Change Document
CSI Lawyer version 13.0

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CSI HELSINKI OY

More instructions
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NOTE IN VERSION 13.0

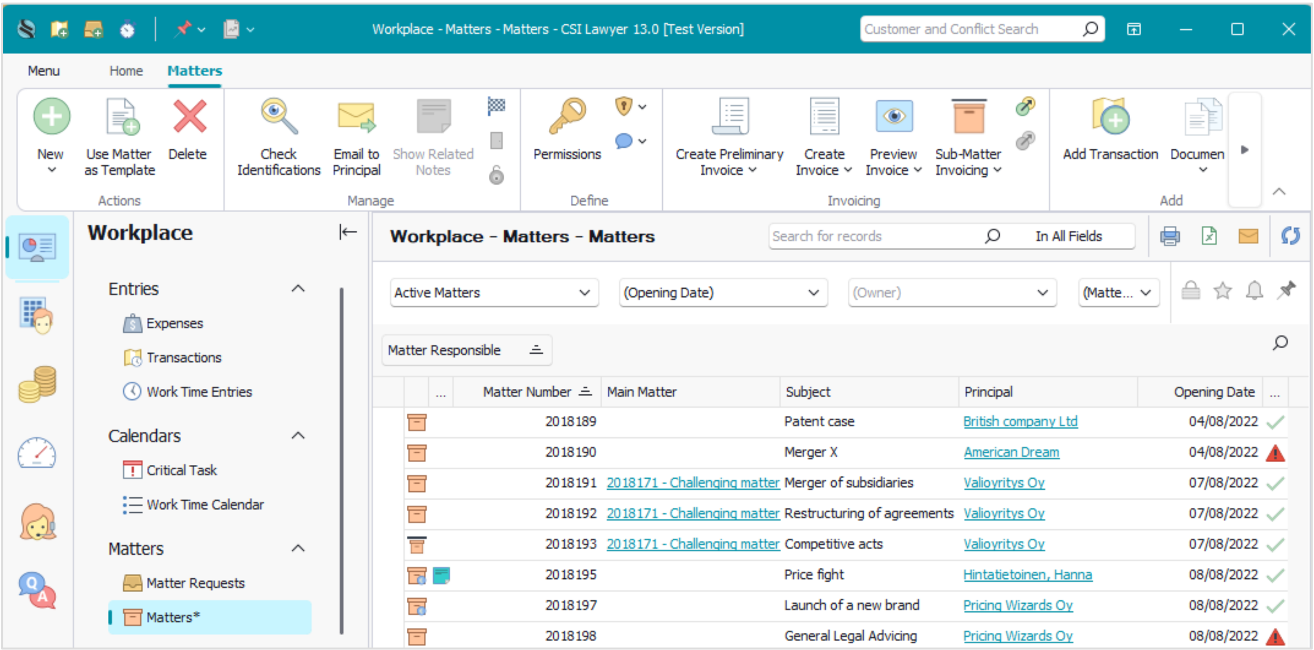
System environment requirements for the version

1. CSI Helsinki only supports the two most recent versions of CSI Lawyer. Currently, the supported versions are 13.0 and 12.1. If your company uses an older version, please update it as soon as possible.
2. The version 13.0 supports SQL Server 2017 and newer servers, and CSI cannot guarantee its compatibility with older versions. In case your company uses an older SQL Server version, please contact your IT support to have it updated.
3. The minimum version of .NET Framework is 4.8. If needed, this is a free download from the Microsoft site: [https://dotnet.microsoft.com/download/dotnet-framework/net48.](https://dotnet.microsoft.com/download/dotnet-framework/net48)

GENERAL

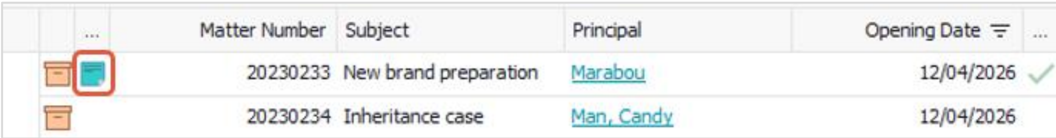
Blue-green default theme

The previous green CSI default theme has been replaced with a blue-green theme. Blue-green is also the default theme color in new CSI products. The original turquoise CSI theme remains available as an option.



Icon color change for important related notes

To ensure consistent icon colors across CSI Lawyer and CSI's new products, the icon for an important related note in CSI Lawyer has been changed to turquoise.



...	Matter Number	Subject	Principal	Opening Date	...
	20230233	New brand preparation	Marabou	12/04/2026	
	20230234	Inheritance case	Man, Candy	12/04/2026	

Changes to Outlook synchronization and email notifications for critical tasks

Outlook synchronization for critical tasks and the sending of email reminders have been updated to use Microsoft Graph API instead of EWS (Exchange Web Services), which will be discontinued in Exchange Online on 1 October 2026.

At the same time, system-level parameters have been updated as follows:

- Integration > "Exchange parameters" has been replaced by "MS Graph API Parameters", which include Tenant ID, Client ID, and Client Secret.
- A new parameter "Critical task calendar email" has been added to Integration > "Outlook Synchronization Parameters" group.
- A new group "General" has been added to the "Email notifications" section, including the parameter "Email address for notifications".

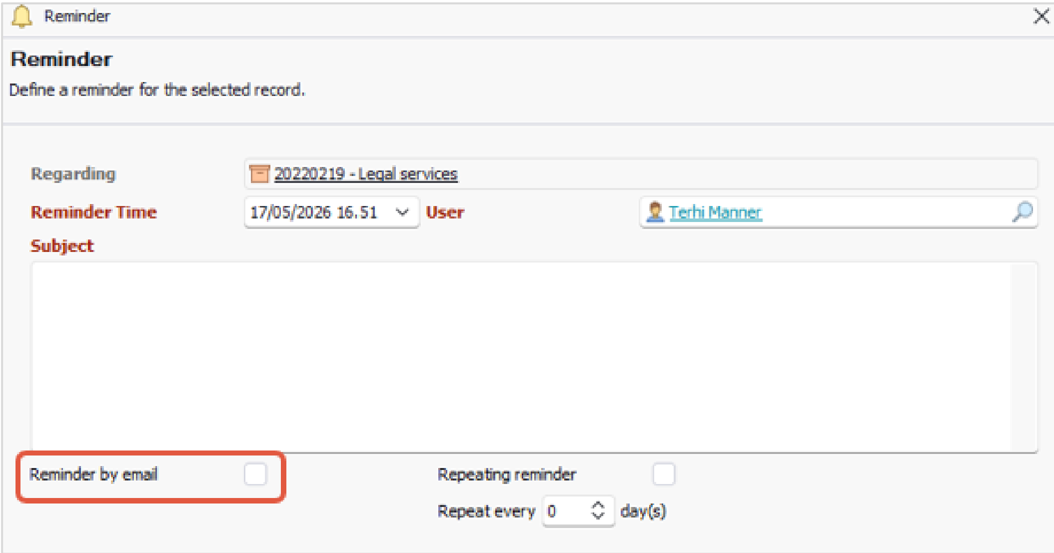
Because the previous Exchange parameters have been replaced with new Graph API parameters, customers whose system previously had the "Exchange service URL" parameter set (i.e. not empty) will receive the following notification when upgrading:

"An integration using the Exchange Web Service interface has been in use in the software. Integration settings must be updated to use the Graph API interface. To ensure correct operation of integrations, please review the system-level parameters. If necessary, contact CSI Helsinki Support."

Option to receive reminders by email

To ensure that critical reminders are noticed promptly, they can now be individually routed directly to users' email inboxes. Less important or recurring reminders can be left visible only within CSI, helping to prevent email inbox overload. **NOTE!** This feature requires activation of a separate synchronization service.

A new checkbox "Reminder by email" has been added to both the reminder dialog and the reminder template dialog. If selected, the user will receive the reminder by email. Otherwise, the reminder will be shown only in CSI Lawyer.



