



UNITY™ PRACTICE MANAGEMENT V4.26

Release Notes

November 2025

CONTENTS

1.	Overview - UNITY™ PRACTICE MANAGEMENT V4.26.....	3
2.	NEW FEATURES	3
2.1	TRUST DEPOSIT SELECTION IN BANK RECS	3
2.2	AVAILABLE FUNDS CALCULATION FOR PROTECTED FUNDS ACROSS MULTIPLE BANK ACCOUNTS.....	3
2.3	BILL MATTER' ACTION TO MATTER RECORD	4
2.4	CREATE PRE-BILL' BUTTON TO MATTER RECORD.....	4
2.5	CONFLICT CHECK DETAILS' CUSTOM OBJECT	4
2.6	ESTIMATE' FIELD ON MATTER RECORD.....	4
3.	IMPROVEMENTS TO EXISTING FEATURES	5
3.1	INCLUDE BANK ACCOUNT INFORMATION ON TRUST RECEIPTS	5
3.2	SEND TASK ID TO FLOWS	5
4.	BUG FIXES	5
4.1	HANDLING OF CMA TRANSACTION FORMS.....	5
4.2	AUTOMATIC AMOUNT DURING DISBURSEMENT CREATION	5
5.	UPDATED PERMISSIONS	6
5.1	OBJECT PERMISSIONS	6
5.2	FIELD PERMISSIONS.....	6
6.	APPENDIX 1 – RELEASE NOTES FOR v4.25.....	6
7.	APPENDIX 2 – RELEASE NOTES v4.20	10

1. OVERVIEW - UNITY™ PRACTICE MANAGEMENT V4.26

At Dye & Durham, we are committed to continuously enhancing our products to ensure that they meet our customers evolving needs. This release introduces new features and enhancements to existing functionality.

Administrators should be aware that some action items are required as a part of this release, including:

- **Data Maintenance for Protected Funds** to associate existing, unreleased records with their corresponding Bank Accounts
- **Page layout updates for the Matter object** to display new available actions for Billing and Pre-Billing.
- **Permission updates** for the new Conflict Check Details object and new fields for Protected Funds, Stage Task, and Matter.

2. NEW FEATURES

2.1 TRUST DEPOSIT SELECTION IN BANK RECS

Trust Deposits can now be selected during Bank Reconciliation. This will automatically select all associated Receipts for clearing during the reconciliation process.

2.2 AVAILABLE FUNDS CALCULATION FOR PROTECTED FUNDS ACROSS MULTIPLE BANK ACCOUNTS

You can now protect funds within specific bank accounts and have the system automatically respect those protected balances when calculating available funds.

This ensures that protected amounts are only deducted from their assigned bank account and do not impact balances in other accounts.

- **For Administrators:** Existing unreleased Protected Funds records will need to be updated to have their Bank Account field populated. Otherwise, the existing protected funds record will not be acknowledged for protection (i.e. will appear as not in effect until a bank account has been allocated).

2.3 BILL MATTER' ACTION TO MATTER RECORD

A feature that allows users to quickly bill a Matter using the new “Bill Matter” button on the Matter Record page. Clicking the button automatically opens the Batch Billing screen with the corresponding Matter pre-filtered, simplifying the workflow and reducing extra navigation steps.

2.4 CREATE PRE-BILL' BUTTON TO MATTER RECORD

This feature allows users to quickly pre-bill a Matter using the new 'Create Pre-Bill' button on the Matter Record page. Clicking this button will automatically generate a pre-bill record if the matter contains any invoiceable items.

- **For Administrators:** The layout has been updated to include the 'Create Pre-Bill' button, which enables Unity PM users to generate a pre-bill directly from the matter record.
- **Note:** Make sure the Flow User checkbox in the user’s details is selected so that the user can use this functionality or any components built using Flow.

2.5 CONFLICT CHECK DETAILS' CUSTOM OBJECT

Currently, when **Conflict Check** action on **Party** record returns an excessive number of results, the backend data written to the **Technical Details__c** field can exceed Salesforce’s 131,072-character limit. This causes the process to fail with a STRING_TOO_LONG error, leaving the user unable to complete the conflict check. To prevent this error, now we have new custom object **Conflict Check Details** to store the results of Conflict Check.

2.6 ESTIMATE' FIELD ON MATTER RECORD

Now, we have new field **Estimate__c** on the Matter to track the original Fee Estimate that was given to my client, so that I can track whether I meet, exceed, or fall short of the expected figures and report on them for future action.

