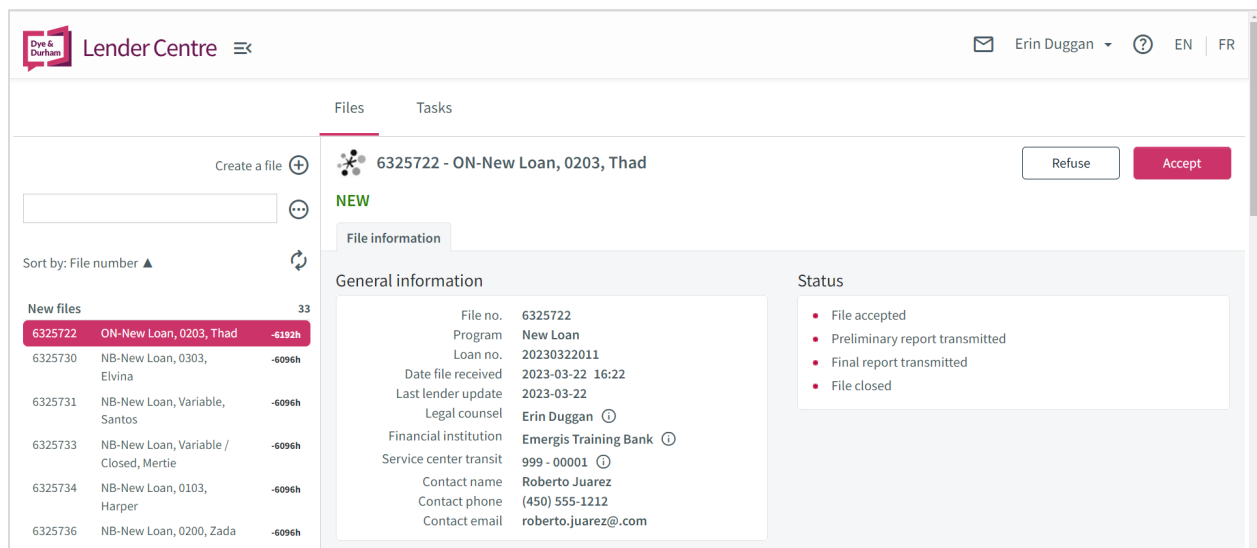
- c) Selecting the Lender Centre/Assyst Portal link brings users to the Lender Centre/Assyst Enrolment page in their browser, initiating the enrollment process to obtain credentials. Once obtained, add them to the user's profile as outlined in Step #3.

7. ACCESSING THE LENDER CENTRE

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

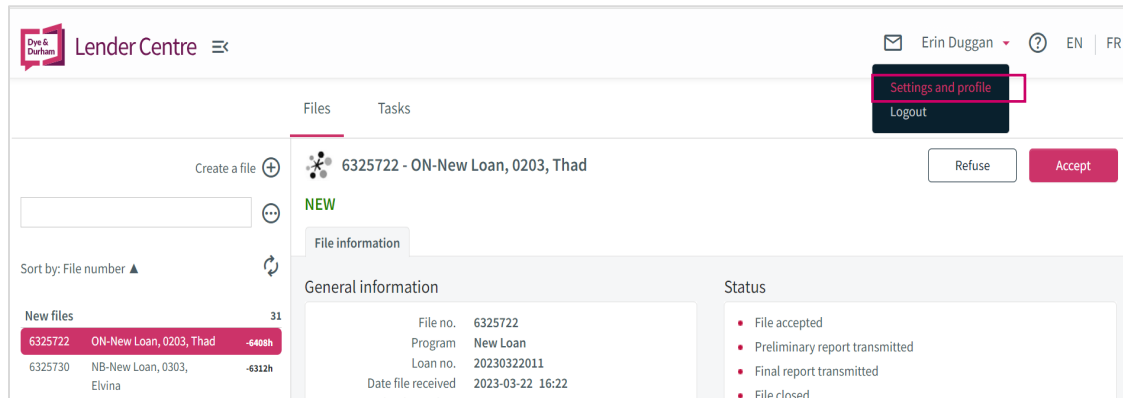


This action brings users to the Unity® Lender Centre page, allowing them to continue transactions in the same manner as before (through the standalone Assyst Real Estate portal).

