



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](#)
- [Set Up Email Forwarding](#)
- [Set Up Calendar Integration](#)
- [CosmoLex Day to Day Tasks](#)
- [Training & Support Resources](#)

User Setup

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.

- [Setup Overview: Manage Your Default Settings](#)
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Set Up Email Forwarding

CosmoLex allows the forwarding of your emails into the system for automated or manual matter tagging. This will help to archive emails per matter and mark for billing if needed. Each user's email needs to be configured to forward into CosmoLex - we suggest working with your firm administrator to complete this step.

- [Configuration of Email Forwarding](#)
- [Managing Emails in CosmoLex](#)
- [Email Apps & Integrations](#)

Set Up Calendar Integration

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. These apps will first need to be turned on by the system administrator. Once completed, you will be able to sync your individual calendar.

- [Sync Your CosmoLex Calendar with Google Calendar](#)
- [Sync Your CosmoLex Calendar with Office 365 Calendar](#)
- [Add, Edit and View Calendar Events in CosmoLex](#)

CosmoLex Day to Day Tasks

Adding a Contact

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

→ [Managing Clients & Other Contacts](#)

Creating a Matter

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

→ [Add and Manage Matters in CosmoLex](#)


Adding Time and Expenses

→ [Add and Manage Time Entries](#)

→ [Add and Manage Matter Costs](#)

Training & Support Resources

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

These resources can be found in the CosmoLex Support Portal located [HERE](#). You can also access this portal through the  icon at the top right of your CosmoLex application.

Free Training Classes

CosmoLex 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](#)
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Technical Services Team

You can call, email or submit a ticket online to our support team. You can also start a live chat directly from the CosmoLex application

US Support - 732-595-9015

Canada Support - 365-804-0050

Email: support@cosmolex.com

To submit a Ticket online: [Submit a Support Ticket](#)