

# BEST USER TIPS FOR CSI LAWYER®

Version 12.0

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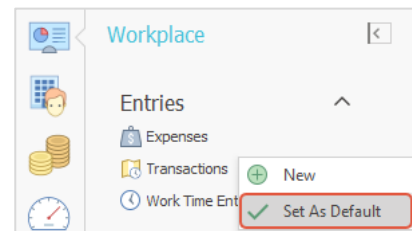
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**This document presents the key functions available for all users to enhance the way they e.g. make entries, use views and folders, and navigate between windows.**

## Setting default folders

The different task areas in the software have predefined default folders that open when you move to the task area. If another folder better supports your daily work, you can set it as the default folder to access it without any extra clicks. You can set your own default folder for each task area.

- Go to e.g. the Workplace area and open the Transactions folder.
- Define the Transactions folder as default by moving the cursor onto the folder in question, then right-click on it > Set As Default.

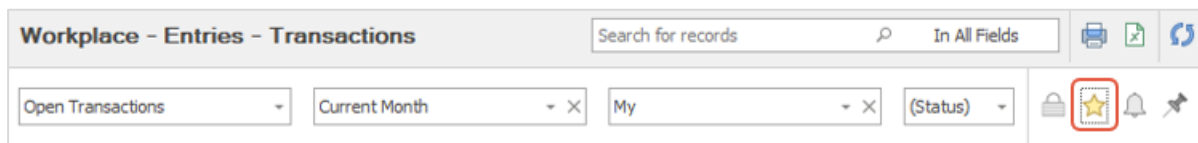


You can specify similar default folders not only for the task areas but also for different windows such as customer, matter request and matter. For example, the customer window can be configured to open directly to the Transactions folder instead of the Basic Information window.

Because customer information is divided into multiple sections (customer, matter, invoicing), you can have a default folder for each section and select one of the sections to open each time you open a customer window. Similarly, in the matter window, you can determine the Invoicing section as the default and there the Invoices folder as the default folder, after which the matter window will always open directly to the folder in question.

## Defining a default view for entering transactions

If you register billable transactions regularly, you can make life easier by selecting a default view and timeframe in the Transactions folder that best support your daily work. Set your selections as default by clicking the ★ button.

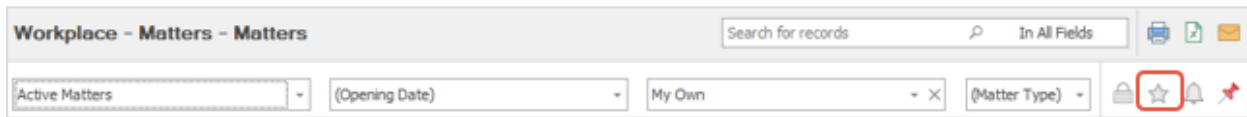


If your selection looks like in the example above, the system displays your uninvoiced transactions registered during the current month whenever you open the Transactions folder. Should you want to cancel your default setting, click the star again to go back to the system standard, or make a new default setting by selecting the star with different filters.

## Defining a default view for viewing matters

When opening the Matters folder, the system displays, by default, the matters considered your “favorites” (which you have either recently processed or which you have manually added as favorites). If you wish you

can change your default view to e.g. Active Matters. Make the changes in the Matters folder and then click the ★ button to set the view as default.



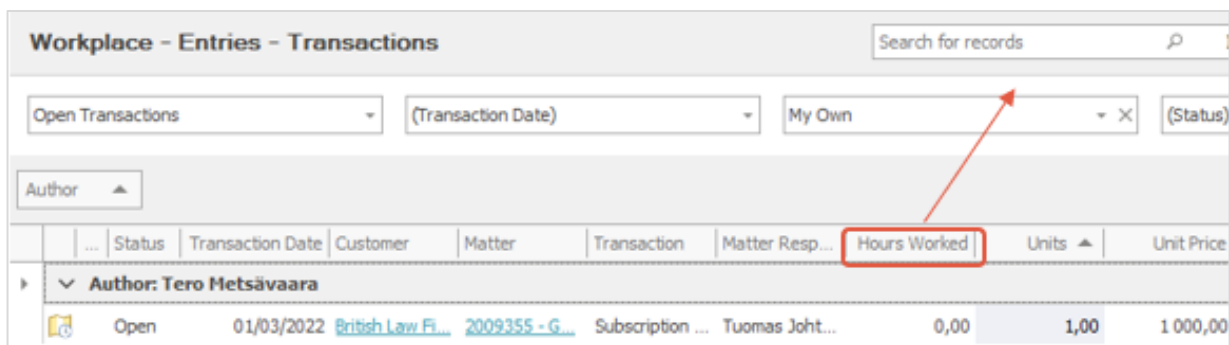
After this, the Matters folder will open your “favorite matters” until you cancel this or make another selection.

