



Unity[®] is replacing The Conveyancer[®]

Getting Ready For Unity
Administrator's Guide



Unity is
The Conveyancer
plus much more

Unity offers the best in fast, secure, web-based conveyancing to help you manage your practice more efficiently than ever before. Unity will retain the familiar functionality and layout of The Conveyancer, while offering a host of new features on a modern, intuitive platform.

Unity empowers legal professionals to manage all their real estate matters, documents and events in one place – giving you a single, unified view of your business and customers.

Why Unity?

Everything you love about The Conveyancer in a fast, modern, web-based platform

You'll be instantly familiar with the organization of main data entry screens and all of your existing client contact data, master templates, letterheads and default configurations will be automatically moved to Unity.

Your firm and customer security is our top priority

Designed from the ground up with security in mind, all Unity data is encrypted, backed up, and stored in secure Canadian locations.

New global databases include everything you need

New global databases have been created for all the contacts you use daily. Jurisdictions, brokers, and a host of other useful databases are in Unity so you can begin transacting right away.

Receive the same unparalleled customer support you have always enjoyed

We'll be by your side the whole way. Your dedicated Deployment Administrator and our customer service team will answer any questions you might have and ensure your transition to Unity is seamless.

Partner integrations are accessible directly within Unity

You can access all our market leading partner integrations including title insurance, mortgage instructing, land registrations, accounting systems, and much more directly within Unity.

Your existing third-party credentials will transfer into Unity so you can begin using them immediately.

Be a Unity Pro with DoProcess University

The DoProcess University will keep you at the top of your game. In this online learning portal you can access a comprehensive library of "how to" videos, tips and tricks, and other training resources to ensure you get the most out of Unity.



Important to Note!

✓ Although Unity is similar to the Conveyancer, there are key differences that you and your staff need to be aware of before your firm starts using Unity. In addition to these differences, there are technical requirements / configurations that your firm needs to comply with before accessing Unity.

✓ It is highly recommended that all users in your firm take advantage of the training offered prior to and after your cutover to Unity. Without this training, your staff will not be able to effectively process transactions on the new platform.

✓ DoProcess will support you every step of the way to ensure your transition to Unity is smooth and easy.



Moving from The Conveyancer to **Unity**

How does the transition to Unity from The Conveyancer work?

Three months prior to your office having access to Unity you will start receiving communications from DoProcess.

We will provide a link to a personalized webpage that assist you in performing the steps required to move to Unity.

The day you start your transition is called your **"Unity Go Live date"**. From this date you will begin a four-week transition period. This transition period is the time to start using Unity and become familiar with it. During this period, you can open transactions in both The Conveyancer and Unity. After the four-week transition period ends, all-new transactions will need to be opened in Unity. The Conveyancer can be used to complete existing transactions in progress that were started before the end of the transition period, but no new transactions can be opened after this time.

Note that matters created in The Conveyancer will not be moved to Unity. You can continue to access to the Conveyancer to complete transactions in progress or to refer back to old transaction information.



What do we move to **Unity** from The Conveyancer?

Not all information contained in The Conveyancer is moved to Unity.

Please note the following below:

	Moved (Yes/No)	Notes
Existing Transactions	No	Existing transactions prior to your Unity go live date must be completed in The Conveyancer
Client Contacts	Yes	Each contact is moved over individually
Master Documents / Letterhead	Yes	All masters should be moved over as part of the transition process. If elements are missing please contact DoProcess customer support
Private Solicitors	No	A publicly available crowdsourced solicitor database is available in Unity
Mortgagee Data	Yes	Both private and institution mortgage data is migrated to Unity and remains private to your firm
Surveyor	No	A publicly available crowdsourced surveyor database is available in Unity
Real Estate Agents	Yes	Real estate agent contact data is migrated to Unity and remains private to your firm
Condo Corporations	Yes	Condo corporation contact data is migrated to Unity and remains private to your firm
Residence Associations (Alberta only)	Yes	Residence association contact data is migrated to Unity and remains private to your firm
Insurance Companies	No	A publicly available crowdsourced insurance company database is available in Unity
Jurisdictions	No	A publicly available crowdsourced jurisdiction database is available in Unity
Management Companies	No	A publicly available crowdsourced Management Company database is available in Unity
Mortgage Brokers	No	A publicly available crowdsourced Mortgage Brokers database is available in Unity

	Moved (Yes/No)	Notes
Real Estate Brokers	No	A publicly available crowdsourced Real Estate Brokerage database is available in Unity
Configurations	Yes	Existing conveyancing configurations are migrated if applicable
Third Party Credentials	Yes	Third party credentials for mortgage instruction, title insurance and other integrations are migrated from The Conveyancer if available.
Staff Profiles	Yes	Clients must however specify what profiles from The Conveyancer are to be migrated as part of the transition process
Billing Information	Yes	Existing credit card set up is persevered. Invoices are also available



What steps does your firm need to take to move to **Unity**?

