



UNITY[®] PRACTICE MANAGEMENT

RELEASE NOTES

FEBRUARY 12, 2024

UNITY® PRACTICE MANAGEMENT RELEASE NOTES – FEBRUARY 12, 2024

We're excited to announce new features and various workflow improvements to Unity® Practice Management with the February 12, 2024 release.

SUMMARY OF CHANGES:

1. NEW FEATURES

1. **Accounting** button has been added to the top navigation bar.
2. Submit a customer support ticket from the **Customer Support** menu option in the profile drop-down menu (replaces "Unity Remote Support").
3. Integration Registration links were moved to the **My Integration Credentials** option in the profile drop-down menu.

2. WAFFLE MENU

1. Access and import mortgage instructions from the "waffle" menu.
2. Access other integration services available from our partners from the "waffle" menu.

3. RENAMING OR RELABELING

1. "Events" is renamed to "**Planning**" on the top navigation bar.
2. "Messages" menu option on the top navigation bar is now an "envelope"  icon.
3. "Work Items" renamed to "**Tasks**"
4. "Notifications" renamed to "**Correspondence**"
5. "Supplemental Tasks" renamed to "**Extended Workflows**"
6. "User Defined Fields" renamed to "**Additional Details**"
7. "Document Production Stop Codes" screen relabeled to "**Additional Information Required**"

4. IN MATTER NAVIGATION CHANGES

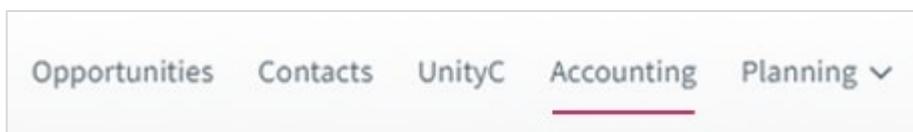
1. "**Tasks**" added to left matter menu workflow
2. "**Correspondence**" added to left matter menu workflow

5. OTHER IMPROVEMENTS

1. Unity® Practice Management now accessible via Mac and Firefox browser (Beta version)
2. Configure your title insurance settings moved to the Account Administration menu.

1. NEW FEATURES

1.1. AN **ACCOUNTING** BUTTON HAS BEEN ADDED TO THE TOP NAVIGATION BAR.

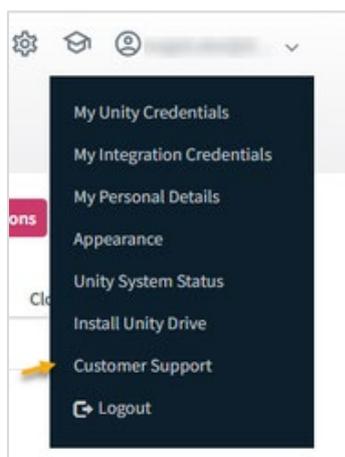


Now, you can learn more about Unity® Accounting within Unity® Practice Management. Click on “Accounting” to learn more and connect with sales.

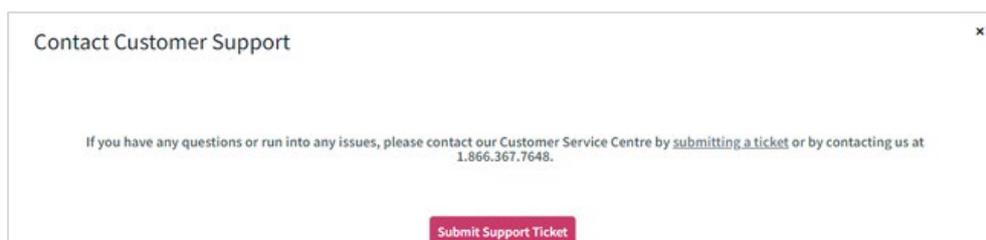
As you may know, Unity® Practice Management and Unity® Accounting customers can now use a direct connection to seamlessly capture all fees and disbursements. Learn more about the integration [here](#).

1.2. SUBMIT A CUSTOMER SUPPORT TICKET FROM THE **CUSTOMER SUPPORT** MENU OPTION IN THE PROFILE DROP-DOWN MENU (REPLACES “UNITY REMOTE SUPPORT”)

Customer support resources have moved to your profile settings. This move replaces “Unity Remote Support,” previously found in the Integrations menu. To navigate to support, click on your user profile icon, then select “**Customer Support**” from the drop-down menu.



