



Unity®

UNITY® PRACTICE MANAGEMENT & UNITY® ACCOUNTING PRACTICE MANAGEMENT SYNC QUICK START GUIDE

Last Updated January 2024

CONTENTS

1. UNITY® PRACTICE MANAGEMENT	2
Practice Management Sync.....	2
1.1. Unity Matter.....	2
Statement of Account page.....	2
1.2. Send Multiple Matters for Export.....	6
Send Multiple Matters for Export	6
2. UNITY® ACCOUNTING	7
2.1. Practice Management Sync	7
2.2. Client/Matter	8
View Imported Data	8

Unity® Practice Management and Unity® Accounting Integration

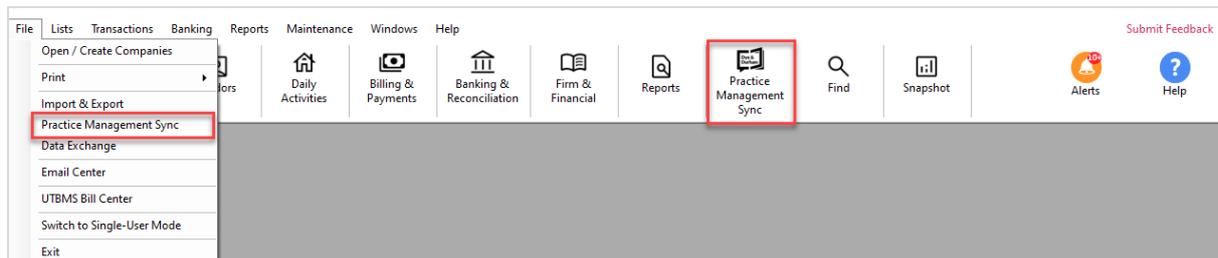
QUICK START GUIDE

1. UNITY® PRACTICE MANAGEMENT

Practice Management Sync

If you have not signed up for the Unity® Practice Management and Unity® Accounting “Practice Management Sync” feature, you will get an error message in Unity® Accounting, letting you know that a Unity® account has not been connected to Unity® Accounting. Please [contact support](#) to have the feature enabled.

You must enable the feature from Unity® Accounting to begin set up.



