How to configure integration with Practice Manager or Winlaw

Print Director can import the matters from Legal Interact Practice Manager (Winlaw) as accounts, so users bill their printing and phone calls to them, and export the costs for Practice Manager's **Cost Recoveries**. Legal Interact support needs to help with the Practice Manager side. The integration needs a Print Director licence that includes third-party integration; without it, **Third Party Integration** does not appear under **Scheduled Tasks**.

What Legal Interact support sets up

Practice Manager must export all matters to a comma separated file. Note where the file is saved; Print Director imports it from there. The account code must be in the first column and the account name in the second, for example:

00027082,CROWTHER,00027082,Active,MELISSA

The other columns are optional. Print Director only checks the fifth column: a row with *Suspend* there is not imported. Leading zeros in the account code are dropped.

Import the matters as accounts

1. Open Resource Manager.
2. In the tree, click **Scheduled Tasks** > **Third Party Integration**, click **Add**, and choose **WinLaw**.
3. Change the **Scheduled Task Name** to *Import accounts*.
4. On the **Settings** tab:
   - In **Synchronise with Account Group**, choose the account group to import the matters into. Only costs billed to accounts in this group are exported.
   - Under **Actions**, choose **Import accounts only**.
   - In **Accounts file path**, enter the path of the file Practice Manager creates.
5. On the **Schedule** tab, choose **Hourly**.
6. Click **OK**.

Changes to the matters file are then imported every hour.

Export the costs

Practice Manager cannot import the costs on a schedule, so this task must only run when you run it, just before Cost Recoveries.

1. In **Scheduled Tasks** > **Third Party Integration**, click **Add** and choose **WinLaw** again.
2. Change the **Scheduled Task Name** to *Transactions*.
3. On the **Settings** tab:
   - In **Synchronise with Account Group**, choose the same account group as the import.
   - Under **Actions**, choose **Export transactions only**.
   - In **Transactions file path**, enter where the file must be saved.
4. On the **Schedule** tab, set the start date far in the future (for example 2050), so it never runs by itself. The rest of the schedule does not matter.
5. Click **OK**.

Before each Cost Recoveries run

1. In **Scheduled Tasks** > **Third Party Integration**, right-click the *Transactions* task and click **Execute now**. Resource Manager asks the PDServer to run it straight away.
2. After a minute or two, check that the transactions file has been written. It holds every transaction since the last export.
3. Run **Cost Recoveries** in Practice Manager.

Related articles

- *How to create third-party accounts*
- *How to report on transactions for third party accounts*

Print Director version at time of publish: 2.5.15.3. Publish date: 09/11/2026.