Moving to
Unity is as
easy as

READY!
SET!
GO!

Get Ready!

- ✓ Use the [Unity System Checker](#) to ensure that your workstation meets the minimum system requirements to run Unity.

- ✓ Clean up your secondary databases in The Conveyancer. Delete entries in your Parties database that you do not want to have carried over to Unity.

- ✓ Continue to upgrade The Conveyancer regularly so we can prepare your settings, data, and documents for migration to Unity.

Get Set!

- ✓ **Twelve weeks prior to your Unity Go Live date** you will be prompted by The Conveyancer to confirm the list of staff members you would like to have associated with your firm's Unity account. Ensure that each profile is marked "Yes" to have it moved to your Unity account and that all their contact information is complete and is up-to-date.

- ✓ **Continue to upgrade The Conveyancer** regularly so we can prepare your settings, data, and documents for migration to Unity.

- ✓ **Complete the Getting Ready Checklist** below to ensure your office is ready for transition.

- ✓ **Two weeks prior to your Unity Go Live date**, DoProcess will begin loading your settings, data, and documents into the new platform.

Go! (Unity Go Live date)

- ✓ **All staff members will receive an email** containing instructions to set up their Unity user account.

- ✓ **Complete the Unity System Set-up Tasks checklist** presented in Unity when you log in.

- ✓ **Visit the DoProcess University** to learn how to use all the time saving features in Unity.

- ✓ **Start creating new transactions in Unity** and leveraging all the capabilities of this powerful new platform.

Getting ready to move to **Unity** checklist > 7 TASKS TO DO

These seven tasks should all be completed at least **two weeks prior** to your **Unity Go Live** date:

- Upgrade to the latest version of The Conveyancer

- Check **Minimum System Requirements** for all workstations that will be using Unity. Update any workstations that don't meet minimum system requirements

- Update workstation configurations. Not updating these workstation settings will result in users not being able to effectively use Unity

- Identify the staff profiles that you wish to have added to your Unity account and complete their contact information

- Delete Parties records that you do not want to have added to your Unity account

- Confirm the Default Configuration settings in The Conveyancer are complete and correct

- Confirm other default configurations, such as Statement of Account or Trust Ledger Configurations, are complete and correct

Day one with **Unity** checklist > 4 TASKS TO DO

You will be walked through the following tasks when you log into **Unity** for the first time:

- Set up your Unity user profile

- Complete the Unity System Set-Up Tasks checklist to update your workstation configurations (if not already completed)\

- Check your Account Details and templates to confirm they appear as you expected. Please note, some of your templates may not have been associated with a category prior to migration. These templates will show as 'uncategorized' in Unity, and will need to be added to a category in order to access them in a matter.

- Access the DoProcess University and complete the Introduction to Unity program to receive your Unity User Certificate

- Begin opening new matters using all the time saving features Unity has to offer!

Update Workstation Configurations



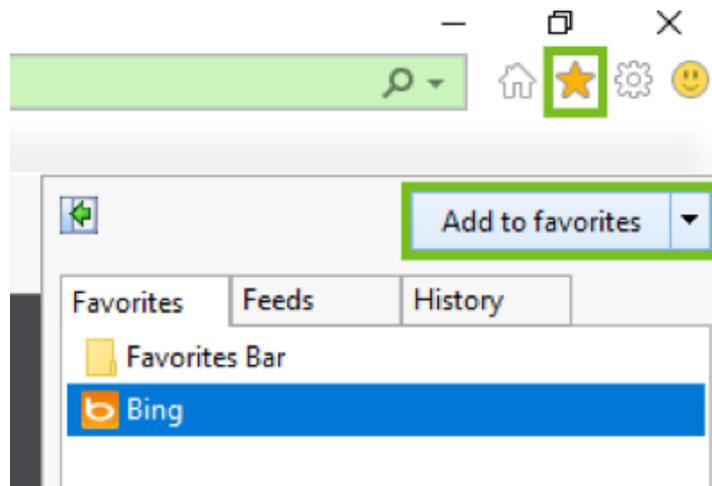
✓ Not updating your workstations settings will result in users not being able to effectively use Unity

Bookmark Unity

For faster access to the Unity login page, add <https://unity.doprocess.com> to your list of bookmarked pages on your browser or create a shortcut on your desktop.