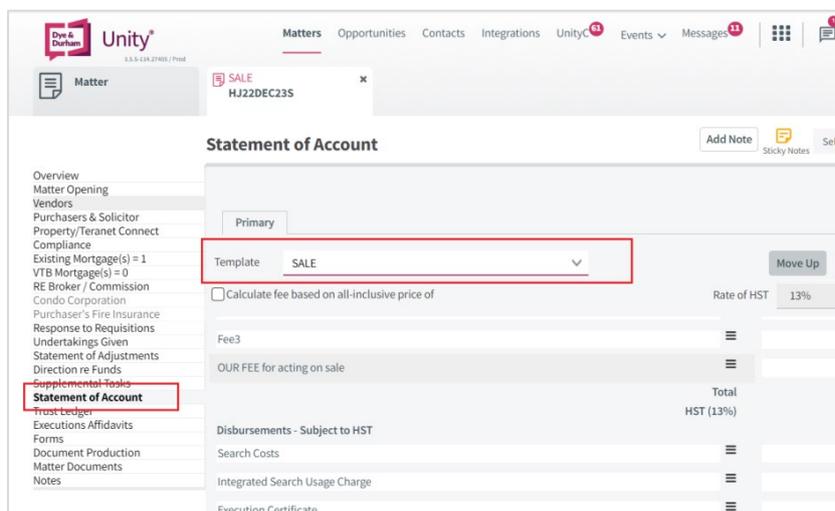
1.1. UNITY MATTER

Statement of Account page

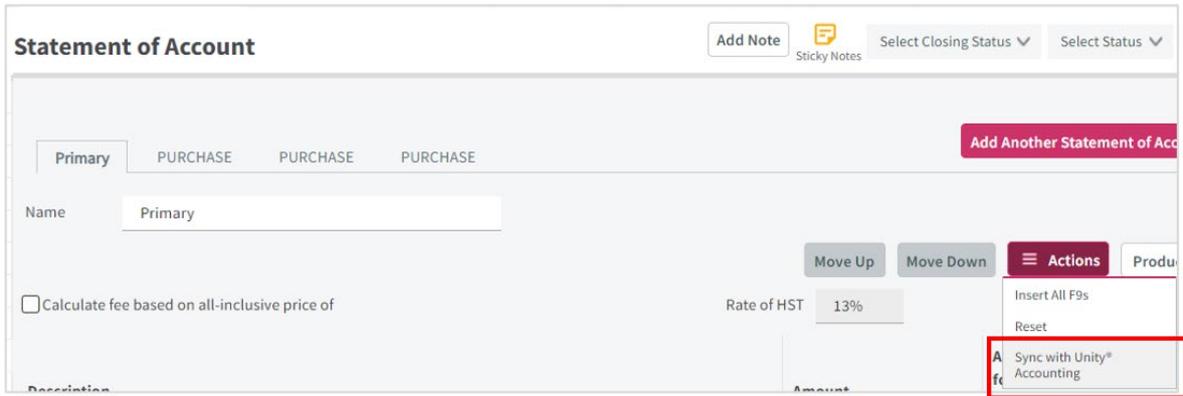
When working on a Unity matter, the "Sync with Unity® Accounting" feature will allow the Statement of Account data to be received in Unity® Accounting for import to your client accounting files.

The information populated in the Statement of Account in Unity® can be sent directly to Unity® Accounting. To begin adding data for transfer, follow these steps:

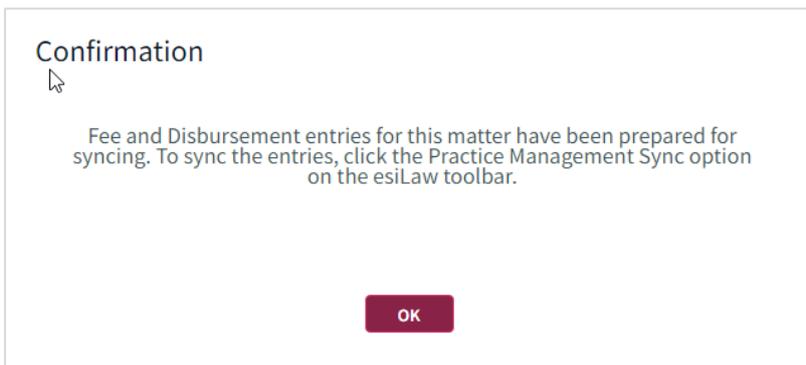
- a) In Unity® Practice Management, access an existing matter or open a new one and then navigate to “Statement of Account” section. From there, you can apply a library template, enter any data, and *Insert F9s* as needed to populate the fields.



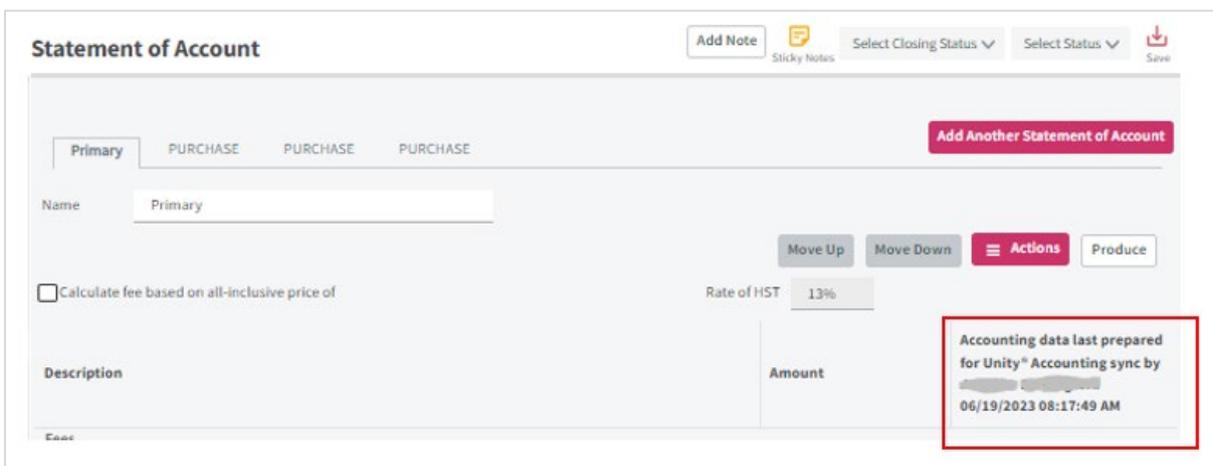
- b) Once complete, select “Actions” and “Sync with Unity® Accounting”.
- *Note: You may also use the “Actions” button to insert all F9s to populate the entire Statement of Account using your template information before sending the information to the corresponding Accounting File.*



