# YEAR-END TO-DO LIST FOR CSI POWER USERS

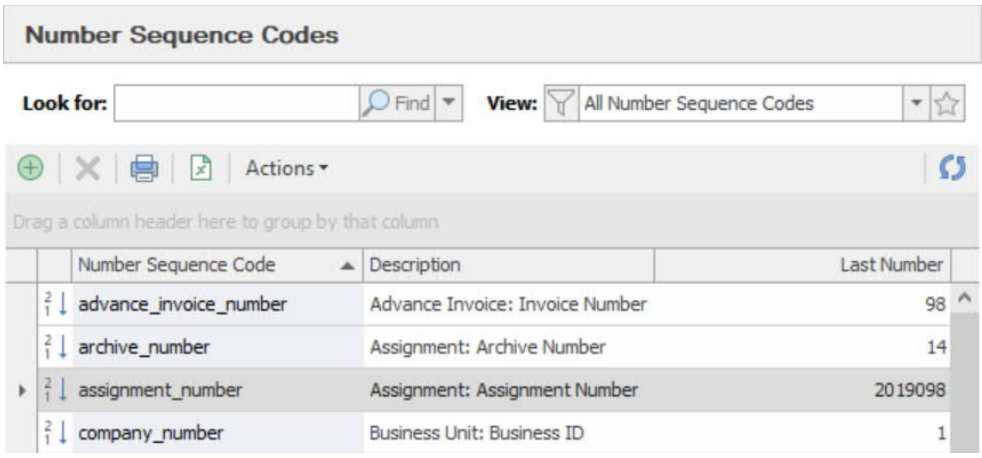
At the end of the year, CSI Lawyer requires a couple of actions from the power users. Please check the below to-do list for any actions that may be necessary in your organization.

## NUMBER SEQUENCES

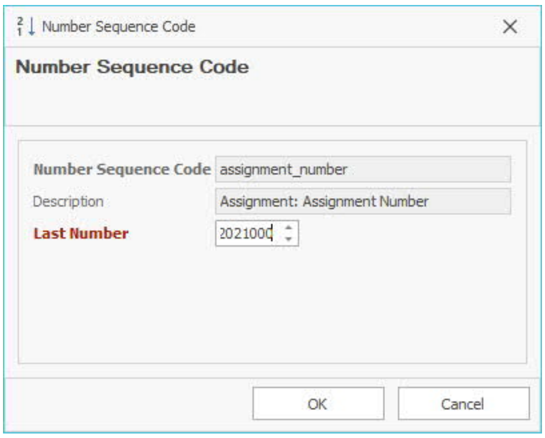
### Does your office use number sequence codes which include a year?

When you wish to start using the year 2021 number sequences, please update the value in their Last Number field.

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




3. Write 2021000 in the Last Number field if you wish the next assignment that is opened in CSI to have the number 2021001.




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 2020.**

15880.5

- 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 2021 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 > Financial > Fiscal Years
2. Select New.
3. The start and end dates of the fiscal year 2021 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 2020 until you have registered ALL the required invoices and payments for it**.

1. Go to Settings > Financial > Fiscal years.
2. Click on 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.

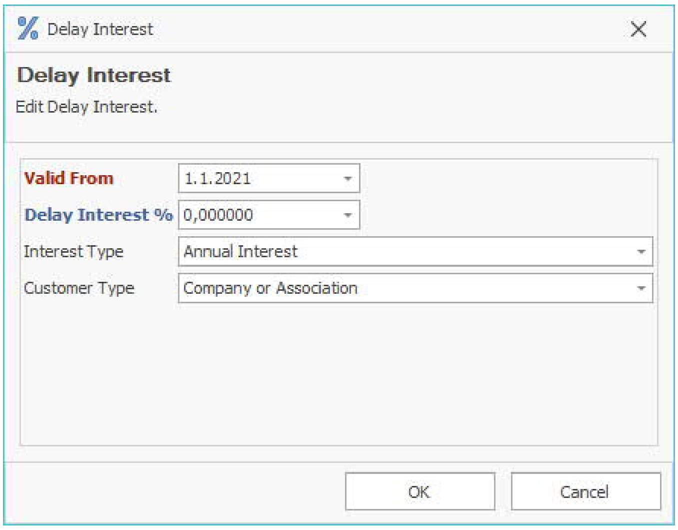
## DEFINING A DELAY INTEREST

### Does the delay interest change on 1.1.2021?

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 > Organization > Business Units.
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.