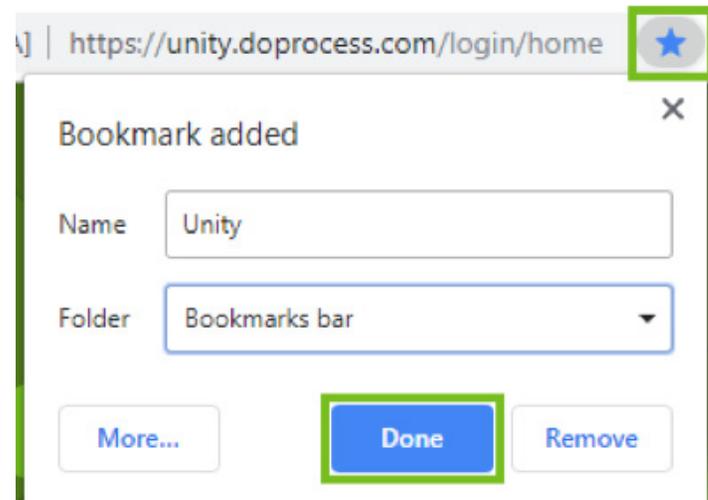
Internet Explorer

Click the star in the top right corner
Click 'Add to favourites'



Google Chrome

Click the star beside the address bar
• Click 'Done'



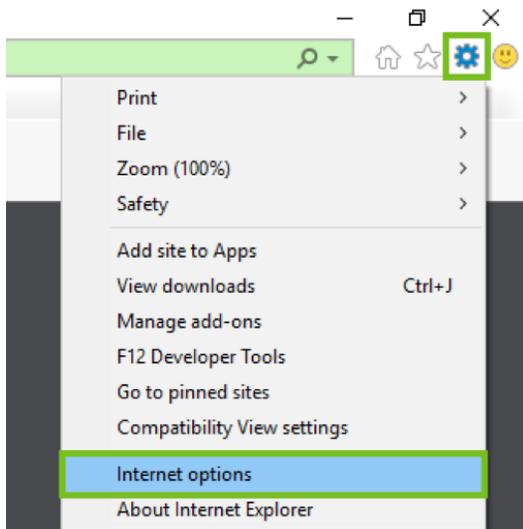
Add Unity as a Trusted Site

Adding Unity to your list of trusted websites will allow you to produce and open documents from the platform without having to verify that it is a trusted file before opening. It will also enable the document for editing, saving or printing after it has been opened.

**Note: In some cases you may require the assistance of your IT department to change this setting on your browser and any web protection software installed.*

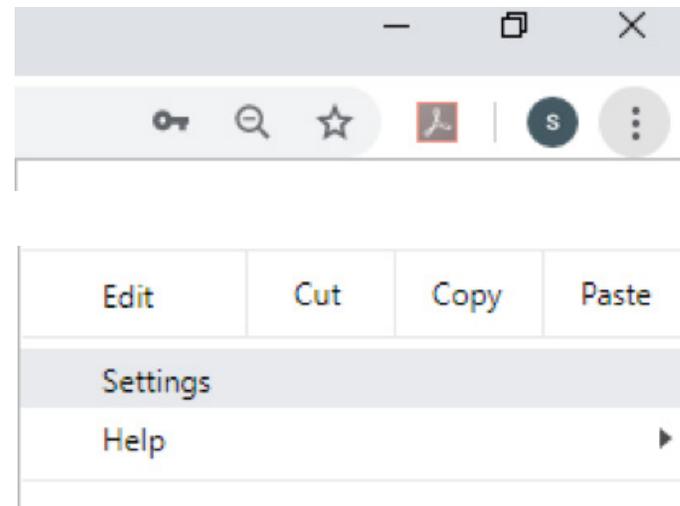
Internet Explorer

Click on the gear in the top right corner
Click on 'Internet Options'



