



Phone: (866) 878-6798 • Support: (732) 595-9015

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

Transitioning to a 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:

- [Adding Users](#)
- [Adding Timekeepers \(and their rates\)](#)
- [Important Settings to review](#)
- [Setting up your Banks](#)
- [Setting up your Email, Calendar, and Document integrations](#)
- [Day to Day Tasks](#)

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.

- [Definitions of System Defined User Roles](#)
- [Creating a Customized User Role](#)

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 and Matter Owners

In CosmoLex you can create various timekeepers whose *time or expenses* will be tracked and/or billed, and matter owners (lawyers). For Timekeepers who will track time, you will also set up their rate.

- [How to Add a TimeKeeper](#)

Program Settings

It is important that you review important settings. Follow the link below, and review **Firm Settings** and **My Settings** to learn about the settings you should focus on for now. No worries, many changes to your settings can be made as you use the system.

- [Getting Started with CosmoLex](#)

Double Check!

Take a moment to double check that your firm information is correct. This can be found in the Set Up Area - Firm Settings - Firm Information

Banking Information

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](#)

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

- [Enabling Bank Feed in CosmoLex](#)

Bank is not supported? You can still import your Bank Transactions to help automate your reconciliations.

- [Importing Bank Transactions](#)

CosmoLex Apps and Integrations

Email Forwarding Set Up

CosmoLex allows the forwarding of your emails in to 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](#)

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.

- [How to Sync your CosmoLex Calendar with your Google Calendar](#)
- [How to Sync Your CosmoLex Calendar with Office 365 Calendar](#)



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Document Storage

Use our native CosmoLex storage, or integrate with Box, Dropbox, or OneDrive for easy document management.

- [Using CosmoLex Native Document Storage](#)
- [How to Sync your Document Storage with Dropbox and Box](#)
- [How to Sync Your Document Storage for OneDrive and OneDrive for Business](#)

Enabling LawPay

LawPay is our integration partner for credit card processing

Already have a LawPay Account? Follow these instructions to link your existing LawPay account with CosmoLex.

- [Enabling Your LawPay Integration \(With LawPay Account\)](#)

Interested in opening a Lawpay Account? Please follow these instructions on how you can Register for LawPay within the CosmoLex Application.

- [Enabling Your LawPay Integration \(No LawPay Account\)](#)

CosmoLex Day to Day Tasks

Creating a Matter

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

- [Creating a Matter in CosmoLex](#)

Adding Time and Expenses

- [Adding a Time Card](#)
- [Posting an Expense to a Matter](#)



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Helpful Links and Information

To Contact our Client Relations Team

Phone: (866) 878-6798 ext 510

Email: onboarding@cosmolex.com

To Contact our Technical Services Team with any Technical Questions

Phone: (732) 595-9015

Email: support@cosmolex.com

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

To Contact CosmoLex Billing Department

Phone: (866) 878-6798

Email: care@cosmolex.com