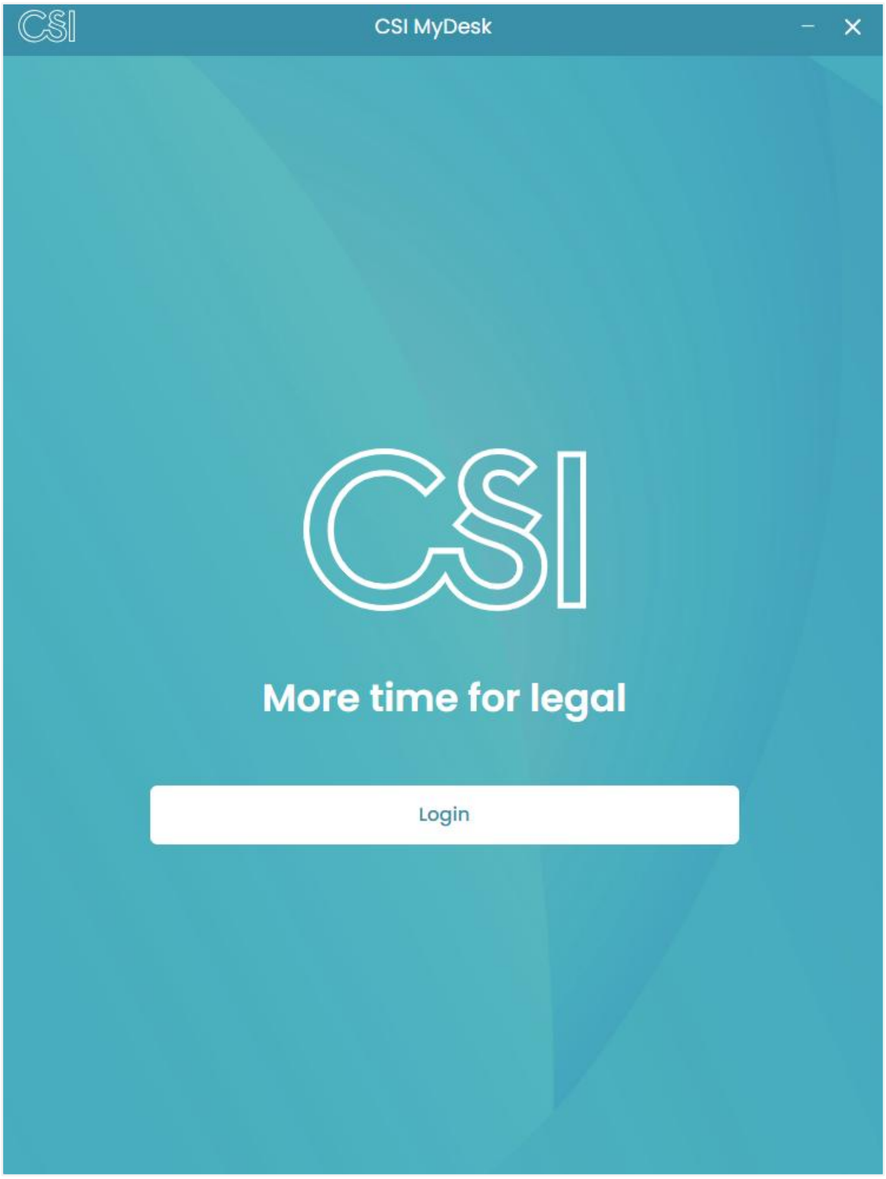

NEW CSI MYDESK

USER GUIDE

June 2026

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1. GETTING STARTED

1.1 Devices supported

The CSI MyDesk is available for Windows PC, Mac & Linux.

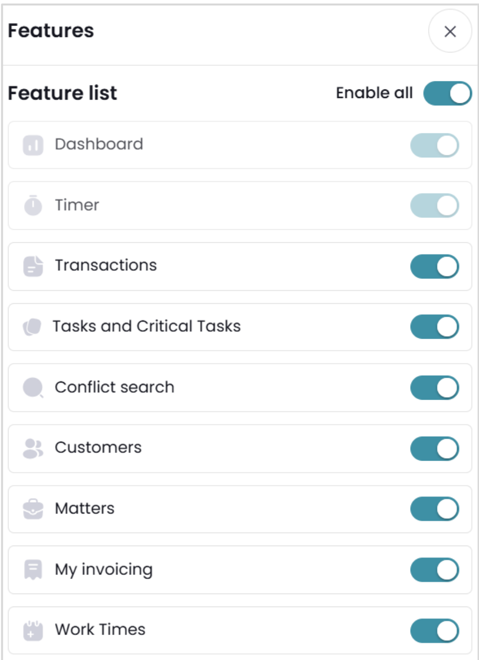
1.2 What functionality does CSI MyDesk offer

CSI MyDesk is a desktop application that provides easy access to CSI's key features without needing to open CSI Lawyer.

You can:

- Add and manage your own transactions, tasks, critical tasks and work time entries
- Perform conflict searches and conflict checks
- View customers, matters, matter requests and create new matter requests
- View your billable matters, create preliminary invoices from them and review your entries on preliminary invoices.

The information added, edited, or deleted in CSI MyDesk is synchronized to the CSI software and vice versa. Some of the CSI functions, e.g. creating customers and matters, invoicing, managing payments, and defining software settings are to be performed in the CSI software.



When installing the application, you are requested to choose which features to enable/disable. The Dashboard and Timer are always enabled.

Restricted users have no access to the My invoicing and Conflict search features, but can enable/disable the Customers, Matters, Transactions, Tasks & Critical tasks, and Work Times features.

After taking the app into use, you can access the "Feature list" in the Profile area. If you toggle a feature off the app hides all related functionality from the app (e.g., hiding Tasks removes task-related views and options). Toggling a feature on reveals related functionality without requiring a restart or re-login.

The navigation bar on the left is adjusted accordingly.

If you have disabled a feature and receive a push notification related to it (e.g., Task notification while Tasks are disabled), tapping the notification you can enable the feature. Alternatively, you can dismiss the dialog.

1.3 Good to know about the app logic

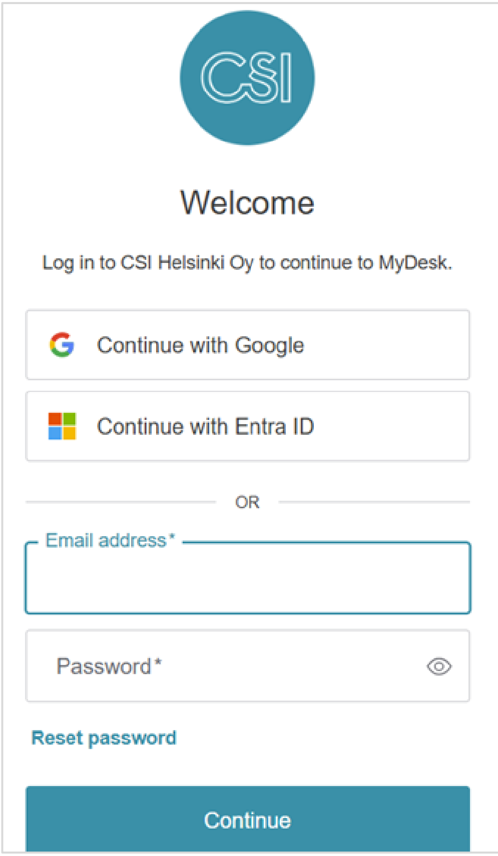
- You can choose to use the app either in dark or light mode and its accent color from 7 different colors. Colors are also used to indicate status (open, completed etc.) of e.g. tasks.
- If a matter, a transaction, or a customer has a long name or description, it is displayed as truncated. You can see the entire text in a tooltip by first opening the entity in its own screen and then hovering the mouse cursor over the truncated text.
- You can mark your commonly used customers and matters as favorites, and use filters to narrow down search results.
- You can add notes and attachments (maximum size 1 MB) to different entities. The acceptable file formats are pdf, .jpg, .jpeg, .zip, .png, .doc, .docx, .ppt,.pptx,.xls, .xlsx, .xml, .json, .mp3, .mp4.
- When you opened the app for the first time, it asked for permission to collect and analyze data to enhance the performance and functionality of the app. If you accepted the data analysis, the toggle button in the "About" section is colored and, if you wish, you can switch it to grey to prevent data collection.
- You can set CSI MyDesk to start automatically when you start your computer.

1.4 Installing and signing in to CSI MyDesk

CSI MyDesk can be easily installed via the installation page:

[Download CSI MyDesk · CSI Helsinki]

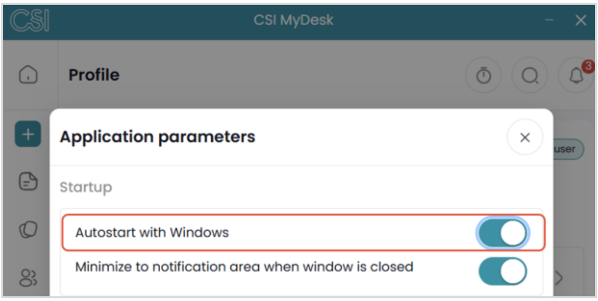
Once the application is installed, you can sign in by authenticating with Google or Microsoft Entra ID. It is also possible to sign in using your email and password, if you have set up your account using that method.



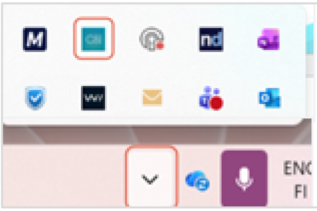
1.5 Opening CSI MyDesk

Once CSI MyDesk has been installed, you can open it by clicking the CSI MyDesk icon on your desktop, or by searching for the application by name.

If you have enabled the option to start CSI MyDesk automatically with Windows (found in the application settings under your profile), the application will launch automatically when you start your computer and sign in to your Windows account.



If you have enabled the setting “Minimize to the notification area when closing the window”, the application will remain active in the background even after you close it.



In that case, you can open the application by expanding the hidden icons and clicking the CSI MyDesk icon.

1.6 Using Dashboard and the menus

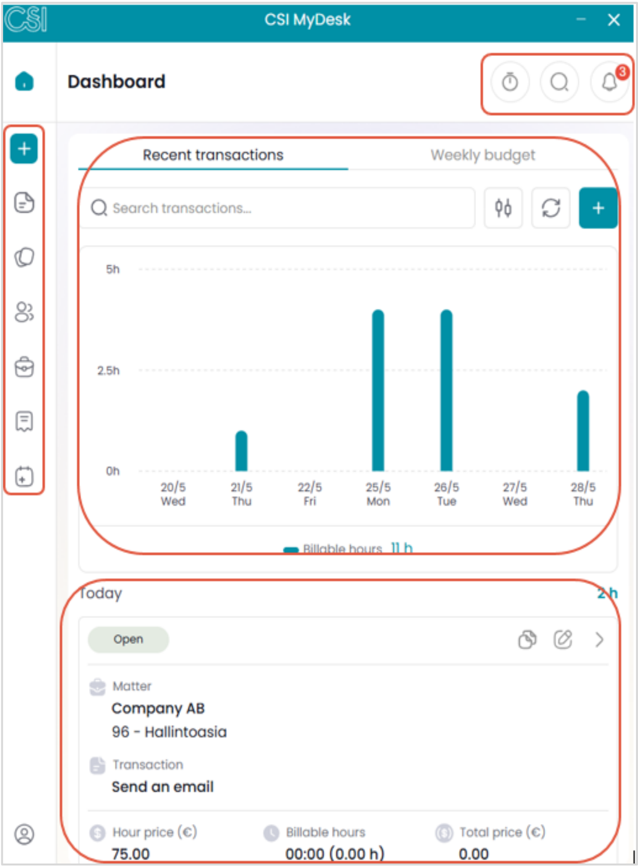
Once you have successfully logged in and selected the organization/database, you are directed to the main **Dashboard** screen. You can always access the Dashboard by selecting the button.

The dashboard summarizes your recent transactions and offers:

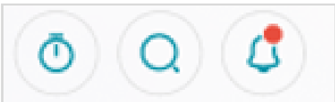
- Two charts visualizing your work
- Top-right menu with three key features
- Left-hand menu for navigating between sections
- Quick action button

The Dashboard offers two pre-defined charts:

- **“Recent Transactions”** 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. You can search for transactions within the displayed timeframe.
- **Weekly Budget** displays the total billable hours of your transactions from the past 4 weeks. It also shows your possible budgeted hours per week. The Search field searches for transactions within the last four weeks. At the beginning of a new year, the chart may include the last few weeks from the previous year for continuity.
- Below the charts, you find a list of all your transactions (2) for the displayed timeframe, grouped by date.