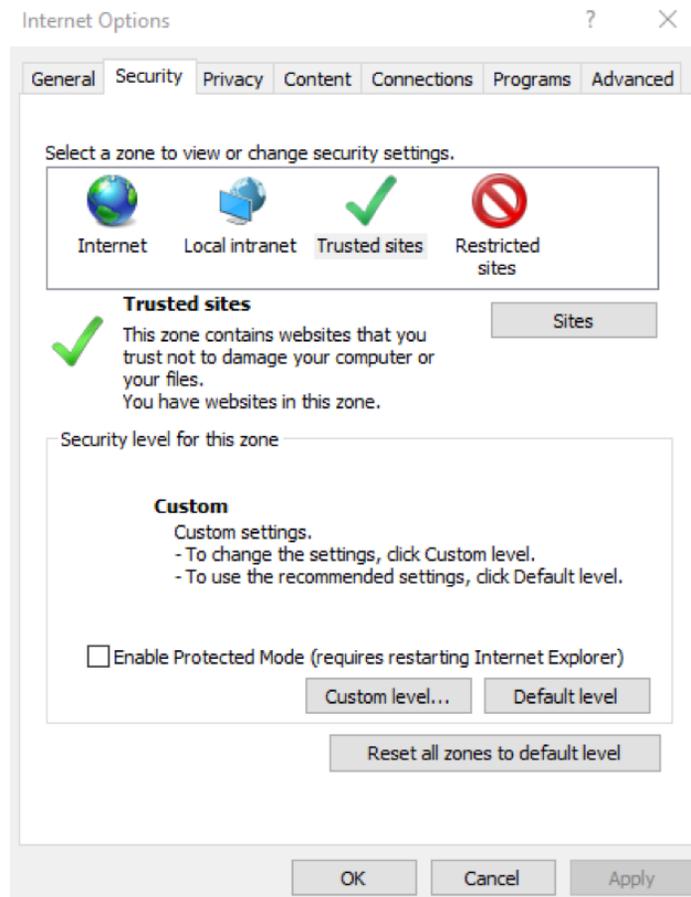
Google Chrome

Click on the 3 dots in the top right corner
Click on 'Settings'



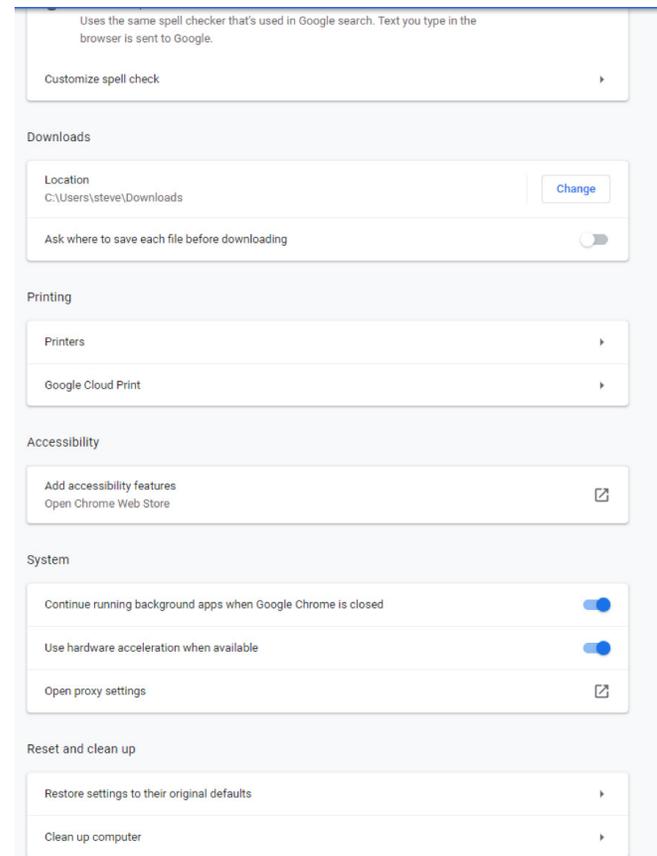
Internet Explorer (continued)

