



## Release Notes

### 1.46 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.

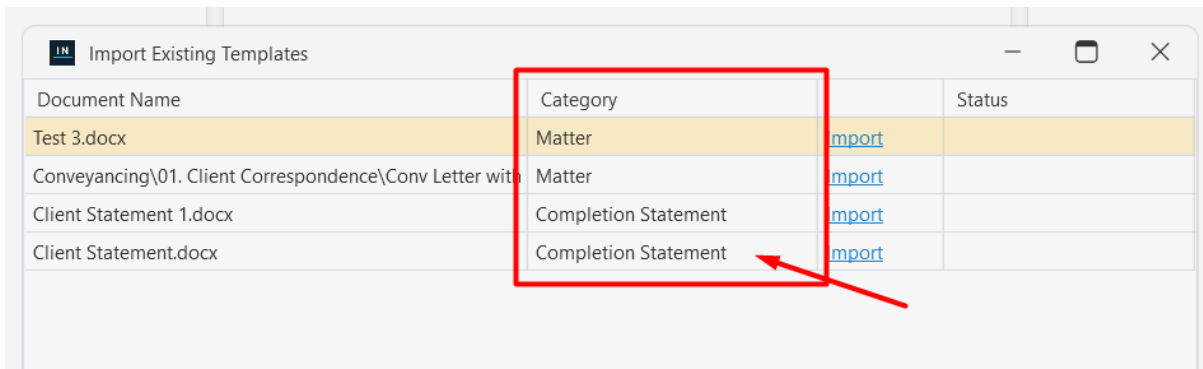
All users must update the program, so it may be beneficial to check that all of your colleagues have closed and reopened Insight after you have upgraded your version.



## New Features and Functions

### Import Completion Statements

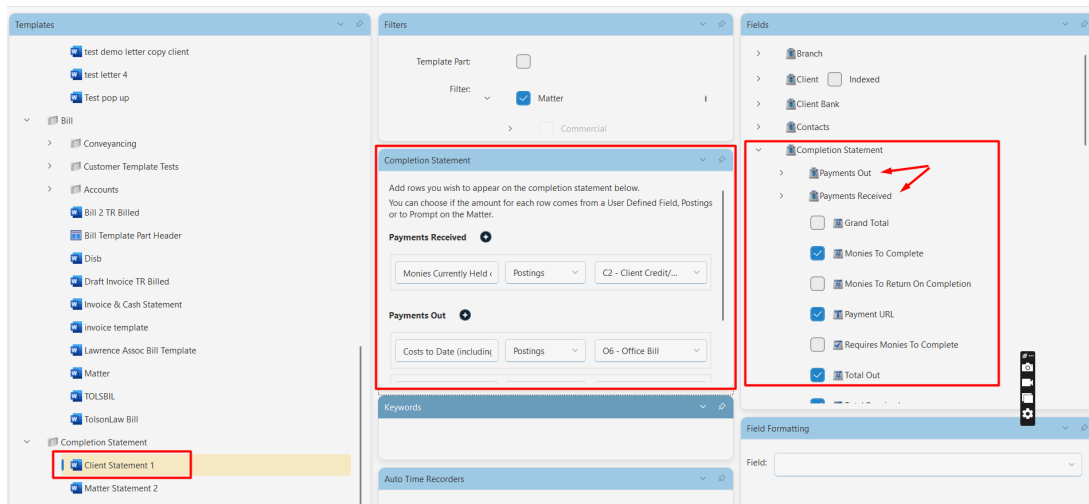
Previously only Matter and Bill Templates could be imported into Insight. This has now been extended to include the importation of Completion Statements. Users can now import an existing document as a Completion Statement and amend and add merge fields to it rather than having to create a brand new document.



Only Word .docx documents can be used. Excel or PDF documents are not compatible with templates.

Name	Date modified	Type	Size
Client Statement 1.docx	14/07/2023 14:48	Microsoft Word Docum...	21 KB
Client Statement.docx	16/03/2022 16:07	Microsoft Word Docum...	20 KB
Matter Statement 2.docx	25/07/2023 10:17	Microsoft Word Docum...	20 KB
Probate Statement of Account.docx	28/10/2022 16:03	Microsoft Word Docum...	21 KB

When importing a Completion Statement document, the relevant filters, rows and merge fields will appear, as well as 'Payments Received / Payments Out' settings.






## Property Searches Integration

Users will now be able to order residential conveyancing searches, and view orders, through their Unity® Global Platform account.

Details

 Unity® Global Platform

Name:

Environment:

Deleted:

Once users have \*registered their Unity® Global Platform Account in the External Services setting in Insight, this will enable an Order Property Search Task to be created, which can be used as an adhoc task or part of a workflow.

1 Order Dye & Durham Property Search

Options

Name:

Notes:

Auto Complete:

Property Search Options

Address:

> Matter

Once the Task has been set up, Users will be able to place search orders by running the Order Property Search Task action. This will launch the Unity® Global Platform order screen. If the user has not yet logged into Unity® Global Platform, they will be prompted to log in before they are redirected to the order screen.



CREATE ORDER

ORDER DETAILS

PROPERTY TYPE  Residential  Commercial

NEW BUILD  Yes  No

REFERENCE

TITLE MAPPING

FIND ADDRESS  OR

Order Summary

Insight Legal Test

Head Office  
Conveyancing

PROPERTY TYPE  
Residential

YOUR REFERENCE  
CON1

OUR REFERENCE  
3902934

EXTERNAL ID  
616671a4-4b8d-45ae-bdde-  
317035267713

ADDRESS  
AB1 2CD

Once the order has been completed or saved as a draft the pop up screen will close.

**The information for the order will be available on the user's Unity® Global Platform account.**

\*to register for a Unity® Global Platform account please email [sales-cms-uk@dyledurham.com](mailto:sales-cms-uk@dyledurham.com) and Nathan will be able to assist you in creating an account.