- c) On confirmation of the data being sent, a window will pop up and confirm that the information is ready to be retrieved by Unity® Accounting



- d) On completion, the Matter will have a note below the action button noting the last time the sync action was run and by which user.

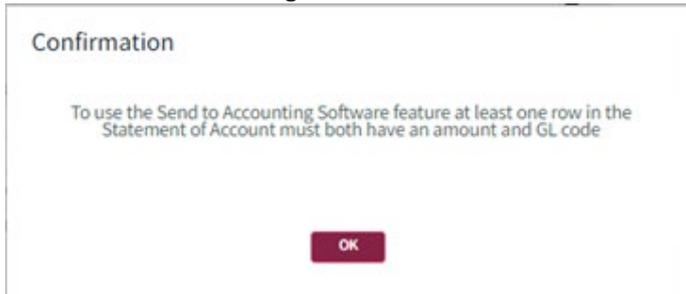


Important Notes & Troubleshooting:

- a) In order to successfully send the information to the corresponding Accounting File, ensure at least one item has an accounting code applied, otherwise the transfer will fail.

Description	Amount	Accounting Codes
Search Costs	\$35.00	20 - Court Costs [5210]
Integrated Search Usage Charge	\$0.00	
Execution Certificate	\$0.00	

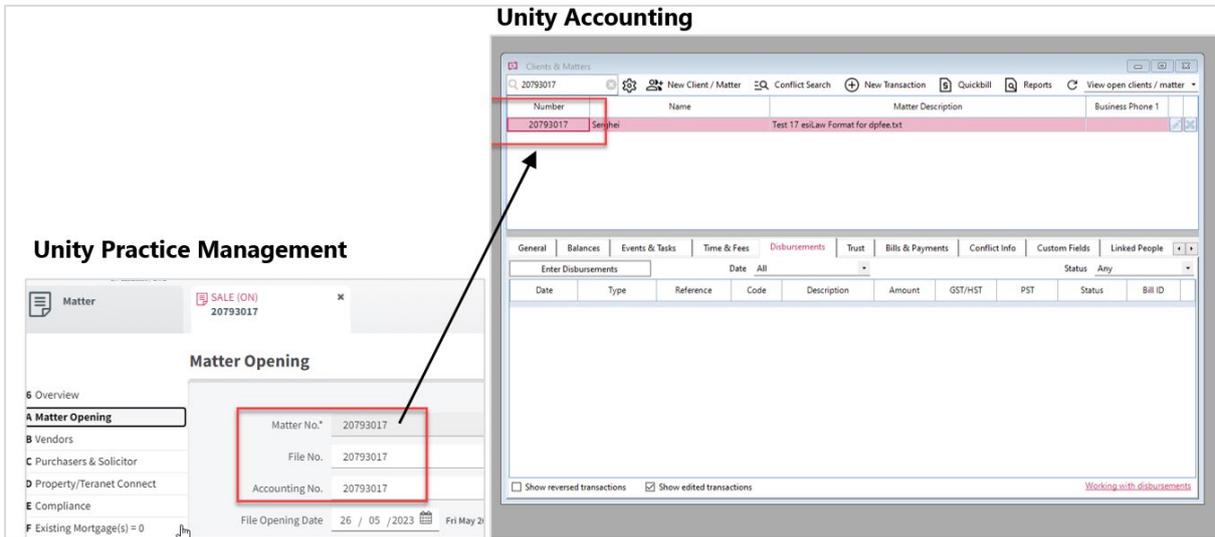
- b) Confirm by clicking on “OK” if a confirmation popup appears, confirming you have added at least one accounting code.