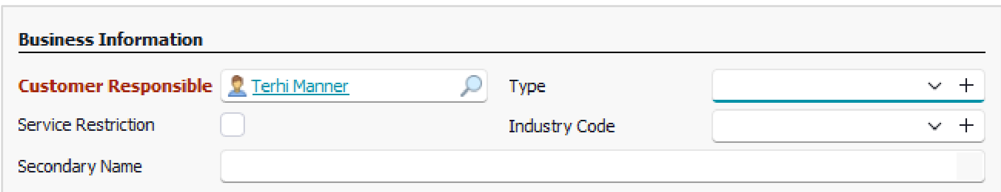
Change history tracking after record deletion

When change history tracking is enabled for an entity (such as a company or private person, a matter, etc.) and an individual record (for example, a specific matter) is deleted from the software, a record of who performed the deletion and when is retained in the database for potential data protection and privacy audits.

CUSTOMER

Secondary names added for customers and included in conflict checks

To make conflict checks easier, a new Secondary Name field has been added to the Business Information section of the corporate customer window. One or more parallel trade names can be entered for a customer in this field, without the need for any special separators.



The corporate customer's secondary names are included in conflict searches as well as in searches performed in customer and matter lists. This means searches no longer need to be carried out separately using multiple names.

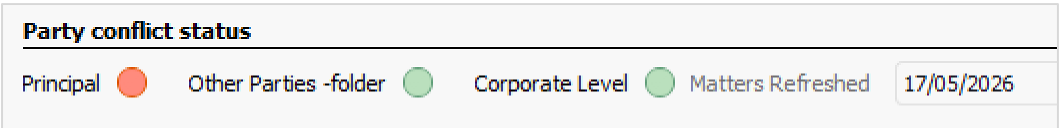
More detailed conflict checks across multiple levels

Because users opening matters want to see conflicts as comprehensively as possible, the software now performs conflict checks in more detail at the matter level, party level, and customer group (corporate) level.

The checks apply both to the standard party roles provided by the software and to any party roles that have been added manually. The outcome of the checks is also affected by protected matters and/or their parties, even if they are hidden from the user performing the conflict check.

Conflict status of parties

A new "Party Conflict Status" section has been added to the Information tab of the Conflict Check window, providing a quick overview of potential conflicts at different levels after you have saved the conflict check.



If a red indicator appears next to a level, the conflict status at that level may require closer review. The "Matters Refreshed" field is populated with a date when the conflict check is first saved and is updated thereafter each time the "Refresh Matters" function is used, which refreshes all data in the window.

The indicator colors also take insider matters into account, even if the user performing the conflict check does not necessarily have visibility into those insider matters.

Determination of conflict status

The indicators showing the conflict status of the principal are defined as follows:

Principal's roles in former matters	Indicator color
The principal in the conflict check has been • only in the roles of principal, client, and payer, OR • in any manually defined coparty role, OR • the principal has no party roles or matters recorded in the system	
The principal in the conflict check has appeared in any opponent-type role in at least one matter	
The principal in the conflict check has appeared in any other–type party role (but not in coparty or opponent roles)	

When checking the conflict status on the “Other parties” tab, the conflict status of all parties added to the list is taken into account:

- The indicator is green if at least one party has a green indicator and none has a red indicator.
- If any party has a red indicator, a red indicator is shown here as well.
- If all parties have grey indicators, the indicator shown here is also grey.

At the party level the indicators are determined as follows:

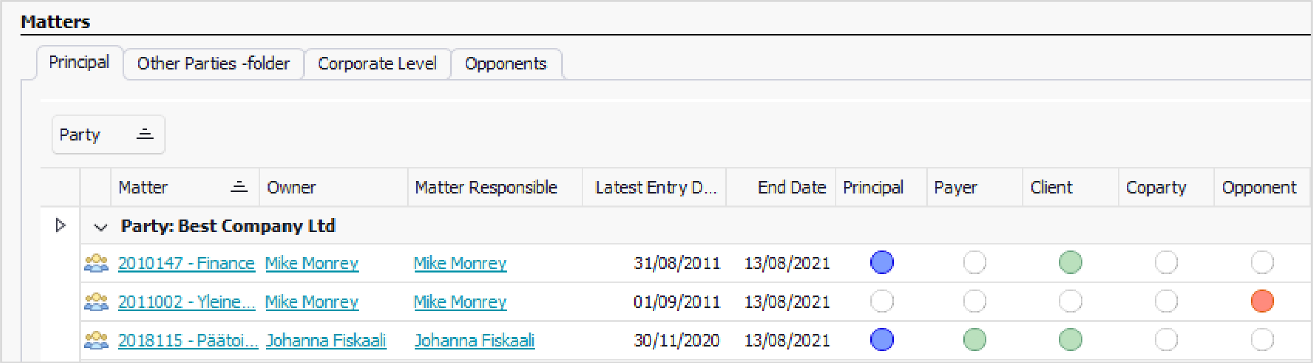
Roles of other parties in former matters	**Indicator color**
A party added to the “Other parties” list in the conflict check is not a party to any matter, OR no party role has been defined for that party	🟢
If the party is an opponent in the conflict check	
• and has only appeared in opponent-type party roles	🟢
• and has appeared in at least one matter in a coparty–type role	🔴
• and has only appeared in other-type party roles	⚪
If the party has not been marked as an opponent in the conflict check	
• and has appeared only in coparty-type roles	🟢
• and has appeared in at least one matter in an opponent-type role	🔴
• and has appeared only in other–type party roles	⚪

The conflict status for the principal’s corporate group structure is determined as follows:

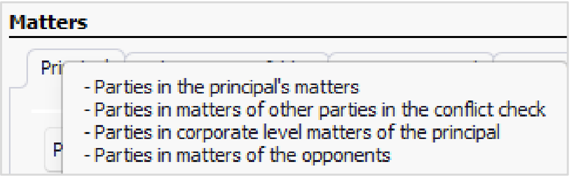
Roles of other companies within the principal’s corporate group in previous matters	**Indicator color**
If the other companies in the principal’s corporate group are not parties to any matters, OR if no party roles have been defined for them	🟢
If the other companies in the principal’s corporate have appeared	
• only in coparty-type roles	🟢
• in at least one matter in an opponent-type role, OR	🔴
• only in other–type party roles, or if the principal is a private person	⚪

<u>Level-specific review of conflict status</u>

If the conflict status requires closer review at a particular level, this can be done using the tabs available in the Matters section of the window.



Because the contents of the different lists can be difficult to remember, descriptions of the lists are available by hovering the cursor over the Matters heading.



- The **Principal** tab lists all matters in which the subject of the conflict check appears as a party.
- The **"Other Parties Folder"** tab lists the parties involved in the matters of the other parties included in the conflict check.
  NOTE! If new parties are added to the Other Parties folder, their matters are not automatically included in the conflict check. To include them, the "Refresh Matters" function must be selected from the ribbon.
- The **Corporate Level** tab lists the parties involved in matters of the principal's corporate group but excludes matters in which the subject of the conflict check is a party.
- The **Opponents** tab lists the parties involved in matters of the opposing parties of the principal in the conflict check but excludes matters in which the subject of the conflict check is a party. As a result, for example, if the principal in a conflict check has an insider matter, and the opponent in that insider matter is also a party in other matters, those other matters are shown even to a user who does not have access to the insider matter.

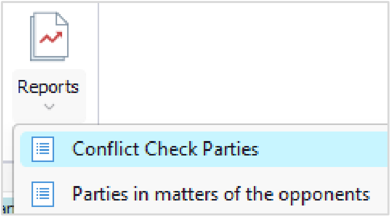
At the same time, the list opened from the "Other Parties" folder in the conflict check now allows assigning an opponent role to a party added to the conflict check.

If the conflict check is performed based on a matter request in which the party had an opponent–type role, the party is also assigned an opponent-type role in the conflict check. If a matter is subsequently created from the conflict check, this opponent role is also taken into account when adding parties to the matter.

The Reports button on the ribbon now provides access to two separate conflict-of-interest reports.

The main report, “Conflict Check Parties”, is divided into:

- Parties in the principal’s matters
- Parties in the matters of the other parties included in the conflict check
- Parties in the matters of the principal’s corporate group



The sub-report, “Parties in the matters of the opponents”, shows the other parties involved in the matters of the principal’s opponents.

