



Release Notes

1.43 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.

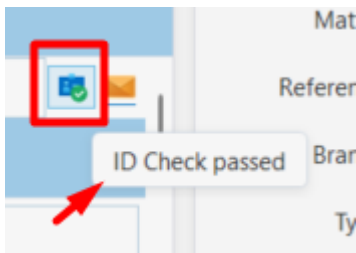


New Features and Functions

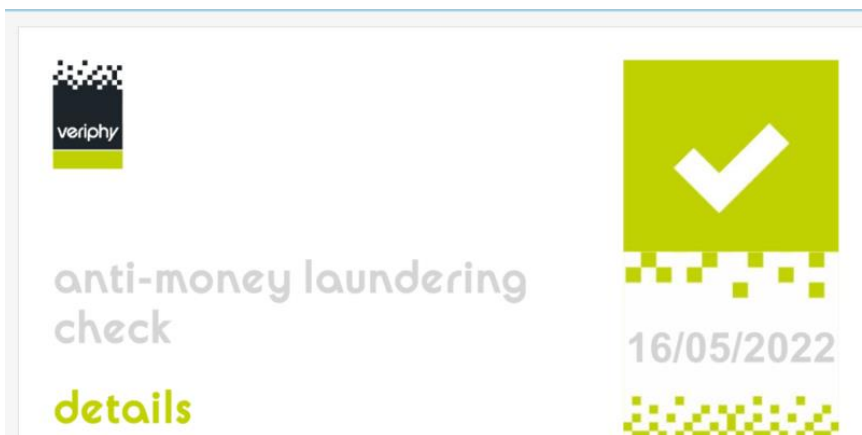
ID Check Icons in Case Enquiry

Users who have access to Veriphy to view the ID/ AML Checks will now be able to see an icon in the Case Enquiry Screen beside the Client Name and Contact Name which will indicate if a Client/Contact has passed or failed the ID/ AML Check. It will also show if the ID/AML Check has not been completed.

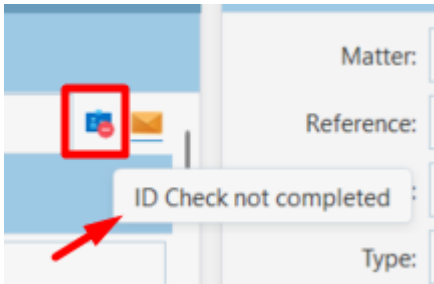
The icon will show as a green tick if passed and a red x if failed. Users can hover over the icon and a pop up will confirm if the check has been passed or failed.



Users can also click on the icon and it will open the corresponding ID/ AML Check report.



If an ID / AML Check has not yet been completed the icon will show a red 'no entry' symbol. When the user hovers over the icon it will confirm that the Check has not been completed. Users will have to perform the ID/AML Check by going to Client or Contact Maintenance and using the 'Perform Check' Function.



Client Name in Posting Request Screen

A Clients column has now been added to the Request Screen in Accounts. This will list the Client names that are associated with the Matter for that particular Posting Request.

This information will make it easier for the Accounts user to know who the Posting Request is for.

Date	Clients	Matter	Type	Ref	Description	Dr/Cr	Amount	Office	New Office	Client	New Client	Include	Print Chq	Post	Decline	Open In	Errors
17/05/2022	Ms Chloe Woollard	CON2	Client Disbursement	CDR	Client Disbursement Request	Debit	20.00	5,408.00	5,408.00	6,438.55	6,418.55	<input type="checkbox"/>	<input type="checkbox"/>	Post	Decline	Client Posting	
24/02/2023	Mr John Price	CON7	Office Bill	SWTEST	Bill of Costs		1,155.00	578.00	1,583.00	500.00	500.00	<input type="checkbox"/>	<input type="checkbox"/>	Post	Decline	Client Posting	
09/03/2023	Mrs Susan Fredrick Mr Paul Fredrick	CON1	Client Disbursement	CDR	Client Disbursement Request	Debit	20.00	7,241.60	7,241.60	252,480.00	252,460.00	<input type="checkbox"/>	<input type="checkbox"/>	Post	Decline	Client Posting	
09/03/2023	Mrs Susan Fredrick Mr Paul Fredrick	CON1	Office Bill	CF	Bill		655.00	7,241.60	7,846.60	252,480.00	252,480.00	<input type="checkbox"/>	<input type="checkbox"/>	Post	Decline	Client Posting	
30/05/2023	Mrs Susan Fredrick Mr Paul Fredrick	CON1	Client Disbursement	SUR1	Payment of Surveyor Fees	Debit	145.00	7,241.60	7,241.60	252,480.00	252,335.00	<input type="checkbox"/>	<input type="checkbox"/>	Post	Decline	Client Posting	

