

CosmoLex

CERTIFIED CONSULTANT

Partner Training

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 and read the articles in its entirety and certify completion within the [CCC CAP Partner Checklist Form](#).

Training Videos & Webinars

- [CosmoLex Product Overview](#)
 - What is CosmoLex & what sets us apart?
- [Advanced Accounting Functionality in CosmoLex](#) (37:18)
- Getting Started:
 - [Adding Your First Matter](#)
 - [Billing and Payments](#)
 - [Trust Accounting](#)
 - [Reconcile Bank Account](#)
 - [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
 - [CAP User](#)

Training Articles and Resources

Two of our most frequently used article categories can be found below.

- [Migration of Data into CosmoLex](#)
 - [Data Migration Process Overview](#)
- [Getting started](#)



For more information and instructions, you can visit our help pages at:

Knowledge Base: <https://support.cosmolex.com/knowledge-base/>

Support Center: <http://support.cosmolex.com/>

Partners FAQ: <https://partners.cosmolex.com/faqs/>

Upon completion, or 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 of CosmoLex, please contact your CosmoLex Channel Partner Manager at partners@cosmolex.com.

Your Channel Partner Manager will follow up and send out our Certified Consultant Agreement for review and signature.