15880.5




5. Add the date 1.1.2021 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 2021 from your tax authority.

1. Go to the Settings > Common settings > 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.

## UPDATING UNITED KINGDOM’S AREA SETTING

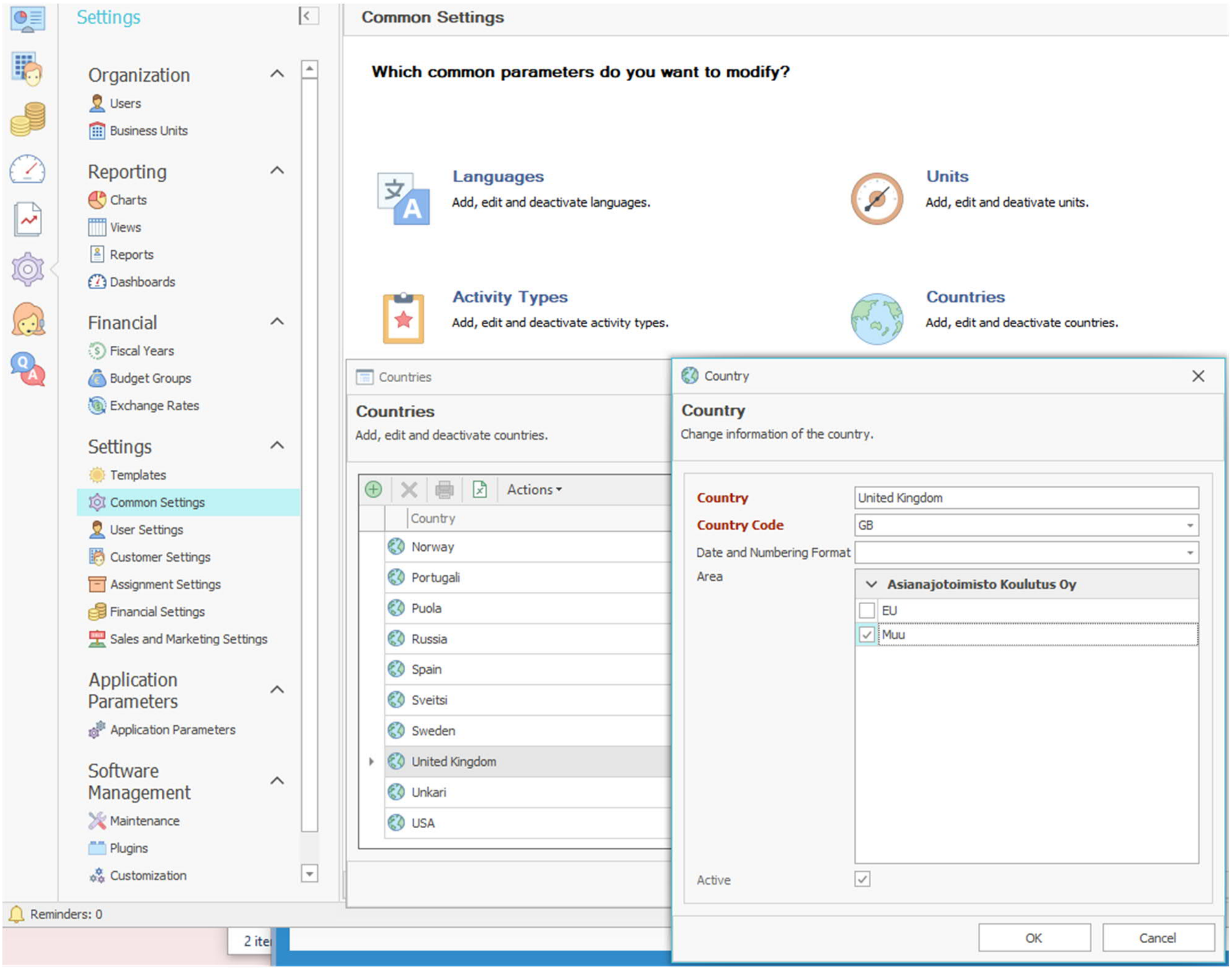
### Does your office have clients in United Kingdom?

The United Kingdom withdrew from the EU at the end of January 2020. The transition period for leaving the EU started in February and goes on for the remainder of 2020. After the transition period (from 1.1.2021), sales of services to the United Kingdom are sales to a country outside the EU.

To update United Kingdom’s Tax area, do as follows:

1. Go to the Settings > Common settings > Countries
2. Double click on United Kingdom on the countries’ list to open the country specific settings:

15880.5




3. In the Area field, change the selection from “EU” to “Other”
4. Confirm by selecting OK.

**NOTE! Do not change the Tax Area for United Kingdom before you have created all invoices you wish to register for 2020.**

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

15880.5