Click on the Security tab, then click the 'Site's button



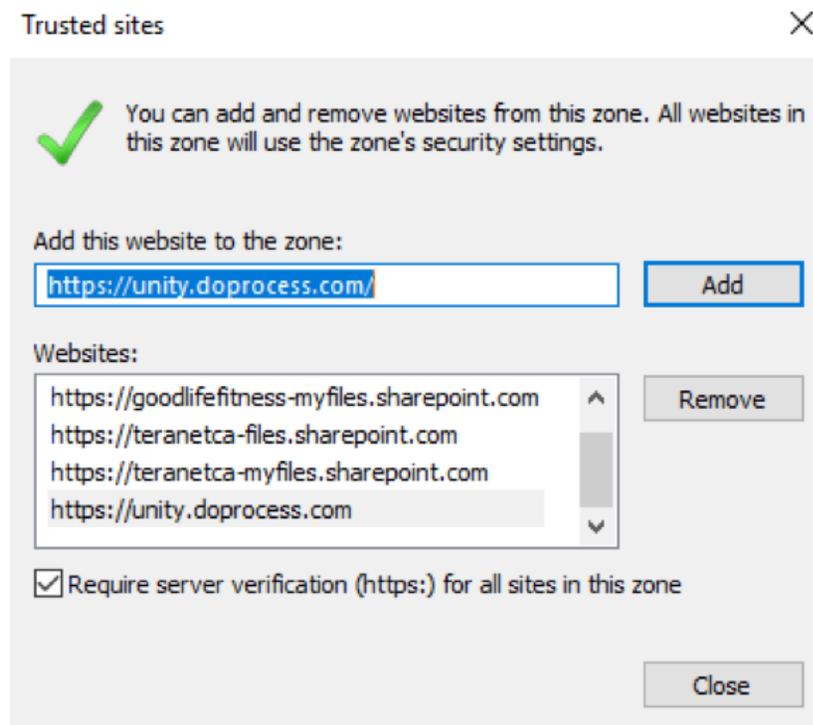
Google Chrome (continued)

Scroll to the bottom, click 'Advanced settings'
Click 'Open Proxy Settings'



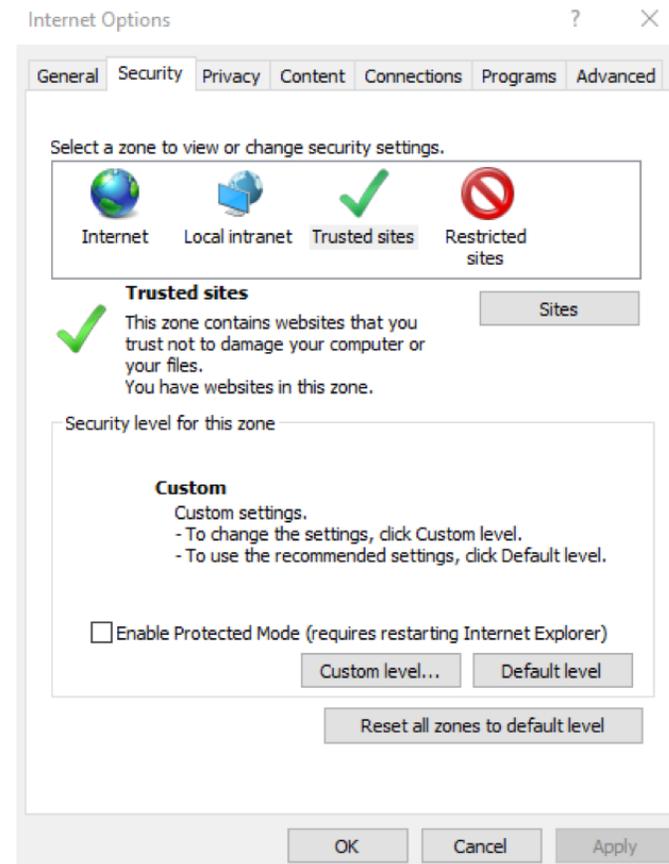
Internet Explorer (continued)

Type 'https://unity.doprocess.com' into the box
Click 'Add'



Google Chrome (continued)

Click on the 'Security tab', then click the 'Sites' button



Google Chrome (continued)

Type 'https://unity.doprocess.com' into the box
Click 'Add'

Trusted sites ✕



You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.

