Phone: (866) 878-6798 • US Support: (732) 595-9015 • CA Support: (365) 804-0050

Welcome to CosmoLex! Your Firm has joined thousands of legal professionals who are using our state-of-the-art Law Practice Management System.

Setting up your Account may seem like a daunting task. No Worries! We have put together this **User Set Up Guide** so that you can get your CosmoLex Account up and running.

This guide will walk you through your first steps:

- Account Settings
- Email Set Up
- Calendar Integration
- CosmoLex Day to Day Tasks
- Where can I go for Help and Training?

Before Getting Started with setting up your Account, please take a moment to watch a short video to see a quick guided tour of your CosmoLex Account.

- CosmoLex Quick Tour

Getting Started

Account Settings

It is important that you review Important settings. The Link Below will take you to our My Settings Page. Here you will learn about the settings that you should focus on for now. No worries, changes to your setting can be made as you use the system.

- My Settings

CosmoLex Apps and Integrations

Email Forwarding Set Up

CosmoLex allows the forwarding of your emails into the system for easy tagging to matters. This will help organize your emails on the matter level, and manage billing for emails if needed.

- Configuration of Email Forwarding

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Syncing your Office 365 or Google Calendar with CosmoLex

We provide a two-way sync between your CosmoLex calendar and your Google calendar or Office 365 Calendar. This real-time sync allows for easy tagging to matters for organization and billing purposes.

- Sync Your CosmoLex Calendar with Google Calendar
- Sync Your Cosmolex Calendar with Office 365 Calendar

Now that you have your Emails and Calendar Integrations set up please review the articles below that will go over how to Manage these areas.

- Getting Started with Calendar and Tasks (Video)
- Add, Edit and View Calendar Events in CosmoLex
- Managing Emails in CosmoLex

CosmoLex Day to Day Tasks

Adding a Contact

Clients can be added through both the “Contact” and “Matters” tab

- Add and Manage Clients and Contacts

Creating a Matter

A matter must be created first if you need to create any time/expense cards, invoices or Trust Transactions.

- Tour the CosmoLex Matter Details Page
- Add and Manage Matters in CosmoLex

Adding Time and Expenses

- Add and Manage Time Entries
- Add and Manage Matter Expense

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Where Can I Go For Help and Training?

CosmoLex has quite a few avenues for Assistance and Training that ALL users have complete access to.

All resources can be found in the CosmoLex Support Portal located HERE. You can also easily access the Support Portal through the '?' icon at the top right of your CosmoLex application.

Free Training

CosmoLex also offers Free Live Web-Based Training 5 days a week. We have a variety of classes that will allow you to get up and running with CosmoLex.

- CosmoLex Training Schedule

For additional Live Training Options, please contact our Technical Services Team.

Knowledge Base

You can view our database of detailed how to articles, videos, troubleshooting guides and tips in our Knowledge Base.

- CosmoLex Knowledge Base

Technical Services

To contact our Technical Services Team with any how to questions, please feel free to call, email or submit a ticket online. You can even open a Live Chat directly with a Support Specialist.

US Support - 732-595-9015
Canada Support - 365-804-0050

Email: support@cosmolex.com

To submit a Ticket online: Submit a Support Ticket