

Release Notes - Unity PM - v4.10

★ Reverse Invoice Invocable Action

The Reverse Invoice action is now available as an invocable option in flows.

★ LEDES (Beta)

LEDES exports can now be extracted from the system in 98BI v2 format.

Additional configuration required

A custom button will need to be configured.

Release Notes - Unity PM - v4.11

🔧 Multiple Clicks on TARDIS Timer Controls

Fixed the bug that results in phantom timers running in the background when the start/stop timer controls in the TARDIS are double/multiple clicked.

★ Rate Display in Fee Earners Pre-Bill Table

Fee Earner Rates are now included in the summary section of a Pre-Bill.

This feature relies on data recorded on a new field called **Rate Text** which may need to be pre-populated on Time Entries that are in the middle of Pre-Billing.

This field is automatically populated for Time Entries included in new Pre-Bills

The base **NebuLAW Permission Set** has been updated to include field access to the new **Rate Text** field. If custom permission sets or profiles are used, please ensure that these are updated accordingly.

★ Reverse Journal Function

A reverse action is now available for Journal records

📄 Updated Trust Deposit Creation

Users can now manually review the Trust Receipts to be included in a Trust Deposit record

Release Notes - Unity PM - v4.12

★ Write Off Disbursements in Pre-Bills

Disbursements can now be written off from a Pre-Bill.



The Write Off action in this context is defined as the setting the Amounts to a zero value and marking off the Disbursement as billed so that it's excluded from calculations of Unbilled Disbursements and prevents it from being billed in the future

★ Write Off Time Entries in Pre-Bills

Time Entries can now be written off from a Pre-Bill.



The Write Off action in this context is defined as the setting the Amount to a zero value and marking off the Time Entry as billed so that it's excluded from calculations of WIP and prevents it from being billed in the future

★ Controls for System-Level WIP Calculations

A custom setting is now available to enforce system-level WIP calculations as an override.

Previously, firms with private Time Entry sharing only calculates WIP on Matters based on the logged in users' access level (i.e., Time Entries that they do not have access to are excluded from WIP calculations) which may result in inaccurate or fluctuating WIP figures on the Matter, depending on the last user who recorded time against it.

For Administrators

This toggle is located under the General Settings custom setting.

Updated Trust Deposit Creation

The total amount of receipts included in the Trust Deposit being created is now available when creating a new Trust Deposit

Release Notes - Unity PM - v4.12.2

Minimum of FLS for Prof. Fees Tax Rate Override

Updated the minimum field-level security requirement to read-only for the Professional Fees Tax Rate Override to allow proper completion of pre-bill calculations without the need for edit access to the same field.

Release Notes - Unity PM - v4.12.3

Calculation of Available Funds on Manual Withdrawals

Fixed a bug where any unreleased protected funds may still be included in the Available Funds displayed on the manual withdrawal creation screen.

Release Notes - Unity PM - v4.13

WIP & Disbursement Snapshot Reporting

A new report type for “**WIP & Disbursements**” is now available under the Aged WIP & Debtors custom report tab.

This report produces a document in the following format (note that there is no Aging in this report type)

Page 1 of 1

WIP & Disbursements Snapshot

As at 28 November 2024

Matter	Client	Matter Summary	WIP ex. GST	GST on WIP	Disbursements ex. GST	GST on Disbursements	Total
M000001	Neutral Moon Pty Ltd	Unlaid Dismissal	\$250.00	\$25.00	\$22.73	\$2.27	\$300.00

For Administrators

The base **NebuLAW Permission Set** has been updated to include field access to the new **Content Version Source** field on the **Trial Balance** object. If custom permission sets or profiles are used, please ensure that these are updated accordingly.

For Administrators

The **WIP & Disbursements Snapshot** picklist value may need to be added manually to the **Report Type** field on the **Trial Balance** object prior to first use.

Updated Batch Sizing for Aged WIP & Debtor Reports

The batch size for each JSON field of the Trial Balance object has been updated from 500 to 450 to accommodate Matters with longer summaries or client details.