From there, a popup will appear to [Submit a Support Ticket](#) or call customer support.



Submitting a support ticket is the recommended first option, as the support ticket page may include answers to commonly asked questions or alerts about known issues and how to solve them.

1.3. INTEGRATION REGISTRATION LINKS WERE MOVED TO THE **MY INTEGRATION CREDENTIALS** OPTION IN THE PROFILE DROP-DOWN MENU.

Now, you can register for various title insurance providers in the same place you add and store your Integration Credentials.

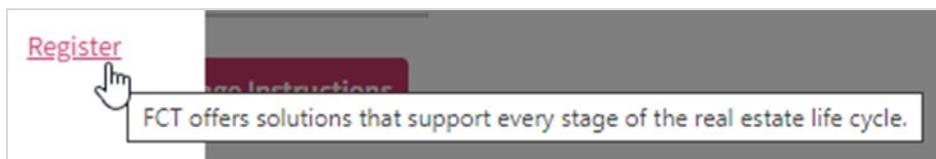
To register for other title insurance providers or to add your title insurance credentials, go to your user profile icon, then select “**My Integration Credentials**”.



On the My Integration Credentials screen, select the title insurance providers you want to register for and input your login credentials.



Look for the “register” button on the right side of the screen to register.

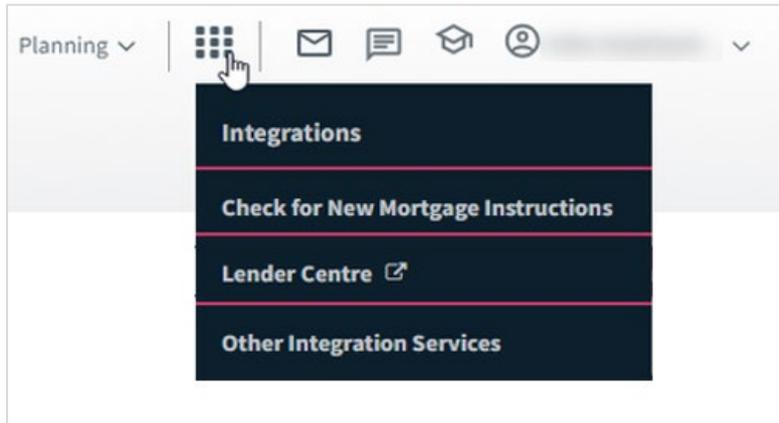


2. WAFFLE MENU ☰

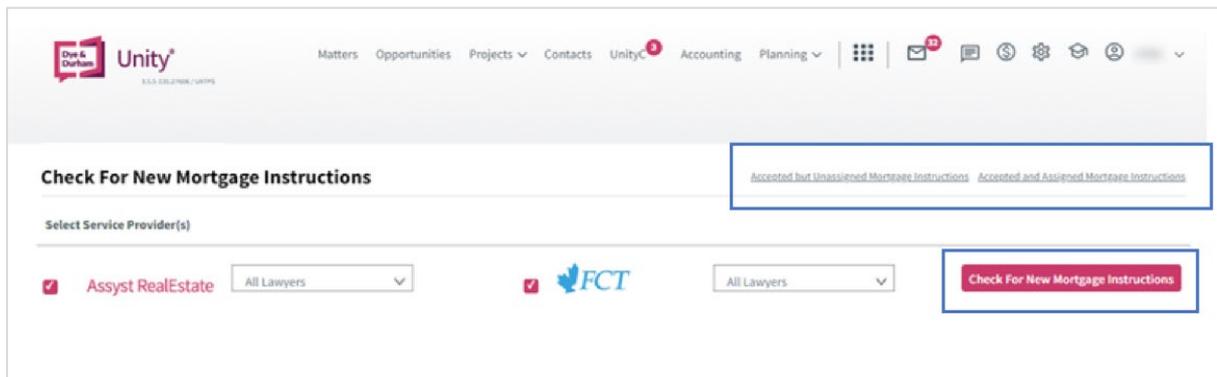
2.1. ACCESS AND IMPORT MORTGAGE INSTRUCTIONS FROM THE “WAFFLE” MENU.

Now, instead of accessing mortgage instructions from the “Integrations” top menu button, you will access and import mortgage instructions from the “waffle” menu.