The reports allow matters to be sorted by opening date or matter number. However, closed matters are always listed at the end of the report.

A new heading **“**Opponents**”** has also been added in the conflict inquiry email template to list the names of the opposing parties of the principal in the conflict check.

Conflict check to identify the principal’s conflicting party roles in open matter requests

When a conflict check is saved for the first time, the system also checks whether the principal has any open matter requests in which the principal is listed as an opponent. If conflicting roles are found, the system displays a list of the matter requests in which the principal has been marked as the opponent.

The Conflict Search view considers only active matter requests

In the Matter Request column of the Conflict Search view, only active matter requests are now taken into account. Previously, the column also showed an entry if the customer had inactive matter requests. This was unnecessary, because the customer’s role in a matter created from a matter request is shown in the view anyway, and a role in a rejected matter request should not create a conflict of interest.

Warning about open conflict checks when creating a matter from a matter request

If a matter is to be created from a matter request, the conflict check linked to that matter request must be approved.

If the user tries to create a matter from a matter request while the conflict check is still in progress, the user is shown the message: “The matter request has an open conflict check. The conflict check must be approved before the matter can be created.”

If the matter request has a rejected conflict check, the user is shown the message: "The matter request has a rejected conflict check. Do you still want to create the matter?" By selecting "Continue", the matter is created. Selecting "Cancel" leaves the matter request open and does not create a matter.

If the matter request has an approved conflict check or no conflict check at all, the software creates a matter from the matter request normally.

Removal of the expired identification warning for closed matters

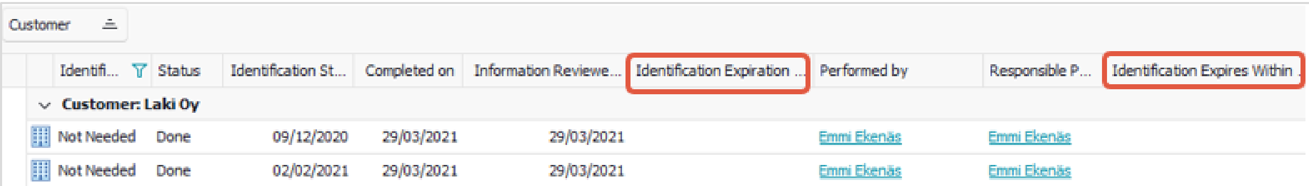
Because closed matters do not create a need for customer identification, the display of the warning triangle indicating expired identification in matter lists has been changed as follows:

- If the matter was closed before the identification expired, the warning triangle is no longer shown on the matter row.
- If the matter was closed after the identification expired, the warning triangle is still displayed.

Removal of expiry calculation for customer identification at the "Not required" level

Because customer identification is not always required, the software has unnecessarily performed validation calculations for identification expiry in some matters.

The validation calculation has now been changed so that if the identification level of a corporate or private customer is "Not Needed" and the status is "Done", the "Identification Expiry Date" column in the identification event remains blank and no warning triangle is shown in the "Identification Expires Within 30 Days" column.



Customer

Identifi...	Status	Identification St...	Completed on	Information Reviewe...	Identification Expiration ...	Performed by	Responsible P...	Identification Expires Within ...
Customer: Laki Oy								
Not Needed	Done	09/12/2020	29/03/2021	29/03/2021		Emmi Ekenäs	Emmi Ekenäs	
Not Needed	Done	02/02/2021	29/03/2021	29/03/2021		Emmi Ekenäs	Emmi Ekenäs	

Other invoicing method for the customer and the matter party

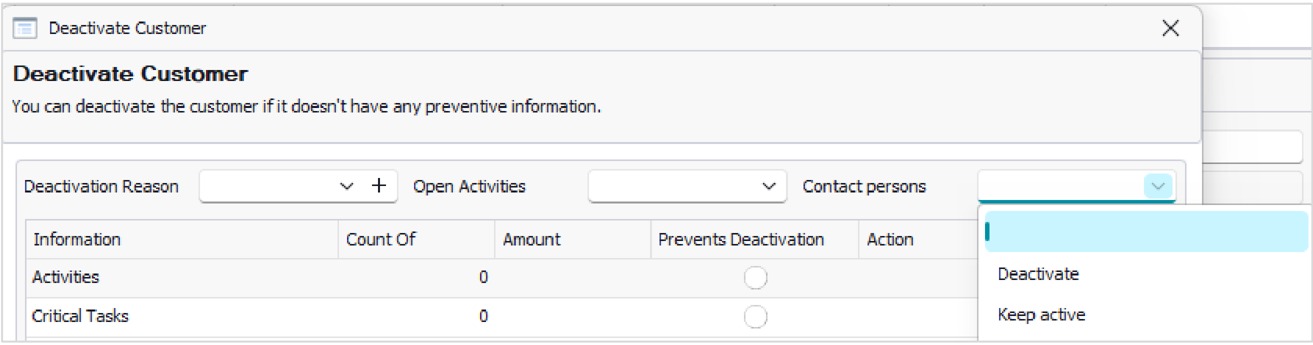
A free-text field called "Other Invoicing Method" has been added to the corporate customer window and the matter party window. This field can be used to enter invoicing method information when the invoicing method is something other than a summary invoice, e-invoice, or email. If the party is a private person, the field is not active.

In invoice lists, the icon indicating the invoicing method is determined from strongest to weakest as follows: 1) customer: summary invoice, 2) party: e-invoice, 3) party: email, 4) party: other invoicing method, 5) customer: e-invoice, 6) customer: email, 7) customer: other invoicing method.

To make use of this information, a Payer (Other Invoicing Method) column can be added to invoice views. If the alternative invoicing method information has been defined in the party details of the customer's matter, an additional Party (Other Invoicing Method) column should also be added.

Deactivation of customer contacts when a corporate customer is deactivated

To enable deactivation of a corporate customer's contacts at the same time as the customer is deactivated, a Contact Persons selection list has been added to the "Deactivate Customer" window, offering the options "Deactivate" and "Keep active". If neither option is selected, the contacts are left active.



If "Deactivate" is selected, the corporate customer is first deactivated, and if that succeeds, its contacts are then deactivated according to the defined deactivation rules.

If the software is unable to deactivate the customer or one of its contacts, the user is shown an error list of the failed deactivation (customer/contact, name, and reason preventing deactivation).

MATTER REQUEST

Changes to the matter request window

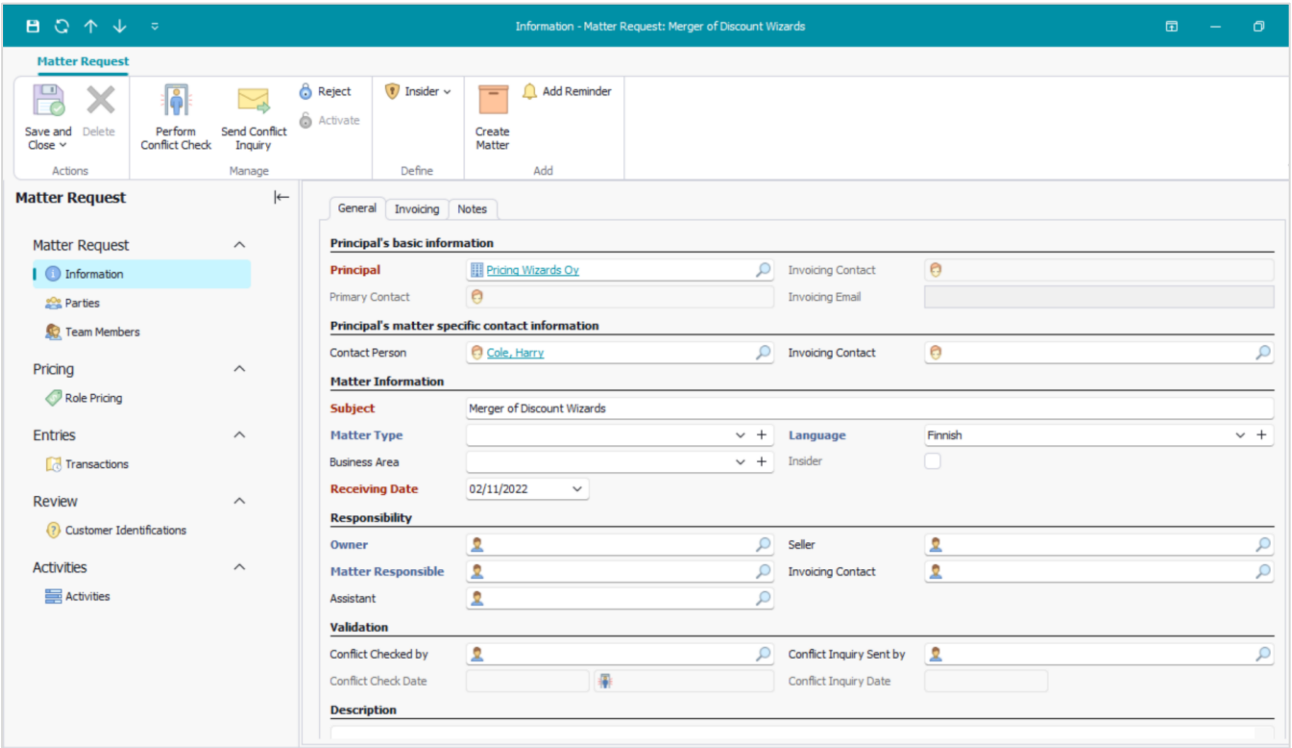
To make the use of matter opening requests easier, new fields have been added to the matter request window. The customer and contact information entered into these fields is also saved in the folders of the matter request.