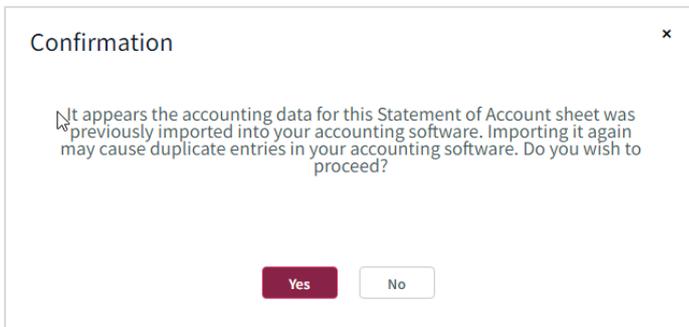
- c) The Firm’s configuration’s Statement of Account settings for the ‘Matter Identifier for Accounting Software’ field will determine what displays as the **Matter No.** field.

- This setting can be found by following this path: **Admin Settings** → **Statement of Account** → **Manage General Statement of Account Settings**. The window as shown below will appear to change your selection, if necessary. ([The Administrators Guide](#) includes more detailed information).

- d) In our example, since we selected “Matter Number” in the “Statement of Accounts” settings, the **Matter No.** field in the Unity® Practice Management file will be used as the official record ID and for field mapping to the corresponding Unity® Accounting Client/Matter file.
- o Remember, the field ID is based on how it is configured in your firm settings – select from either: Matter No., File No., or Accounting No. ([The Administrators Guide](#) includes more detailed information).



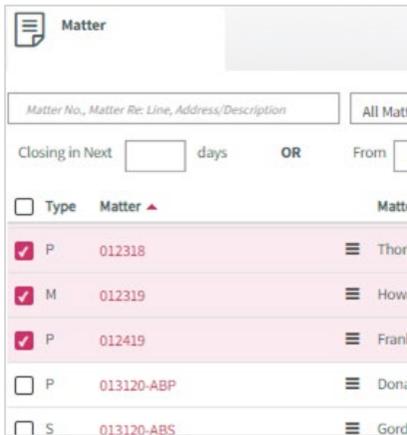
- e) If the information has been previously imported to Unity® Accounting, a message displays as shown below; select **Yes** to continue, ‘No or X’ to cancel.



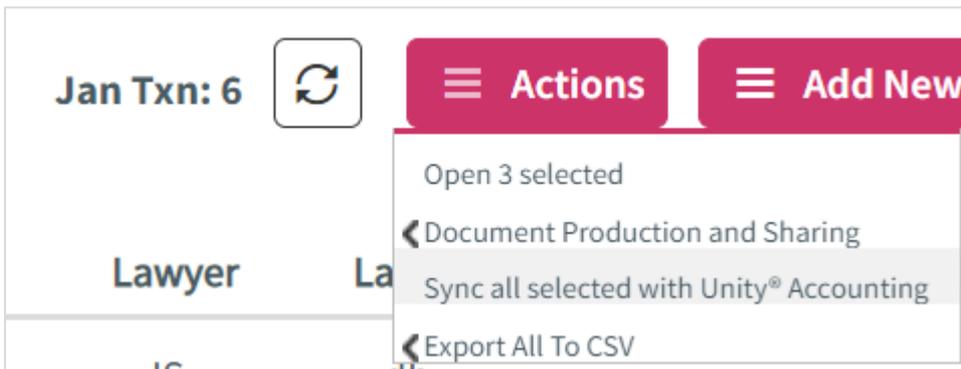
1.2. SEND MULTIPLE MATTERS FOR EXPORT

Send Multiple Matters for Export

- a) From the Matter list find and select the Matters to export. Click the checkbox on each matter that you want to send the Statement of Accounts data to Unity® Accounting.



- b) Click on "Actions" then select "Sync all selected with Unity® Accounting".



