

YEAR-END TO-DO LIST FOR CSI POWER USERS

At the end of the year, CSI Lawyer requires a couple of actions from the power users. Please check the below to-do list for any actions that may be necessary in your organization.

NUMBER SEQUENCES

Does your office use number sequence codes which include a year?

When you wish to start using the year 2020 number sequences, please update the value in their Last Number field.

1. Go to Settings > Parameters > Common Parameters > Number Sequences > Number Sequence Codes.
2. Open e.g. the Assignment number.

Number Sequence Codes			
Look for:		Find	View: All Number Sequence Codes
<div> + × 🖨 📄 Actions </div>			
Drag a column header here to group by that column			
	Number Sequence Code	Description	Last Number
2 1	advance_invoice_number	Advance Invoice: Invoice Number	98
2 1	archive_number	Assignment: Archive Number	14
2 1	assignment_number	Assignment: Assignment Number	2019098
2 1	company_number	Business Unit: Business ID	1

3. Write 2020000 in the Last Number field if you wish the next assignment that is opened in CSI to have the number 2020001.

Number Sequence Code

Number Sequence Code

assignment_number

Description

Assignment: Assignment Number

Last Number

202005

OK

Cancel

4. Repeat this for all the required number sequence codes.



NOTE! Do not change the number sequence code for INVOICES until you have created all invoices you wish to register for 2019.

- When the Last Number field has been updated with a new value, you won't be able to return to the old number sequence code as the new value always has to be greater than the previous one.

ADDING A NEW FISCAL YEAR AND LOCKING THE OLD ONE

Does your office use a calendar year as their fiscal year?

Add a new fiscal year for 2020 in order to be able to create invoices and register payments for the new fiscal year, and to ensure that all dashboard charts are displayed properly.

1. Go to the Settings > Parameters > Financial Parameters > Fiscal Years
2. Select New.
3. The start and end dates of the fiscal year 2020 are filled automatically.
4. Confirm by selecting OK.

We also recommend locking the old fiscal year in case your office locks individual fiscal periods within fiscal years.



NOTE! Do not lock the fiscal year 2019 until you have registered ALL the required invoices and payments for it.

1. Go to Settings > Parameters > Financial Parameters > Fiscal years.
2. Click on Actions > Deactivate (or right-click on the row and select Deactivate).
 - In case there are open fiscal periods within the fiscal year, they will be locked simultaneously.

DEFINING A DELAY INTEREST

Does the delay interest change on 1.1.2020?

Update the new delay interest in the Settings. Define the delay interest separately for Companies and Associations and for Private Persons. If your company has several business units, these changes must also be made separately for each business unit.

1. Go to Settings > Business Unit Settings > Business Unit Settings.
2. Open the desired business unit by double-clicking it.
3. Select the Delay Interests subfolder.
4. Add a new delay interest by clicking the New button.

% Delay Interest

Delay Interest
Edit Delay Interest.

Valid From 01/01/2020

Delay Interest % 0,000000

Interest Type Annual Interest

Customer Type Company or Association

OK Cancel

5. Add the date 1.1.2020 to the 'Valid From' field, and define the new delay interest as well as the other details.
- The previous delay interest ends automatically as soon as the new delay interest becomes valid.

UPDATING THE EXPENSE TYPES

Does your office use expense types?

If required, update the unit prices for the expense types. Please check e.g. the mileage fee and the daily allowances for the year 2020 from your tax authority.

1. Go to the Settings > Templates > Expense Types.
2. Select the expense type to be updated by double-clicking the row.
3. Update the required information.
4. Confirm by selecting OK.

Should you have any questions regarding these instructions, please contact the CSI support.