## Editing views to display your desired data

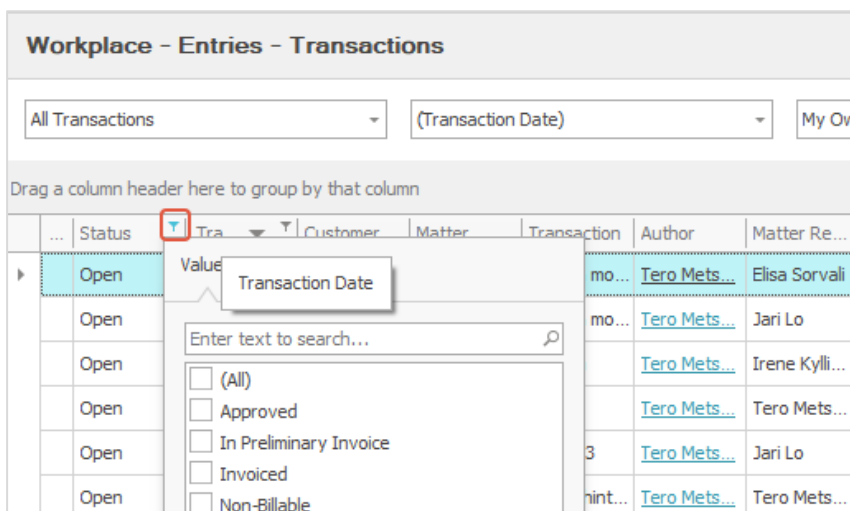
You can temporarily edit a view for your own needs and export the data in the edited view to e.g. Excel.

In a view you can:

- 1) Remove unnecessary data columns by picking the column header and dragging and dropping it upwards, outside the view, until you see a black cross over the title.



- 2) Filter the data in the list based on the value of the columns by selecting the ▾-button in the column header and then the desired values from the list.



- 3) Organize the data according to the values in the columns in alphabetical or numerical order with the ▲ and ▼-buttons. Click the column header to make the arrow appear.

**Workplace - Entries - Transactions** Search

All Transactions (Transaction Date) My Own

Drag a column header here to group by that column

| ... | Status         | Transactio... | Customer       | Matter      | Transaction      | Author     | Matter ... |
|-----|----------------|---------------|----------------|-------------|------------------|------------|------------|
|     | In Prelimin... | 25/01/2023    | Example Ltd    | 2009363 ... | Phone call       | Tero Me... | Tero Me... |
|     | Invoiced       | 14/10/2021    | Dotterbolaq Ab | 2009261 ... | General advising | Tero Me... | Marina ... |

- 4) Reorganize the order of columns by dragging and dropping column headers in the desired order.
- 5) Group the data e.g. per author by dragging and dropping a column header into the gray area displaying the text "Drag a column header here to group by that column".

**Workplace - Entries - Transactions** Search for records

All Transactions (Transaction Date) My Own

Author

| ...                      | Status | Transactio... | Customer   | Matter        | Transaction      | Matter R...  | Hours W... | Unit Price | Billable H... |
|--------------------------|--------|---------------|------------|---------------|------------------|--------------|------------|------------|---------------|
| ▼ Author: Antti Avustaja |        |               |            |               |                  |              |            |            |               |
| ▶                        | Open   | 30/01/2023    | Zolt Oy    | 2009032 - ... | Yleinen          | Irene Kyl... | 1,00       | 600,00     | 0,00          |
|                          |        |               |            |               |                  |              | 1,00       |            | 0,00          |
| ▼ Author: Joonas Ingman  |        |               |            |               |                  |              |            |            |               |
|                          | Open   | 23/11/2022    | Kasbono Oy | 2009361 - ... | General advising | Tero Met...  | 2,00       | 600,00     | 0,00          |

If you are a power user, you can make permanent changes to the views, which will take effect for all CSI users. In this case, editing the view is possible directly in the selection list, where selecting the gear button opens the editing window.