Unity PM - v4.14 Release Notes

New Features

Time Entry Write Off Timestamps

A new field for Write Off Date is now available for Time Entries.

This field is populated as Time Entries are written off from the Matter via the Pre-Bill page.

For Administrators

The base **NebuLAW Permission Set** has been updated to include the relevant field access required. Please refer to the **Updated Field Permissions** section below for more details. If custom permission sets or profiles are used, please ensure that these are updated accordingly.

Improvements to existing features

Time Entry Billed Date Updated Definition

The Billed Date field on the Time Entry object has been updated to incorporate the Write Off Date if available.

For Administrators

The base **NebuLAW Permission Set** has been updated to include the relevant field access required. Please refer to the **Updated Field Permissions** section below for more details. If custom permission sets or profiles are used, please ensure that these are updated accordingly.

Assigning Matter Plans

A new custom setting has been introduced to allow users to choose a plan off a picklist instead of a lookup.

This eliminates the need for users to search for a Matter Plan name before assigning it to a Matter.

For Administrators

The new custom setting flag is located under **NebuLAW General Settings** called **Use Matter Plan Selection Picklist**.

Extended Item Number field length for Unity Orders

The field length for the Item Number field on Unity Orders has been extended from 6 to 18 digits.

Bug fixes

Calculation of Balances for CMA Withdrawals

Fixed some performance issues when calculating the available balance on a CMA matter for withdrawal which would sometimes fail to return a result.

Ad Hoc Matter Stage Budgets

Budgets set when creating a new Matter Stage will no longer be overridden by a blank value.

Previously, users can only associate a budget after the Matter Stage has been created by editing the record.

Assigning Matter Plans

The Matter Plan selection lookup is now made mandatory.

Previously, users can bypass the selection and it will assign a Matter Plan at random.

Updated Field Permissions

Object	Field	Min Access Level Required	Where is it used?
Time Entry	Write Off Date	Edit	Writing off Time Entries via Pre-Bills
Time Entry	Write Off Date	Read	Factoring in the Write Off Date for calculating the Billed Date of a Time Entry

Unity PM - v4.15 Release Notes

New Features

Manually Create Disbursements from Unity Orders

A new action for manually creating a Disbursement from a Unity Order record is now available. This is applicable for customers who do not have automatic disbursement creation enabled or are processing Unity Orders that are not initially linked to Matters.

For Administrators

The **Unity Order** page layout may need to be updated to include the new action button called **Create Disbursement**.

Search by Payment Request when identifying Unidentified Funds

Users can now allocate unidentified funds to Matters by searching for a related Payment Request record.

For Administrators

This feature can be adopted by enabling the **Identify Funds by Payment Request Search** setting under **NebuLAW General Settings**.

Bug fixes

Consideration of Non-Applicable Tasks for Stage Completion Status

Tasks that are marked Not Applicable will now fully qualify as a closed/completed Task when determining the status of a Matter Stage.

Unity PM - v4.16 Release Notes

New Features

Automated Annual Trust Statement Runs

A new automated process is now in place to handle annual trust statement runs, removing the need for manual intervention and reducing the risk of missed compliance tasks.

Key features include:

- **Preview list of matters** before sending, giving users visibility and control over which matters are included.
- **Exclude closed matters** from trust statement runs to reduce clutter and improve accuracy.
- A **statement preview link** is now available to quickly view statements before finalising the send.

For Administrators

The custom settings flag for excluding closed matters from being included in the annual trust statement runs can be located under **Trust Statement Settings**.

This is disabled by default and will need to be manually enabled if desired.

Improvements to existing features

Maximise Timeout for Unity Search Document Sync Callout

The timeout threshold for document sync callouts to Unity Search has been increased to improve stability and prevent timeout-related sync failures.

Bug fixes

Adjust Minimum FLS Requirement for Stage Tasks to Read

The minimum field-level security (FLS) requirement for accessing Stage Tasks has been adjusted to allow read-level access.