The top menu (3) offers three key functions:



Timer: To manage and start timers for transactions.
Conflict search: To make a quick conflict search.
Notifications: To view recent notifications, alerts, and updates related to tasks and matters.

The **Menu on the left** remains the same throughout the app and offers the following options:

Dashboard: Offering an overview of your key metrics.

Quick Action: Enabling you to add new transactions, tasks, critical tasks, and work time.

Transactions: Allowing you to manage transactions.

Tasks: Enabling you to manage your tasks.

Customers: To view customers and customer-related information.

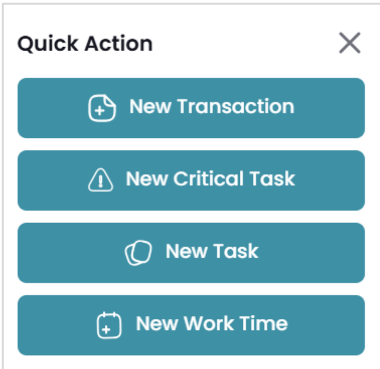
Matters: To view matters and matter requests and information related to them.

My Invoicing: To view your billable matters and preliminary invoices.

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

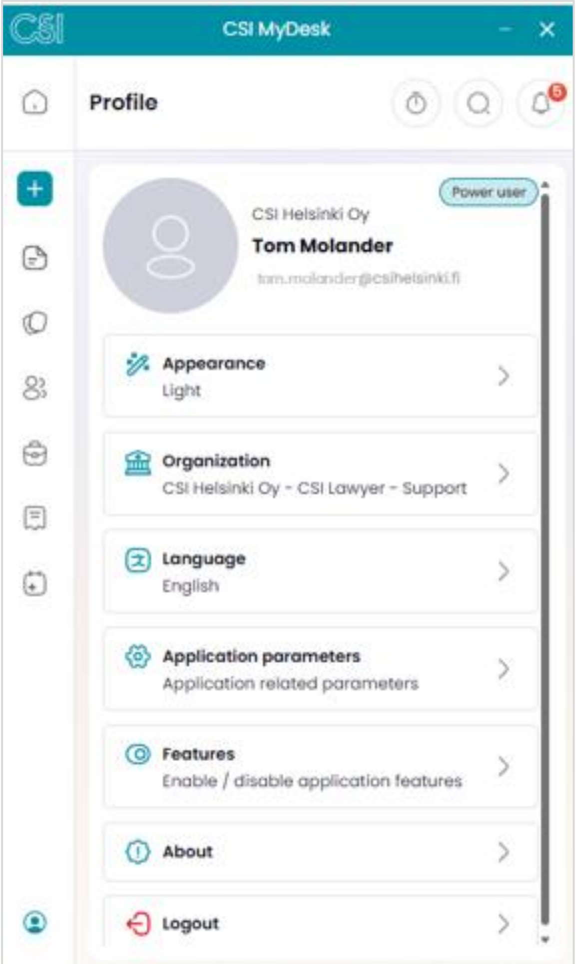
Profile: To view your user details and manage the app settings.

The Quick Action button opens the list of quick actions. You can add a new activity, matter, task, or working time entry.

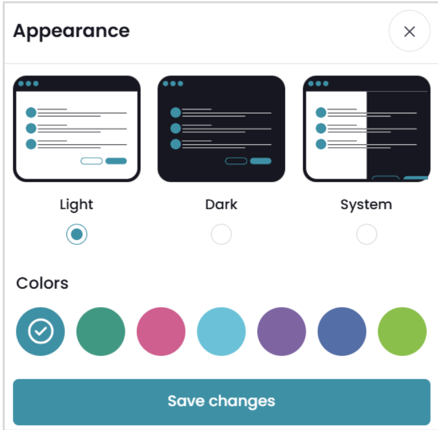


1.7 Defining user-based settings

You can adjust certain user-specific settings (e.g appearance and language) by selecting Profile in the bottom-left corner.



Appearance enables customization of the app's appearance. You can use the app either in the dark or light mode. You can also select your user interface color from 7 different colors.



If you work with multiple CSI databases, you can change the organization (CSI database) to which the app is linked by selecting the arrow button in the **Organization** field.

Language enables you to use the app in English, Finnish, or Swedish.

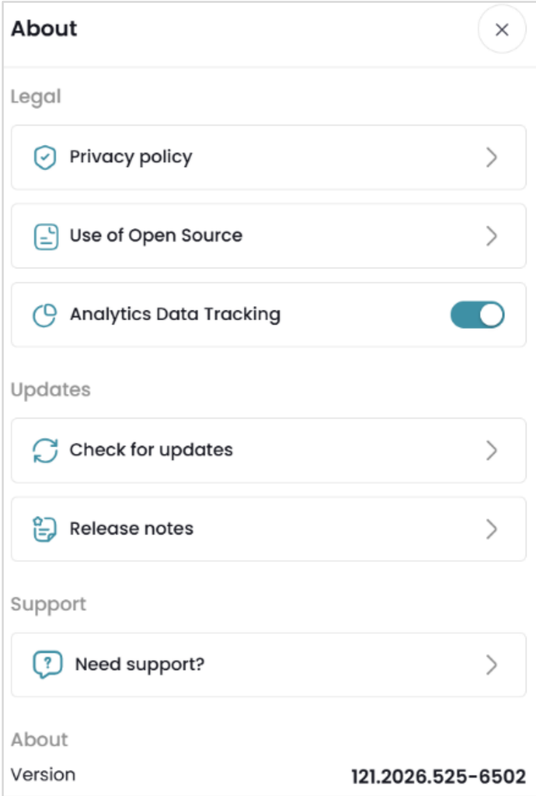
The top of the screen displays your user information. The Profile photo placeholder enables you add a photo to the profile if you wish.

Application parameters allow you to configure the application to start automatically when your computer starts and to minimize to the notification area when the window is closed. Here you can also view default values for the following parameters, which affect transactions created via the app: minimum duration, rounding accuracy, transaction type, and default transaction type.

By selecting the **Features** button you can enable or disable app features, as described in chapter 1.2.

The **About** button offers:

- **Legal** information about CSI's Privacy policy, use of open-source components in the app and analytics data tracking (permission to collect and utilize data to improve the app).
- **Check for Updates** button that enables you to update to the latest app version.
- **Release notes** button listing the release information of the latest version.
- **Need support?** button enabling you to send email to the CSI support.
- The current version number of the app is displayed at the bottom of the screen.



The **Logout** button at the bottom of the profile view signs you out of the application and returns you to the login view.

2. ADDING TRANSACTIONS

You have several options to record transactions in the app:

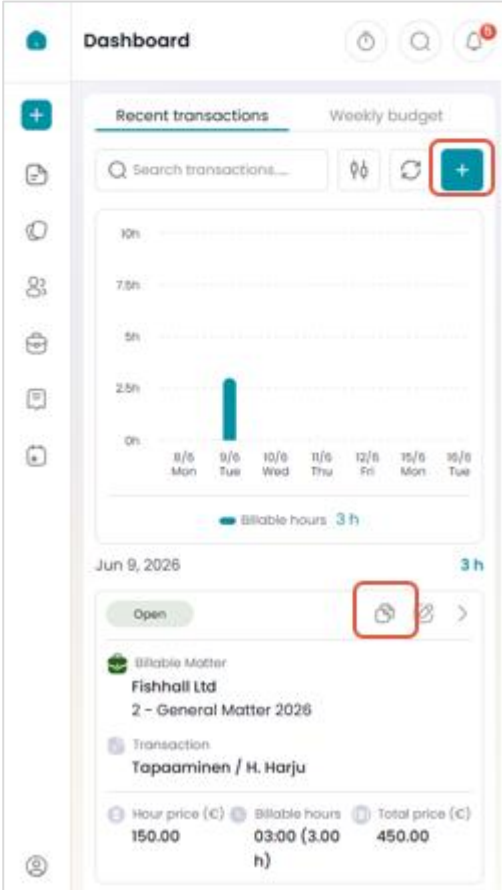
- In the **Dashboard** or the **Transactions screen**, by adding a completely new transaction or using an existing one as a template.
- In the **Timesheet screen**, easily adding transactions for selected matters and dates. This option is recommendable if you mainly work on a few matters during the week.
- With the **"Quick Action > New transaction"** button available in the menu.
- In the **Matter screen**, by selecting the Entries tab.
- Using the **Timer.**

2.1 In the Dashboard screen

- Add a new transaction with the “+” button OR

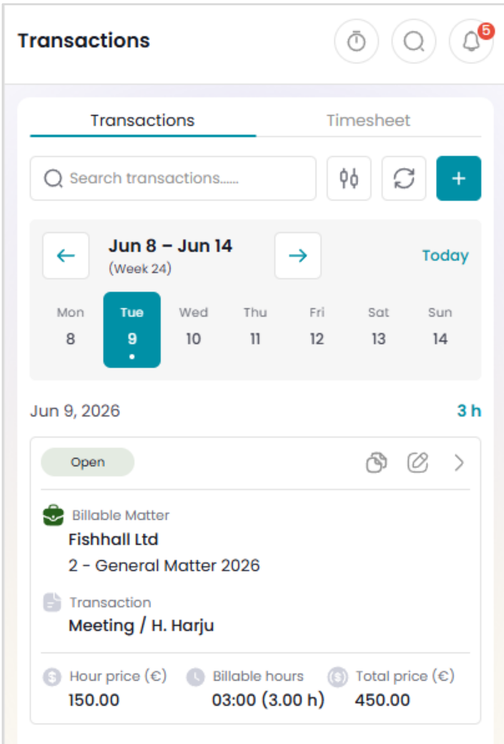
- Select “Use as template” to copy a suitable transaction, make the required changes to it and save.

  This works well if you are adding transactions to a matter to which you have already recorded work during the last week.



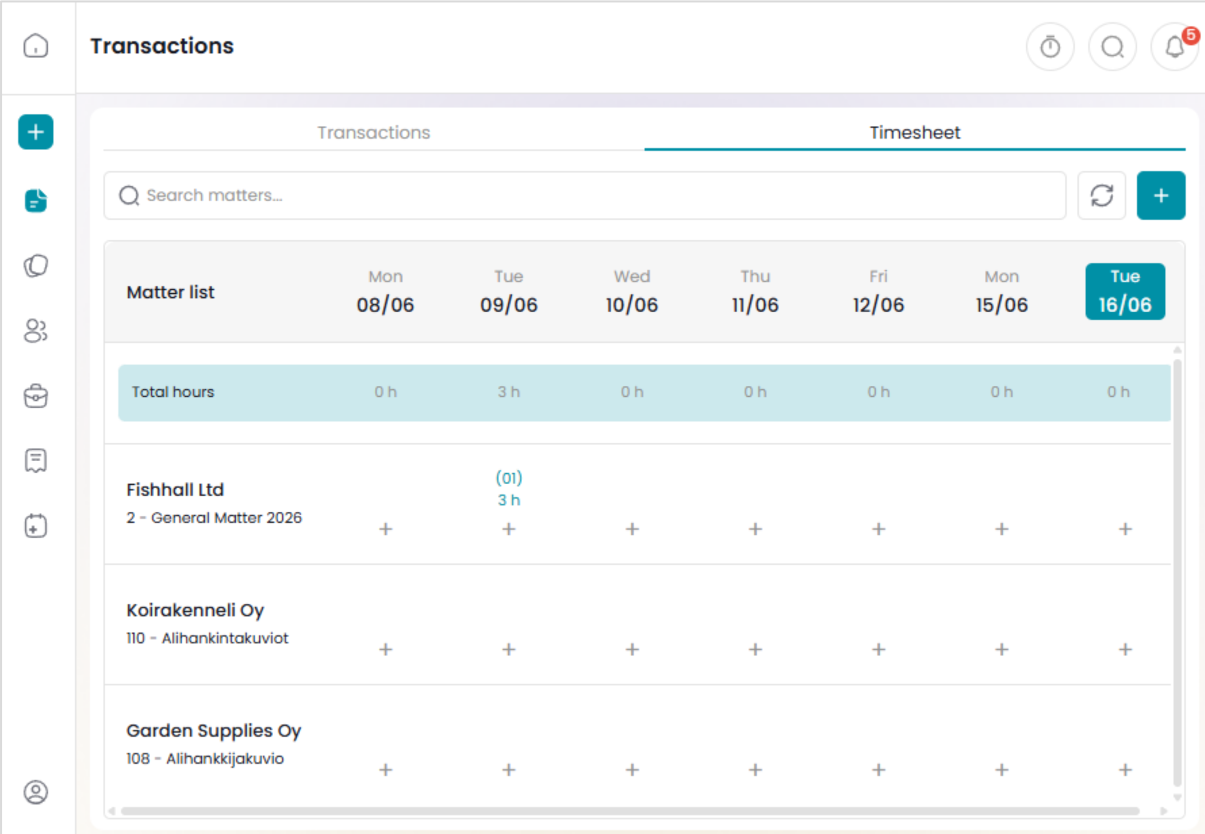
2.2 In the Transactions screen

- View weekly transactions by swiping the calendar horizontally. The dates having transactions are indicated with a dot. Your transactions for the chosen week are listed below the calendar.
- Add a new transaction with the “+” button or by using the “Use as template” button.