The changes to the matter request window are as follows:

The following have been added to the **General** tab

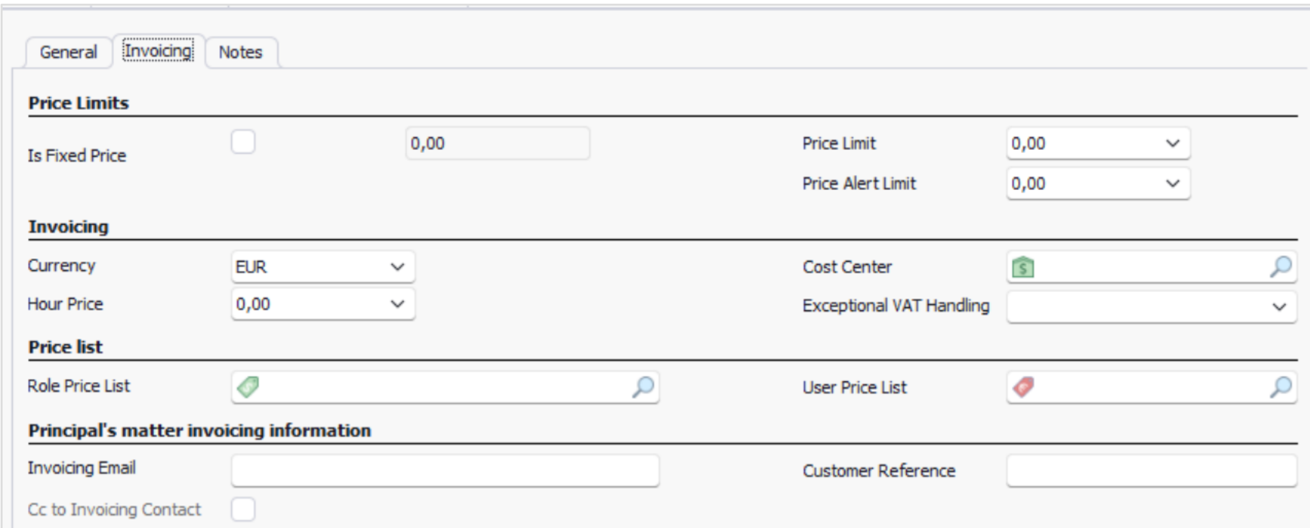
- A **Principal's Basic Information** group, which includes Primary contact, Invoicing contact, and Invoicing email address fields. The values for these fields are retrieved from the principal and cannot be edited in the matter request window.

- A **Principal's Matter Specific Contact Information** group, containing the Contact person and Invoicing contact fields. The information entered in these fields is saved to the principal's party details.



- If the matter request is marked as an insider matter request, the user is shown the message: "Remember to define the team members as well so that all necessary persons can access the matter."

The following have been added to the **Invoicing** tab:



- **Price List** group, with Role Price List and User Price List fields. The contents of these fields are saved to the settings of the matter that will be created.
    - The role-based price list selected in the Role Price List field is also copied to the list of role-based price lists of the matter request. If is later manually changed via the Role Pricing folder, this role-based price list field is cleared, and the user is notified of it.
    - If role prices are first defined manually via the Role Pricing folder and after that a role-based price list is selected in the matter request's Role Price List field, the manually defined role prices are removed and the information from the selected role price list is copied to the Role Pricing folder of the matter request.
    - If changes are made in the settings to the role price list linked to the matter request, those price list changes are updated to the matter request before a matter is created from it.

- **Principal's Matter Invoicing Information** group, containing the Invoicing Email, "Cc to Invoicing Contact," and Customer Reference fields. The Invoicing Email and "Cc to Invoicing Contact" fields have also been added to the principal's party window in the matter request.

The following have been added to the party window of the matter opening request:

- **Invoicing** group, containing the Invoicing Contact, Invoicing Email, "CC to Invoicing Contact," and "Customer Reference" fields.

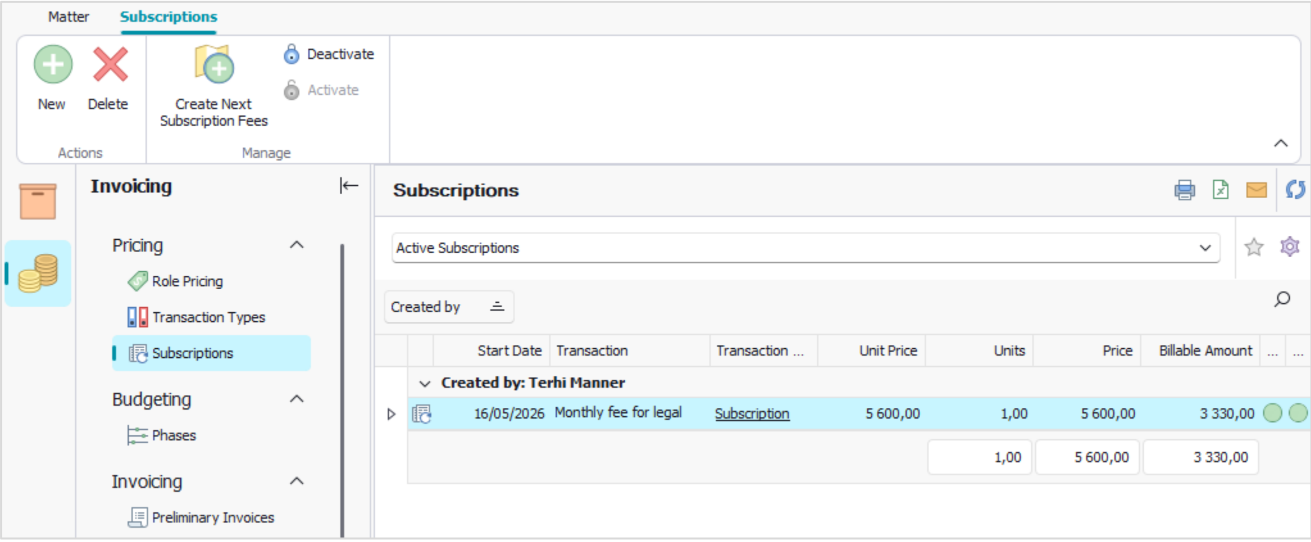
When a matter is created from a matter request, its important notes are copied to the matter, and the user is shown the message: "All notes marked as important have been copied to the opened matter."