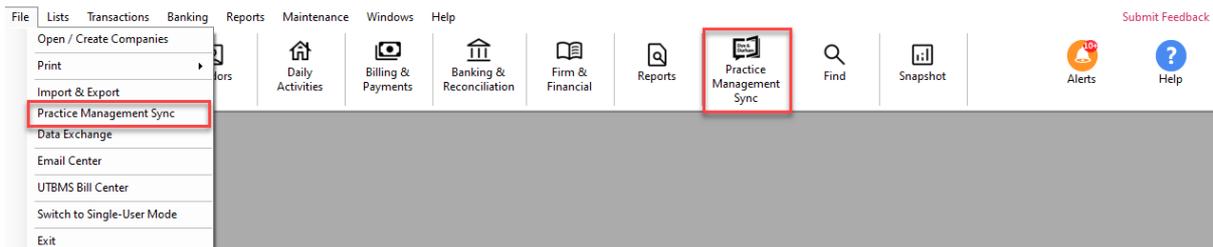
2. UNITY® ACCOUNTING

Within Unity® Accounting, you can see which Statement of Accounts are waiting to be imported into Unity® Accounting. A firm administrator or billing user will need to review and approve the import data before it's added to the associated Matter/Client ID.

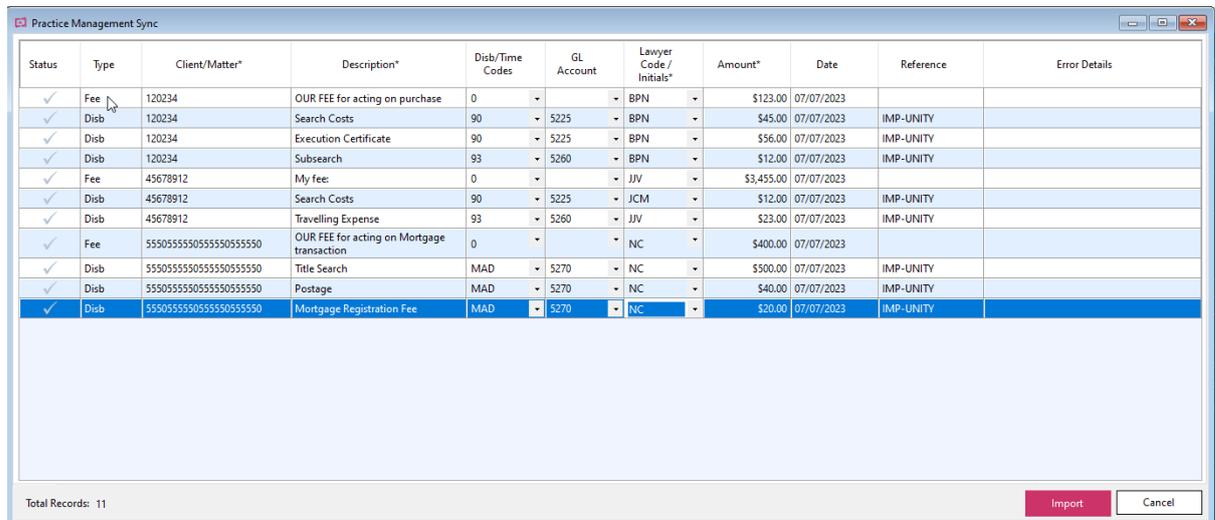
The instructions in this section will outline how to view the Practice Management Sync data and import it into Unity® Accounting.

2.1. PRACTICE MANAGEMENT SYNC

- a) On the menu ribbon click **Practice Management Sync** or select File -> **Practice Management Sync** to display the window.



- b) Review the information on the screen. (Note: The ability to sort by any field is available.)



Status	Type	Client/Matter*	Description*	Disb/Time Codes	GL Account	Lawyer Code / Initials*	Amount*	Date	Reference	Error Details
✓	Fee	120234	OUR FEE for acting on purchase	0		BPN	\$123.00	07/07/2023		
✓	Disb	120234	Search Costs	90	5225	BPN	\$45.00	07/07/2023	IMP-UNITY	
✓	Disb	120234	Execution Certificate	90	5225	BPN	\$56.00	07/07/2023	IMP-UNITY	
✓	Disb	120234	Subsearch	93	5260	BPN	\$12.00	07/07/2023	IMP-UNITY	
✓	Fee	45678912	My fee:	0		JJV	\$3,455.00	07/07/2023		
✓	Disb	45678912	Search Costs	90	5225	JCM	\$12.00	07/07/2023	IMP-UNITY	
✓	Disb	45678912	Travelling Expense	93	5260	JJV	\$23.00	07/07/2023	IMP-UNITY	
✓	Fee	55505555055550555550	OUR FEE for acting on Mortgage transaction	0		NC	\$400.00	07/07/2023		
✓	Disb	55505555055550555550	Title Search	MAD	5270	NC	\$500.00	07/07/2023	IMP-UNITY	
✓	Disb	55505555055550555550	Postage	MAD	5270	NC	\$40.00	07/07/2023	IMP-UNITY	
✓	Disb	55505555055550555550	Mortgage Registration Fee	MAD	5270	NC	\$20.00	07/07/2023	IMP-UNITY	