2.3 In the Timesheet

In the Timesheet tab, you can easily add transactions to multiple matters and dates.



As rows, the timesheet displays all the matters to which you have added billable transactions during the week. If the list of matters is long, you can search for a specific matter.

- The colored "+" button above the time sheet enables adding new matters to the list.

As columns, you'll see the last 7 days including the current day.

- Your total billable hours are summed up per day, and you can navigate between the days by swiping horizontally.

Each **cell** displays your total billable hours recorded for a specific matter on a particular date.

- Above the hour total, the number of transactions recorded in the matter is displayed.
- To view the transactions recorded, click the cell to open the transaction list.

You can add a new transaction by clicking on the "+" button in any cell.

- The selected date and matter are pre-filled and cannot be changed.

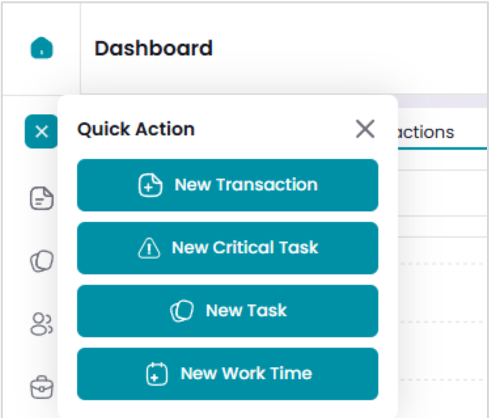
After completing and saving the transaction, the time sheet reflects the updated billable hour amount.

NOTE! Using the time sheet, you can only add transactions with hour-based transaction types. Thus, transactions recorded elsewhere in other units (e.g., units, minutes, days) are not displayed on the time sheet either.

2.4 Using the Quick Action button

The Quick Action button opens another menu from where a new transaction can be created. The menu is available everywhere in the app.

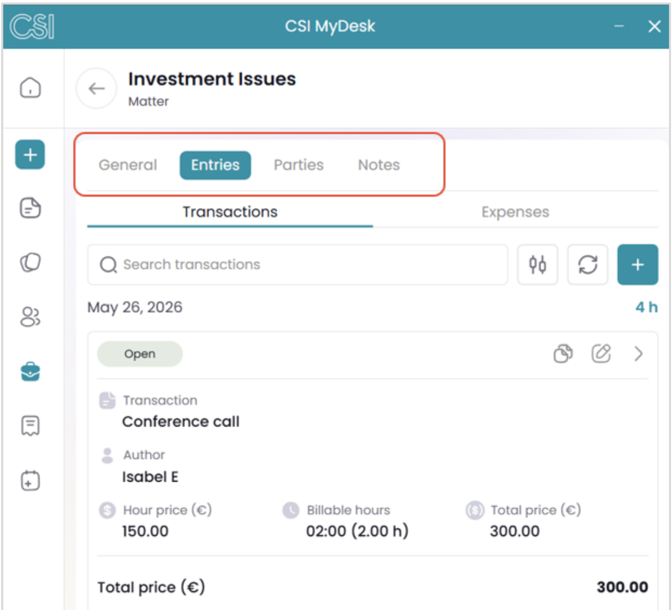
The button also allows you to add a new critical task, task, or work time.



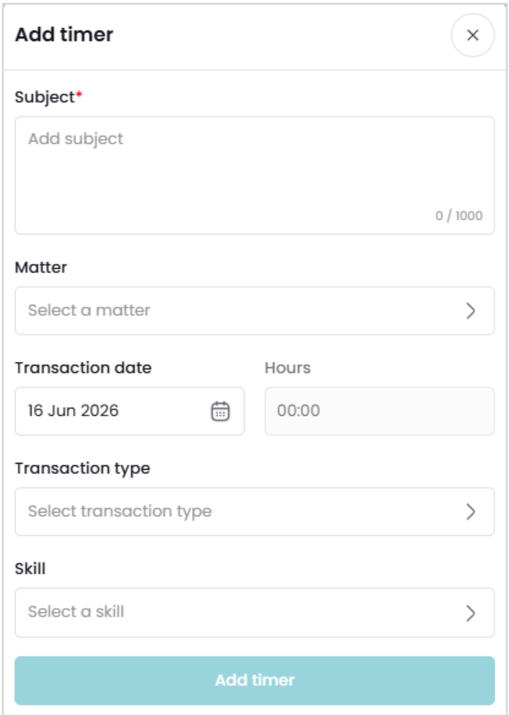
2.5 From the matter screen

You can also add transactions from the matter screen (More > Matters) by selecting a matter and clicking its Entries tab open.

The Entries tab displays both transactions and expenses recorded in the matter. When adding a new transaction here, the matter information is prefilled automatically.



2.6 Using timer

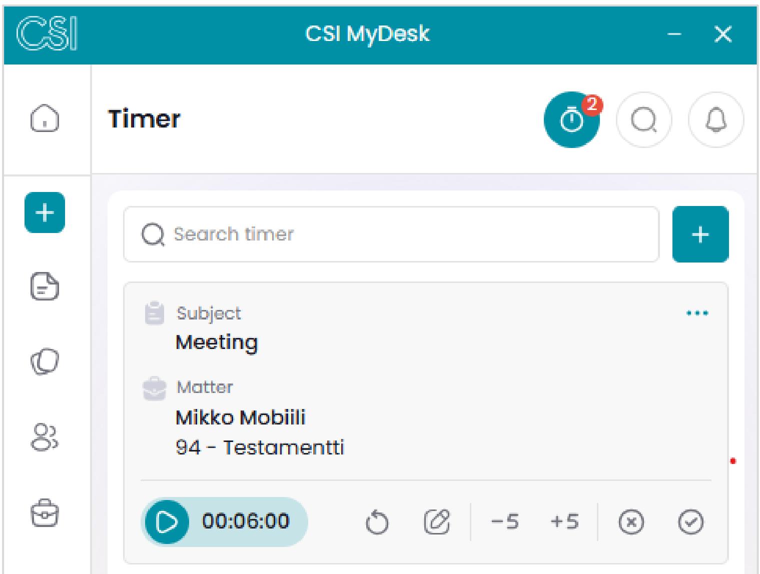


To measure the duration of your transactions, you can select on the top menu the Timer button.

The Timer screen displays any open timers you have. The “+” button adds a new timer.

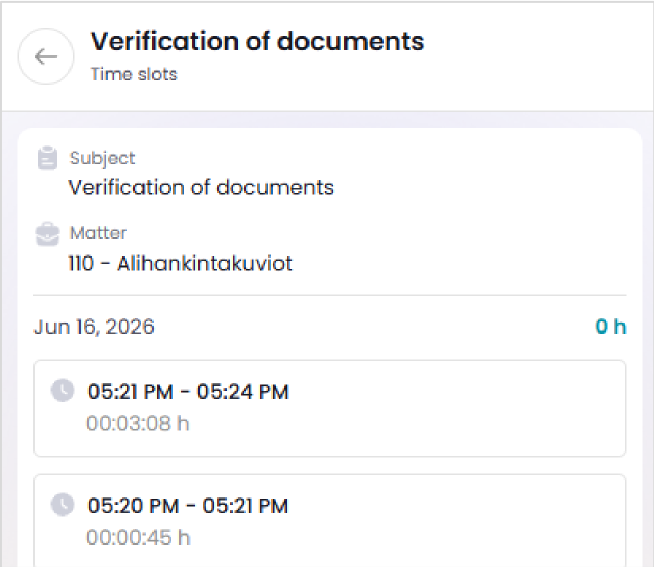
1. Start by entering information for the timer. Click “Add timer” to open the actual timer screen.

2. Now, start the timer with the button.



3. Stop the timer by clicking .
   - The “-5 mins/+5 mins” buttons enable adding/deducting time.
   - The timer can be set to zero with “Reset”.
   - With “Close” you can leave the timer without saving its value.
4. “Save” opens a transaction screen where you can fill in the required details and save the transaction.

The application automatically records the time periods during which the timer has been running. You can view these time periods by clicking the three dots in the top-right corner of the timer.



If the timer is running, the application displays a ”Pause” icon. By clicking it, you’ll see the list of timers.

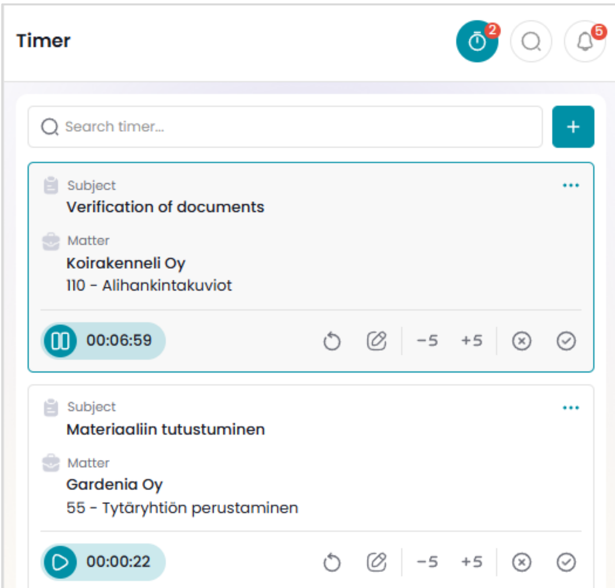
Managing multiple timers

If you work simultaneously on several tasks, you can measure their duration with multiple timers.

New timers are opened by selecting the “+” button next to the “Search timer” field.

The app lists all the timers on the Timer screen, and the Timer button on the top menu indicates the number of open timers.

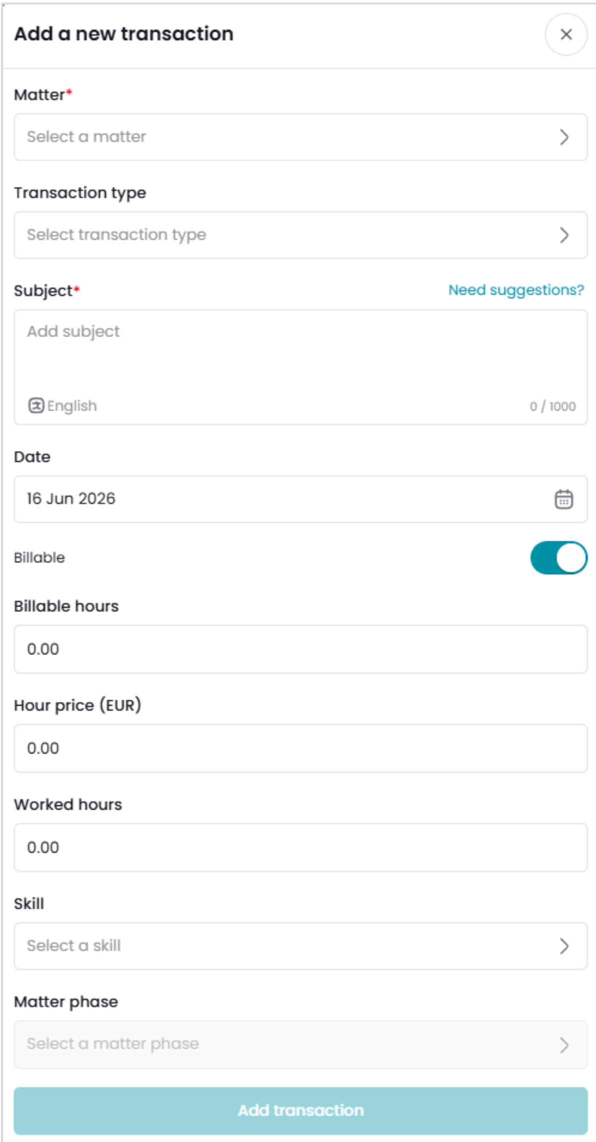
However, you can have only one active timer at a time. When you start one timer, the one that was previously running stops.