**Workplace - Matters - Matters** Search for records In All Fields Print Export Refresh

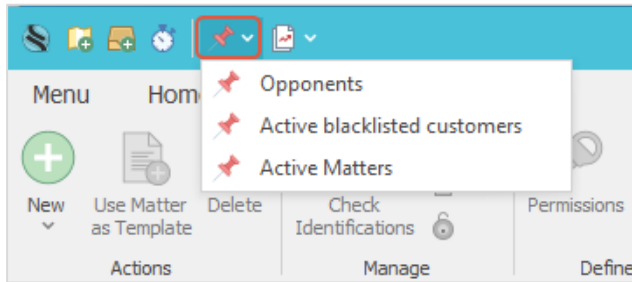
Active Matters (Opening Date) My Own (Ma... Lock Star Pin Settings

Once you have made the changes, the Save and Close button will save them and reload the edited view.

## Pinning the most used views to the Views list

You can add your regularly used views to the Views list located in the top bar of the main window, where they can easily be found and opened. To pin them, select the view, specify the filters you want, and then click the -button. When you make a pin the system suggests a name for the view, but you can edit the name to easily identify it.

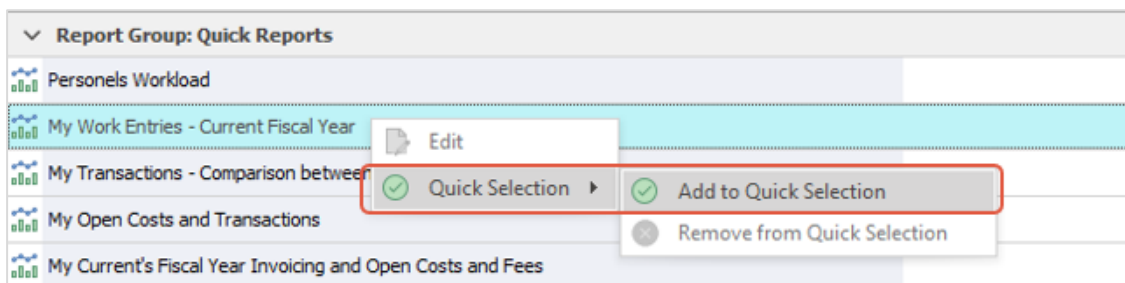
After you are done, the -button on the top left of your CSI window opens a list of your pinned views, from which you can easily open them with just a click.



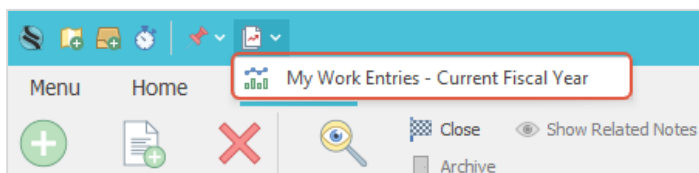
## Pinning the most used reports to the Quick Selection list

You can also attach your most used reports as a quick selection to the Reports list that opens from the top bar of the software.

To add a report, 1) go to the Reports area, 2) take the cursor to your desired report, 3) right-click on the report and 4) select 'Add to Quick Selection'.




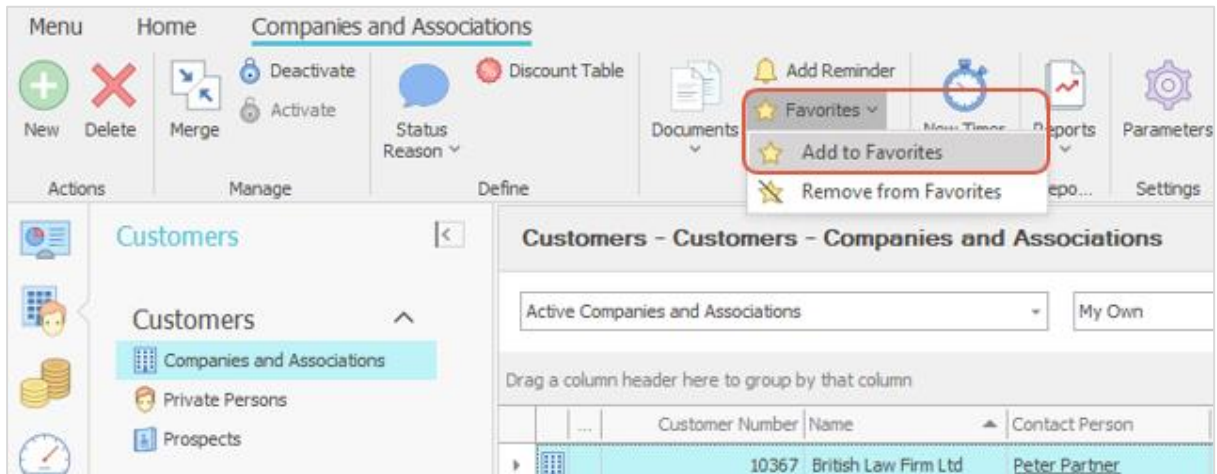
The report you have attached will now appear in the list that opens from the Reports button in the top bar, where you can open it with a single click.