To access your mortgage instruction options, navigate to the “waffle” ☰ menu, hover over it and select “**Check for New Mortgage Instructions**” to continue with your familiar workflow.



A Pop-up will appear.



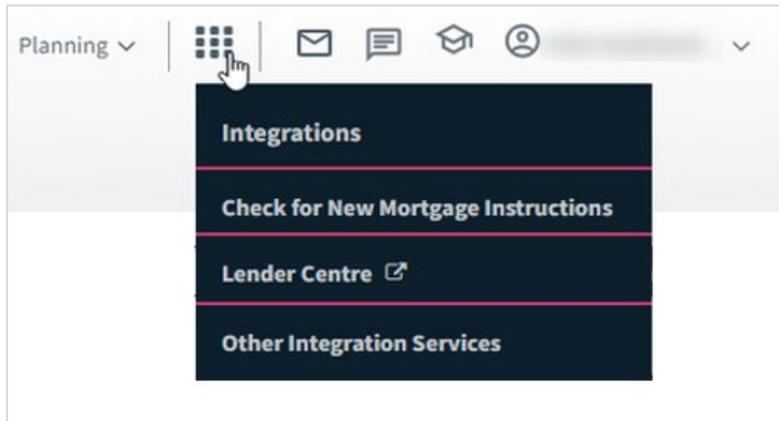
You can also access previously assigned or accepted but unassigned mortgage instructions here.



2.2. ACCESS OTHER INTEGRATION SERVICES AVAILABLE FROM OUR PARTNERS FROM THE “WAFFLE” MENU.

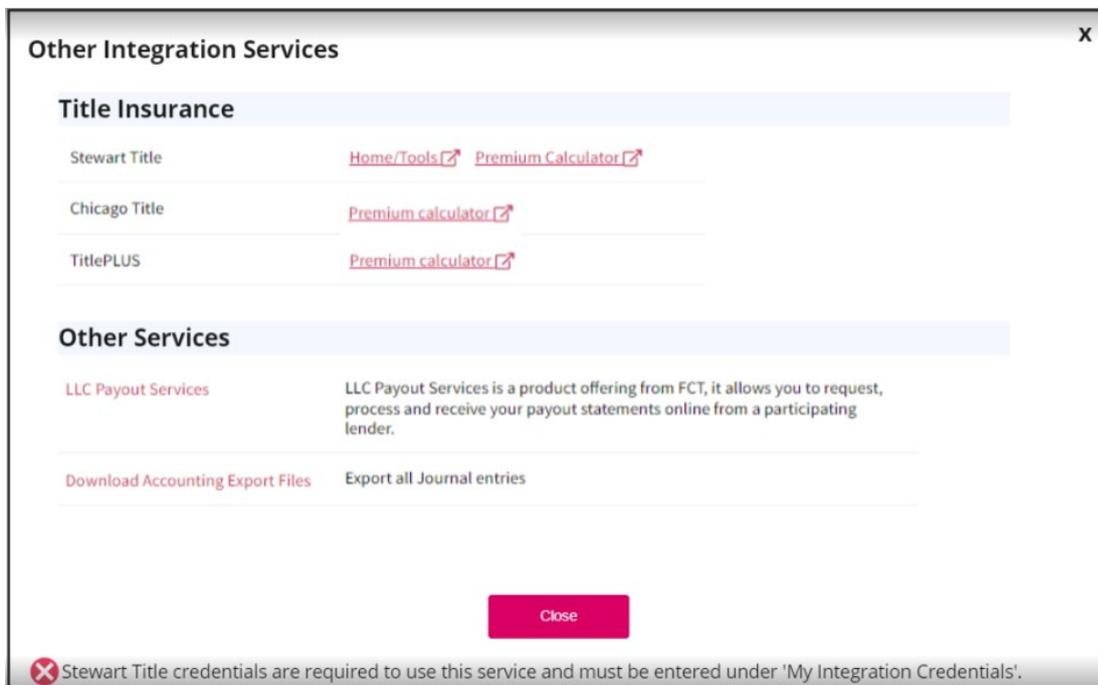
Now, instead of accessing Other Integration Services options from the “Integrations” top menu button, you will access it from the “waffle”  menu.

To access **Other Integration Services** options, navigate to the “waffle”  menu, hover over it and select “Other Integration Services”.



A pop-up will appear.

Please note that Title Insurance options will vary based on your province (Ontario screenshot below).