MATTER

Indicator in the matter view when the subscription price has been exceeded

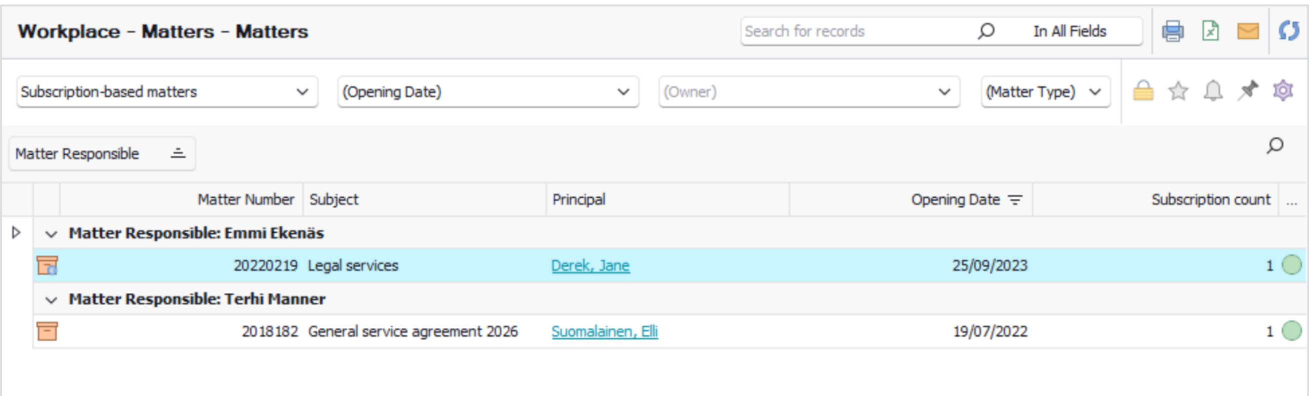
During a certain period, significantly more work may be recorded to a subscription matter than the subscription price allows, and in that situation the matter owner/invoicer would like to be informed so that some work can be moved to the next invoicing period.

To monitor the situation, the "Active Subscriptions" view in the matter window has been expanded with the "Billable Amount" and Status columns (the rightmost column).



- The “Billable Amount” column shows the sum of open transactions manually linked to the Subscription price, excluding any periodic fees of the subscription.
- The Status column indicates the status of active subscriptions related to the matter using a ball icon:
  - The ball is green when the “Billable Amount” for the subscription row is less than 80 % of the value in the Price field of the subscription.
  - The ball is orange when the “Billable Amount” for the subscription row is 80–100 % of the value in the Price field of the subscription.
  - The ball is red when the “Billable Amount” for the subscription row exceeds 100 % of the value in the Price field of the subscription.

The new matter view “Subscription-based Matters” shows, for each matter, the number of active subscriptions and their status.

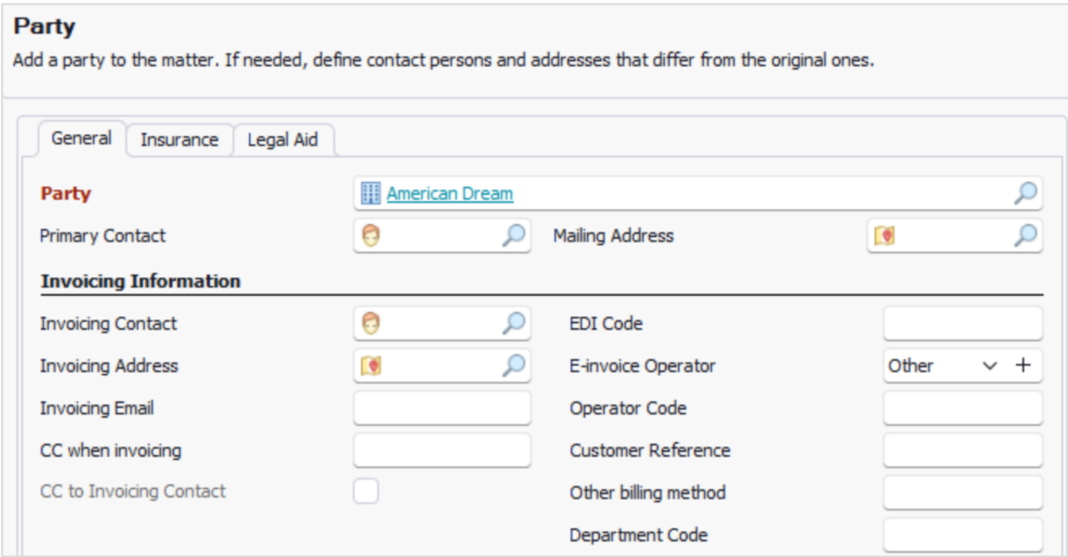


- The Status column works in the same way as above and indicates, with an icon, the status of the subscriptions related to the matter:
  - The ball is green when the billable amount of every subscription related to the matter is less than 80 % of the value in the Price field of the subscription.

- The ball is orange when the billable amount of at least one subscription related to the matter is 80–100 % of the value in the Price field of the subscription.
- The ball is red when the billable amount of at least one subscription related to the matter exceeds 100 % of the value in the Price field of the subscription.

“CC when Invoicing” field added in the matter’s Party window

Invoice CC recipients defined at the customer level must sometimes be overridden for a specific matter. The CC when Invoicing field has now been added also to the matter Party window, allowing invoicing email addresses stored in the customer details to be overridden in the party details of the matter.



Removal of spaces in sub-matter numbering

Spaces have previously been used in sub-matter numbering, for example "5001 - 100". The spaces have now been removed from the numbering to make the numbering of matters and sub-matters more consistent. The change does not affect existing submatters.

PRICING

Copying price lists to matters created with the “Use as template” function

If a role-specific or user-specific price list has been defined for the matter, the “Use as template” function now also copies the price list to the new matter.

ENTRIES

Automatic interim saving of timers

To prevent timer readings from being lost in the event of a disruption, automatic interim saving has been added to the software.

The timer data is saved to the database:

- When a new timer starts for the first time
- Once a minute while the timer is running
- When the timer stopped.

The timer data is removed from the database when the timer is closed, or when a transaction is created from the timer and it is then closed. If the user creates transactions from several timers, they are closed only after the saving of the transactions has been completed.

If timers saved for the user are still found in the database when the software starts, they are loaded in status “Pause”, and the timer window is opened.

Current date as entry date for transactions created with the “Use as template” function

When an existing transaction is used as a template, the entry date of the new transaction is now set to the current date instead of the date of the transaction used as the template.

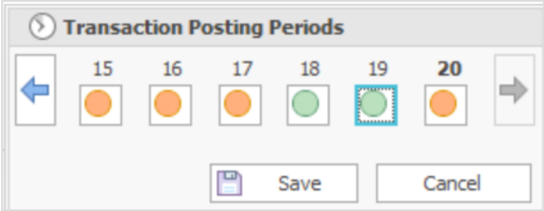
Closing the transaction posting period at month level

Power users can now manage transaction posting periods on a monthly basis as well. This function complements the existing weekly and user-specific posting period management in situations where a month changes in the middle of a week and the month (fiscal period) needs to be closed.

If transaction posting periods have been enabled in the system-level parameters (Transactions > Transaction posting period = Enabled):

- In the individual fiscal year window (Settings > Financial > Fiscal Years), power users are shown a “Posting period closed” column.
- The power user can close an individual fiscal period (month) by clicking the “Posting period closed” checkbox for the posting period.
- When the posting period is closed, transactions can no longer be entered for that period. In that case, the user receives the message: “The transaction posting date is in a closed posting period. You cannot save the transaction.”

NOTE! If the power user has closed a fiscal period (month), the user’s weeks will still appear open even though transactions can no longer be entered for those weeks.



"Edit Multiple" available for expenses

The Edit Multiple function can now also be used in the expense list to edit information for several expenses at once. This is especially useful if expenses are imported into the CSI software through a bookkeeping integration, in which case the integration user is marked as the author for all of them and cost center information may also need to be updated. The function is available from the context menu opened with the right mouse button.

If the author of an expense is changed, the author's cost center for the expense is checked and updated if necessary. If the cost center is also changed in the same mass update in addition to the author, the selected cost center overrides the cost center retrieved from the user's information.

Mass editing of expenses is allowed if the user otherwise has the right to edit the expense. If the selected expense rows include an expense that the user is not allowed to edit, it is skipped and shown as skipped in the summary of the function.
Note that the edit multiple -function is available only for power users and users with extended user rights.