## Setting customers and matters as favorites

The customer and matter folders provide a Favorites view option. The views are meant to make your work easier by listing the customers or matters whose data you've either recently processed, or that you've manually added as your favorites.

To manually add a favorite, select the matter or customer in the view and click the  button on the ribbon or from the right-click menu. If you want, you can also use the 'Remove from Favorites' function to remove a specific customer or matter from your favorites.



## Moving between windows with quick links and the Related function

In lists, any underlined piece of information acts as a quick link to that information. For example, by clicking a customer's name in the Transactions list, you can directly open the customer window of the matter's principal.

Workplace - Entries - Transactions

All Transactions

(Transaction Date)

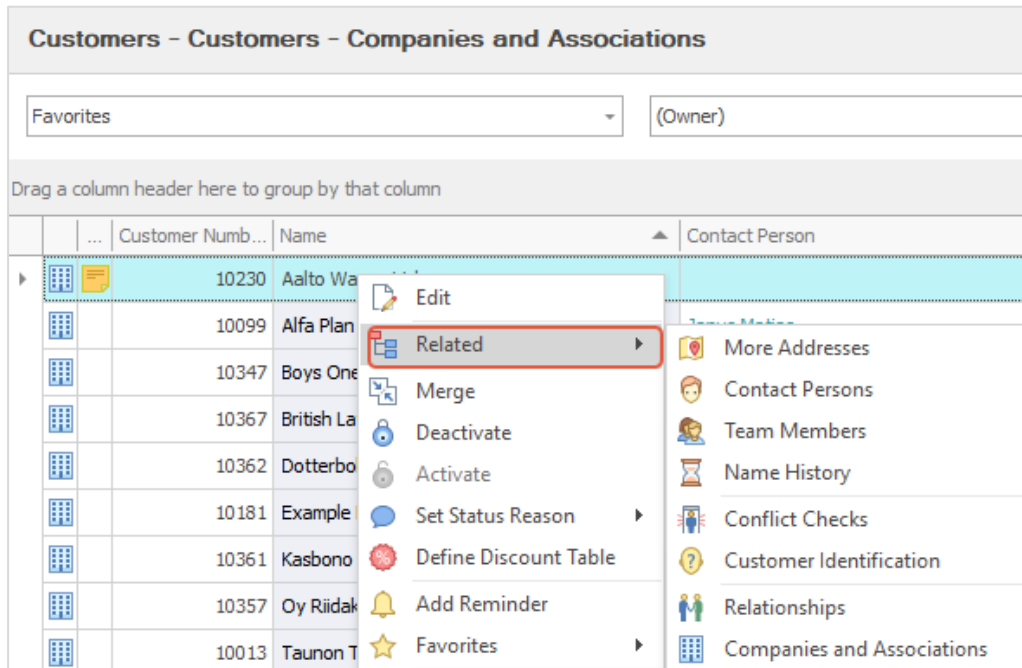
My Own

Drag a column header here to group by that column

| ... | Status | Transaction ... | Customer   | Matter            | Transaction      | Author       |
|-----|--------|-----------------|------------|-------------------|------------------|--------------|
|     | Open   | 23/11/2022      | Kasbono Oy | 2009361 - Q4 2022 | General advising | Jonas Ingman |

In case you simply wish to open a certain data row in a new window, make sure your cursor is not on top of any of the links when you double-click it.

Another useful function to quickly navigate between windows is available on all lists (e.g. Matters, Companies and Associations, or Invoices) by right-clicking the mouse. In the menu that opens, the 'Related' function enables moving directly to any of the folders within the selected entity, instead of opening the general information first and then moving on to the desired folder.