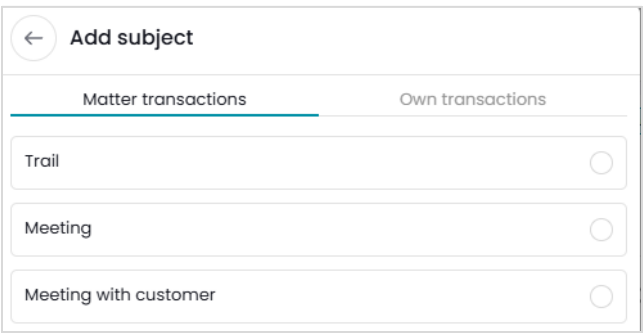
2.7 Data required to save a transaction

Saving a transaction with CSI MyDesk requires the same mandatory fields as in the CSI software:

- **Matter**: The app displays only your favorite matters by default. Remove the favorite filter to search also for other matters with their subject, matter number or customer name. The search covers all matters having the status Open and to which you have access rights. You can also limit your search to only billable, non-billable or internal matters.
- **Transaction Type**: When selecting the type, you can limit your search to only billable or internal types. You can only select active transaction types that are aligned with the chosen matter (internal for internal matters etc.).
- **Date:** By default, the current date.
- **Subject:** The description may contain max 1000 characters. If prefilled based on the transaction type selection, you can modify the field further. The subject will be printed on the invoice, so write it in the language of the matter shown in the subject field.



You can utilize the "Need suggestions" button to choose a suitable subject for the transaction. The subject can be selected either from the transactions added to the matter or from your own transactions added to any matter. Once chosen, you can still modify it.



In the **Billable** field, define whether the matter is "Billable" or "Non-billable”. In non-billable matters, the field is already locked to "Non-billable”. In internal matters, the field is not visible.

Enter **Billable Hours / Amount, Hour / Unit Price** and actual **Worked Hours** for the transaction. The app displays the currency of the selected matter. If needed, select also the **Skill** representing the specific expertise required for the work.

If phases have been defined for the matter, select a **matter phase** for the transaction.

When all the required fields are filled, and you save the transaction, the app returns you to the previous screen and locks the transaction’s Matter field to prevent accidental changes. If the transaction saving fails, you’ll get an error message.

Common reasons for transaction saving failures

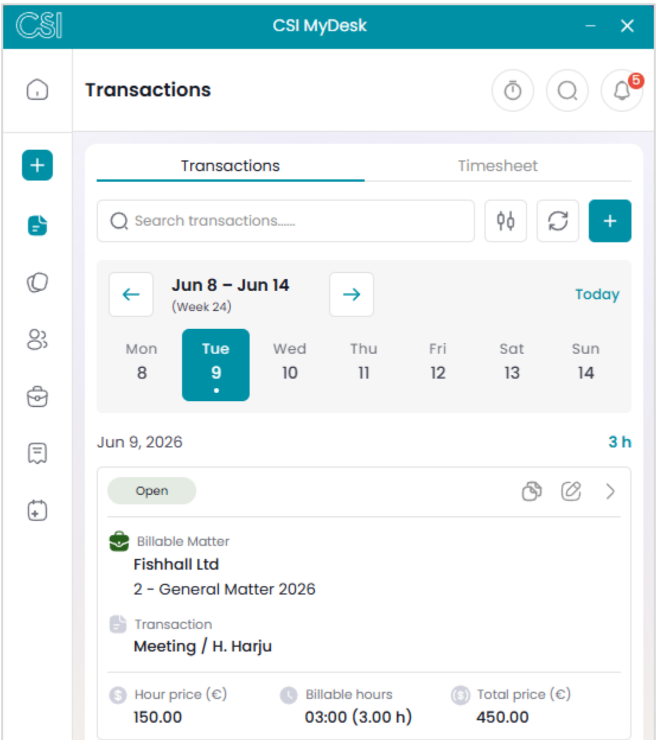
A few situations may prevent you from adding transactions to a matter:

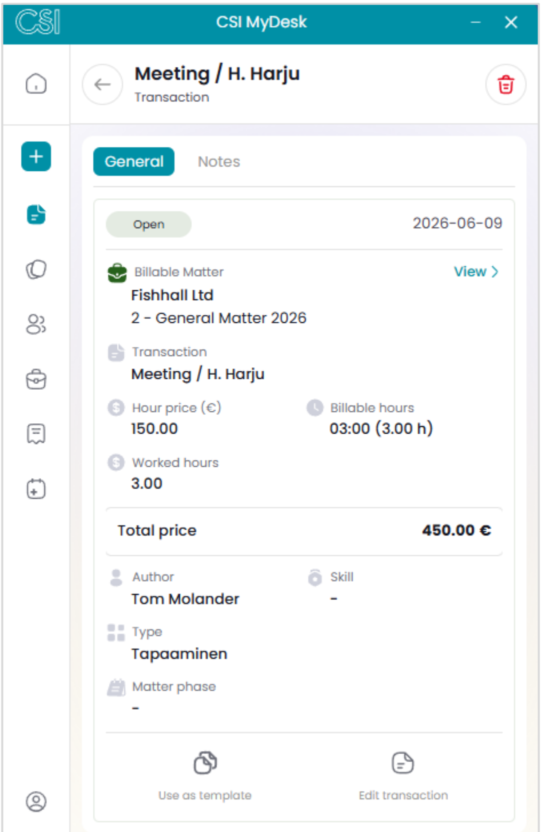
- The matter has a service restriction
- The registration period for transactions on the selected date has been closed
- A matter-related invoice (of the principal or payers) has been outstanding for a predefined period
- The matter principal or a matter payer lacks identification.

2.8 Viewing and editing transactions

You can view your transactions in the Transactions view where they are sorted by the transaction date. To ensure the information is up to date, you can click the -button. This will refresh the app and display an updated list of activities from the CSI database.

Clicking on a transaction on the list will open a detailed view of the entry.





The **General** tab displays the transaction's basic information. Next to the Matter field, the View button enables you to access the matter details. If the matter is billable but the price field is missing, your organization has decided to hide pricing information.

You can edit the transaction, or use it as template for a new transaction.

- You can only edit transactions which are created by yourself and have status "Open" or "Non-billable". If the settings made in the CSI software do not limit your rights, you can modify all transaction details except the matter and author fields. The "Save changes" button saves your modifications.
- Use as template duplicates the selected transaction and allows you just to modify the required details before saving the duplicate as a new transaction.
- **NOTE!** For the new transaction, the app always retrieves the current unit price for the copied transaction from the CSI software and sets the current date as its date.

2.9 Deleting transactions

You can remove transactions from the system with the Delete button. **NOTE!** Deleted transactions cannot be retrieved so the app requires confirmation before deleting them.

A transaction can only be deleted if:

- You are marked as the author of the transaction AND
- The transaction has the status "Open," "Non-billable," or "Reviewed" AND
- After clicking on the Delete button you confirm the deletion.

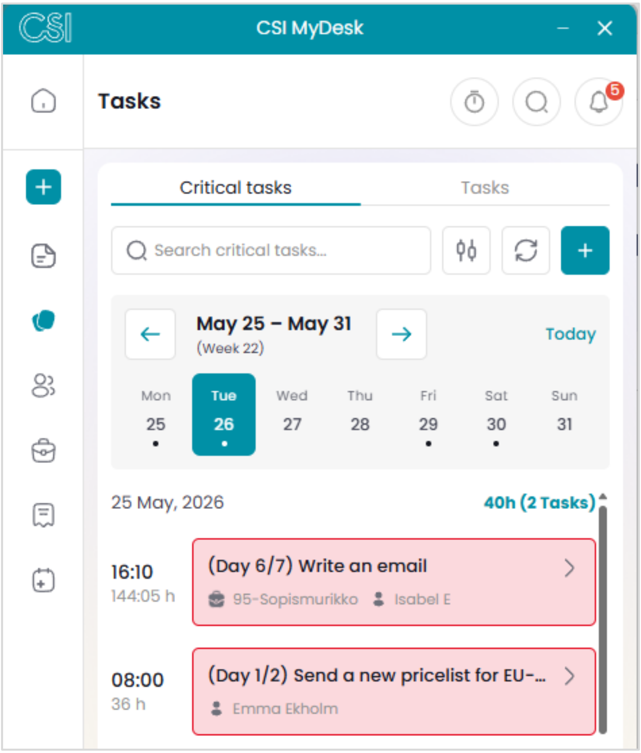
Once the transaction has been deleted, the transaction screen closes, and you are returned to the screen from which you accessed the transaction.

3. MANAGING CRITICAL AND NORMAL TASKS

The Tasks section enables you to view, add, and edit the tasks and critical tasks assigned to you. The Tasks screen displays Critical tasks and Tasks as separate tabs.

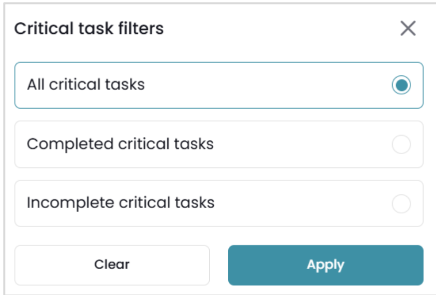
3.1 Managing critical tasks

By default, the app shows the Critical tasks tab.



The calendar above the critical task list indicates with a dot the dates containing critical tasks. Clicking a date opens the critical tasks registered for that date.

Using filters, you can view your completed critical tasks (Done), incomplete ones (other than "Done") or all.



When a filter is applied, a red dot appears in the filter icon. The Clear function removes all filters.

3.2 Viewing and editing critical tasks

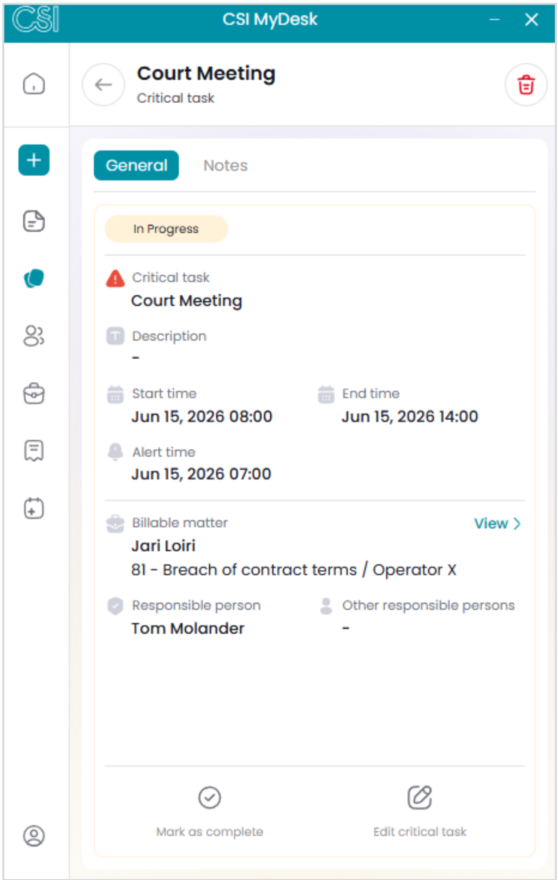
From the list, you can open an individual critical task to see its details.

The General view displays the critical task details, the related matter (if any) and other persons responsible for the critical task. Clicking the View button, you can access details of the matter.

