CSI Mobile Functionality Overview (version 1.121)

Supported Devices and Versions

CSI Mobile is available for both Android (10 and above) and iOS devices (13.6 and above), including smartphones and tablets.

What can you do with CSI Mobile?

The CSI Mobile app allows you to perform several tasks without needing to open the main CSI software. These include:

- Adding and managing your own transactions, tasks, critical tasks, and work time entries.
- Using timer to measure duration of transactions.
- Performing conflict searches and converting them to conflict checks.
- Viewing customers, matters, and matter requests and creating new matter requests.
- Viewing your billable matters, creating preliminary invoices and reviewing your preliminary invoices.

During installation, you can enable or disable features, with the Dashboard and Timer always enabled.

Any information added, edited, or deleted in CSI Mobile is synchronized with the CSI software and vice versa. In case of network errors, the app notifies you about them.

Note! Creating customers and matters, invoicing, managing payments, and defining software settings still must be done in the CSI software.

How can you personalize the app?

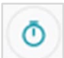
In the Profile screen, you can:

- View your user details, define authentication methods, and select your preferred language.
- Customize your app's appearance. You can use it in dark or light mode and choose accent colours.
- Toggle app features on or off to personalize the app’s functionality.

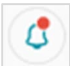
How to use the Dashboard and menus

Upon logging in, you are directed to the main Dashboard, which summarizes your recent transactions and weekly budgets, and whose top and bottom menus offer quick access to the key functions.

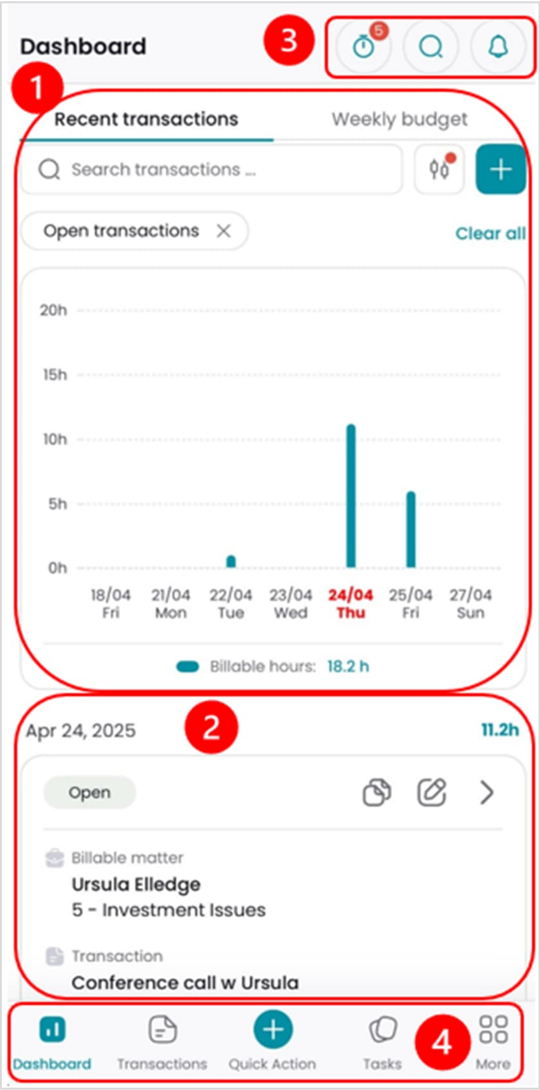
- **"Recent Transactions"** (1) shows the total billable hours of your transactions in the past 5 working days (Monday to Friday). If you have recorded transactions for the weekend, those days are included in the 5 visible days.
- The **Weekly Budget** tab displays the total billable hours of your transactions from the past 4 weeks, as well as your budgeted hours per week (if set).
- Below both charts, you find a **list of your transactions** (2) for the displayed timeframe, grouped by date.
- The **top menu** (3) offers button for:

   Timer

   Conflict search

   Notifications

- The **bottom menu** (4) enables you to easily navigate to different functions. It remains the same throughout the app.



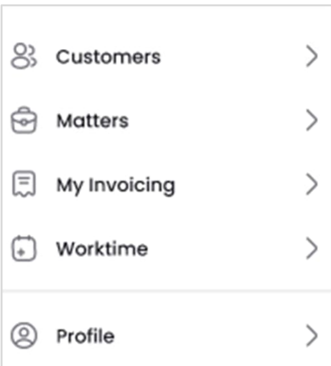
Dashboard: Displays your key metrics from the past 5 days / last four weeks and the transactions recorded.