Add this website to the zone:

Websites:

- https://goodlifefitness-myfiles.sharepoint.com
- https://teranetca-files.sharepoint.com
- https://teranetca-myfiles.sharepoint.com
- https://unity.doprocess.com

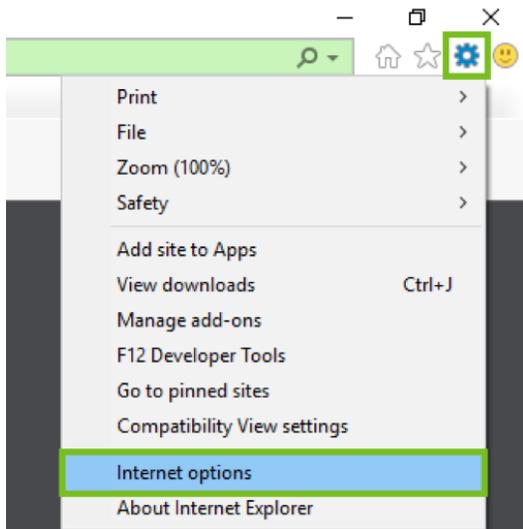
Require server verification (https:) for all sites in this zone

Allow Cookies and Pop-Ups for Unity

In your browser's security settings, allow Unity to save cookies to your system so that it can save your workstation as a Trusted Location for two-step verification. Also allow pop-ups so that you are able to access all of the documents you produce through Unity.

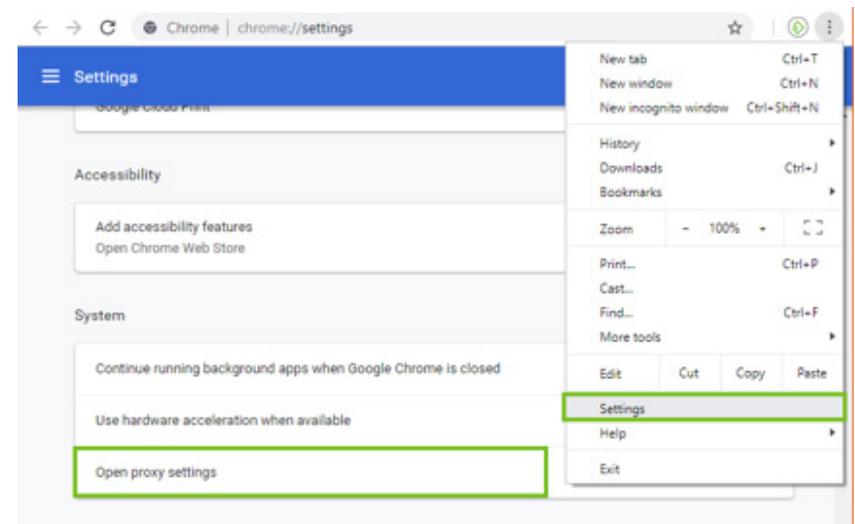
Internet Explorer

Click on the gear in the top right corner
Click on 'Internet Options'



Google Chrome

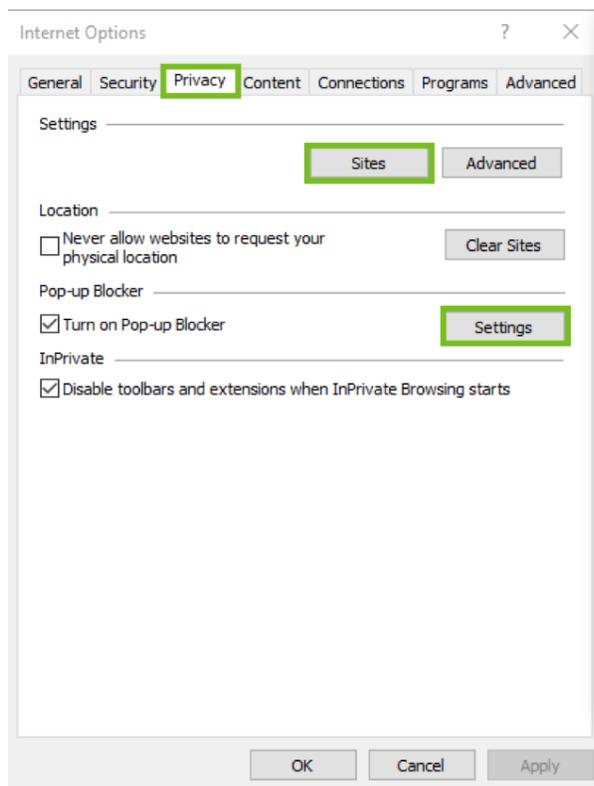
Click on the 3 dots in the top right corner
Click on 'Settings'
Scroll to the bottom, click 'Advanced settings'
Click 'Site Settings'



