

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 2022 number sequences, please update the value in their Last Number field.



NOTE! 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. **Keep this in mind particularly when updating the number sequences for different invoice types; do not change the number sequence code for invoices until you have created ALL invoices you wish to register for 2021.**

1. Go to the Settings > Common Settings > Number Sequence Codes.
2. Open, for example, the Assignment number.

Number Sequence Codes			
		Search for records	In All Fields
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	126
2 1	archive_number	Assignment: Archive Number	662
2 1	assignment_number	Assignment: Assignment Number	2021204

3. Write 2022000 in the Last Number field if you wish the next assignment that is opened in CSI to have the number 2022001.

2
1

Number Sequence Code

X

Number Sequence Code

Number Sequence Code

assignment_number

Description

Assignment: Assignment Number

Last Number

2022000

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

ADDING A NEW FISCAL YEAR AND LOCKING THE OLD ONE

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

Add a new fiscal year for 2022 for creating invoices and registering 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 2022 are filled automatically.
4. Confirm by selecting OK.

Should the old fiscal year be locked?

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



NOTE! Do not lock the fiscal year 2021 until you have registered ALL the invoices and payments for it. However, you can reopen the fiscal year, if required.

1. Go to the 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.

If you reopen a locked fiscal year, the fiscal periods will remain locked. They must open them separately by first opening the fiscal year and then activating the required fiscal periods.

DEFINING A DELAY INTEREST

Does the delay interest change on 1.1.2022?

If required, 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 the Settings > Organization / Business Units.
2. Open the desired business unit by double-clicking it.
3. Select the Delay Interests folder.
4. Add a new delay interest by clicking the New button.

5. Add the date 1.1.2022 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, for example, the mileage fee and the daily allowances for the year 2022 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.

HOURLY PRICES, COST PRICES, AND BUDGETS

Remember to edit the hour and cost prices of users and, if required, update the cost prices for the remaining 2021 transactions. If your office has budgets in use, it's also time to create new budgets for budget groups and/or individual users.

Should you have any questions regarding these instructions, please contact the CSI support at support@csihelsinki.zendesk.com.