Transactions: Allows you to manage your transactions, and to add new ones, also using the timesheet.

Quick Action: Enables you add transactions, tasks, critical tasks, and work time entries.

Tasks: Enables you to manage your critical tasks and tasks, edit, delete and to add new ones.

More: Opens a menu for other available entities:



Customers: To view customers and customer-related information.

Matters: To view matters, matter requests and information related to them.

My Invoicing: To view your billable matters, preliminary invoices and information related to them.

Work time: To add and manage your work time entries.

Profile: To view and edit your user details, and to manage the app settings.

How to use CSI Mobile's key functions

Record a new transaction

- In the **Dashboard** or in the **Transactions** screen, add a new transaction with the "+" button or select an existing transaction as a template for a new one.
- In the **Timesheet**, click on the "+" button in any cell to add a transaction for a specific matter on a particular date.
- Click **Quick Action > New Transaction** to open a screen for recording a new transaction.
- Click **More > Matters**, select the matter, then its Entries tab where you can add a new transaction either with the "+" button or by using an existing transaction as a template.
- Click the **Timer** function to start a timer and create a transaction from it.

Check conflicts of interest

- To perform a quick conflict search, click on the **Conflict search** button (magnifier) on the top menu and enter the search criteria. In the conflict check result screen, the icons on the customer type row show if the customer has been a coparty (green), opponent (red), has no role in other matters (grey), or is blacklisted or has a matter request or sales opportunity (yellow).
- Once you have checked these details, the **Conflict check** button enables you to save a conflict check for the customer. It gets the status "In progress" and will be displayed in future conflict searches. **Note!** Sending a conflict inquiry nor approving/rejecting the conflict check is not allowed in the app. To perform those functions, you must open the CSI software.

View critical or normal tasks

- Click on the Task button in the bottom menu to see the critical and normal tasks for the current week in their own tabs. In the calendar, the dates with critical tasks or tasks are indicated with a dot, and you can swipe the calendar horizontally to view tasks recorded for other weeks.

Add a new critical or normal task

- New critical or normal tasks can be added in the Tasks screen with the "+" button. Alternatively, you can add them by selecting Quick Action > New critical task / New task from the bottom menu.
- **Note!** If critical tasks in the CSI software are synchronized to Outlook, you cannot add critical tasks in the app.

View customers, matters and matter requests

- To view customers, click on the **More button > Customers**, and enter search criteria to find the customer. When clicking open an individual customer screen, the customer's matters, matter requests, conflict checks and notes are displayed as tabs. You cannot add new customers in the app.
- To view matters and matter requests, click on the **More button > Matters**. The matter screen offers separate tabs for matters and matter requests. When you click open an individual matter's screen, the matter's entries, parties, identifications and notes are displayed as tabs. For matter requests, the app displays parties, identifications and notes. This screen does not enable creating new matters or matter requests.

Create new matter requests

- To create a new matter request, start by performing a conflict search for the customer. The conflict search results screen provides the necessary information to evaluate if there are obstacles for taking on the customer's matter. If not, you can create a matter request from the same screen.

View your billable matters and create preliminary invoices

- To view your billable matters, click on the **More button > My Invoicing**. The "My Billable Matters" screen displays matters where you have a responsibility role, and which have transactions or expenses to be invoiced within the matter's invoicing period. To view those billable entries, select the "Billable entries" tab.
- To create a preliminary invoice from the matter, click on the "Create preliminary invoice" button on its General tab. **Note!** If you need to make changes to entries, do it before creating a preliminary invoice as it locks the entries.

Review your preliminary invoices

- Access preliminary invoices which await your review by clicking on More > My Invoicing > My Preliminary Invoices or click the Notifications button on the top menu to see if you have any.
- Click on a preliminary invoice to review its details. If the preliminary invoice has status "In Review" and its content is fine, you can mark it as reviewed to move it to the next reviewer in the process. If the status of the preliminary invoice is either "Reviewed" or "Open", you must open the CSI software to approve it.

Notifications

To help you react on different events, CSI Mobile provides push notifications for e.g. your upcoming critical tasks and tasks, new matters where you have a responsibility role, and preliminary invoices requiring your review. You may also receive email notifications about user account related changes. Notifications are consistent across time zones.

For the full CSI Mobile functionality, please see the CSI Mobile User Guide.