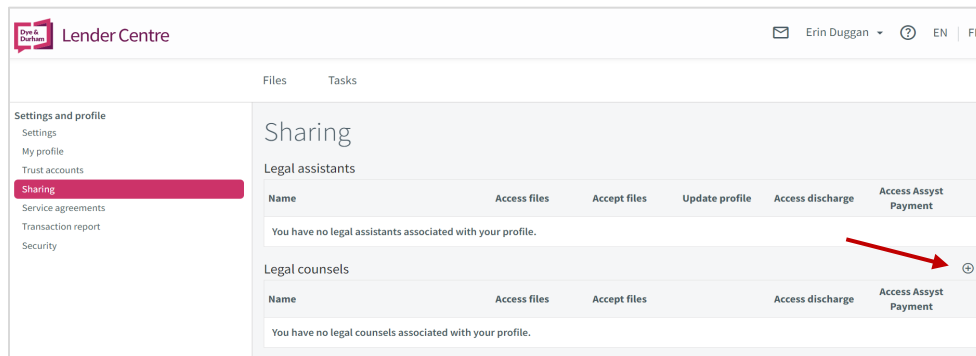


8. SETTING UP SHARING IN THE LENDER CENTRE

- 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):



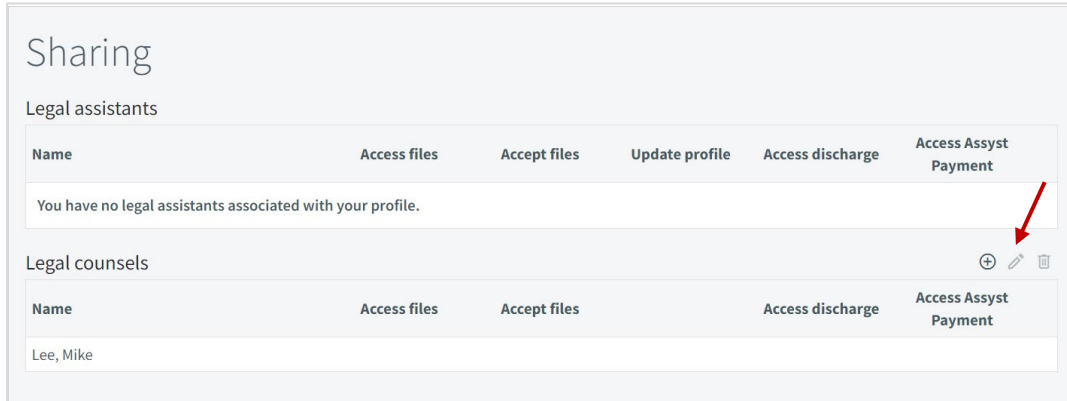
- b) From the side bar, select **Share** and then click on the \oplus sign on the Legal Counsel section:



- 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:

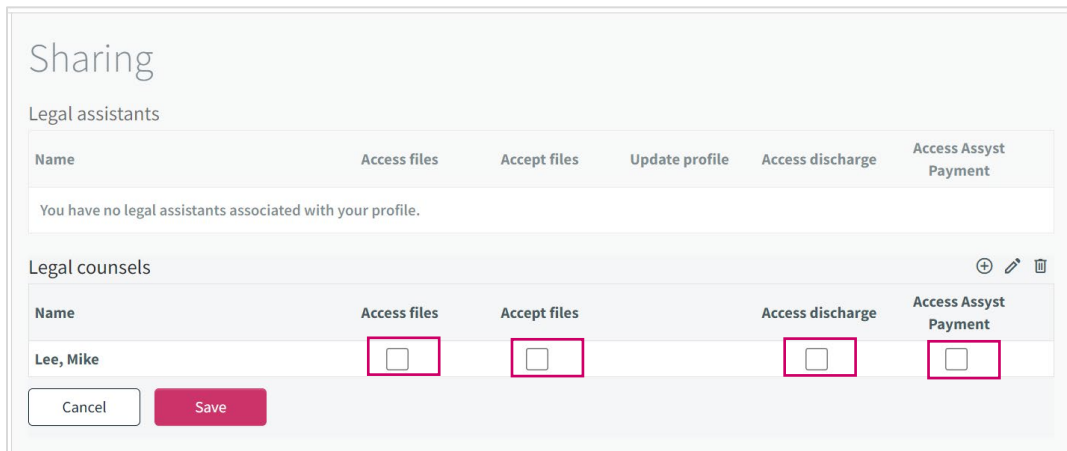
The screenshot shows the 'Add legal counsel' form. It has three input fields: 'Legal counsel last name' with the value 'lee', 'Province' with a dropdown menu showing 'Ontario', and 'City' which is currently empty.

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



The screenshot shows a 'Sharing' interface with two main sections: 'Legal assistants' and 'Legal counsels'. The 'Legal assistants' section has a table with columns: Name, Access files, Accept files, Update profile, Access discharge, and Access Assyst Payment. Below the table is a message: 'You have no legal assistants associated with your profile.' The 'Legal counsels' section has a table with columns: Name, Access files, Accept files, Access discharge, and Access Assyst Payment. Below the table is a row for 'Lee, Mike'. To the right of the 'Legal counsels' table are three icons: a plus sign, a pencil, and a trash can. A red arrow points to the pencil icon.

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



The screenshot shows the 'Sharing' interface with the 'Legal counsels' section. The table has columns: Name, Access files, Accept files, Access discharge, and Access Assyst Payment. Below the table is a row for 'Lee, Mike'. The checkboxes for 'Access files', 'Accept files', 'Access discharge', and 'Access Assyst Payment' are highlighted with red boxes. At the bottom of the interface are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted in red.

- 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".