3. RENAMING OR RELABELING

3.1. “EVENTS” IS RENAMED TO “PLANNING” ON THE TOP NAVIGATION BAR.

The Events menu option has been renamed to **Planning**. From the Planning button, you can access your Events, Day at a Glance and Staff Availability options.



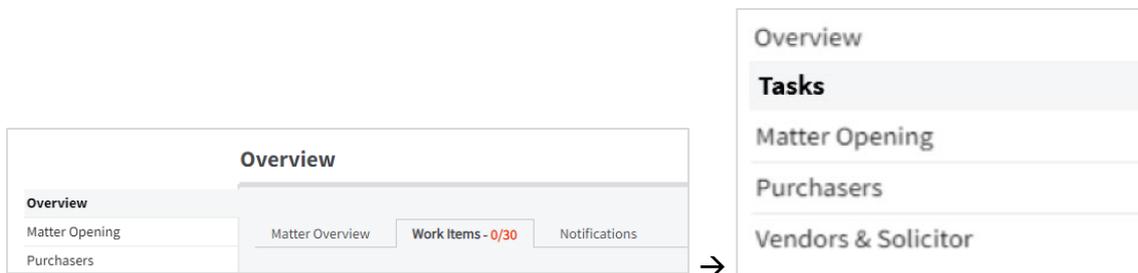
3.2. “MESSAGES” MENU OPTION ON THE TOP NAVIGATION BAR IS NOW AN “ENVELOPE” ✉ ICON.

The messages menu option is now an “envelope” ✉ icon . Click on the icon to go to your messages.



3.3. “WORK ITEMS” RENAMED TO “TASKS”

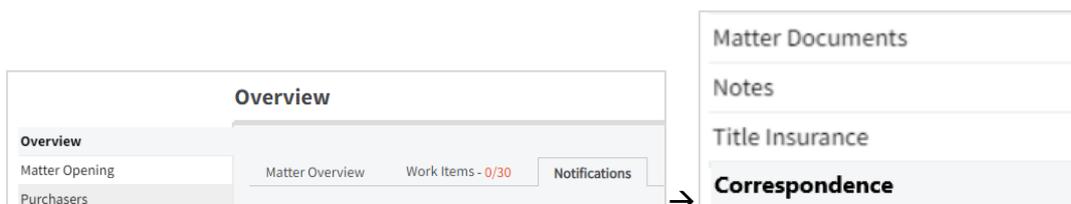
“Tasks” (Previously Work Items) now has its own category on the Matter menu.



See section 4.1 for more information on Tasks.

3.4. “NOTIFICATIONS” RENAMED TO “CORRESPONDENCE”

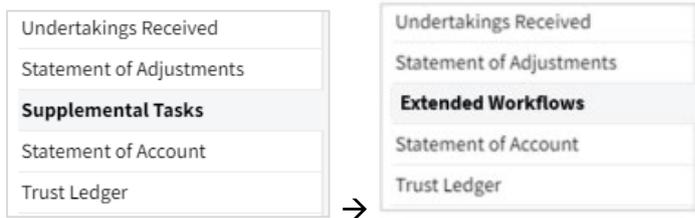
“Correspondence” (Previously Notifications) now has its own category on the Matter menu.



See section 4.2 for more information on Correspondence.

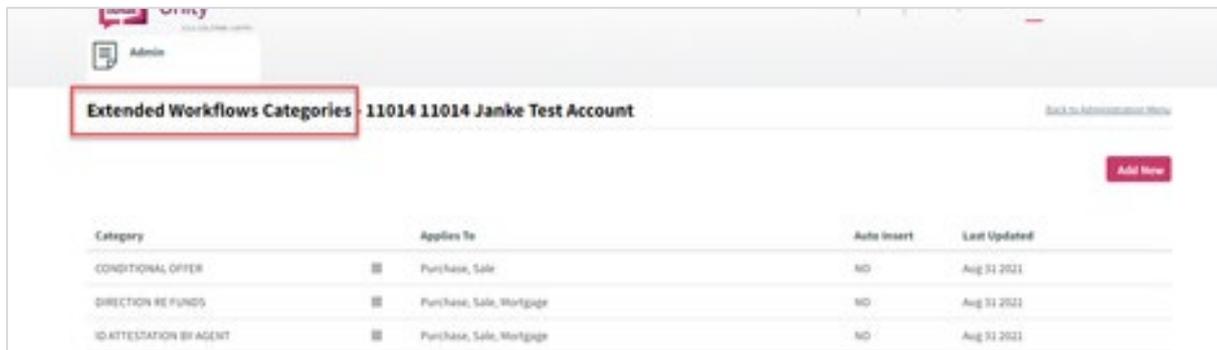
3.5. “SUPPLEMENTAL TASKS” RENAMED TO “EXTENDED WORKFLOWS”

Supplemental Tasks in the Matter menu have been renamed “**Extended Workflows**”.