Internet Explorer (continued)

Allow Cookies

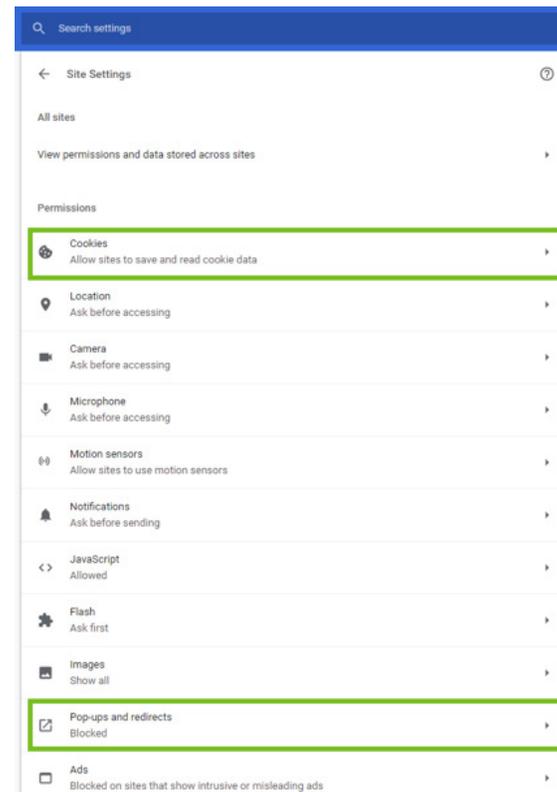
Click on the 'Privacy' tab, then click the 'Sites' button
Type 'https://unity.doprocess.com' into the box
Click 'Allow'



Google Chrome (continued)

Allow Cookies and Pop-ups

Click 'Cookies' or 'Pop-ups and Redirects'
Click 'Add' under the 'Allow' heading
Type 'https://unity.doprocess.com' then 'Add'



Internet Explorer (continued)

Allow Pop-ups

Click on the 'Privacy' tab, then 'Settings'

Type 'https://unity.doprocess.com' into the box

Click 'Add'

Per Site Privacy Actions ×

Manage Sites

 You can specify which websites are always or never allowed to use cookies, regardless of their privacy policy.

Type the exact address of the website you want to manage, and then click Allow or Block.

To remove a site from the list of managed sites, select the name of the website and click the Remove button.

Address of website:

Managed websites:

Domain	Setting
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Configure Google Chrome/PDF Settings

Configure your Google Chrome settings in order for the lender documents to produce properly in Unity.

Change setting to enable 'download PDF files instead of automatically opening them in Chrome'.

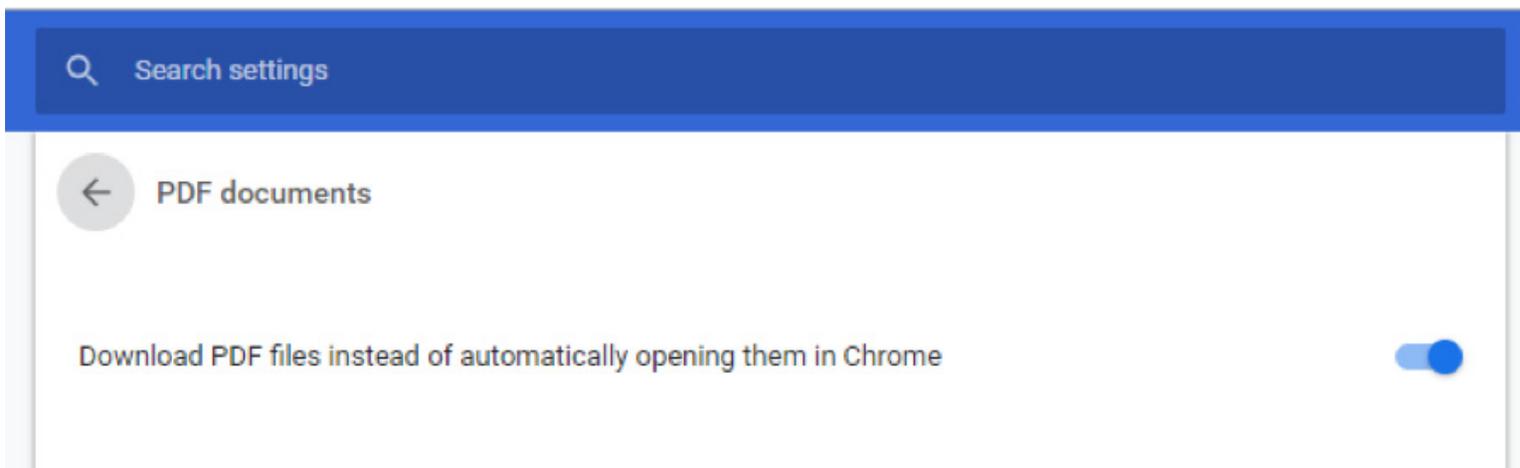
Click the configuration menu and select 'Settings'