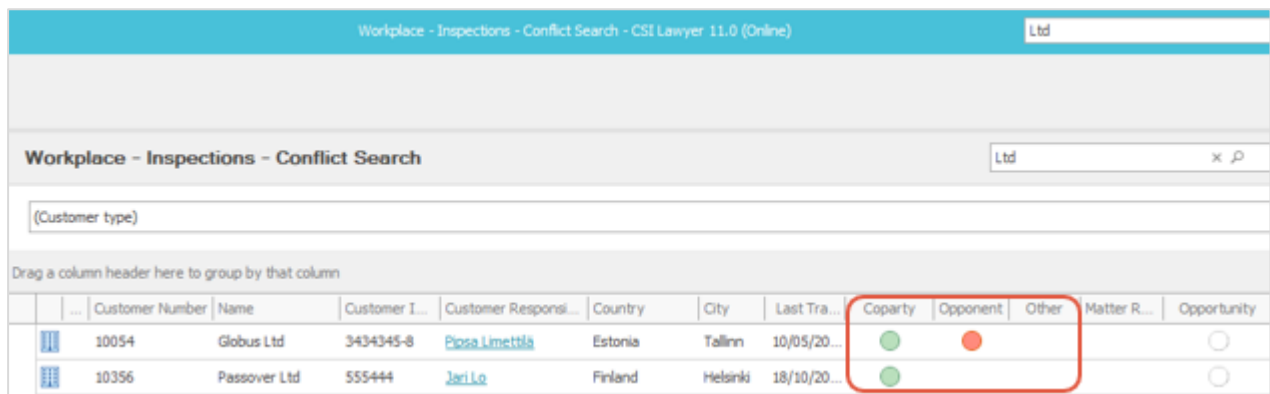


## Using the Customer and Conflict Search field for quick searches

The search field, available in the top bar of the window, is primarily designed for speeding up conflict searches, but it also works well for finding customers. The field is visible to all user groups for which the power user has granted navigation rights to conflict checks.



When making a keyword search in the field, it opens the Conflict search view, lists all customers – both private persons and companies – that match the keyword, and displays whether they are a co-party, opponent or some other shareholder in the matters saved in the software.



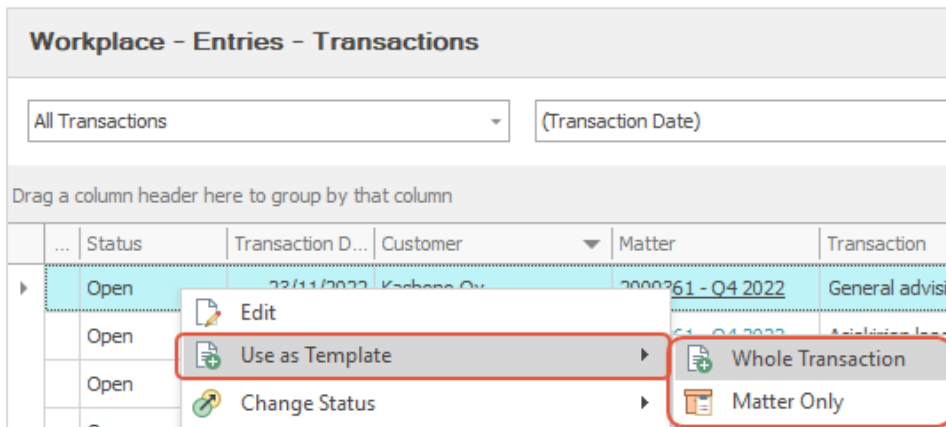
If necessary, from here it is also easy to continue creating a more thorough conflict check that gets saved in the software.

## Using existing entries as a template

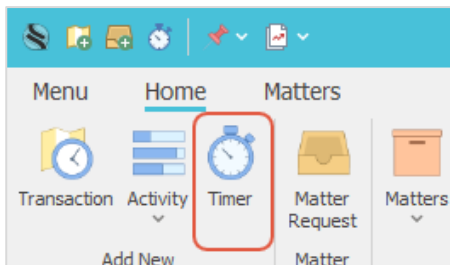
When registering transactions it is easy and quick to use former transactions as templates. By selecting a suitable entry from the Transactions list and using it as a template for a new one, you can either copy only



the matter information or all the transaction details to the new entry. The copied information can then be edited as required before you save the new transaction.