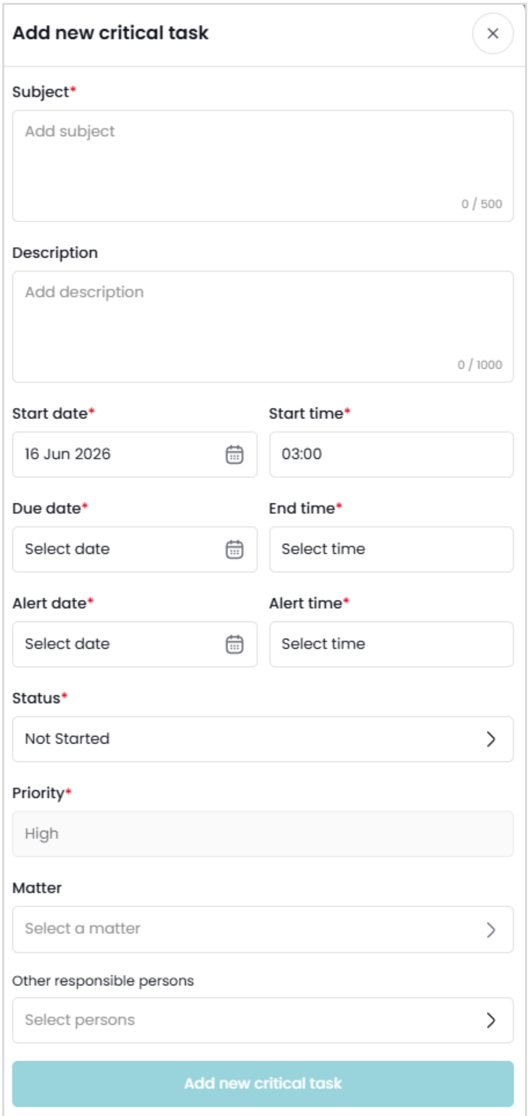
You can mark a critical task as completed or edit it. **NOTE!** If critical tasks in the CSI software are synchronized to Outlook, critical tasks cannot be edited in the app. With the Delete button on the top right corner you can also delete it.

By clicking the Notes tab, you can view notes related to the critical task and add new notes with attachments (max 1 MB).

After editing a critical task, the changes are saved with the “Save changes”. “Close”  in the top right corner leaves the page without saving changes.



3.3 Adding critical tasks



Critical tasks are added either in the Critical tasks screen by selecting "+" or by selecting Quick Action > New critical task.

NOTE! If critical tasks in the CSI software are synchronized to Outlook, you cannot create critical tasks in the app.

If you attach a matter to the critical task, only your favorite matters are listed by default. Remove the favorite filter to see all the matters. You can also search for a matter.

Once all the details are filled in, you can save the critical task.

"Close" ✕ closes the window without saving the critical task.

After saving a new critical task, you can add related notes and their attachments (max 1 MB) to its Notes tab. Notes which are marked as important are displayed on the top of the notes list.

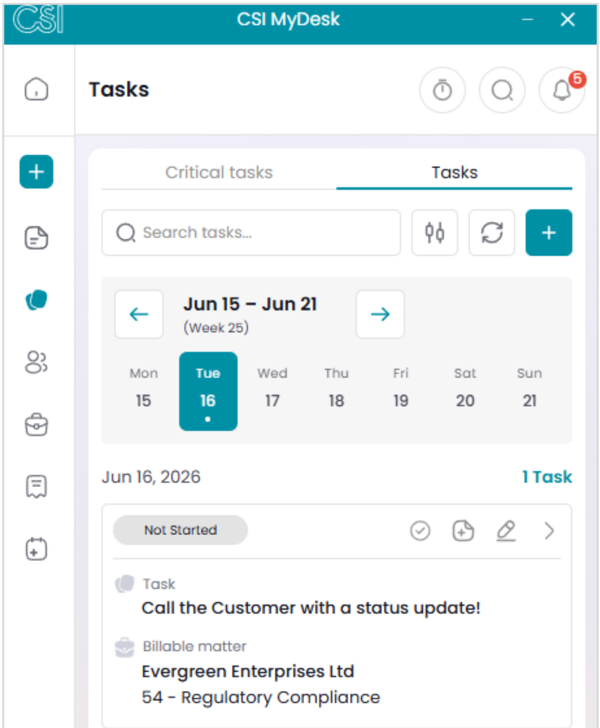
3.4 Managing tasks

To view and edit tasks, and to add new tasks, click the Tasks tab open.

The calendar above the task list indicates with a dot the dates containing tasks. Clicking a date opens the tasks registered for that date as a list.

Using filters, you can view your completed tasks, incomplete ones or all.

You can click any of the tasks on the list to open it for viewing or editing.

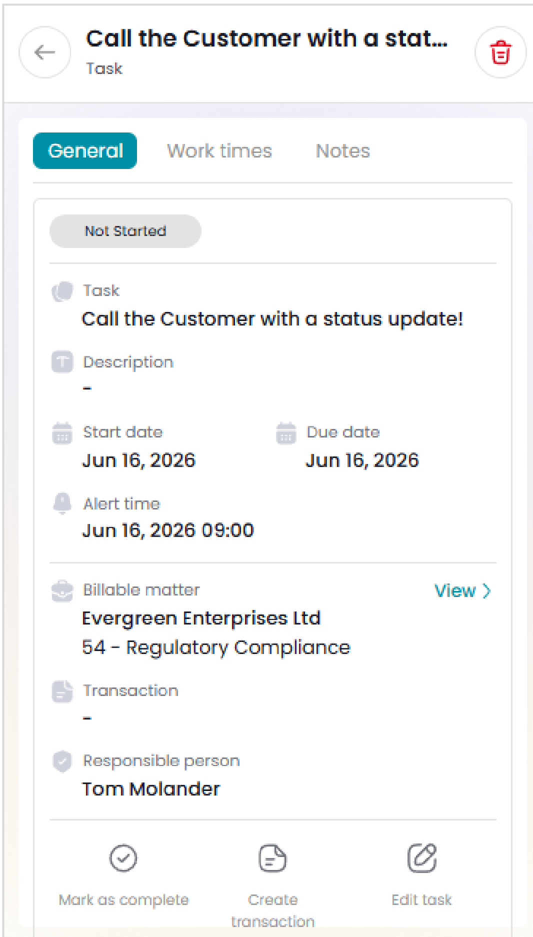


The General tab of a task displays its details and related matter (if any). If there is a matter linked to the task, the View button enables you to view additional matter details.

You can mark the task as completed or edit it. Additionally, you can create a billable transaction from the task by filling in the required fields.

The Work times tab allows you to attach the task to a work time entry.

In the Notes tab, you can view notes added to the task or add new ones with attachments (max 1 MB).

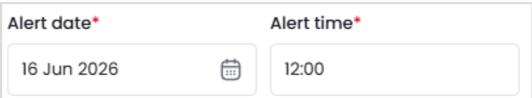


New tasks can be created in the Tasks tab by selecting the “+” or by selecting Quick Action > New Task from the menu.

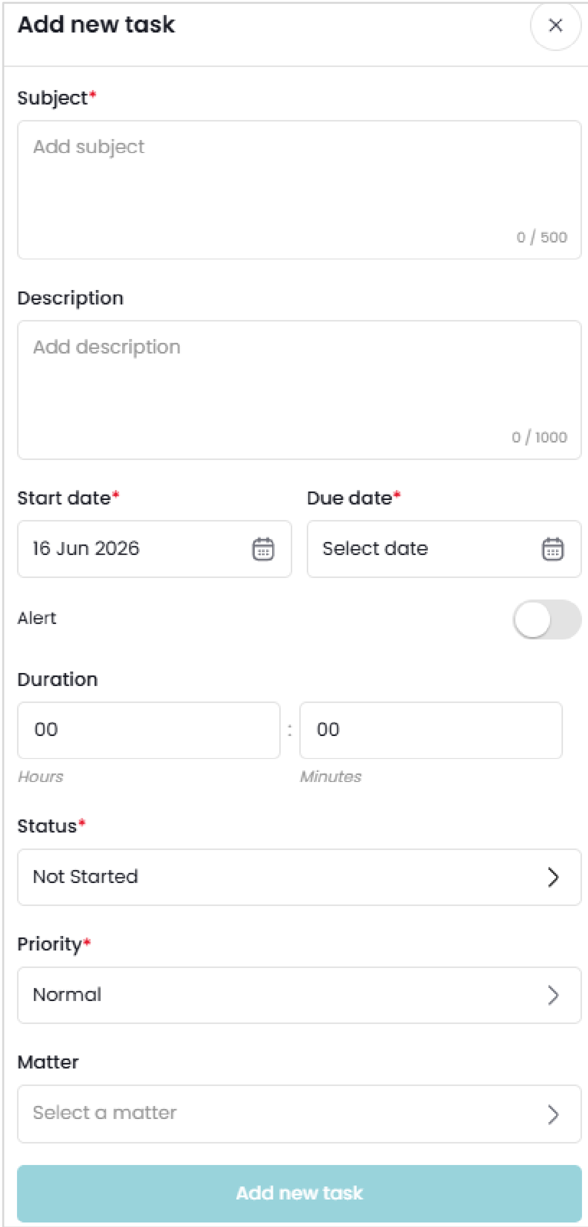
In the task creation screen, you can enter task details and the matter if the task is matter related. By default, the app lists your favorite matters, but by removing the favorite filter you can see all the matters.

Fill in at least the start date and due date for the task, as well as its duration and status.

If you select the Alert setting, the app opens new fields for entering the alert date and time.

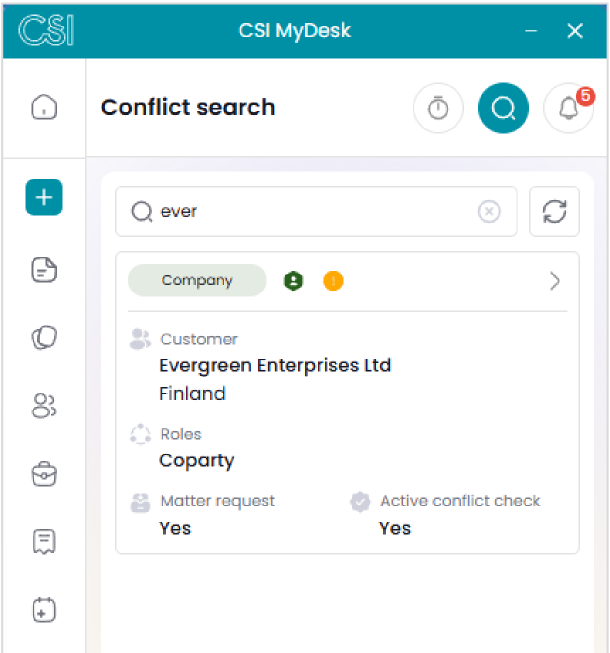


Once you save the task, its Notes tab gets active and enables you to add notes and their attachments (max 1 MB) to the task.



4. CHECKING CONFLICTS OF INTEREST

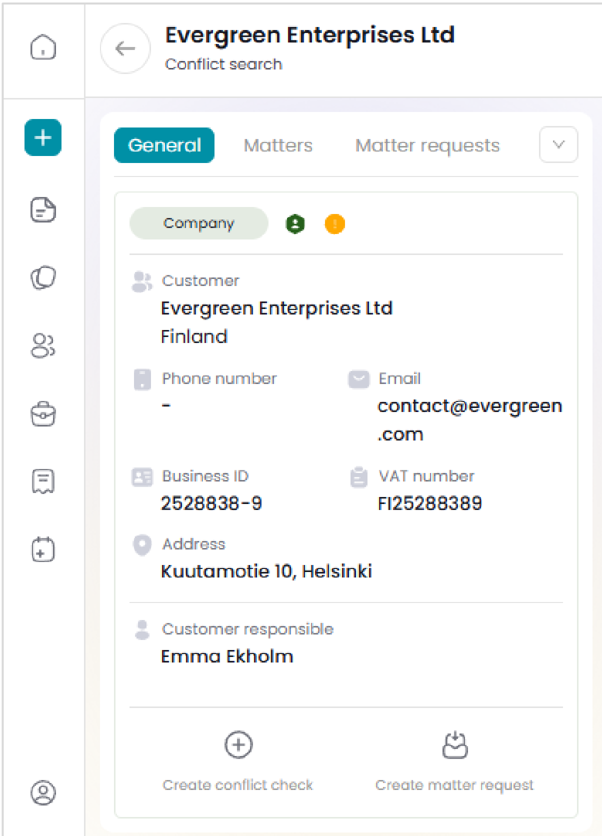
To check the customer's conflicts of interest, click on the magnifier button in the top menu.



The button opens a conflict search screen where you can look for the customer to be checked. With the search criteria entered, the app looks for matches and displays the necessary details for each customer.
The icons on the customer type row indicate which roles the customer has had in the matters saved in the CSI software:

- **Grey:** No role in any matter
- **Green:** Coparty in one or several matters
- **Red:** Opponent in one or several matters
- **Yellow:** The customer is either blacklisted or has a matter request or sales opportunity.