Click 'Advanced'

Under 'Privacy and Security' click 'Site Settings'

Click 'PDF documents'

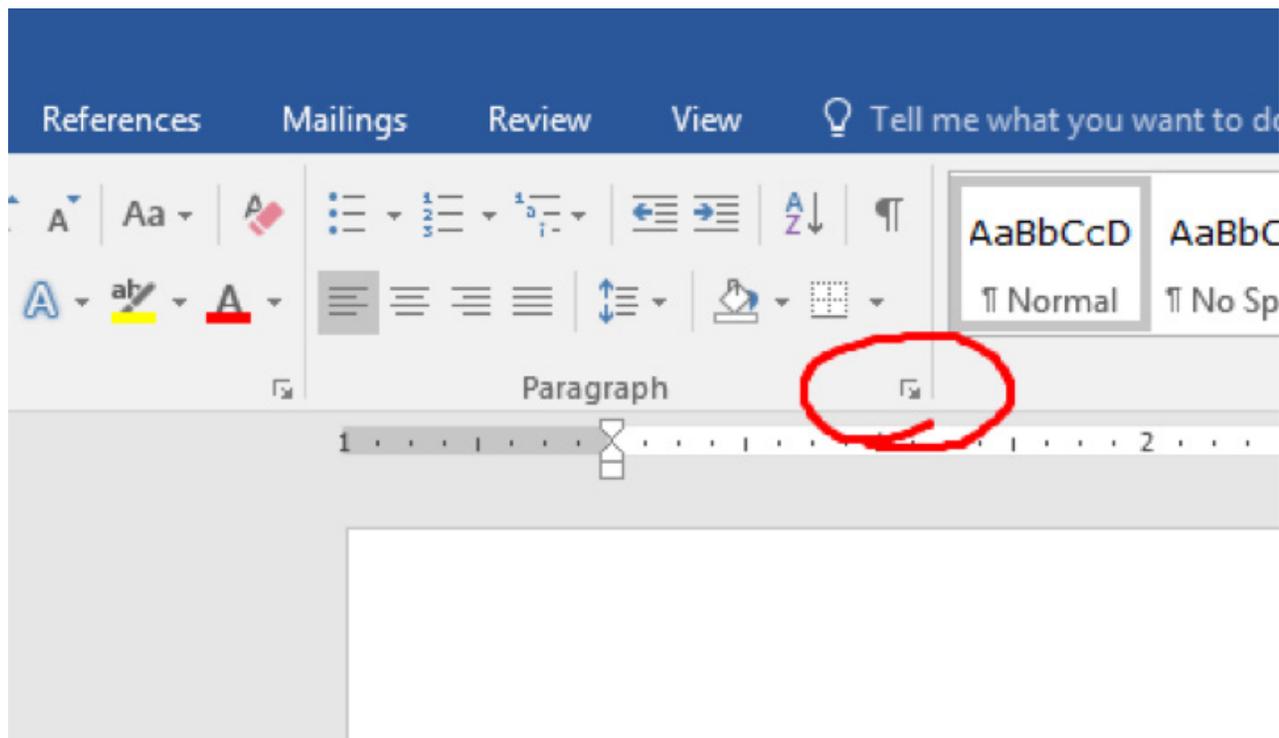
Ensure the option is selected as 'on'



Configure the Word Normal Template for Unity

Configuring these settings on all computers that will access Unity will ensure consistent format and spacing for documents produced from Unity.

Step 1 > Open a blank word document and click on the arrow at bottom right corner of paragraph settings:



Step 2 > Edit the normal.dotm template on your computer

Make the adjustment of setting 'after' to '0'
Click on 'set as default' at the bottom
Select all documents and then click 'OK'.

