

CosmoLex

Non-Financial Data Migration Guide

Introduction	2
General Pre-Migration CosmoLex Setup	3
Populating Import Templates	3
Importing Into CosmoLex	4
Resolving Errors & Warnings	6
Sign Off Checklist	10

Introduction

This article is to walk you through the migration of non-financial information from another program if you wish to perform these steps yourself. Review our [data migration services guide](#) for complete details.

CosmoLex provides comprehensive instructions and a variety of tools so you can complete your non-financial data migration. Contact us if anything is not clear. If you do not have time or resources to perform the migration, CosmoLex along with its certified partners can also provide a turn-key migration service for a fee. If you would like to learn more about our data migration, contact your CosmoLex Account Manager to schedule a free data migration consultation call.

You can migrate a variety of non-financial data such as Clients, Matters, Contacts, Related Parties, Notes, Tasks, Events, Custom Fields ,Vendors and Matter Party Allocation Data. This guide will provide a general overview of the migration process, for a more detailed walkthrough, please watch our [migration training video](#)

Once you have completed your non-financial migration and wish to move to your financial migration, you can locate that guide [HERE](#)

Important Notes:

- Ensure you have the latest version of this guide available at: <https://www.cosmolex.com/documents/dm/Non-Financial-Data-Migration-Guide.pdf> (clear your browser cache). You can compare the “Last Edited” date in the footer section.
- Download the latest version of the Non-Financial Import Template available at: <https://www.cosmolex.com/documents/dm/cosmolex-matter-import.xlsx> (clear your browser cache). You can compare the “Last Edited” date shown in the 1st tab of the excel.
- We have a full training video which walks you through these steps, located here: <https://support.cosmolex.com/knowledge-base/how-to-migrate-your-data-into-cosmolex/>

General Pre-Migration CosmoLex Setup

Ensure you have the following setup in your CosmoLex account:

1. **Trust Banks** - by default CosmoLex provides a bank named 'Trust Bank', you can rename this and add additional accounts to your system under Accounting > Bank. These are the accounts you will map your matters to. CosmoLex also allows mapping multiple Trust Banks to a Matter if that's needed.
2. **Operating Banks** - by default CosmoLex provides a bank named "Operating Bank". You can rename this and add additional accounts to your system under Accounting > Bank. Use this account type for any sort of General or Business accounts.
3. **Matter Owners** - Under Setup > Matter Owners, you want to add any responsible lawyers. As part of the import process, you will need to map your matter owners to ones already in the system.
4. **Default Matter Owner** - During the import, if no matter owners are assigned, or does not match someone within your system, the default matter owner will be chosen. You can select/confirm this default under Setup > Firm Settings > Firm Preferences.
5. **Timekeepers** - You can create Timekeepers for those who will be entering time or expense entries in CosmoLex. If a firm doesn't track time, you will still need to set up a timekeeper for tracking expenses. To manage timekeepers, go to Setup > Timekeeper
6. **CosmoLex Users** - Ensure to add CosmoLex users under the Account section prior to import. Various import items such as Tasks, Notes, Events had assigned users and names must match between data being imported and CosmoLex users.

Populating Import Templates

You can export a variety of data from your legacy system and place it into our provided CosmoLex matter import template. You can locate the template and instructions [HERE](#). CosmoLex or its certified consultants can guide you in extracting and re-formatting the data into this template.

Note: The best way to go about copying all your contact/matter data into our data import template would be to copy a column at a time from your spreadsheet and paste the data into the correct columns in our data import template. Copying all data at once from the spreadsheet into our data import template will result in an error message.

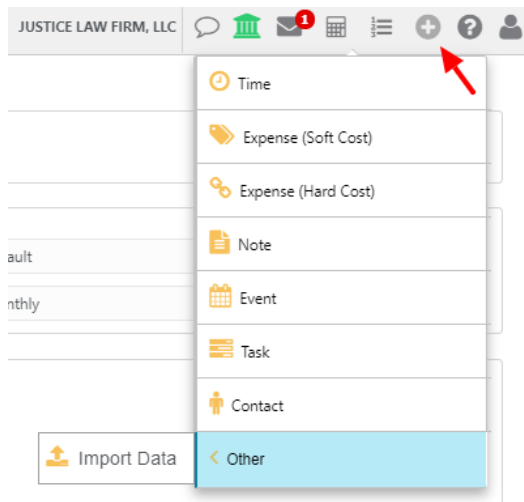
Be sure to name the import file and save it to your desktop.

NOTE:

- Client Naming convention is a single column containing: "first name last name".
- It is best not to use any special characters in the name, e.g. *, ^, #, etc.
- Use "TRIM" on all columns to ensure no space before first letter
- Remove unnecessary columns before import

Importing Into CosmoLex

1. Log in to CosmoLex
2. Click on the “+” icon on the top right corner, and in the drop-down menu, select “Other > Import Data”.