The fields also display if the customer has matter requests, active conflict checks, or open sales opportunities, or has been blacklisted.



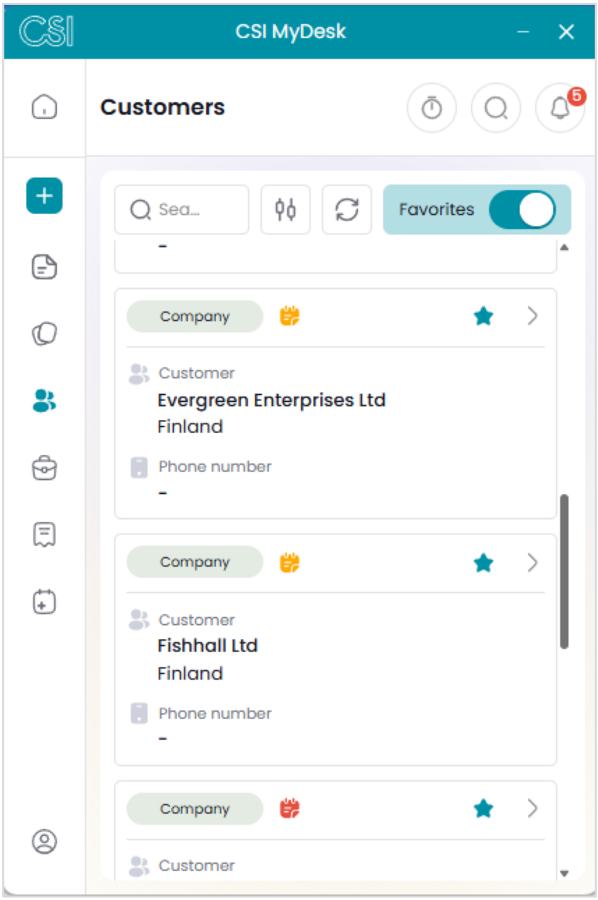
By clicking on an individual search result, you can open the customer information in a separate screen. The customer-related details such as matters, matter requests, former conflict checks, and notes can be found in their own tabs.

Once you have checked all the relevant details and wish to continue, click on the "Create conflict check" button to save the conflict check for the customer. It is saved with the status "In Progress" and will appear in the future conflict search results.

However, you cannot send conflict inquiries or approve/reject the conflict check in the app. These functions must be performed in the CSI software.

If the conflict search did not reveal any obstacles for taking the matter, you can also create a matter request from this screen by selecting the “Create matter request” button.

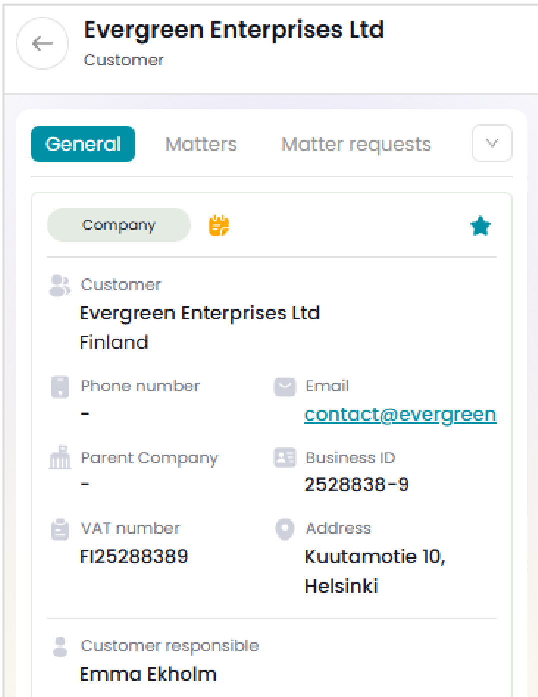
5. VIEWING CUSTOMERS



The Customers section enables you to view the customer data but not to edit it or add new customers. To view a list of customers, click on the  -button.

The search finds customers based on the VAT number, customer name, or business ID. Using the filter, you can restrict the search only to companies or private persons. You can also filter out your favorites or all customers by toggling the favorite button in the bottom right corner.

In the list you’ll see the customer details: customer type (company/private person), customer’s name and home country, possible favorite status (green star), and customer’s phone number.



By selecting any of the customers on the list you can see their details.

By clicking the email address, the app opens your email application and prefills the customer’s email address as the recipient.

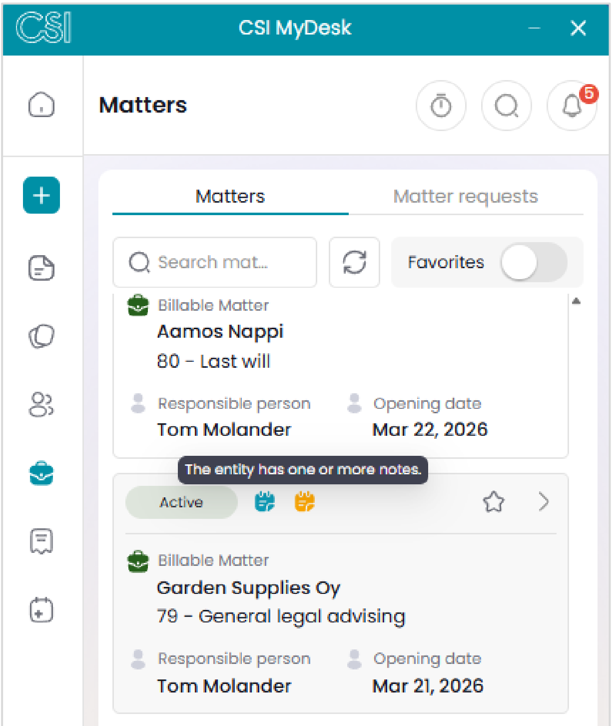
In the Matters, Matter requests, Conflict checks or Notes tabs, you’ll find additional customer-related information.

6. MANAGING MATTERS AND MATTER REQUESTS

The Matters section behind the button enables you to search, filter, and view matters and matter-related information. You cannot add new matters, but CSI Lawyer users are able to create new matter requests on the Matter Requests tab.

The Matter Requests tab enables the same functionality for matter requests.

6.1 Viewing matters



The Matters tab lists all the matters available in the CSI software and offers a search bar and filtering options to find the desired matter. You can search for all matters or just for your favorite ones.

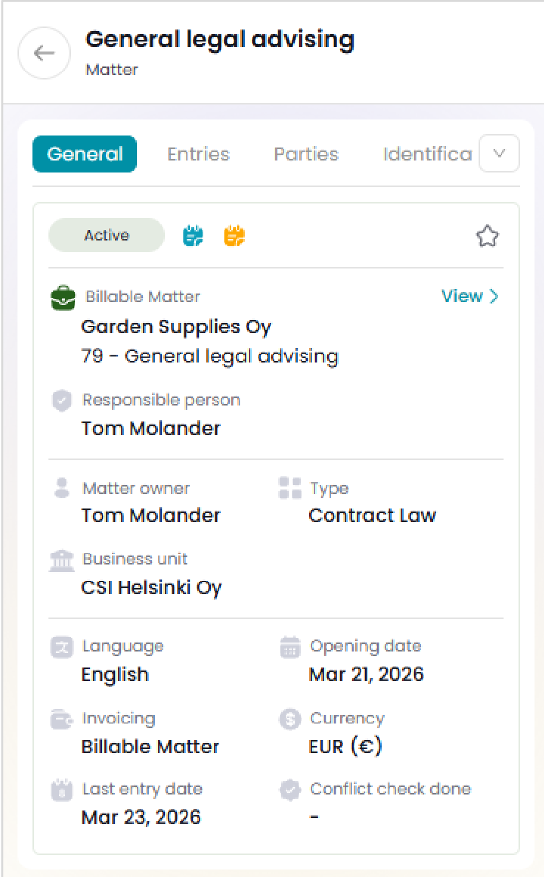
The icons on the matter status row indicate:

- Whether the matter has notes
  - Yellow: at least one note
  - Red: at least one important note
  - Turquoise: at least one important related note
- What type of matter it is:
  - Non-billable
  - Main matter or sub-matter
  - Fixed-fee matter
  - Insider matter

An icon has also been added in front of the matter type to indicate whether the matter is: a) Billable , b) Internal , or c) Non-billable .

You can click on the matter on the list to see its details.

The additional matter-related details are organized into separate tabs for General, Entries, Parties, Identifications, and Notes.



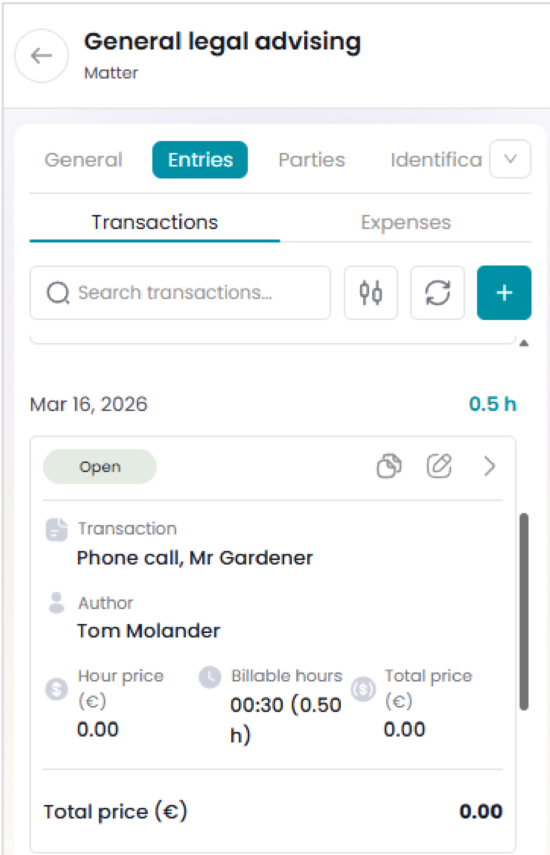
Matter-related entries

The **Entries** tab lists all matter-related transactions and expenses.

You can search for specific transactions or expenses and filter out all/open entries and either your own entries or the ones made by others.

For restricted users, these filters are locked to “My own”. The parameters defined in the CSI software may also limit users’ access to their own entries only.

You can add a new transaction using the green **Add transaction** button. Expenses cannot be added in the application.

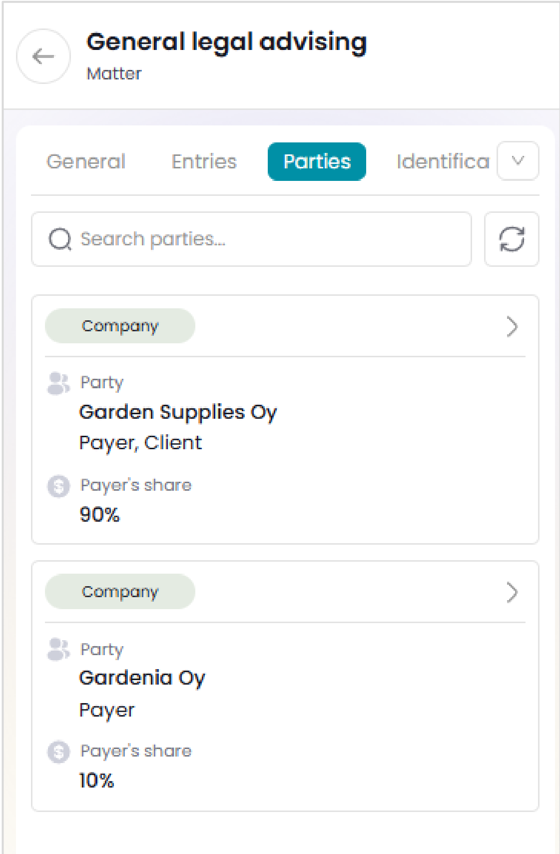


Matter parties

The **Parties** tab displays all customers involved in the matter. To restricted users, matter parties are not displayed. If there are multiple parties, you can search for a party with the name.

For each party the app displays the customer type (company/private person), name, roles within the matter, and the payer's share.