- **For Administrators:** The **Nebulaw** permission set has been updated to include read and edit access to the **Estimate__c** field on the Matter object.

3. IMPROVEMENTS TO EXISTING FEATURES

3.1 INCLUDE BANK ACCOUNT INFORMATION ON TRUST RECEIPTS

Enable the display of bank account name on trust receipts so users can easily verify where funds were deposited and ensure accurate trust record management.

3.2 SEND TASK ID TO FLOWS

There is now a toggle field called Send Task ID to Flow on the Stage Task object which allows the current Task record ID to be sent as an input variable for the flow to be run. It sends the Task ID only which can then be used to query the whole task record and corresponding details.

4. BUG FIXES

4.1 HANDLING OF CMA TRANSACTION FORMS

Creating new Receipts and Withdrawals from a CMA Bank Account record page now behaves as expected with the CMA Matter being pre-filled and locked in.

4.2 AUTOMATIC AMOUNT DURING DISBURSEMENT CREATION

During Disbursement creation, the Amount will be pre-filled with value and will successfully save when a Disbursement Expense code is selected.

5. UPDATED PERMISSIONS

5.1 OBJECT PERMISSIONS

OBJECT	MIN ACCESS LEVEL EXPECTED	WHERE IS IT USED?
Conflict Check Details	Create, Read	Used to store results of the conflict check process

5.2 FIELD PERMISSIONS

OBJECT	FIELD	MIN ACCESS LEVEL EXPECTED	WHERE IS IT USED?
Conflict Check Details	Matter	Edit	For recording the Matter that's a potential conflict
Conflict Check Details	Matter Summary	Edit	For recording the Matter Summary of the Matter that's a potential conflict
Conflict Check Details	Party	Edit	For recording the Party that's a potential conflict
Conflict Check Details	Role	Edit	For recording the Role of the Party that's a potential conflict
Matter	Estimate	Optional	For data recording and reporting only
Protected Funds	Bank Account	Read	For allocating the protected funds to a specific Bank Account
Stage Task	Send Task ID to Flow	Read	For reading the toggles to derive expected behaviour on task flows

6. APPENDIX 1 – RELEASE NOTES FOR V4.25

PERSON ACTING & PERSON RESPONSIBLE FIELDS ON FEE ESTIMATES AND MATTERS

There are now standard lookup fields for Users on the Fee Estimate and Matter objects to track the Person Acting and Person Responsible.

- **For Administrators:** The default NebuLAW permission set has been updated to include read and edit access to the new fields on the Fee Estimate and Matter objects

FEE ESTIMATE LOOKUP ON MATTER

There is now a lookup field from a Matter record to its originating Fee Estimate record, if any.

- **For Administrators:** The default **NebuLAW** permission set has been updated to include read and edit access to the new fields on the Matter object.

ACTIVE LOOKUP FILTER ON TIME ITEMS

Time Items can now be marked as Active / Inactive.

- **For Administrators:** Existing Time Item records will need to be marked as Active in order for them to be available for selection on Time Entries.

JOURNAL CANCELLATION TRACKING

Reversing a Trust Journal transaction now flags the original and cancellation records as Cancelled and records who cancelled the transaction.

The screenshot displays the 'Details' view for a Journal object with ID TJ-NAB-000001. The interface is organized into several sections:

- Related / Details:** A table with fields: Journal Number (TJ-NAB-000001), Transaction Date (10/10/2025), Amount (\$50.00), and Description (Internal Transfer).
- Matter Details:** A table with fields: Source (M000001) and Destination (M000001).
- Cancellation Information:** A section containing a 'Cancelled' checkbox (checked), 'Cancelled By' (User User), and 'Cancelled Journal' (TJ-NAB-000000).
- System Information:** A table with fields: Bank Account (Default Trust Account), Authorized By, Created By (User User, 10/10/2025, 10:21 am), and Last Modified By (User User, 10/10/2025, 10:21 am).

- **For Administrators:** The default **NebuLAW** permission set has been updated to include read and edit access to the new fields on the Journal object.

AUTOMATIC GENERATION OF RECEIPT PDF

When the Generate Trust Receipt button is clicked on a Receipt transaction, it now automatically creates a Content Version that's named with the Receipt Number instead of just **NebulawTrustReceipt**

- **For Administrators:** The Receipt page layout has been updated to swap the old Print Trust Receipt button that's referencing the Visualforce Page with the new Generate Trust Receipt button that's using a custom Lightning Web component
- **For Administrators:** The **NebuLAW** permission set has been updated with additional access to the **PdfGeneratorControllerLC** Apex Class.

