

How to configure integration with Practice Manager or Winlaw

To configure the integration into Legal Interact Practice Manager, assistance from Legal Interact will be required.

Required from Legal Interact Support

Configure Practice Manager to export all matters to a comma separated file. Take note of this file path as it is needed when importing into Print Director.

Note the format of the file must be comma separated with the Account Code in the first column and Account Name in the second column. Example:

```
00027082,CROWTHER,00027082,,,Active,,,,MELISSA
```

In the example above the leading zeros of the account number will be dropped. Also, all columns after the Name column are optional. The only column that may be checked by Print Director is column 5 ("Active"). If it contains "Suspend" the row will not be imported.

Import Accounts into Print Director

Once the matters file has been exported by the Legal Interact support, we can configure the import into Print Director:

- Open Resource Manager.
- Navigate to **Scheduled Tasks > Winlaw Integration**.
- Click **Add**.
- Change the **Scheduled Task Name** textbox to **Import accounts**.
- On the **Settings** tab, ensure the **Synchronise with Account Group** drop down is set to the group into which you would like the accounts to be imported. Only transactions billed to accounts within this group will be exported to Practice Manager.
- In the **Actions** frame change the option to **Import accounts** only.
- In the **Accounts file path** textbox, enter the path to the file that is created by Practice Manager.

WinLaw Integration

Scheduled Task Name:

Execute on PDServer:

Settings | Schedule | Accounts file format

Synchronise with Account Group:

Actions

Import accounts and export transactions Export every transaction

Import accounts only Consolidate transactions for each account

Export transactions only

Accounts file path:

Delete matters file after import

Transactions file path:

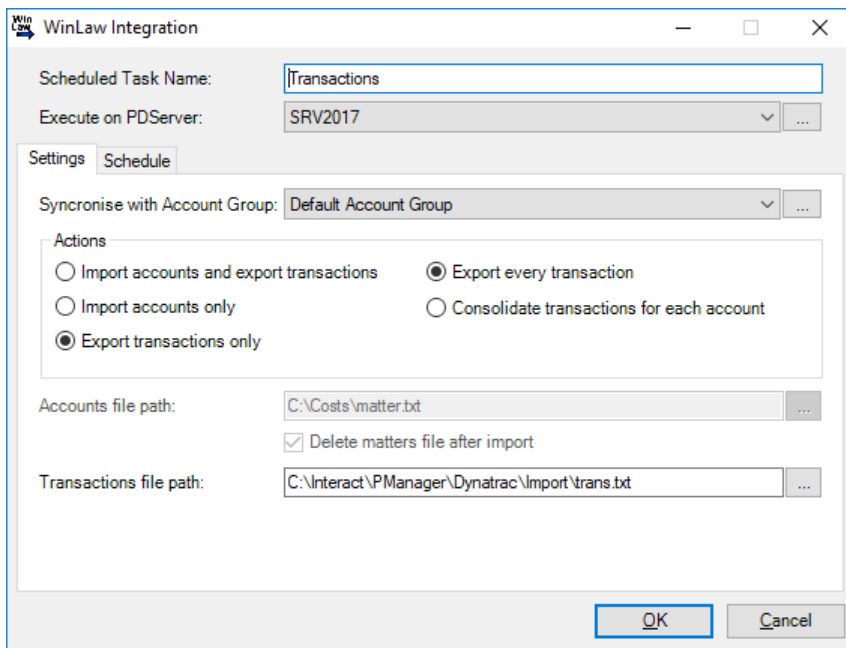
- Click the **Schedule** tab.
- In the **Schedule Pattern** frame, choose **Hourly**.
- Click **OK**.

Now, any updates to the matter.txt file will be imported into Print Director every hour.

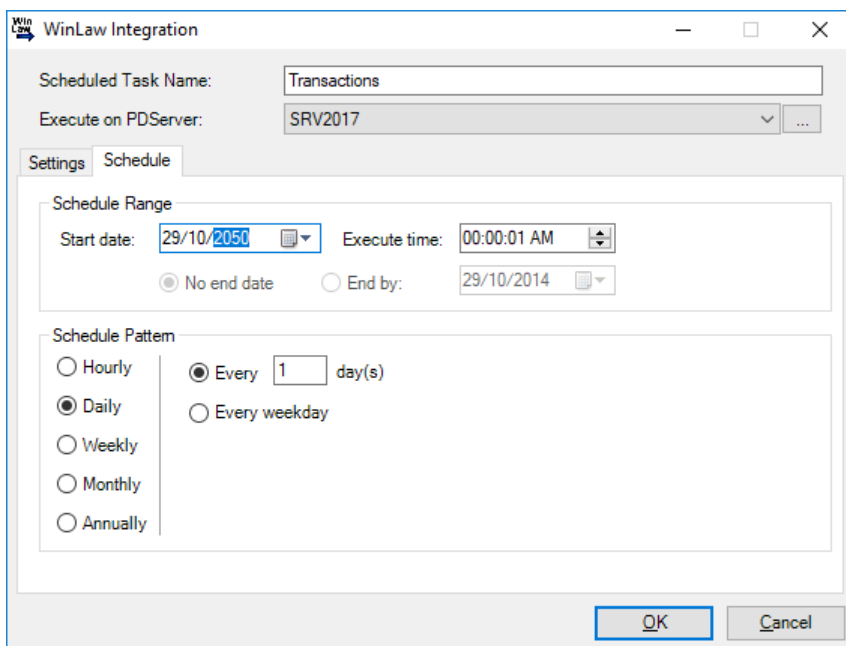
Export transactions for import into Practice Manager

Print Director uses a Scheduled task for third party integrations. However, Practice Manager does not support the automatic importing of transactions on a schedule. So, we will set our Scheduled Task to never execute automatically. The only time it must be executed, is when the Cost Recoveries is going to be executed in Practice Manager.

- Open Resource Manager.
- Navigate to **Scheduled Tasks > Winlaw Integration**.
- Click **Add**.
- Change the **Scheduled Task Name** textbox to **Transactions**.
- On the **Settings** tab, ensure the **Synchronise with Account Group** drop down is set to the group into which the accounts were imported from Practice Manager. Only transactions billed to accounts within this group will be exported.
- In the Transactions file path textbox, enter the path where the transactions file will be saved.



- Click the **Schedule** tab.
- Since Practice Manager does not automatically import the transactions file, we must set this scheduled task not to execute automatically. To do this, we must set the **Start date** to a year far in the future (e.g. 2050). Then actual schedule pattern does not matter.



- Click **OK**.

Manually execute the transactions export before running Cost Recoveries in Practice Manager

Before the Cost Recoveries function is run in Practice Manager, the **Transactions** export must be executed by Print Director:

- Open Resource Manager.
- Navigate to **Scheduled Tasks > Winlaw Integration**.

- In the right-hand pane, right click on **Transactions**.
- Choose **Execute on next refresh**.
- Click **PDServers**.
- Right click on the server and choose **Refresh**.

Now all the transactions will be exported going back to the last date it was run. The Cost Recoveries function can now be executed in Practice Manager.

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