Unity PM - v4.18 Release Notes

Improvements to existing features

Improved Task Status Updates in Matter Plans

We've added visual feedback for task status changes in Matter Plans. If a validation error occurs when updating a task status, users will now see a clear error message explaining the issue, allowing them to take appropriate action. Previously, these errors were not visible, making it unclear why changes weren't saving.

UnityPM/SM22 Integration - Improve Product Description on Disbursements

Updated the UnityPM/SM22 integration to enhance disbursement records by including the [Product Name][Search Criteria] format in the description field when disbursements are received from SM22.

Add official support for partial GST disbursements

We've added official support for partial GST disbursements, enabling accurate handling of mixed supply disbursements where only a portion of the expense is subject to GST.

For Administrators: Prerequisite Settings

For the calculations of Taxable and Non-Taxable Components to be effective, ensure that the default Professional Fees Tax Rate is set in your Invoice Settings

For Administrators: Permission Set Update

The default **NebuLAW** permission set has been updated to include **Edit** access to the new fields.

If you are using custom permission sets or profiles, please ensure that the permissions are updated accordingly.

For Administrators: Page Layout Update

The **Disbursement** page layout will need to be updated to display the new fields, if required.

iManage or NetDocuments and Unity Search integration enhancement

We've enhanced the DMS Integration for iManage and NetDocuments with Unity Search integration to streamline how documents from **Unity Search** are handled and stored.

New Workflow

- Lodge orders directly in Unity Search.
 - When documents are received back, they are now automatically uploaded to the relevant iManage or NetDocuments workspace and folder linked to the associated matter.
-

Weekend Budget Display Fix in Tardis

We've resolved an issue where Tardis was incorrectly displaying 60 billable units as required for all fee earners on Saturdays and Sundays. The system now correctly shows **0 units** for weekends by default, aligning with actual budget expectations. This ensures more accurate reporting and avoids confusion when reviewing weekly targets.

Ability to Re-Add Dynamic Tasks in Matter Plans

A new button has been added to the Matter Plan that allows users to re-add Dynamic Tasks by triggering the planned task logic again. Clicking this button updates the stage's task status, enabling the system to reinsert any Dynamic Tasks that may have been missed or previously removed. This provides greater flexibility and control when managing matter stages.

Statement classes are now global

The following classes can now be used and extended by customers for use with their custom statements:

Class Reference	Description
nebulaw.ControlledMoneyRecordVC	For producing Controlled Money Movement Statements
nebulaw.TrustStatementVC	For producing Trust Ledger Statements
nebulaw.NebulawTrustReceiptVC	For producing Trust Receipt Statements
nebulaw.DebtorStatementVC	For producing Debtor Statements

File Maintenance Audit Trail Enhancements

Stage Task records can now be marked as **Auditable** which makes the completion of resulting Tasks an entry to the **File Maintenance Audit Trail**.

Unity PM - v4.19 Release Notes

New Features

Option to Automatically Apply Bulk EFTs

A new custom setting is available that provides an option to automatically apply payments resulting from a Bulk EFT withdrawal transaction.

Improvements to existing features

Updated Disbursements Description of Unity Search Orders

The Disbursements created from Unity Search orders now follow the format of *{Product Description}: {Search Criteria}*

e.g. NSW Title: 41/A/5409

Bug fixes

Tax Validation Rules

Fixed handling of negative-valued disbursements (e.g. refunds and credits) on the tax calculation validation where previously it would incorrectly display a tax calculation validation error for negative amounts.

Unity Search Order

Fixed the sync matching logic for Unity Search Orders to use Transaction Numbers. Previously, refund transactions would replace the original transaction instead of creating another one due to shared Order ID and Item Number descriptors.

How to Guides

Enabling Auto Apply Bulk EFTs

<https://app.tango.us/app/embed/Enable-Auto-Apply-CTOs-in-Salesforce-a833fa4a3ef74906b613aeb5fc6ad40a>