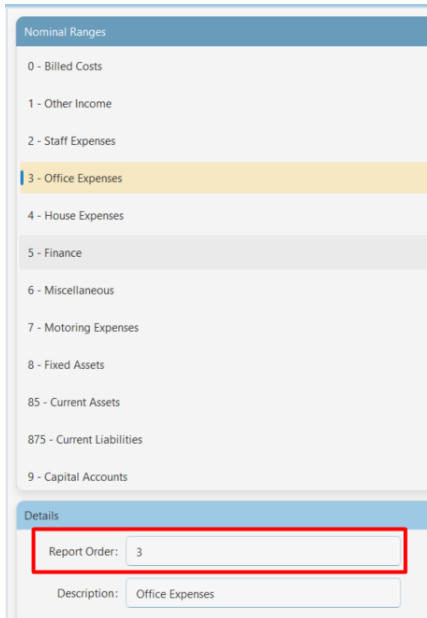
The Clients column will show the Title, First Name and Last Name of each Client linked to the Matter where applicable. In the case where there are multiple clients linked to the one Matter this column will show all clients linked in a list within the same Posting Request row.

Date	Clients	Matter	Type	Ref
17/05/2022	Ms Chloe Woollard	CON2	Client Disbursement	CDR
24/02/2023	Mr John Price	CON7	Office Bill	SWTEST
09/03/2023	Mrs Susan Fredrick Mr Paul Fredrick	CON1	Office Bill	CF
22/08/2023	John Spence Anna Spence	CONV4	Office Disbursement	LR
30/09/2023	John Spence Anna Spence	CONV4	Office Bill	4589665
01/02/2024	Abby Fredrick Mrs Susan Fredrick Ms Chloe Woollard	CON3	Client Debit/Credit	TRF



Nominal Budget Report Ordering

The Nominal Budget Report has now been updated to match all other Nominal Reports by ordering the report from the Report Order set in Nominal Ranges in System Settings. Previously the report was ordered by alphabetical order.



This change will make it easier for users to make comparisons between the various nominal reports. It will also allow users more control over the order of the Nominal Ranges on the Nominal reports to prioritize the nominal information they wish to see first.

INSIGHT LEGAL		Nominal Ledger Budgets												
A Dye & Durham Solution		for 2023 - 2024.												
Ref	Description	April	May	June	July	August	September	October	November	December	January	February	March	Total
Income														
Billed Costs														
Costs CON	Billed Costs - Conveyancing	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00	300,000.00
Costs WIL	Billed Costs - Wills	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	15,000.00	1,500.00	3,000.00	1,500.00	33,000.00
Total:		26,500.00	26,500.00	26,500.00	26,500.00	26,500.00	26,500.00	26,500.00	26,500.00	40,000.00	26,500.00	28,000.00	26,500.00	333,000.00
Expense														
Office Expenses														
4007	Stationary	500.00	300.00	500.00	600.00	1,200.00	300.00	300.00	300.00	600.00	600.00	300.00	300.00	5,800.00
4009	Bookkeeping	1,200.00	500.00	500.00	500.00	500.00	500.00	1,200.00	300.00	300.00	300.00	300.00	300.00	6,400.00
4015	IT & Hardware	1,500.00	500.00	500.00	500.00	500.00	500.00	2,000.00	500.00	500.00	500.00	500.00	500.00	8,500.00
5020	Land Registry Account	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	600.00	7,200.00
SUND 001	Sundries	500.00	500.00	500.00	500.00	500.00	1,200.00	500.00	500.00	500.00	500.00	500.00	500.00	6,700.00
House Expenses														
2000	Rent	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	1,200.00	14,400.00
2020	Electricity / Gas	500.00	500.00	500.00	500.00	500.00	500.00	500.00	600.00	600.00	600.00	600.00	600.00	6,500.00
Motoring Expenses														
3001	Motor Expenses	300.00	500.00	300.00	300.00	500.00	300.00	300.00	500.00	300.00	300.00	500.00	300.00	4,400.00
Total:		6,300.00	4,600.00	4,600.00	4,700.00	5,500.00	5,100.00	6,600.00	4,500.00	4,600.00	4,600.00	4,500.00	4,300.00	59,900.00

**Only Nominal Ledgers which have budgets set up will appear on the Nominal Budget Report*