

# YEAR-END 2025-2026 TO-DO LIST FOR CSI POWER USERS

As always at the end of the year, CSI Lawyer will require 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 series

### Does your office use number series which include a year?



**Do not change the number series for invoices until you have created ALL invoices you wish to register for 2025.** When the Last Number field has been updated with a new value, you won't be able to return to the old number series, but all new invoices will be registered for 2026.

When you wish to start using the year 2026 number series, please update the value in the Last Number field of each number series.

Update the number series as follows:

1. Go to the Settings > Common Settings > Number Series.
2. Open one of the number series, for example the Matter number.

Number Series			Search for records	In All Fields	
Drag a column header here to group by that column					
	Number Series	Description	Last Number		
2 1	advance_invoice_number	Advance Invoice: Invoice Number	133		
2 1	archive_number	Matter: Archive Number	70001		
2 1	assignment_number	Matter: Matter Number	2025000		

3. Enter 20260000 in the Last Number field if you wish the next matter that is opened in CSI to have the number 20260001.

Number Series

Number Series

assignment\_number

Description

Matter: Matter Number

Last Number

2026000

OK

Cancel

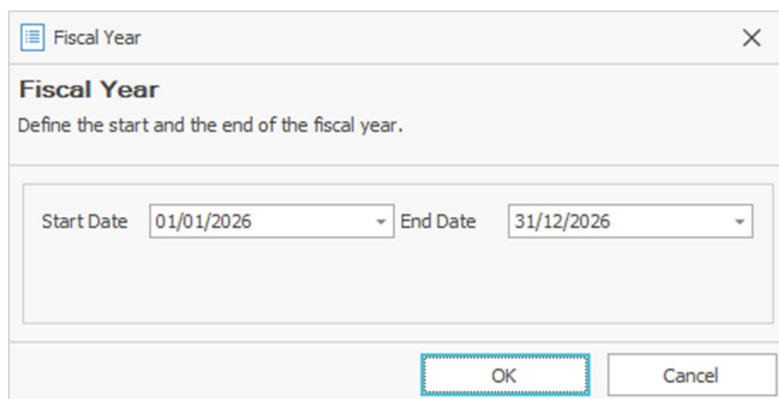
4. Repeat this for all the required number series.

## Adding a new fiscal year and closing the old one

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

To be able to create invoices and register payments you need to add a new fiscal year for 2026. This also ensures 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 2026 are filled in automatically.



4. Confirm by selecting OK.

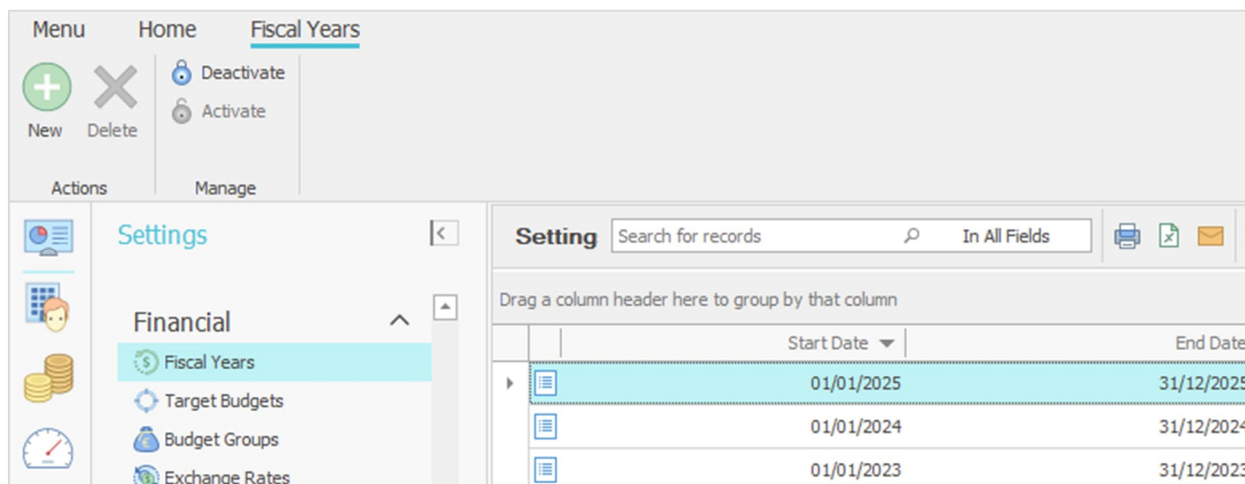
### Should the old fiscal year be closed?

If your office closes individual fiscal periods within fiscal years, we also recommend locking the entire old fiscal year.

**!** Do not close the fiscal year 2025 until you have registered ALL the invoices and payments for it. However, you can reopen the fiscal year if required.

You can close the fiscal year as follows:

1. Go to the Settings > Financial / Fiscal Years.



2. Click on Deactivate (or right-click on the row and select Deactivate).
3. If there are open fiscal periods within the fiscal year, they will be locked simultaneously.

If you reopen a locked fiscal year, the fiscal periods within it will remain locked. They must be opened separately by first opening the fiscal year and then activating the required fiscal periods within the year.

## Defining delay interests

### Does the delay interest change on 1.1.2026?

If required, update the new delay interest in the settings. Define the delay interest separately for companies and for private persons. If your company has several business units, these changes must also be made separately for each business unit. The previous delay interest is automatically deactivated as soon as the new delay interest becomes valid.

You can define the new delay interests as follows:

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.

**% Delay Interest**

**Delay Interest**  
Edit Delay Interest.

Valid From: 01/01/2026

Delay Interest %: 0,000000

Interest Type: Annual Interest

Customer Type: Company or Association

OK Cancel

5. Add the date 1.1.2026 to the ‘Valid From’ field and define the new delay interest as well as the other details. Confirm by selecting OK.

If there are additional changes to the delay interest during the year 2026, you can add them by following these same instructions.

## 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 2026 from your local 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 and confirm by selecting OK.

## Hour prices, cost prices, and budgets

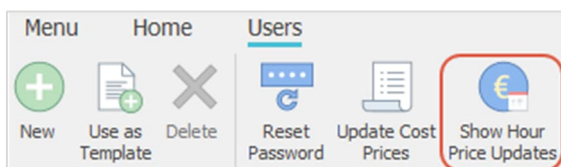
Also remember to edit the hour and cost prices of your users and, if required, update the cost prices for the remaining 2025 transactions. If your office uses budgets in CSI, it’s also time to create new budgets for the budget groups and/or individual users.

If you wish to check the pricing defined for your customers, the Financial Reports folder offers a couple of useful reports:

- Prices Defined for Matters
- Prices and Discounts Defined for Customers

Matter-based pricing can also be checked by selecting the matter and the Matter Pricing report which is available on the matter ribbon behind the Reports button.

If you’re using CSI Lawyer version 12.1, you can update the hour prices of users in advance with the new Hour Price Update function. The function can be found under settings > Users, behind the “Show Hour Price Updates” button.



Should you have any questions regarding these instructions, please contact the CSI support at [help@csihelsinki.fi](mailto:help@csihelsinki.fi).

**We wish you all the best for the year 2026!**