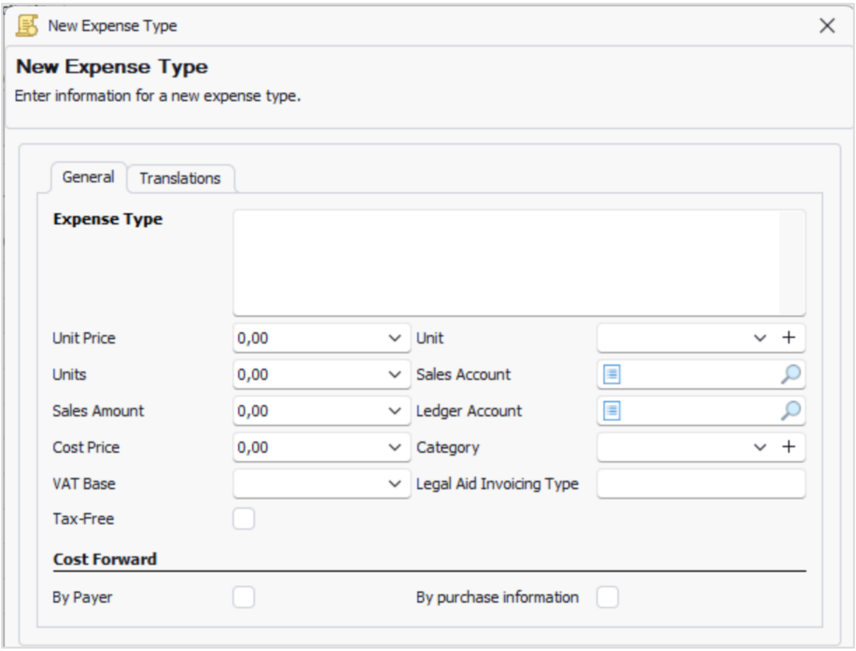
Transfer information added to the notes of transferred transactions/expenses

An archived note is now added to the notes of a transaction or expense transferred from one matter to another, indicating the source matter, the time of transfer, and the user who performed the transfer.

INVOICES

Expense type's cost-forward option by purchase information taxability

Companies that invoice expenses by purchase information taxability have requested the possibility to define for an expense type a cost-forward option based on purchase information taxability, because until now the definition has only been possible according to the payer's taxability and the information has had to be changed manually on the expense.



The fields in the expense type window have now been arranged into two columns, and under them a Cost Forward invoicing group allows invoicing to be selected for the expense type either according to the payer or according to purchase information. After the selection, the Unit Price, Units, Sales Amount, and Tax-Free are locked. The values of Unit Price and Sales Amount are set to Cost Price, Units is 1, and the value of the Tax-Free field is “No”.

When an expense type is selected or changed for an expense, the software works as follows:

- For an expense type defined as “By payer”, the “By payer taxability” option is selected automatically in the expense window.
- For an expense type defined as “By Purchase Information,” the “By purchase information taxability” option is selected automatically in the expense window.
- If neither of the options has been selected for the expense type, the “No cost forwarding” option is selected automatically in the expense window.

VAT on the legal expenses invoice after the insurance company’s payment

In legal expenses cases, when a legal expenses invoice has first been created for the insurance company using the “Insurance Company > Send/Print” functions, the received payment has been recorded, and an invoice has then been created for the customer for the remaining amount, the invoice printout now shows the text “The VAT share of the amount payable is [the full VAT payable on the invoice before payments, etc.].”

The change makes it easier to ensure that the insurance company’s payment has been allocated correctly with regard to VAT. In the Finnish invoice template, the text is printed below the “Total payable” line if the invoice contains legal expenses information.

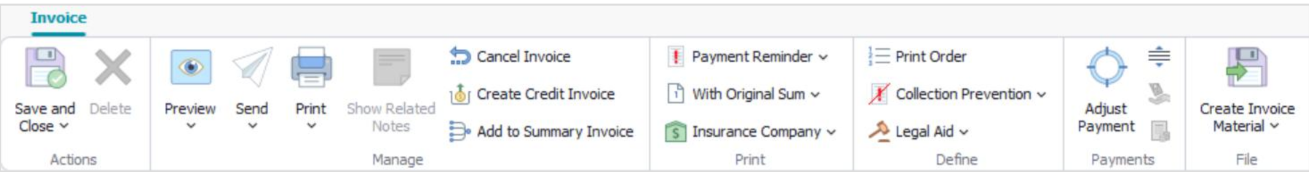
Correction of the invoice preview text in CSI LakiMies

CSI LakiMies does not have a preliminary invoice function, but the confusing text “Preliminary Invoice” has nevertheless been shown in the invoice preview. It has now been replaced with the text “Preview”.

Changes to the invoice ribbon and status handling

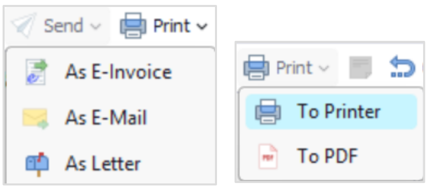
To make it easier for invoice handlers to keep track of when an invoice has actually been sent and when it has only been printed, the ribbon functions for different types of invoices have been reorganized and changes have also been made to invoice status handling.

For example, the changes in the ribbon of a normal invoice are as follows:



There are now separate buttons for the preview, sending and printing of invoices:

- Under the Preview button there are Quick Preview (default), which does not show the printing parameters window, and Preview, which opens the parameter window.
- The Send button makes it possible to send the invoice as an e-invoice, as an email attachment, or by post.
- The Print button enables printing the invoice either to a printer or as a PDF file.



Invoice status handling works as follows:

- When “Send” is selected and the invoice status is Open or Printed, the invoice status changes to “Sent” and the sending date is saved on the invoice.
- When “Print” is selected and the invoice status is Open, the invoice status becomes “Printed” and the print date is saved on the invoice. The function “Send > As Letter” is in practice the same as “Print > To Printer”, but it marks the invoice as sent.
- When “Print” is selected and the invoice status is Sent, the print date is saved on the invoice. The print date is not shown in the invoice window, but it can be customized to be shown in CSI Lawyer and CSI Professional.

Other invoice-related function buttons have also been streamlined. The status changes according to the same normal invoice logic also when handling a payment reminder, as well as for a summary invoice and the invoices sent within it. By contrast, the invoice Print and Send functions available under the “With Original Sum” button do not affect the invoice status.

Sending and printing an invoice create a note on the invoice. For invoices sent with a summary invoice, the note texts indicate which function has been performed on the invoice.

Sending a payment reminder saves the payment reminder in the invoice’s Payment Reminders folder, but printing a payment reminder does not create such an entry.

Generating invoice data is considered as sending the invoice.

Invoice type added to the name of the saved invoice PDF

When an invoice is printed as a PDF, the invoice type is now added to the file name so that invoice handlers can see from the file name what type of invoice it is. This makes invoice handling easier and faster and aligns the file naming practice with invoices sent by email.

When a payment reminder is printed as a PDF from an invoice, the file name now includes the payment reminder title text.

Streamlining the invoicing email hierarchy

Searching for the invoicing email address and CC invoicing contact has been streamlined.

The search for the invoicing email address now has the following hierarchy:

Level	Field name	Hierarchy
Party	Invoicing Email	1
Customer	Invoicing Email	2
Party, invoicing contact	Email	3
Customer, invoicing contact	Email	4
Customer	Email	5

For the “CC to invoicing contact” address, the system perform searches in the following order:

Invoicing contact	Field name	Hierarchy
Invoicing contact in the party details	Email	1
Invoicing contact in the customer information	Email	2
Invoicing contact in the invoice information	Email	3

The invoicing contact and the “CC to Invoicing Contact” field must be defined at the same level. In addition, the system checks whether the payer contact defined for the invoice is the same as the contact found through the CC invoicing contact search. If not, it is added to the CC field.

Invoice front page to comply Swedish legislation

The invoice front page template included in the Swedish country package has been changed to comply with Swedish legislation. The software works as before if the invoice print currency is SEK, or if the VAT amount in the database bookkeeping currency is 0.