3. On the next screen, choose the type of data you wish to import, then click continue on the bottom right. Below we used the example of importing clients/contacts.

Please select your operation

Operations that have already been started will have a "Continue" label

Operations:

<input type="radio"/>	Import Clients/Contacts
<input type="radio"/>	Import Clients/Contacts Custom Fields
<input type="radio"/>	Import Matters
<input type="radio"/>	Import Matter Custom Fields
<input type="radio"/>	Import Matter Parties Allocation
<input type="radio"/>	Import Matter Trust Bank
<input type="radio"/>	Import Relations
<input type="radio"/>	Import Notes, Events or Tasks Data
<input type="radio"/>	Import Payees
<input type="radio"/>	Import Time/Expense (Work in Progress)
<input type="radio"/>	Import Journal Entry
<input type="radio"/>	Import Accounts Receivable Data
<input type="radio"/>	Import Invoice Payment
<input type="radio"/>	Import Trust Balance Data
<input type="radio"/>	Import Trust Uncleared Data
<input type="radio"/>	Import Operating Retainer Transaction Data

- This will open the import window. Click "Choose File" and browse to the excel file you have already created. Select that file, then click "Upload". You can repeat these steps for various other data sheets once you have imported the Contacts and Matters data.

Select the file you want to import



The next window is a **temporary area** in which any issues with the data can be addressed PRIOR to import.

Import CosmoLex Data

🏠 Auto-Fix
⚡ Action
✖ Remove All
🔴 Total Errors: 4
🟡 Total Warnings: 0
🟢 Total Auto-Fix: 0
📄 Selected Items: 18
Complete Import
Close

Contacts

Client Name	Type	Contact Id	Company name	Email Address	Address 1	Address 2	City	State	Zip	Work Phone	Cellphone	Notes
🔴	Client	987667			129 West 81st		New York	NY	55896			
✓	Client	1100		batman@gmail.com	Wayne Manor		Gotham City	MN	55895	434-567-894		
✓	Client	17934	Adams & Family	adamsfamily@gmail.com	Cemetery Ridg		Boston	ME	55896		123-444-5555	
✓	Personal	17928			30 Kelsall Stree		Liverpool	Select	55895			
✓	Client	1005			123 Marshall R		Hydsberg	NY	55897			
✓	Employee	289						Select	55896			
🔴	Client	4110			129 West 81st		New York	NY	55896			
✓	Client	1395			698 Candlewo		Cabot Cove	ME	55896			
✓	Adversary	80126			2354 Pacific Co			CA	55895			
✓	Key Cont...	101193			Oxenthorpe Ro	Puddleby-on-t	Slopshire	Select	55896			
✓	Client	2573						MN	55897			
🔴	Client	1500			Apartment 4A,		New York	NY	55897			
🔴	Client	1500						MN	55895			
✓	Client	1306			698 Sycamore		San Pueblo	CA	55896			

Resolving Errors & Warnings

On this screen you will notice in the top area the counts of total Errors (red), Warnings (yellow) and Auto Fix items (green)

Errors - Items that need to be addressed and fixed prior to import

Warnings - Issues which the import identifies and can correct for you

Auto Fix - Those items which were already fixed by the system



▲ Total Errors: 4 ▲ Total Warnings: 0 ▲ Total Auto-Fix: 0 ✓ Selected Items: 18

Locating Error Details

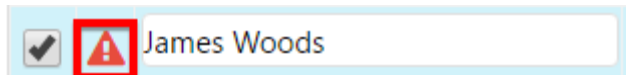
On the right side of the window you will find a magnifying glass. Click on that to expand filters. You can use these filters to locate specific items, or filter by warnings, errors, etc.