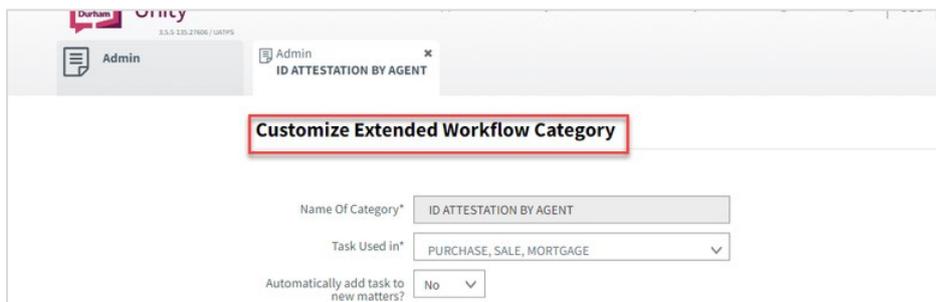


Users can access several Extended Workflows to complete the transaction, such as Pay Bills or Debts, Tenancy, and Independent Legal Advice. Click on “Add New” to choose the Extended Workflow and enter the details to produce documents associated with these Extended Workflows.

To add an Extended Workflow category, go to Account Admin → Conveyancer Configurations → Extended Workflow Categories → Select “Add New”.



From there, you can customize the Extended Workflow Category.



You can find more information about Extended Workflows and their uses on the Unity University portal.

3.6. “USER DEFINED FIELDS” RENAMED TO “ADDITIONAL DETAILS”

User Defined Fields, found at the bottom of many screens along the Matter menu, have been renamed “Additional Details.” Add any known additional details to add them to the final documents.

The diagram shows two side-by-side form panels. The left panel is titled "User Defined Fields" and contains two input fields: "Student Number" and "Real Estate Referral". The right panel is titled "Additional Details" and contains the same two input fields. An arrow points from the left panel to the right panel, indicating the renaming process.

Note: You can create and configure your “Additional Details” fields by going to Account Admin → Conveyancer Configuration → Additional Details. Here, you can select the matter type and then the topic (matter tab) and create the additional fields you require by clicking on the "add another Additional Details field" link.

Additionally, in the same Conveyancer Configuration area, you will find the link for "Additional Details DP Date Codes, which will allow you to set up Document Production Codes for your Master Documents. Finally, you can access the Document Production and Field Code Guide document in your Master Document Template folder.

3.7. “DOCUMENT PRODUCTION STOP CODES” SCREEN RELABELLED TO “ADDITIONAL INFORMATION REQUIRED”

The Document Production Stop Codes screen has been relabelled to “Additional Information Required.” The screen now contains all documents requiring additional information.

The diagram shows two side-by-side screenshots of a software interface. The left screenshot is titled "Document Production Stop Codes" and shows a list of documents with fields for "STOP CODE HERE", "PARAGRAPH NUMBER", and "THIRD STOP CODE". The right screenshot is titled "Additional Information Required" and shows a form with fields for "Testing Stop Codes", "paragraph number", "enter information here", "stop code here", and "paragraph Number". An arrow points from the left screenshot to the right screenshot, indicating the relabeling process.

The additional fields are used to collect any information you want to be included in your final documents. Contact our Document Services team if you need help adjusting the “Additional Information Required” fields for your specified documents.

4. IN MATTER NAVIGATION CHANGES

4.1. "TASKS" ADDED TO LEFT MATTER MENU WORKFLOW

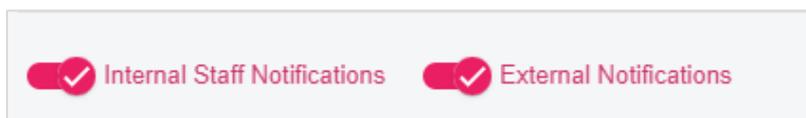
"Tasks" (Previously Work Items) now has its own category on the Matter menu.

