



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, mortgagees, brokers, and a host of other useful databases are in Unity so you can begin transacting right away.

When information changes, DoProcess will update that information for you to ensure your contacts are always up-to-date.

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 remember!

- ✓ All the features and functions of The Conveyancer you rely on daily are available in Unity
- ✓ 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's the transition going to work?

Users of The Conveyancer will gradually begin the transition to Unity starting with Ontario in 2019.

If you use The Conveyancer, your law office will be notified at least three months before the transition date for your move to Unity.

The day you start your transition is called your **"Unity Go Live date"**. From this date you will begin a two-week transition period. This transition period is the time to start using Unity and become familiar with it. You will still have access to The Conveyancer if needed. After the two-week transition period ends, all new transactions will need to be completed in Unity.

The Conveyancer can be used to complete existing transactions in progress that were started there, but no new transactions can be opened.



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** 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.

- ✓ **You can now start creating new transactions** in Unity and leveraging all the capabilities of this powerful new platform.

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

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

- Upgrade any workstations that don't meet minimum system requirements

- 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

- Set up your Unity user profile

- Complete the Welcome to Unity introductory walkthrough

- Access the DoProcess University and complete the Getting Started with Unity program to receive your Unity User Certificate

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