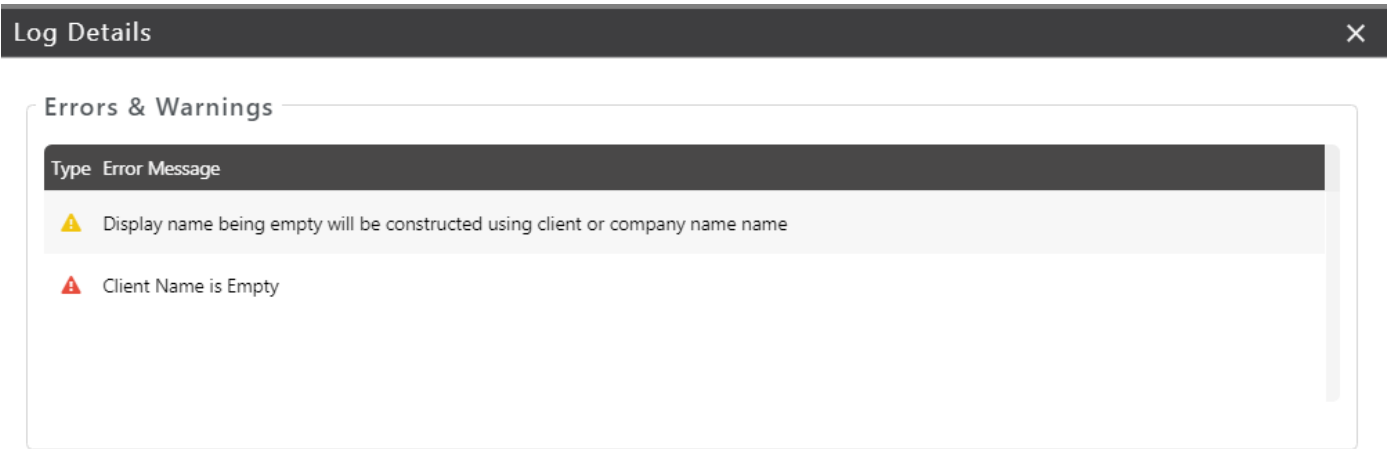
▲ Total Errors: 17 ▲ Total Warnings: 0 ▲ Total Auto-Fix: 0 ✓ Selected Items: 17 Complete Import Close

City	Country	State	Zip	Work Phone	Cellphone	Notes
Gotham City	Select	MN	55895	434-567-8943		
Boston	Select	ME	55896		123-444-5555	
Liverpool	Select	Select	55895			
Hydsberg	Select	NY	55897			
	Select	Select	55896			
New York	Select	NY	55896			
Cabot Cove	Select	ME	55896			
	Select	CA	55895			
Slopshire	Select	Select	55896			
	Select	MN	55897			
New York	Select	NY	55897			
	Select	MN	55895			
San Pueblo	Select	CA	55896			

To see details of the errors or warnings, click on the Caution Symbol to the left of the item listed.



A pop-up will then display, explaining the issue(s)



For this item, there are a few issues listed:

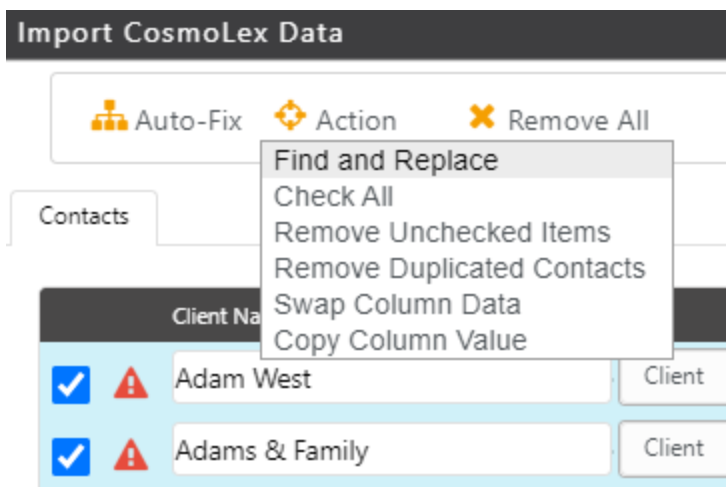
Warnings (yellow) - Relates to missing or invalid information for certain fields. If you were to use the Auto-Fix function, you are agreeing to the fixes described here.

Errors (red) - This is something that is required, yet the program cannot make this fix for you. In this example, I am missing the client name.

Once you understand the errors, exit the log details window to get back to the data list.

If you do not agree to these fixes and therefore do not want to import this item, you can uncheck the item from the import list.

Since it is possible to have multiple errors that need to be resolved, the “Action” menu at the top left provides various features to make bulk edits to your data right within this temporary area.



- For missing data (ex: missing client name) you will need to locate the record and type in the missing information.
- You could use “Find and Replace” or “Swap Column Data” to apply bulk updates.
- You could also use other logical functions such as “Remove Duplicated Contacts” if your data requires those cleansing edits.

You do not have to fix all of your data in one sitting. To leave, click CLOSE at the top right. Your data will still be there for review. No data is yet imported into CosmoLex.

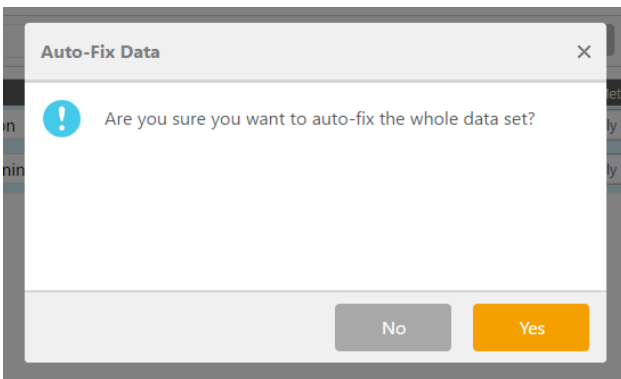
In the future, to get back to the import screen, again Click on the “+” icon on the top right corner, and in the drop-down menu, select “Other -> Import Data”. The sections that are in progress will be named as “Continue with...”

