



UNITY™ PRACTICE MANAGEMENT NX V3.6

RELEASE NOTES

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1. RELEASE NOTES FOR NX V3.6

1.1. DISBURSEMENTS RECONCILIATION SCREEN

Enhancements to the "**Xero Manager**" interface aim to improve usability and provide a smoother experience when handling disbursement reconciliation in Unity PM. Please note that this is dependent on the Nebulaw package being at least version 4.25.

The new **Creditor Disbursements page within Xero Manager** is designed to streamline your accounts payable by grouping multiple disbursements from the same creditor into a **single, consolidated bill**.

How it Works

When syncing disbursements, the system automatically aggregates items from various matters into one payable entry for that creditor. To ensure your accounting remains accurate, the sync automatically identifies and separates:

- **GST components**
- **GST-free components**

This approach is specifically optimised for scenarios like **Search Bills**, where several individual disbursements across different files need to be processed as one total payment to the provider.

Current Functionality Notes

- **Consolidated Billing:** At this stage, the feature is built exclusively for "Many-to-One" syncing (multiple disbursements to one bill).
- **Individual Syncing:** The ability to sync multiple disbursements as separate, individual bills is ***not currently available***. If you require disbursements to be treated as standalone bills, please continue to manage those according to your existing manual workflow for the time being.

1.2. SYNC CONTACT EMAIL INFORMATION WITH XERO

During invoice synchronization from Unity PM to Xero, the contact email details will also be synced in Xero.

- **For Administrators:** Please map the Account email field currently in use in ClientEmailField__c under **Xero Settings** (Custom Settings) so it will be included during invoice synchronization with Xero. By default, this is set to **PersonEmail**, a standard field that is typically available to all users. If the Account email field is part of the NebuLAW package (e.g., BusinessEmail__c), be sure to include the package prefix—for example, nebulaw__BusinessEmail__c.



If the **ClientEmailField__c** setting is left blank in Xero Settings, the system will fall back to the **PersonEmail** field as it is globally available.

1.3. ADD CUSTOM INVOICE LINE-ITEM DESCRIPTIONS BEFORE SYNCING TO XERO

Unity PM users can now add custom descriptions to invoice line items before syncing to Xero, instead of defaulting to "Time." When the **Description** field is left blank, the default value synced on the invoice will be the **Line Type** field value.

- **For Administrators:** The default **NebuLAW** permission set has been updated to include read and edit access to the new **Description** field on the **Invoice Line** object.
- **For Administrators:** The Invoice Line page layout has been updated to add the new Description field.

1.4. XERO INTEGRATION SUPPORT FOR GST-FREE INVOICE TAX TYPE

Allow Unity PM users to seamlessly sync GST-free invoices from NebuLAW to Xero, ensuring that tax information is accurately reflected in Xero. This eliminates the need for manual adjustments to account codes and helps maintain consistency between the two systems.

1.5. TIMEOUT ENCOUNTERED DURING BATCH DISBURSEMENT SYNCHRONIZATION TO XERO

The sync has been optimized to avoid timeouts and ensure every selected disbursement is synced in Xero.

1.6. HANDLING OF REVERSALS

The handling of reversal invoices synced to Xero as Credit Notes is now improved so that it behaves as expected no matter what the entry point is (via Reverse with Xero or normal reversal that's then synced via Xero Manager).

1.7. UPDATED PERMISSIONS

OBJECT	FIELD	MIN ACCESS LEVEL REQUIRED	WHERE IS IT USED?
Invoice Line	Description	Edit	To override the description sent to Xero during invoice synchronization process.