If the bookkeeping currency is SEK and the printing currency is something else, for example EUR, the text “Total moms i SEK” and the VAT amount in the bookkeeping currency are now printed on the front page of an invoice printed in Swedish.

Specificering av fakturabeloppet	Netto	Moms	Totalt
Arvoden	85,97	21,49	107,46
Utlägg	0,00	0,00	0,00
Totalt	85,97	21,49	107,46

Momsspecifikation	Arvoden	Moms	Utlägg	Moms	Netto	Moms	Totalt
Moms 25%	85,97	21,49	0,00	0,00	85,97	21,49	107,46
Totalt	85,97	21,49	0,00	0,00	85,97	21,49	107,46

Att betala totalt		**107,46**
Total moms i SEK	250,00	

If the invoice print language is something other than Swedish, the front page instead shows the text “Total VAT in SEK” and the VAT amount in the bookkeeping currency.

Importing the original invoice’s rounding row to a credit invoice

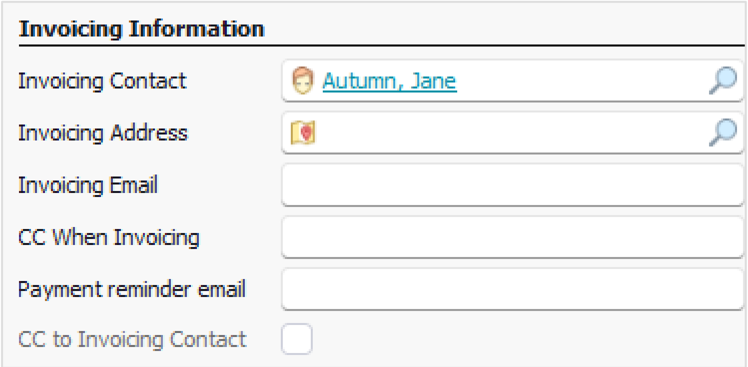
When an invoice is cancelled or fully credited so that the credit invoice fully matches the original invoice amount, the credit invoice shows a rounding amount and VAT amount equal in size but negative to those on the original invoice. The need for rounding arises, for example, when a normal invoice is adjusted in full to a specific gross amount.

Payment reminder title added to the name of the payment reminder file sent by email

When a payment reminder PDF is created from an invoice as an email attachment, the file name now includes the actual title text of the payment reminder.

Customers’ email address for payment reminders

A “Payment Reminder Email” field has been added to the windows for corporate and private customers. An address for sending payment reminders can be stored in this field for cases where an invoice sent to the invoicing email has not been paid. Multiple email addresses can be entered in the field, separated by semicolons. This field is not available in the matter party window.



When a payment reminder is created as an email attachment, the addresses are populated into the message's "To" field provided that at least one valid address is found. An address is considered valid when it is in the format *[at least one character]@[at least one character]*.

If no valid address is found in the "Payment Reminder Email" field, the addresses for the To and Cc fields are retrieved as before (that is, the system checks for an invoicing email address, etc.).

PAYMENTS

Searching the payer by name in Camt-format payment data

Because customers do not always make payments using a reference number, searching for the payer by name has been added to the import of payment data in camt.52, camt.53, or camt.54 file format when no invoice can be directly matched to the payment. If a customer with the payer name found in the payment data exists in the CSI software, that customer is stored on the payment. Otherwise, the payment is imported without payer information.

Payment-specific duplicate check for Camt-format reference data

The duplicate check for payments has been improved as follows when importing payment data in Camt 52/53/54 format:

- The import no longer checks whether the entire batch has already been read; instead, each payment in the batch is checked separately.
- The check searches the database for the unique ID found in each payment record in the material. If the ID is not found, the payment is accepted for import. If the ID is found, the payment is skipped and the import proceeds to the next payment.
- If there were duplicates in the batch, the user is informed of their number at the end: "The payment data contained XX payments that were already found among the previously imported payments."

The change also applies to Estonian reference data, the import of which is included in the functions of the Estonia country-specific add-on.

REPORTS

Layout change to the Transaction Summary (Created, Invoiced, and Paid)

The layout of the Transaction Summary (Created, Invoiced, and Paid) caused problems when pivoting on sum fields other than the Created, Invoiced, and Paid amount fields. For example, the Hours field then calculated the total number of hours by status.

The Created, Invoiced, and Paid amount fields have now been removed from the pivot entirely; Entry Date, Invoice Date, Payment Date, and Worked (h) have been added to the selectable fields; Status has been added as a column-grouping option; and Hours and Total have been set as the sum fields.

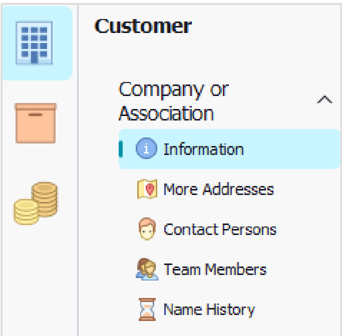
ACCESS RIGHTS

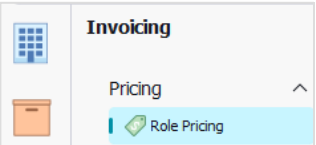
Clarification of user group specific editing rights for customers and matters

The editing rights for customer and matter information have been changed as follows in situations where the editing rights for a customer and/or matter have been restricted in the parameters to a specific user group. In such cases, editing rights are always retained by users who belong to the editing rights user group, the customer responsible, and users who have been added to any responsibility role of the matter.

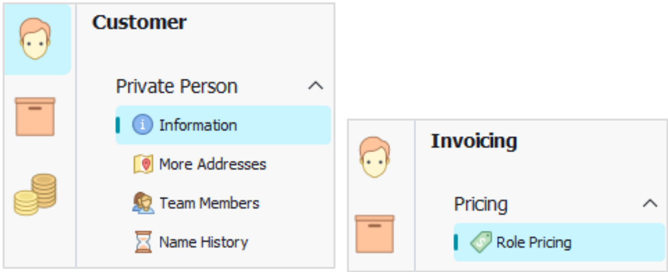
If the user does not belong to any of the groups mentioned above, editing of the information is blocked for them:

- In the corporate customer window, in the folders under the Company or Association group, and in the folders of the Pricing group in the Invoicing section.

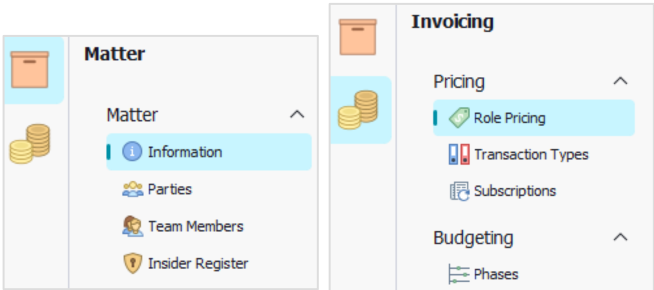




- In the private person window, in the folders under the Private Person group, and in the folders of the Pricing group in the Invoicing section.



- In the matter window, in the folders of the Matter group, and in the folders of the Pricing and Budgeting groups in the Invoicing section.



Separation of matter creation and editing rights parameters

The parameters that restrict matter creation and editing rights have been separated from each other, making the combined effect of the parameters easier to understand.