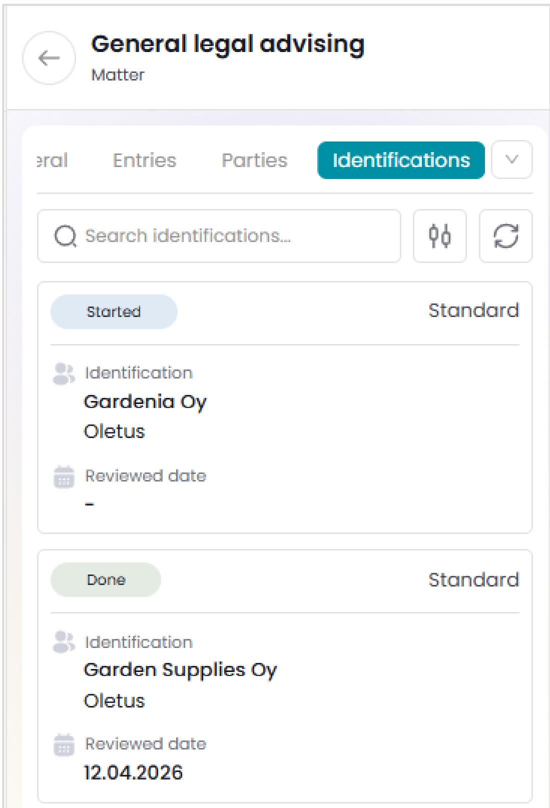
You can click on any party to view its details: the home country, phone, email address, business ID and VAT number, address, and the customer responsible. The screen also allows you to view the party's other matters and notes.



Matter-related identifications

If identification is in use, the Identification tab displays a list of any matter-related identifications which concern the customers involved in the matter. The tab is not displayed to restricted users.

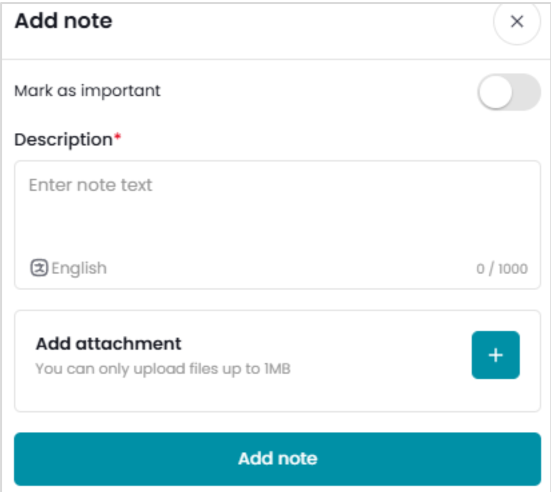
For each identification event, the app displays its status (not started, started, done), the required Identification level (simplified, standard, enhanced, not needed), the customer's name, the risk assessment level and the date when the identification was last reviewed.



Matter-related notes

In the Notes tab, you can store additional information relevant to the matter. Notes are not displayed to restricted users.

For each note entry, the app displays the author of the note, the note text, and the creation date.



By clicking on the Edit button, the app opens a screen where you can edit the note content. After making your changes, click somewhere at the top of the screen to hide the keyboard and to have the Save button displayed.

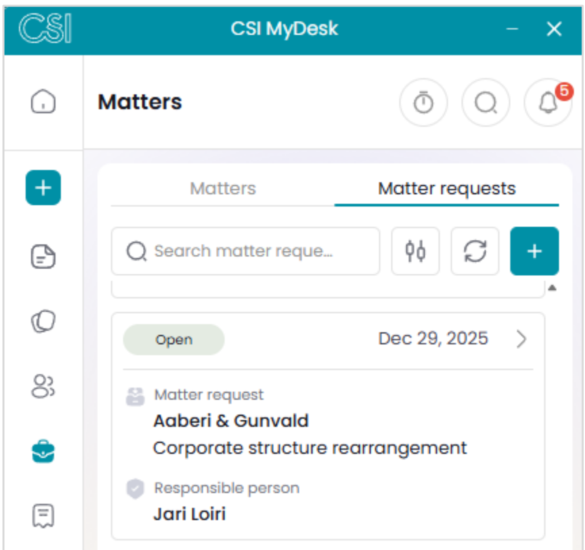
If a note has attachments, you can open them by clicking the button. The same function also allows you to download the attachment and save it to your chosen location. You can also delete notes from a matter.

6.2 Viewing matter requests

The Matter requests tab displays all matter requests which have the status “Open” and to which you have the necessary access rights. You can search for specific matter requests based on their subject or the principal’s name.

For each matter request, the creation date, client, subject, and responsible lawyer are displayed.

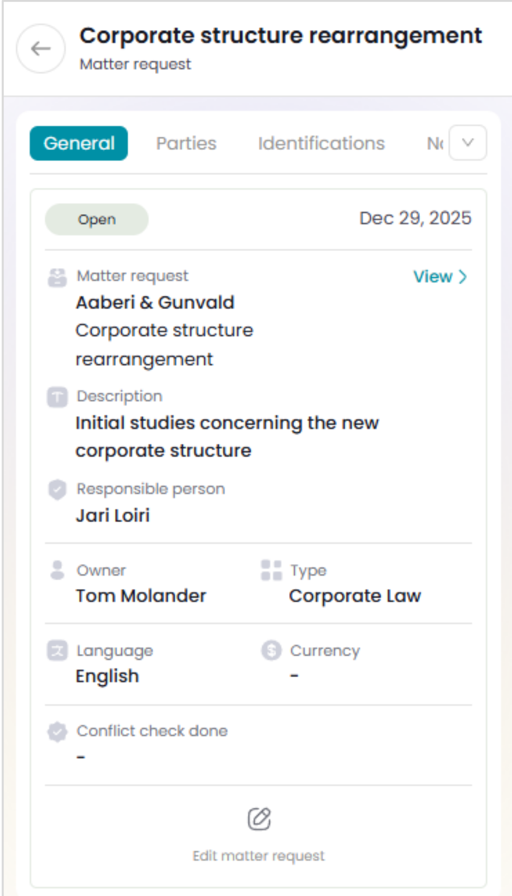
By selecting a matter request from the list, you can view its additional details.



The screen of an individual matter request contains its owner, type, language, and currency.

If a conflict check has been performed for the request, the “Conflict check done” field is displayed with the conflict check date.

The screen allows you to view further details of the matter principal as well as the matter request related parties, identifications, and notes.



6.3 Creating matter requests

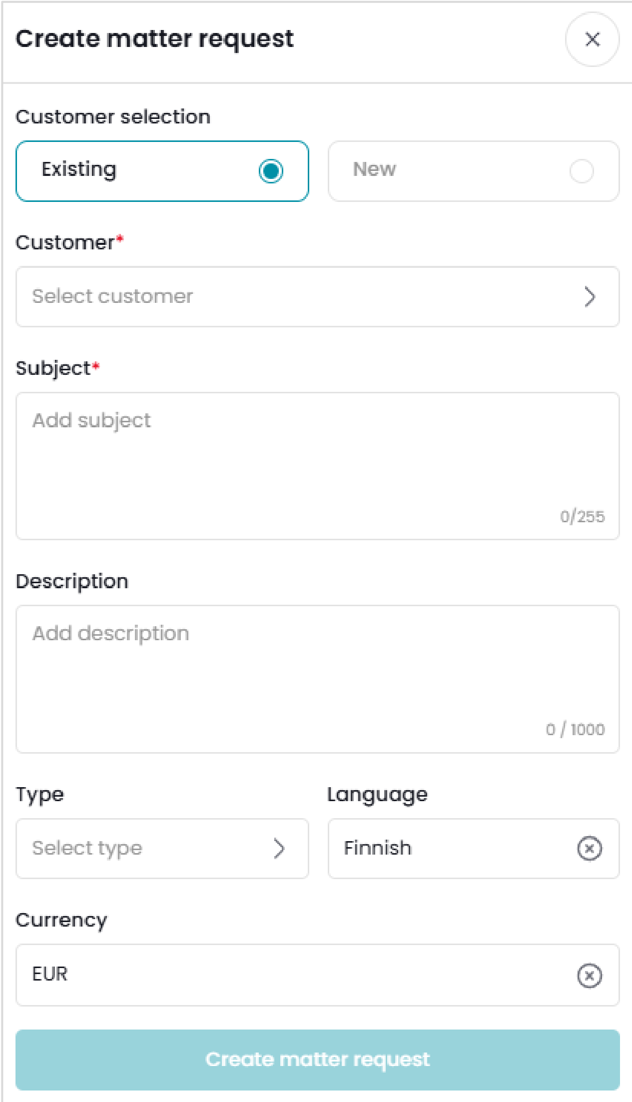
You can create a new matter request either via a conflict check or directly from the case request list by clicking the + button.

The button opens a view for creating a new matter request. You can either add an existing client as the principal for the matter request or create a completely new corporate customer or private person.

To save a new customer, the type, name, and country must be specified.

Once a customer has been selected or a new one has been created, the customer is added to the matter request. You can then enter a subject and a more detailed description, as well as select the matter type, language, and currency. After entering the details, you can save the matter request by clicking the 'Create matter request' button.

After the matter request has been saved and reopened, the tabs Parties, Identifications, and Notes are displayed. You can add notes to the matter request, but adding other parties, performing customer identification, and creating matters must be done in the CSI software.



7. INVOICING-RELATED FUNCTIONS

“My Invoicing” in the left column displays your billable matters and preliminary invoices.

7.1 Viewing my billable matters

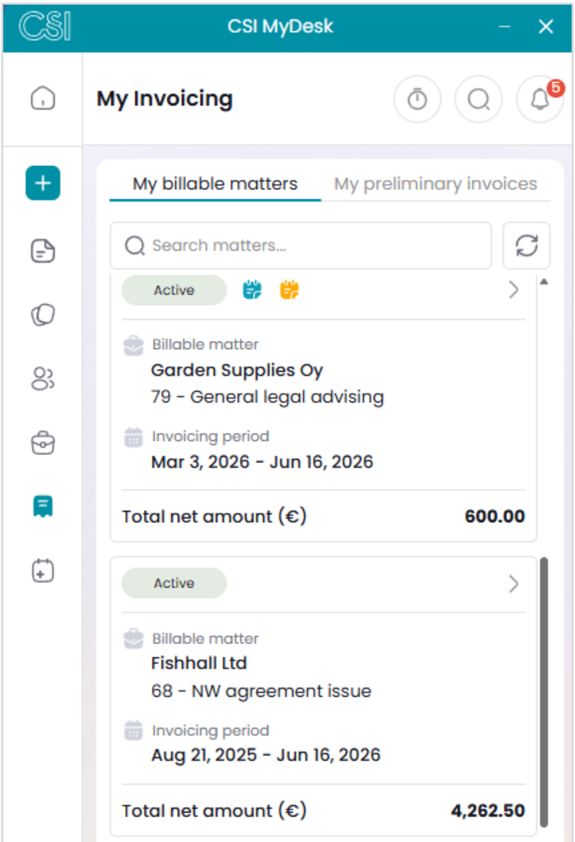
"My Billable Matters" displays a list of your matters which are ready for invoicing. It lists matters

- Where you have the role as owner, responsible person or assistant AND
- Which have status "Active” AND
- Which have uninvoiced transactions / expenses with dates falling within or preceding the matter's current invoicing period.

You can search for a matter with its subject, number and principal’s name.

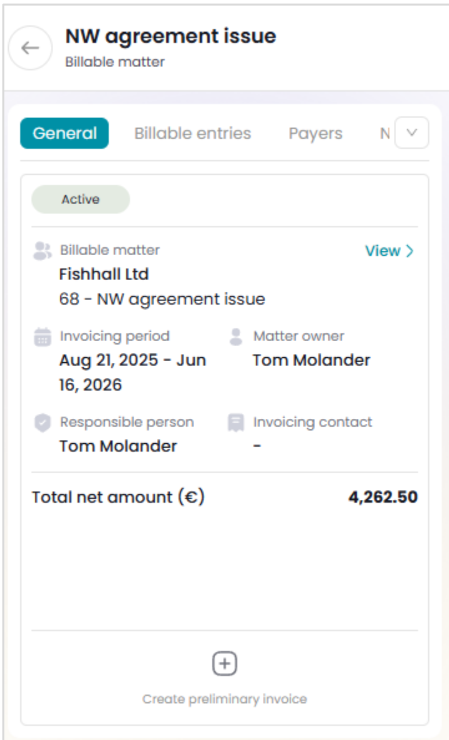
For billable matters, you’ll see their status, red note flag informing about important notes, the matter principal, number, subject and invoicing period.

The total net amount shows the total amount of unbilled entries in the matter currency.