If for whatever reason you wish to remove the data from this temporary area (perhaps start over). Click the “Remove All” button at the top next to the action menu. This will not affect your CosmoLex data, as nothing was yet imported

Using Auto-Fix

Once you have resolved all the errors (red icon), you can click “Auto-Fix” in the top left corner to automatically resolve any remaining warnings. These warnings are usually due to missing or mismatched data which can be corrected automatically by assigning your CosmoLex system defaults.

As mentioned above, you can click on the warning icon for details. If you do not want the system to auto-fix an item we suggest either manually fixing the warning to resolve it, or unchecking that item so it will not be auto-fixed or imported

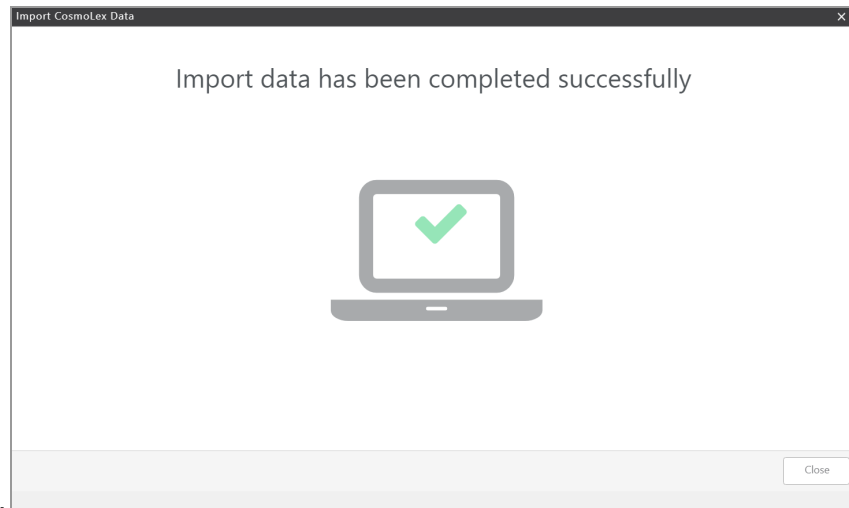


Once you click YES, you will see any warning symbols now turn green (for auto-fixed) and the summary at the top will update.

Completing Import

Once all errors and warnings are resolved, you can then complete the import by clicking the "Complete Import" Button at the top right.

You will then receive a confirmation message



- If there were errors still existing, you will receive a message stating they must be fixed prior to import
- If the import process identifies duplicates with the data already in CosmoLex, you will see an exception report of items that were skipped during the import.
- Once you close this window, the application will refresh and display all of the imported data

You will need to complete these steps for each sheet within the non-financial import template that has data you wish to import.

You will need to set up Import settings for all the sheets except for Contacts. This designates how the rest of the NFD data (Matters, Related parties, Vendors, Notes, Tasks, Events) will be linked to the Contacts/Matters that you have already imported. You need to save the Contact Matching Criteria before proceeding further for Matters and Matter Matching Criteria before proceeding further for Related parties, Notes, Calendar and Tasks.

Below are the Contact Matching criteria while importing the Matters and Relations, you can select any of them and link your matters.

- Contact Import Identifiers- which are internal identifiers that you have from your prior programs, are used to link Contacts.
- Contact Name- Client Name
- Client Id- Client Number
- Client Index# - These are CosmoLex generated serial numbers

Import Options

Application Data Settings

Contact Matching Criterion When Importing Matters

Contact Name

Contact Import Identifier

Client Id

Client Index#

Close Save

Below are the Matter Matching criteria while importing the rest of the NFD data, you can select anyone of them and link your data to Matter.

- Matter Import Identifiers- which are internal identifiers that you have from your prior programs, are used to link Matters.
- Matter File# - These are the Matter file numbers.
- Matter Index# - These are CosmoLex generated serial numbers

Import Options

Application Data Settings

Contact Matching Criterion When Importing Matters ?

- Contact Import Identifier ?
- Client Id ?
- Client Index# ?

Matter Match Criterion When Importing Notes, Events, WIP, etc ?

- Matter Import Identifier ?
- Matter Index# ?
- Matter File# ?

Close Save

Sign Off Checklist

- Verify # of Contacts, Matters, Relations, Notes, Tasks, Events, and Custom Fields, Matter Parties Allocations imported into CosmoLex matches with your Legacy Software.
- Spot check some Contacts and Matters to ensure all imported information is displayed in the appropriate fields.