The changes apply to the following system level and business unit level parameters in the Matter Security group:

- Group to open billable matters
- Group to open internal matters
- Allow editing only for a user group X

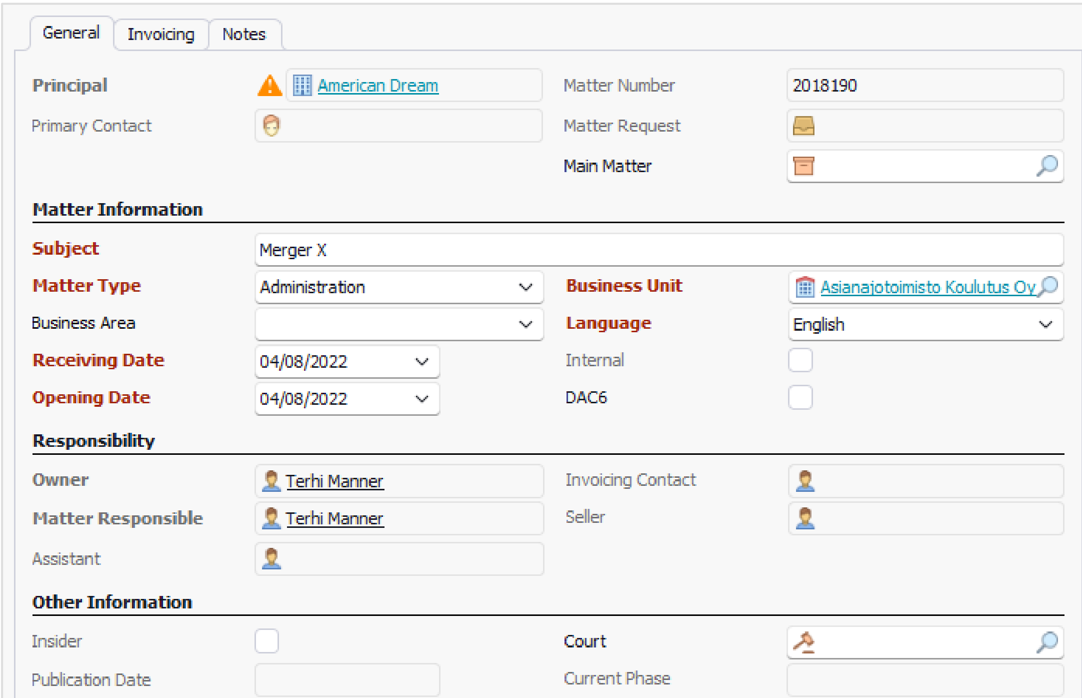
As a result of the user group definitions in the parameters, user X may belong to a group that has the right to create (open) billable and internal matters but may not belong to the group that is allowed to edit them. The combined effect of the parameters on matter access rights in different situations is as follows:

	No ”Editing rights” group has been defined	**A user belongs to the defined ”Editing rights” group**	**A user does not belong to the defined ”Editing rights” group**
No ”Opening rights” group has been defined	Right to open and edit matters	Right to open and edit matters	Right to open but not edit matters

A user belongs to the defined "Opening rights" group	Right to open and edit matters	Right to open and edit matters	Right to open but not edit matters. **NOTE!** Opening matters with the Use as template function is not allowed if a user has no responsibility role in the original matter.
A user does not belong to the defined "Opening rights" group	Right to edit but not open matters	Right to edit but not open matters	No right to open or edit matters

NOTE! A user may have the right to create only internal matters or only billable matters but may still have the right to edit both internal and billable matters.

A user who belongs to the group having editing rights still cannot edit all matter details; certain fields on the General tab are read-only.



The functions in the Team Members folder are likewise not available, nor are the functions in the Insider Register folder of an insider matter.

BOOKKEEPING MATERIALS AND INTEGRATIONS

Generating bookkeeping material in Estonian E-Invoice 1.2 EN format

When generating bookkeeping material in e-invoice format, the home country is now indicated with a two-letter country code instead of the country name, allowing the bookkeeping system to recognize the country. For this purpose, a component has been added to the EstonianEInvoice add-on that generates the bookkeeping material in 1.2 EN format.

The content of the material is the same as invoice material in 1.2 EN format, with the following exceptions:

- Product code handling works in the same way as in the basic 1.2 bookkeeping material.
- Single-line invoice material is not allowed, just as it is not allowed in the basic 1.2 bookkeeping material.

The bookkeeping material is generated from all selected invoices, and no validation similar to invoice material generation is performed at that stage; for example, the payer's e-invoice address is not checked.

Clarifying the bookkeeping integration parameter window

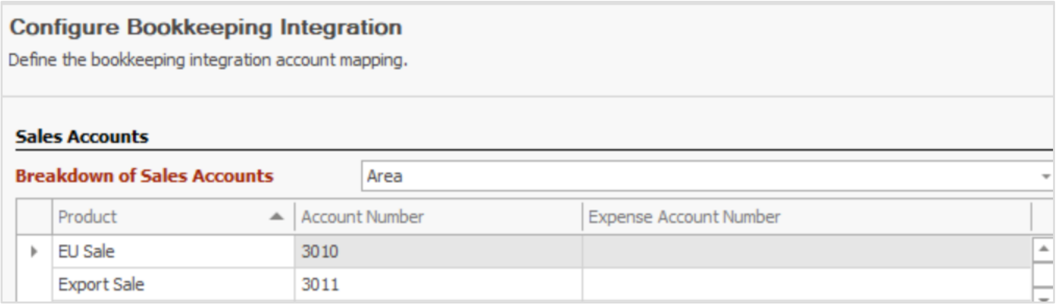
The general parameters window for bookkeeping integrations has been made more logical. The order of the fields in the Balance Sheet Accounts group has been changed, the terms have been clarified, and the unnecessary heading "Balance Sheet Account Number" has been removed.

Possibility to define multiple sales accounts for the Fortnox integration

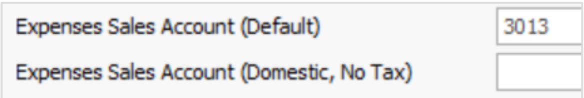
Until now, the Fortnox integration has handled only one sales account, which has meant that all invoices containing expenses had to be handled manually. When there are multiple sales accounts, invoicing of expenses is automatically recognized to the sales account connected to them.

The Fortnox integration now includes the following new settings:

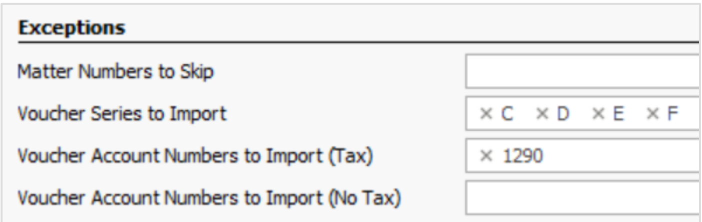
- A new "Expense Account Number" column has been added to the sales account breakdown. This now makes it possible, for example by area, to define the default sales account for transactions in the existing "Account Number" column and a separate default sales account for expenses in the new column (optional).



- An optional field “Expenses Sales Account (Domestic, No Tax)” has been added for the sales account of domestic tax-free expenses.



- An optional field “Voucher Account Numbers to Import (No Tax)” has been added for the accounts of vouchers imported as tax-free.



When purchase invoices are imported from Fortnox into the CSI software as expenses:

- Purchase invoice vouchers are also imported from the accounts listed in the “Voucher Account Numbers to Import (No Tax)” field. These expenses are marked as tax-free, but otherwise they work in the same way as imports from the accounts in the “Voucher Account Numbers to Import (Tax)” field.
- Purchase invoice vouchers are imported from the balance sheet accounts “Balance sheet account” > “Cost-forward Expenses Account (Tax)/(No Tax)” even if they are not listed in the “Voucher Account Numbers to Import (Tax)” field and/or the “Voucher Account Numbers to Import (No Tax)” field. The handling of these has not changed as such, but the balance sheet accounts no longer need to be repeated in the expense account list.

When an invoice is transferred from the CSI software to Fortnox, the account for an expense invoice row is determined according to the following hierarchy from strongest to weakest:

- If the expense was imported from either of the balance sheet accounts defined in the settings under “Balance sheet account” > “Cost-forward Expenses Account (Tax)/(No Tax)”, the expense invoice row gets the same account (as before).
- If the invoice payer is domestic and the expense invoice row is tax-free and “Expenses Sales Account (Domestic, No Tax)” has been defined, the expense invoice row gets the account from the “Expenses Sales Account (Domestic, No Tax)” field.

- If a separate expense sales account "Expense Account Number" has been defined on the row matching the invoice's area, business unit, or matter type, the expense invoice row gets the account from the "Expense Account Number" column corresponding to the area, business unit, or matter type.
- If the default expense sales account "Expenses Sales Account (Default)" has been defined, the expense invoice row gets the account contained in the "Expenses Sales Account (Default)" field.
- In all other cases, the expense invoice row gets the account from the "Account Number" column corresponding to the area, business unit, or matter type (the same account as transactions).