

## Training Checklist

Please review the following training videos, webinars, and support articles to familiarize yourself with the basic features and functions of CosmoLex. It is required that all CosmoLex partners view each video in its entirety and electronically certify their completion at the end of the viewing when prompted.

### Training Videos & Webinars

- [CosmoLex Product Overview](#) (Need to be updated with webinar)
  - What is CosmoLex & what sets us apart?
- [Advanced Accounting Functionality in CosmoLex](#) (57:21)
- Getting Started:
  - [Adding Your First Matter](#)
  - [Billing and Payments](#)
  - [Trust Accounting](#)
  - [Office Expenses \(Business Accounting\)](#)
  - [Events and Tasks](#)
- [Managing Your Users & Permissions](#)
  - One of the first steps in setting up your clients' accounts
- Value Added Services

For more information and instructions, you can visit our Knowledge Base at <http://support.cosmolex.com/knowledge-base/> or our Support Center at <http://support.cosmolex.com/>. Two of our most frequently used article categories can be found below.



### Article Categories

- [Migration of Data into CosmoLex](#)
- [Getting Started](#)

If you have any questions or comments regarding the CosmoLex application or any of the above checklist items, or you would like additional training in any area or CosmoLex, please contact your CosmoLex Channel Partner Manager or [partners@cosmolex.com](mailto:partners@cosmolex.com).

Upon completion of the checklist, you will be contacted by CosmoLex and sent our Certified Consultant agreement to review and sign.