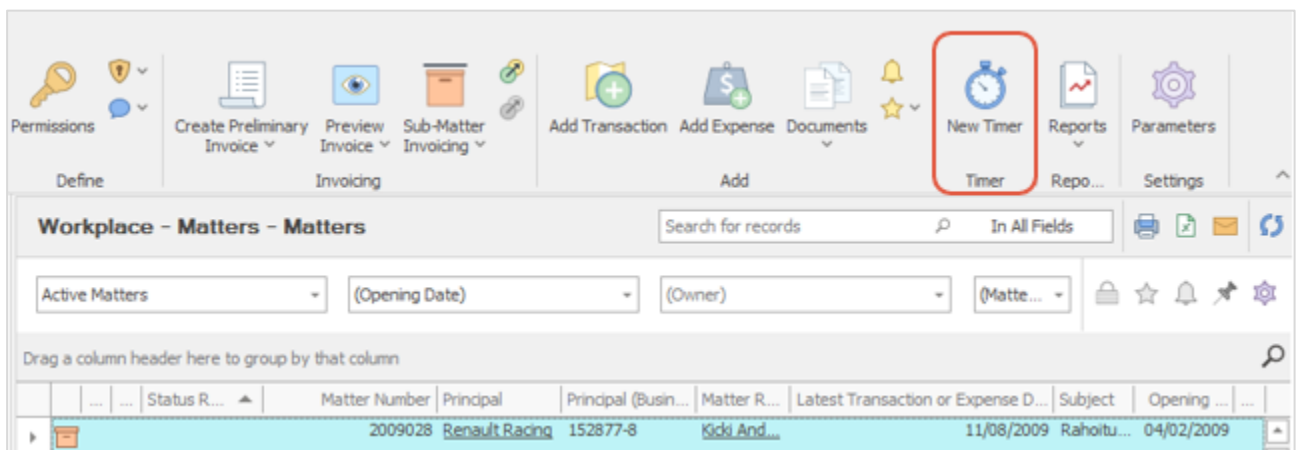


## Utilizing the timer for time entries



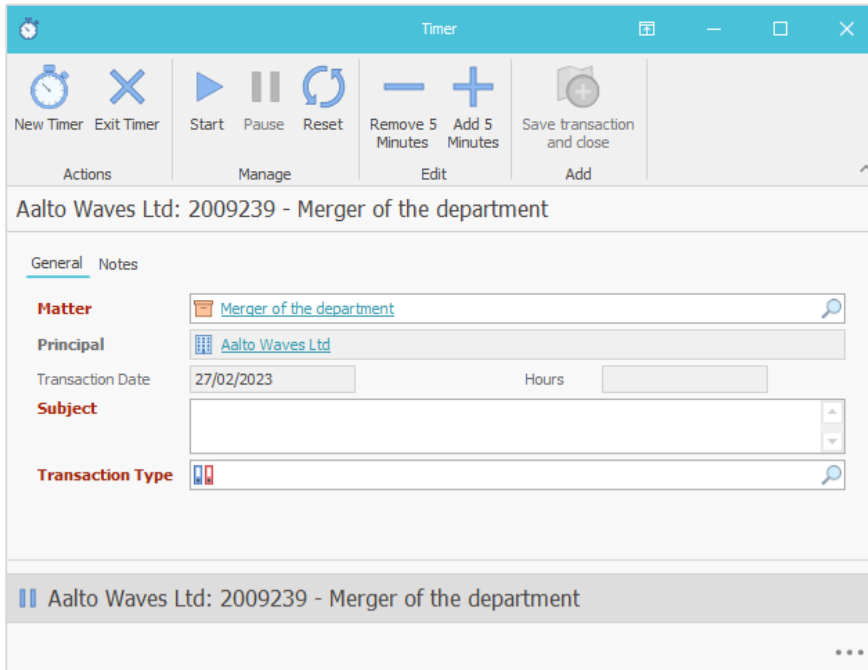
To determine the duration of a transaction, you can use the timer, which can be found e.g. in the top bar of the software, behind the Home button, and in the selection bar for customer and matter lists and windows.

When you wish to measure time spent on a matter, it is recommendable to open the timer for that specific matter, either via the matter list or in the matter window. The 'New Timer' function is available both in the ribbon of the matter lists as well as by right-clicking the mouse on top of the matter row.



A timer started from the matter list or window already has the matter information prefilled.

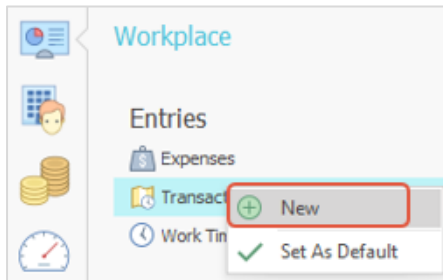




In the timer window you can:


- Start or stop the timer, or reset it to zero (Start / Pause / Reset)
- If necessary, add or remove time in five-minute increments (Remove / Add 5 minutes)
- Start more timers in the list (New Timer), although only one of them can be on at a time
- Save a transaction from the timer (Save transaction and close).

