



Release Notes

1.44 Release

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Introduction

This document explains the changes you will see in the updated version of Insight, along with a brief explanation of the new functions. Training is always recommended to fully understand and make the most of the new functions. Online training is available for just £90.00 for the first delegate and then £45 for any additional delegates plus VAT. Training can be booked by contacting Insight Legal on 01252 518939 option 2.

Installation

Insight will update after your specified upgrade time slot when logging in.

The first time the new update is run, the database will be updated, which may take a few minutes. You must let the update run through uninterrupted, so please give it the time it needs without cancelling the update or running Insight again.

If there are any errors reported during the upgrade process, this will likely be due to your virus checking software interrupting the update. If this occurs, you may find it easiest to temporarily disable your virus protection software and start the upgrade again by restarting Insight, but please check with your IT Company/Department if you have any concerns about doing this.

If any problems are encountered during the update process, please restart Insight, and it will attempt to re-run the update and correct any issues. If you are still having problems with the update after restarting, please get in touch with Insight Legal support at 01252 518939.

All users must update the program, so it may be beneficial to check that all of your colleagues have closed and reopened Insight after you have upgraded your version.



New Features and Functions

'Received From' Field in Credit Postings

An optional field has been added to the C2 Client Debit/Credit, O2 Office Debit/Credit and D2 Debit/Deposit Credit posting screens to allow users to enter the 'Received From' information for Credit postings in a separate area to the Description field.

The screenshot shows the 'Posting' screen with the 'Posting:' dropdown set to 'C2 - Client Credit/Debit'. The 'Date' is 02/04/2024, 'Ref' is empty, and 'Description' is empty. The 'Amount' is 0.00, 'Debit/Credit' is set to 'Credit', and 'Bank' is 'C2 - First Trust Client Account'. The 'Received From' field is highlighted with a red border and is currently empty.

The new 'Received From' field operates in the same way as the current 'Payee' field found in the corresponding Debit posting. It is available to use on the Matter Posting, Batch Posting and Posting Request Screens. It is also available on the Bank Reconciliation Posting Screen for users who utilise the Friendly Score Bank Feed integration.

The screenshot shows the 'Ledger' screen with the 'Request Type:' dropdown set to 'C2 - Client Credit/Debit'. The 'Date' is 29/03/2024, 'Ref' is 'MOA', and 'Description' is 'Money on Account'. The 'Gross Amount' is 250.00. The 'Dr/Cr' is 'Credit' and 'Bank' is 'C2 - First Trust Client Ac...'. The 'Received From' field is highlighted with a red border and contains the text 'Client J Jones'. The 'Notes' field contains 'Funds in relation to surveyor fee'.

The field is completely optional, but if used the information entered will be shown on the Ledger, Cash Book, and Bank Reconciliation screens.

Date	Ref	Description	De
28/07/2023	MOA	Money on Account	
25/09/2023	MOA	Money on Account	
16/11/2023	5037	Bill Issued - 20.00	
16/11/2023	5037	disb 1 only bill	
16/11/2023	5037	(VAT) disb 1 only bill	
16/11/2023	ANT	Anticipated disb 1 test	
16/11/2023	5038	Bill Issued - 40.00	
16/11/2023	5038	disb 3 bill	
16/11/2023	5038	(VAT) disb 3 bill	
29/03/2024	MOA	Money on Account Received From: Client J Smith	



Date	Ref	Ledger Ref	Description	Payee/Received From	Money Out	Money In
29/03/2024	MOA	COM12	Money on Account	Client J Smith		500.00

Date	Ref	Ledger Ref	Description	Payee/Received From	Money Out	Money In	Balance	Cleared
24/11/2023	1	COM2	111			3.00	20,641,999.70	<input type="checkbox"/>

A combined 'Payee/Received From' column has been created in the place of the previous Payee column for the Cash Book and Bank Reconciliation Reports

Date	Ledger	Ref	Description	Payee/Received From	Money Out	Money In	Balance	Cleared	Suppressed
29/03/2024	COM12	MOA	Money on Account	Client J Smith		500.00	20,645,798.63		

Date	Ledger	Ref	Description	Payee/Received From	Amount

The Posting Request Slip has also been updated to include the 'Received From' information when it is entered on a Credit Posting Request