Total Records: 11

Import Cancel

- c) Add any 'Error Details' descriptions if needed before importing that file's data.
- d) Once done, click on 'Import'.
- e) Only the files that are check marked (✓) under the "Status" column will be imported.

2.2. CLIENT/MATTER

View Imported Data

- Open a Client/Matter in Unity® Accounting to see the data that has been imported from Unity® Practice Management.
- Under the “General” tab, you will find the “Account Balances” (including Unbilled Time and Unbilled Disbursements)

Client / Matter		General Details	
Number	99000	Type of Law	Real Estate
Name	JS Unity File	Responsible Lawyer	David Flett
Primary Contact		Originating Lawyer	
Matter Description	Unity Purchase	Assigned Lawyer	
Address and Contact Details		Assigned Assistant	
Mail to Name	JS Unity File	Account Balances	Last Billed
Address Line 1		Unbilled Time	06/28/2023
Address Line 2		Unbilled Disb	-
City	Vancouver	Unpaid Fees	06/28/2023
Country	CA	Unpaid Disb Taxes	
Business Phone 1		Total Unpaid	
Mobile		Trust-Regular	0.00
Home Phone		Trust-Term	0.00
E-mail		Total Trust	0.00
		Additional Details	
		<input checked="" type="checkbox"/> Charge GST/HST at 5.000%	
		<input checked="" type="checkbox"/> Charge PST at 7.000%	
		Send Past Due Statements	Yes

- Select the “Disbursements” tab to view all the Client/Matter disbursement details imported from Unity® Practice Management.

Date	Type	Reference	Code	Description	Amount	GST/HST	PST	Status	Bill ID
Total:					17,850.00	907.50	1,104.60		
06/23/2023	Disbursement	IMP-UNITY	91	Photocopies	50.00	2.50	3.50	Billed	1
06/23/2023	Disbursement	IMP-UNITY	98	Postage	40.00	2.00	0.00	Billed	1
06/23/2023	Disbursement	IMP-UNITY	90	Subsearch	30.00	1.50	2.10	Billed	1
06/23/2023	Disbursement	IMP-UNITY	89	Execution Certificate	20.00	1.00	0.00	Billed	1
06/23/2023	Disbursement	IMP-UNITY	1	Search Costs010	10.00	0.00	0.00	Billed	1
06/22/2023	Disbursement	IMP-UNITY	91	Photocopies	40.00	2.00	2.80	Billed	1
06/22/2023	Disbursement	IMP-UNITY	86	Postage	50.00	0.00	0.00	Billed	1
06/22/2023	Disbursement	IMP-UNITY	87	Subsearch	30.00	4.50	0.00	Billed	1
06/22/2023	Disbursement	IMP-UNITY	89	Execution Certificate	20.00	1.00	0.00	Billed	1
06/22/2023	Disbursement	IMP-UNITY	90	Search Costs	10.00	0.50	0.70	Billed	1

- Select the “Time & Fees” tab to view the Client/Matter Fee details imported from Unity® Practice Management.
 - Here, you can display all items or use the filter fields: (ex: Date = All; Filter = Billable and Non-billable; Status = Any)

Date	Initials	Description	Billable	Hours	Amount	Status	Bill ID
Total:					2.00	300.00	
09/07/2023	JS	OUR FEE for acting on purchase	Yes	1.00	200.00	Billed	1
09/01/2023	JS	OUR FEE for acting on purchase	Yes	1.00	100.00	Billed	1
Total:					2.00	300.00	