## Adding information directly from the tree structure

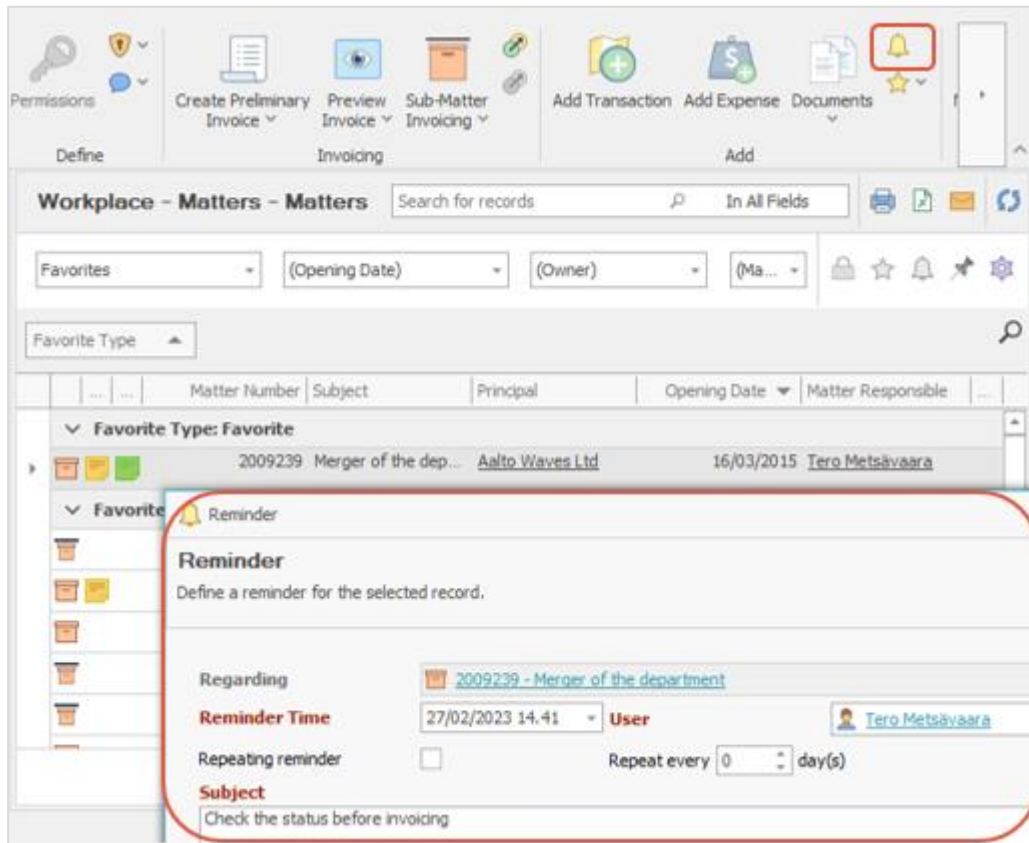


By right-clicking on a folder in the tree structure and selecting “New”, you will be able to add new information, such as a new matter or transaction, without opening the folder.

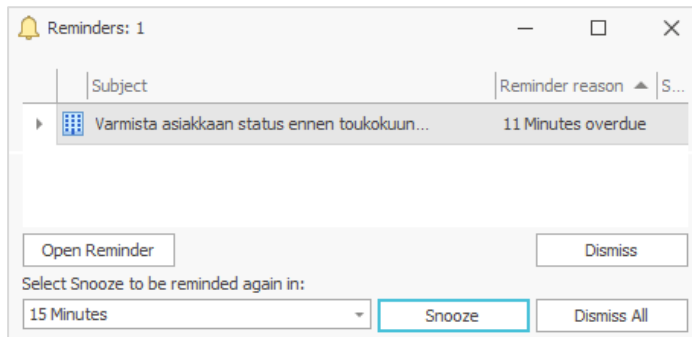
## Utilizing reminders

You can set reminders regarding customers, matters, transactions, invoices etc. to remind either yourself or another CSI user to do something specific. A reminder is added using the  button, found in the ribbon, by filling in the required information: when shall the reminder be activated, who shall receive the reminder and with which subject.

If you need to provide the customer with a matter status update e.g. monthly, you can set a repeating reminder. Check the ‘Repeating reminder’ field and define the cycle with which the reminder is to be displayed to the selected user.

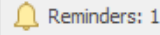


The software checks the reminders every 15 minutes, and the user gets a reminder on their screen if activated reminders are found.



If the CSI window is minimized when the reminder arrives, a red dot on the CSI icon in the bottom bar of the screen notifies the user of the reminder.