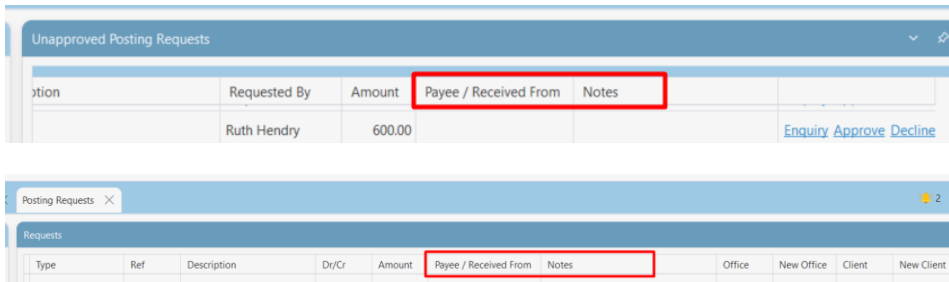
Date:	29/03/2024	Matter Ref:	COM12
Ref:	MOA	Matter Description:	Purchase of house 4
Description:	Money on Account	Clients:	Mrs Ruth Hendry Mr Kevin McMaster Ross Hendry Carringtons
Received From:	Client J Jones		
Amount:	250.00		



Posting Requests

Additional Information Columns in Posting Request Screens

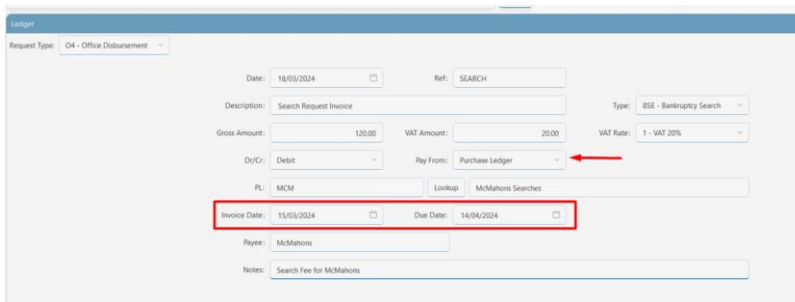
The Posting Request Screens accessible from the Home Screen and the Accounts menu now have additional information columns showing the 'Payee / Received From' details and also any Notes that the user has entered when making the posting request.



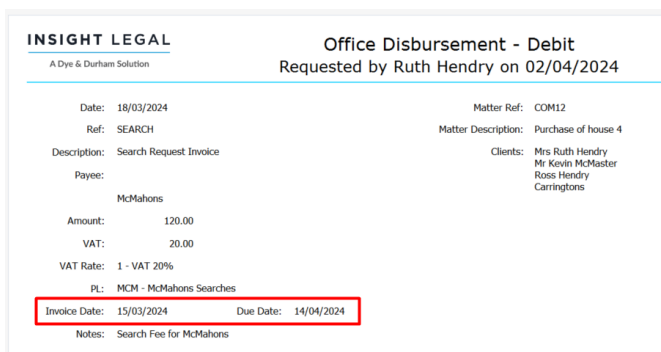
These additional columns will assist the approvers in accessing the additional information entered by the user requesting the posting more efficiently.

Invoice Date and Due Date on Posting Request

When using the O4 Office Disbursement Posting Request and selecting the Purchase Ledger option, users will now be able to enter the details of the invoice date and the due date.



These fields now match the fields available when posting Purchase Ledger Disbursement Postings on the Accounts Matter Posting screen, and the information will be available on the Posting Request PDF and Purchase Ledger Reports once the Posting has been approved and processed.





INSIGHT LEGAL		Purchase Ledger Invoice List									
A Dye & Durham Solution		Report On - Unpaid. Purchase Ledgers displayed from 01/03/2024 to 30/04/2024.									
Supplier	Nominal	Ref	Description	Date	Inv Date	Due Date	Gross	VAT	Outstanding		
									Amount	VAT	
MCN	McMahons Searches	COM12	SEARCH	Search Request Invoice	18/03/2024	15/03/2024	14/04/2024	120.00	20.00	120.00	20.00
Grand Total:							120.00	20.00	120.00	20.00	

The fields will be available when requesting an O4 Disbursement from the Purchase Ledger using either the Ledger Posting Request or the Workflow Posting Request Task

Posting Request Slip generated from Workflow Task

A PDF with the details of the Posting Request will now be generated when using the Posting Request Task in a workflow.

INSIGHT LEGAL		Client Debit/Credit - Debit	
A Dye & Durham Solution		Requested by Ruth Hendry on 03/04/2024	
Date:	03/04/2024	Matter Ref:	RES1
Ref:	CHAPS / FASTER PAYMENT (PLEASE DELETE)	Matter Description:	Residential Sale of Site at 10 Abbey Lane, Newtown
Description:	Funds to HMRC	Clients:	John Spence Ann Spence
Payee:	HMRC		
Amount:	1,200.00		
Bank:	C1 - Client Bank 1		
Notes:	HMRC Online Account		

This matches the current generation of a Posting Request PDF when using the Ledger Posting Request function. The PDF will be automatically saved in the Matter Files folder for the relevant Matter when the request is submitted and the task has been completed.

Name	Folder	Extension	Date Created	Date Modified	File Size	Sender
Funds to HMRC - Request	\	.pdf	03/04/2024	03/04/2024	68.67KB	
Refund to Client re overpayment -	\	.pdf	19/03/2024	19/03/2024	70.32KB	