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

Transitioning to new software can be daunting for some. No worries! We have put together this Onboarding Guide so you can get CosmoLex up and running quickly and get back to practicing law.

This guide will walk you through your first steps:

Let's get started!

Getting Started

Adding Users

Step 1: Before you add in any users, you'll want to set up your User Roles and Permissions. You'll want to make sure that everyone has the right type of access they will need.

➔ Managing User Roles and Permissions

Step 2: Next, add users to your CosmoLex account so everyone who needs to, has the appropriate access.

➔ Adding a User to CosmoLex

Adding Timekeepers

In CosmoLex you can create various timekeepers whose *time or expenses* will be tracked and/or billed. For Timekeepers who will track time, you will also set up their rate. Note - your number of active timekeepers must not exceed your number of users.

➔ Add and Manage Timekeepers

Adding Matter Owners

In CosmoLex, each matter must be assigned a matter owner. Some firms refer to this as the Responsible or Originating Attorney. This field is used primarily for filtering on reports and fee distribution calculations.

➔ Add Matter Owners

Program Settings

At this time, it is important that you familiarize yourself with system settings. Follow the link below, and review **Firm Settings** and **My Settings** to learn about the settings you should focus on for now. Note that some may require the guidance of your bookkeeper or accountant.

➔ Getting Started: Firm Settings

➔ Getting Started: My Settings

Double Check!
Take a moment to double check that your firm information is correct. This can be found in the Setup Area under
Firm Settings > Firm Information

Setting Up Bank Accounts

Step 1: Set up your Bank Accounts in CosmoLex so you can begin keeping track of all of your Business and Trust Transactions.

➔ How to Add a Bank Account to CosmoLex

Step 2: CosmoLex also offers Bank Feed, which can be used for your Trust, Operating, and Credit Accounts.

➔ Understand and Manage the Bank Feed

Step 3: Is your bank not supported? You can still import your Bank Transactions to help automate your reconciliations.

➔ Importing Bank Transactions

Step 4: Use CosmoLexPay (currently only available for our U.S. customers), our built-in payment processing service that includes integrated accounting functionality.

➔ Set Up Your CosmoLexPay Account

Setting up the Client Portal

Use the Client Portal to securely share documents, invoices, calendar events, tasks and notes with the client. You also will have the option to have direct chat with the client as well.

➔ Understanding the Client Portal
➔ Adding the Client Portal Access Button to your Firm's Website

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Invoice Templates in CosmoLex

In CosmoLex, we have a variety of Invoice Templates to choose from, which can also be edited to reflect the type of billing (hourly, fixed fee, or contingency) that your firm does.

➔ CosmoLex Invoice Templates

When editing your invoice templates, there are several fields already provided. However, there may be something else that you want to include. CosmoLex has a full list of available fields to add to your invoice template.

➔ Fields Available for Invoice and Letter Templates

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.

➔ Configuration of Email Forwarding

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

Document Storage

Use our native CosmoLex storage, or integrate with Box, Dropbox, Google Drive, LexShare (US only), NetDocuments, or OneDrive for easy document management.

➔ Set Up and Use Document Storage

Payment Processing

LawPay is our integration partner for credit card processing. Follow these instructions to link your existing LawPay account with CosmoLex, or to learn about how you can register with LawPay.

➔ How to Set Up and Use Your LawPay Integration

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

Adding Time and Expenses

➔ Add and Manage Time Entries
➔ Add and Manage Matter Expenses

We are Here to Help

Client Relations Team

Phone: (866) 878-6798
Email: onboarding@cosmolex.com

Technical Services Team (Support)

Phone (US): (732) 595-9015
Phone (CA): (365) 804-0050
Email: support@cosmolex.com
To submit a Support Ticket online: Submit a Support Ticket

CosmoLex Billing Department

Phone: (866) 878-6798
Email: care@cosmolex.com