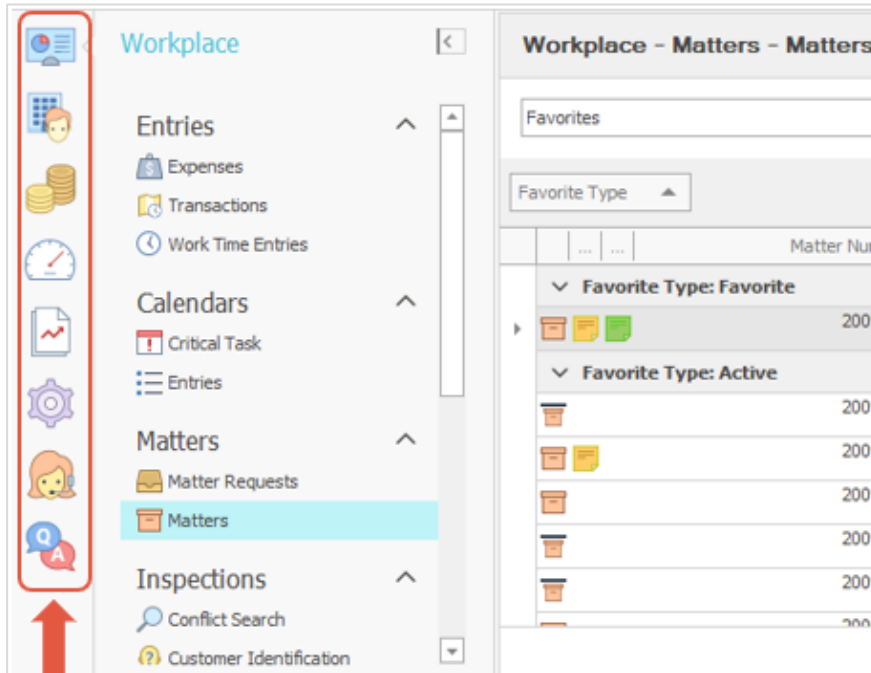
You can open the reminder for a closer look, move it forward, or acknowledge it with Dismiss if it has already been taken care of. The reminder keeps coming back to the user's screen until it is dismissed. Due to this, the reminder time should be defined so that it is relevant to the recipient. The number of activated reminders is also displayed in the lower left corner of the software .

Reminders can also be sent to the users by email which enables reacting to them even if the user does not open the system daily. For more information about this, contact the CSI support.

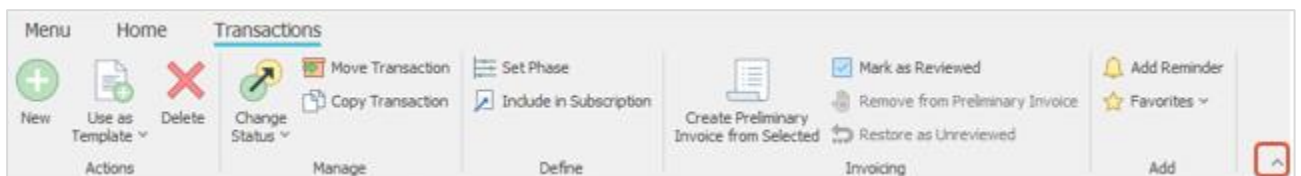
## Hiding the folder structure/ribbon

If you use the software on a laptop with limited screen space, you can temporarily hide the folder structure or make the ribbon narrower to get more space in the windows.

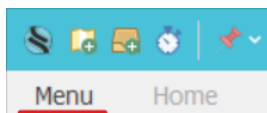
Hide the folder structure by clicking on the icon of the currently active task area. The selection will leave only the icon column of the task areas visible. The folder structure will reappear when you select one of the task areas.



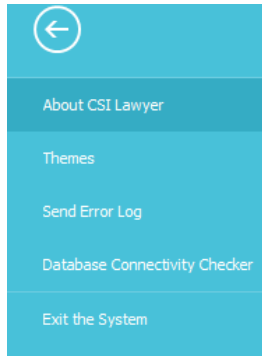
To narrow down the toolbar/ribbon and to restore it back to normal, click the arrow button in its bottom right corner.



## Changing the software theme



The Menu button in the top left corner of the software opens a menu, where you can e.g. customize the look of the software.



The menu enables you to:

- View software version information (About CSI Lawyer)
- Change the software's colour theme (Themes)
- Send an error log to CSI in case you face a problem that gives an error message (Send Error Log)
- Check the quality of the database connection if the software seems to respond slowly (Database Connectivity Checker)
- Close the software.