By selecting a billable matter from the list, the app opens a screen displaying further details of the matter on separate tabs.

- **General**: Displays the basic details of the matter and enables viewing principal details.
- **Billable entries**: Lists all billable transactions and expenses recorded in the matter. Transaction prices (unit and total price) are displayed in the currency of the matter. Expense prices are displayed in the bookkeeping currency of the software.
- **Payers:** Lists all matter-related payers displaying their type (company / private person), name, party roles in the matter, and share.
- **Notes:** Displays all matter-related notes.

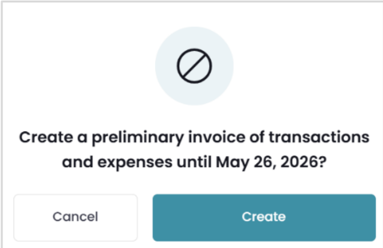


Using the "Create a preliminary invoice" button on the General tab, you can create a preliminary invoice for the matter.

7.2 Creating preliminary invoices from billable matters

The "Create preliminary invoice" button on the billable matter screen creates a preliminary invoice for the matter.

The preliminary invoice contains all uninvoiced transactions and expenses having their date until the end date of the invoicing period of the matter.



If the preliminary invoice creation fails, the app displays an error message and redirects you to the billable matter screen. Reasons which may prevent creating a preliminary invoice are:

- The billable matter has sub-matters that are invoiced through the main matter
- The billable matter has incomplete transactions, e.g. due to lacking value in fields which are set mandatory in the software
- The matter has an existing open, reviewed, or uplifted/downlifted preliminary invoice
- The payer has an active discount table.

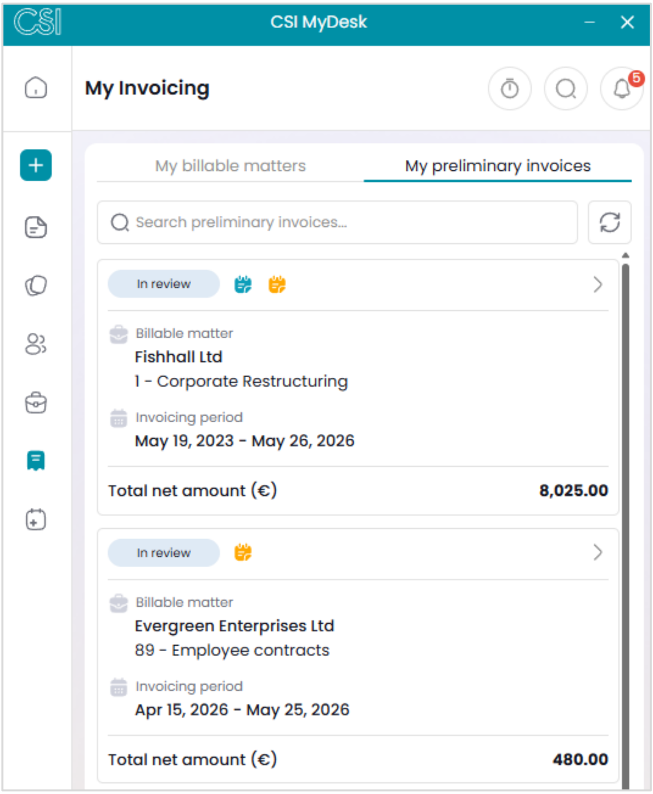
7.3 Reviewing my preliminary invoices

The app enables you to review preliminary invoices but not to approve them.

"The "My preliminary invoices" screen which you can access clicking on the **My Invoicing** in the left column displays a list of preliminary invoices which await your review.

The quickest way to check if you have any preliminary invoices which await your review is to click the Notification button on the top menu.

In case you have a lot of preliminary invoices to be reviewed, you can search for a specific one from the list with the subject or number of the matter, or the principal's name.



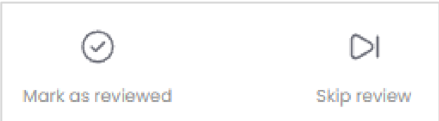
Of each preliminary invoice the app displays the matter's subject and number, principal's name, invoicing period and the total net amount both in the system and matter currencies. If important notes have been added to the preliminary invoice, they are indicated with a red icon. Important related notes e.g., notes added to the matter principal of the preliminary invoice are shown with a turquoise icon.

When you click on a preliminary invoice, the app opens its screen and displays the following details as tabs:

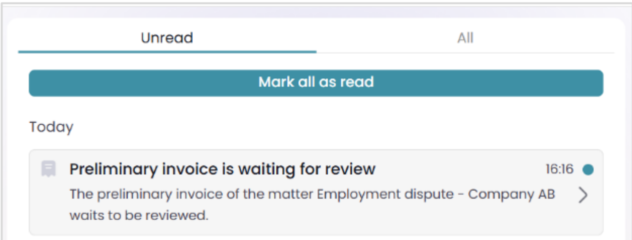
- **General**: Review status of the preliminary invoice (In Review/Reviewed/Open), the matter's principal, number and subject, invoicing period and the total net amount of entries in the matter currency. If the matter has notes, a note indicating their importance is displayed after the status icon.
- **Billable Entries:** All transactions on the preliminary invoice with their date, status, subject, author, billable hours/quantity and hour/unit and total price in the matter currency. All expenses with their date, subject, author and the total price in bookkeeping currency.
- **Payers**: All parties set as payers in the matter, with their customer type, name, party roles in matter, and percentage.
- **Notes:** All notes added to the preliminary invoice with their author, note text, and creation date.

The action buttons available within the Preliminary Invoice screen depend on its review status.

- When the preliminary invoice has status "In Review", you can mark it reviewed on your behalf or skip the review. Both functions move the preliminary invoice to the next reviewer.

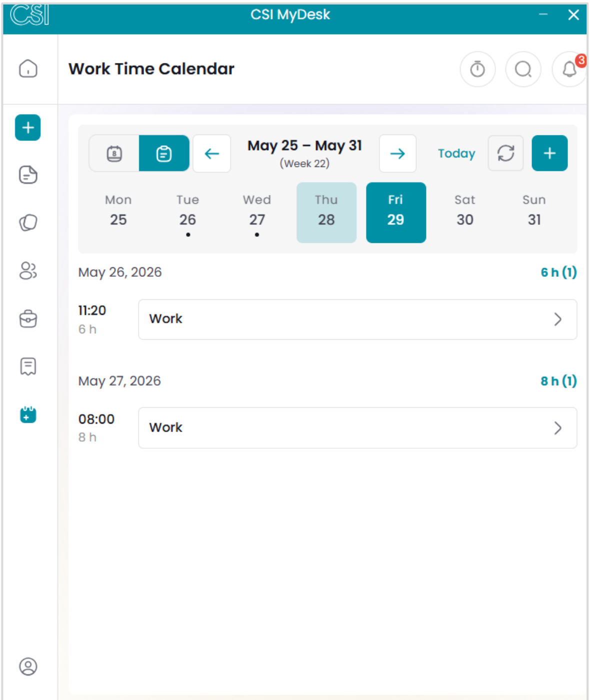


- When the preliminary invoice has status "Reviewed", it has been reviewed by all the users in the review process and awaits approval. The app provides a notification of the approval need and displays it on your list of preliminary invoices but does not enable the actual approval. You need to open the CSI software to approve it.



- When the preliminary invoice status is "Open", the preliminary invoice review process is not in use. The preliminary invoice in the app has no review buttons, and you need to open the CSI software to mark it approved.

8. REGISTERING WORK TIME



The app enables you to register work time by selecting Quick Action > New work time or Work Time Entries from the menu. The Quick Action button opens the Work time screen where you can add the required details and save your work time entry.

The Work Time Entries selection opens a Work Time Calendar with daily and weekly views. The weekly calendar provides an overview of work times for the entire week. In the daily calendar, if its duration of an entry is less than an hour, only the subject of the work time is displayed. For entries exceeding an hour, the card also includes associated matters.

You can select a specific day from the calendar to view its work time entries. In the calendars, a dot indicates that there are work times registered for that date.

You can add a work time entry by clicking “+”, entering the required details and saving the entry.

You can open a work time entry in a single view to see its details, edit or delete it, or create a transaction from it. A time entry can also be used as a template for a new time entry by selecting “Use as a template. The app will then open a new work time with the previously entered information prefilled.

You can also link an activity to a work time entry. If the time entry is linked to a matter, a list of the matter’s activities is shown in the field. Please note that if you select an activity linked to another matter, the matter for the time entry will also be updated.

If you delete a time entry that is linked to an open (unbilled) transaction, a confirmation dialog will appear where you can a) delete both the time entry and the transaction, b) delete only the time entry, c) cancel the action.

If the time entry is linked to a transaction that is no longer open, the system will warn you that the transaction cannot be deleted, and you can a) proceed (delete only the time entry), or b) cancel (the time entry is not deleted). This ensures that no links between time entries and transactions remain if one of the entities is deleted.

9. NOTIFICATIONS ABOUT TASKS AND USER ACCOUNT CHANGES

CSI MyDesk's "Push" notifications keep you informed about different events and tasks and Email notifications about important user account related events. A consistent time zone is used for all notifications, so you can rely on the received information regardless of your location. Notifications appear in the user interface language of the CSI software.

If the CSI MyDesk application is closed but still running in the background (when the "Minimize app to notification area when window is closed" setting is enabled), push notifications will also appear in the bottom-right corner of your computer.

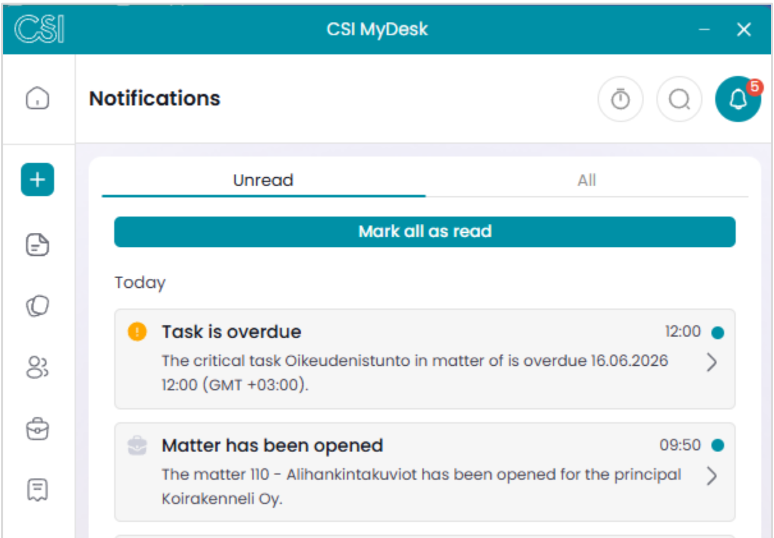
Push Notifications

Push notifications enable you to take actions when needed.

- **Critical Task Alerts:** Inform you about upcoming critical tasks assigned to you. A notification is sent based on the pre-defined alert date/time set or, if undefined, at 8:00 AM on the critical task's due date.
- **Task Notifications:** Inform you about new or upcoming tasks assigned to you. Like critical tasks, the alert timing is based on a pre-defined alert date/time or defaults to 8:00 AM on the task's due date.
- **Matter Openings:** Inform you when a new matter is opened where you have a responsibility role.
- **Preliminary Invoices:** Inform you when a preliminary invoice is ready for your review.
- **Preliminary Invoice Approvals:** You may also receive notifications regarding preliminary invoices which require approval. However, preliminary invoices must be approved in the CSI software, so in the app, you can just click OK to continue working.

In the notification list:

- There are two tabs: one for unread notifications and one for all notifications.
- Different notifications are marked with designated icons. The newly received notifications are marked with a different color and a colored dot.
- You can click an icon to open the related entity directly.
- You can mark all notifications as read using the "Mark all as read" function. The first time you use this function, an information dialog will be displayed. Once all notifications are marked as read, the Unread tab is cleared. Note: If you open a notification in CSI Mobile or another CSI application, it will also be marked as read in CSI MyDesk.



Email Notifications concerning user account

If there are changes in your user account, you'll receive an email notification about them. The invitation for a new user is valid for two days. The other notifications are the following:

- **Account Disabled:** If your account is disabled for security or administrative reasons, the notification explains why it happened and what steps to take next.
- **Account Enabled:** If your previously disabled account is reactivated, you'll get a welcome back email.
- **Account Deleted** (if applicable): If your account needs deletion, you are notified with any necessary instructions.