THIRD PARTY REFERENCE FIELD ON PARTY

There is now a text field on Party to capture data for precedent generation and communications.

- **For Administrators:** The default **NebuLAW** permission set has been updated to include read and edit access to the new field on the Party object.

TRUST TO OFFICE / BULK EFT TAGGING

Withdrawals that are created as part of the Bulk EFT / Trust to Office process are now marked accordingly via the new **Trust to Office** checkbox field on the Withdrawal object.

The **Withdrawal Record Page** is now also updated to dynamically show the **Apply Payments** button only on Trust to Office withdrawals.

- **For Administrators:** The default **NebuLAW** permission set has been updated to include read and edit access to the new field on the Withdrawal object.

DESCRIPTION FIELD ON INVOICE LINE

- **There is now a Description field available on the Invoice Line object.**
- This optional field can be used in Xero to override the default descriptions that are used when syncing invoices to Xero.

BANK REC ADJUSTMENT CLEARING BEHAVIOUR

Bank Reconciliation Adjustment records that have been cleared and uncleared are now handled properly.

Previously, Bank Reconciliation Adjustment records used to retain the Cleared Date field value even after unclearing / unchecking them on the Bank Reconciliation workspace which caused an incomplete listing of Adjustments on the Reconciliation Statement

CMA WITHDRAWAL MANDATORY FIELDS

The **Requesting Solicitor** and **Authorised By** fields when creating a CMA Withdrawal are now non-mandatory fields.

UPDATED PERMISSIONS

OBJECT	FIELD	MIN ACCESS LEVEL EXPECTED	WHERE IS IT USED?
Time Item	Active	Read	For filtering Time Items that are available to use Time Entries
Matter	Person Responsible	Read	
Matter	Person Acting	Read	
Matter	Fee Estimate	Edit	To associate the originating Fee Estimate to the opened Matter
Fee Estimate	Person Responsible	Read	
Fee Estimate	Person Acting	Read	
Journal	Cancelled	Edit	To facilitate Journal cancellation / journal actions
Journal	Cancelled By	Edit	To facilitate Journal cancellation / journal actions
Journal	Cancelled Journal	Edit	To facilitate Journal cancellation / journal actions
Party	Third Party Reference	N/a	For data entry purposes that may be used in document generation
Withdrawal	Trust to Office	Edit	To produce Bulk EFT / Trust to Office withdrawals

NEW APEX CLASSES REQUIRING PERMISSIONS

API NAME	WHERE IS IT USED?
PdfGeneratorControllerLC	For creating Content Versions of Trust Receipt Printouts

7. APPENDIX 2 – RELEASE NOTES V4.20

FIXED FEE BILLING

Fixed Fee Billing is now available on pilot.

EXPECTED (ANTICIPATED) FUNDS PORTAL

The Expected Funds Portal (also known as Anticipated Funds Portal or Unidentified Funds Match) is a tool for linking unidentified funds records (incoming from banks) to expected funds records (generated from transaction records).

BULK EFT AMOUNT OVERRIDES

Bulk EFT is the facility to transfer funds out of trust and into another bank account (usually the practice's general or office account). This is the main instrument in the system to reflect funds taken out of trust as payment towards outstanding invoices against matters.

ACCOUNTING CLOSE PERIOD

The Accounting Close Period feature introduces a standardised control over the recording and modification of the following transactional records:

OBJECT	AFFECTED TOPIC
Receipt	Trust Ledgers
Withdrawals	Trust Ledgers
Journals	Trust Ledgers
Invoices	Accounts Receivables
Invoice Credits	Accounts Receivables

SETUP AND USAGE

CUSTOM SETTING	NEBULAW GENERAL SETTINGS
Field	Accounting Close Period (AccountingClosePeriod__c)

At a product level, the Account Close Period is managed within the **NebuLAW General Settings**.

The Accounting Close Period field value drives the corresponding validation rules in the objects listed above when populated.

INVOICE REVERSALS: REMOVE FROM PRE-BILLS

Users now have the option to remove Time Entries and Disbursements from the originating Pre-Bill when reversing an Invoice.

PREVIEW STATEMENT LINK FIX FOR ANNUAL TRUST STATEMENTS

We have fixed an issue where clicking the Preview Statement link in Annual Trust Statements produced a “Page Does Not Exist” error in client orgs.

The Preview Statement link now correctly includes the package prefix, ensuring it works as expected in all environments.