Overview
Tasks
Matter Opening
Purchasers
Vendors & Solicitor

Tasks can be pre-defined based on the matter type. You can also add a new task if it's missing from the pre-defined list. Look for the "Add Task +" button on the screen.

Description	Status	Due Date	Assignee
File Opening (0/5)			
Agreement of P&S	Not Started	DD / MM / YYYY	
Client Information Request Form completed	Not Started	DD / MM / YYYY	
Obtain Title Instructions	Not Started	DD / MM / YYYY	
Retainer letter to Purchaser	Not Started	DD / MM / YYYY	
Client ID Verified	Not Started	DD / MM / YYYY	

Within Tasks, you can set specific tasks to complete by a specified date. You can toggle notifications ON to automatically inform internal staff and external stakeholders when the task is marked as complete.



To learn more about utilizing tasks, [view this Unity® University article](#) (you must be logged in to Unity® University to view it).

4.2. "CORRESPONDENCE" ADDED TO LEFT MATTER MENU WORKFLOW

"Correspondence" (Previously Notifications) now has its own category on the Matter menu, found at the very bottom of the list.

Forms
Document Production
Matter Documents
Notes
Title Insurance
Correspondence

Correspondence is used to automatically generate notification emails to inform stakeholders of the status of the file. If a user does not set up a Correspondence workflow, nothing will appear on the page. To learn more about Correspondence workflow, [view this Unity® University article](#) (you must be logged in to Unity® University to view it).

Automatic Notifications			
Recipient	Regarding	Status	
⊖ Upcoming Notifications			
Lawyer - Mike O'Lee 	Complete Client Information Request Form task Completed	Pending Task Status	Turn Off
Lawyer - Mike O'Lee 	Provide 2 pieces of ID (one Photo) task Completed	Pending Task Status	Turn Off
Lawyer - Mike O'Lee 	Provide Void Cheque task Completed	Pending Task Status	Turn Off

5. OTHER IMPROVEMENTS

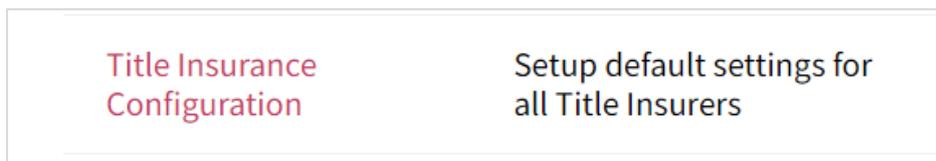
5.1. UNITY® PRACTICE MANAGEMENT NOW ACCESSIBLE VIA MAC AND FIREFOX BROWSER (BETA VERSION)

Unity® users can now access the platform on Mac operating systems and on the Firefox browser. Please note, **this feature is currently in Beta and not recommended for regular use**. During this Beta phase, you may encounter performance issues. In the future, we aim to bring you fully supported functionality for Mac operating systems and Firefox browser users. Stay tuned for more information in upcoming releases.

5.2. CONFIGURE YOUR TITLE INSURANCE SETTINGS MOVED TO THE ACCOUNT ADMINISTRATION MENU.

You must now configure your title insurance settings under the General Administration settings.

To navigate to the Title Insurance Configuration screen, click on “Admin Settings” and then “Title Insurance Configuration”.



A screen will appear to select your configurations.

A screenshot of a "Title Insurance Configuration" dialog box. At the top, the title "Title Insurance Configuration" is followed by a close button (X). Below the title, there is a dropdown menu for "Default setting in Purchaser's Report to Purchaser" with the selected option "Enclose policy with reporting letter". The dialog is organized into sections for different title insurance companies: "Stewart Title Guaranty Company" with a checkbox "Do not deduct the EC Fee from premium in Trust Ledger or Statement of Account"; "FCT" with a checkbox "Do not deduct the Connecting Counsel Fee from premium in Trust Ledger or Statement of Account"; "Chicago Title" with a checkbox "Do not deduct the Elite Fee from premium in Trust Ledger or Statement of Account"; and "TitlePLUS" with a checkbox "Do not deduct Legal Counsel Fee from premium in Trust Ledger or Statement of Account". At the bottom, there are "OK" and "Cancel" buttons.