Non-Financial Data Migration Guide - CosmoLex

1 Migration of Client & Matter Information

CosmoLex onboarding department is able to extract and migrate non-financial data from a variety of programs. Review CosmoLex's data migration service guide for complete details.

This article is to walk you through the migration of your contact and matter information from another program if you wish to perform these steps yourself. While this guide only covers contact and matter migrations, you can also migrate variety of other non-financial data such as Relations, Notes, Events/Calendar, Tasks, Payee Data.

1.1 Part-1: EXTRACT DATA INTO A TEMPLATE

You can export variety of data from your legacy system and place into an excel "client/matter import template". CosmoLex or its certified consultants can guide you in extracting and re-formatting the data into this template. You can locate the template and instructions HERE**.**

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. We do not recommend copying all data at once from the spreadsheet into our data import template as you will receive an error message.

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

NOTE:

- Client Naming convention is 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

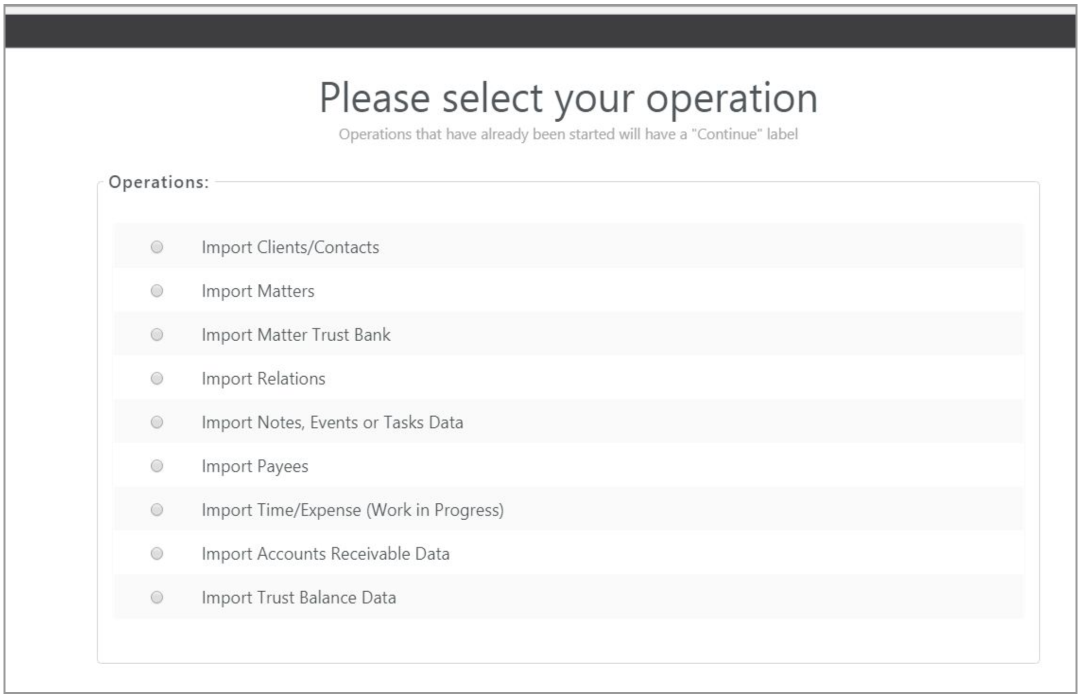
1.2 Part-2: IMPORTING THE EXCEL FILE INTO COSMOLEX

Prerequisites:Ensure you have the following setup in your CosmoLex

1. Trust Banks - by default CosmoLex provides a bank named 'Trust Bank', you can rename this and add additional accounts to your system (Accounting > Bank). These are the accounts you will map your matters to. CosmoLex also allows mapping multiple Trust Banks to your Matter if that's needed.
2. Matter Owners - Under Setup > Matter Owners, you want to add any responsible attorneys. As part of the import process, you will need to map your matter owners to ones already in the system.
3. Default Matter Owner - During the import, if no matter owners is 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.
4. CosmoLex Users - Ensure to add CosmoLex users under Account Management 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.

To import this data, follow these steps:

1. Log in to the application.
2. Click on “+” icon on the top right corner, and in the drop-down menu, select “Other -> Import Data”.
3. On the next screen, choose option “Import Client Data” and click Continue.
4. 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.

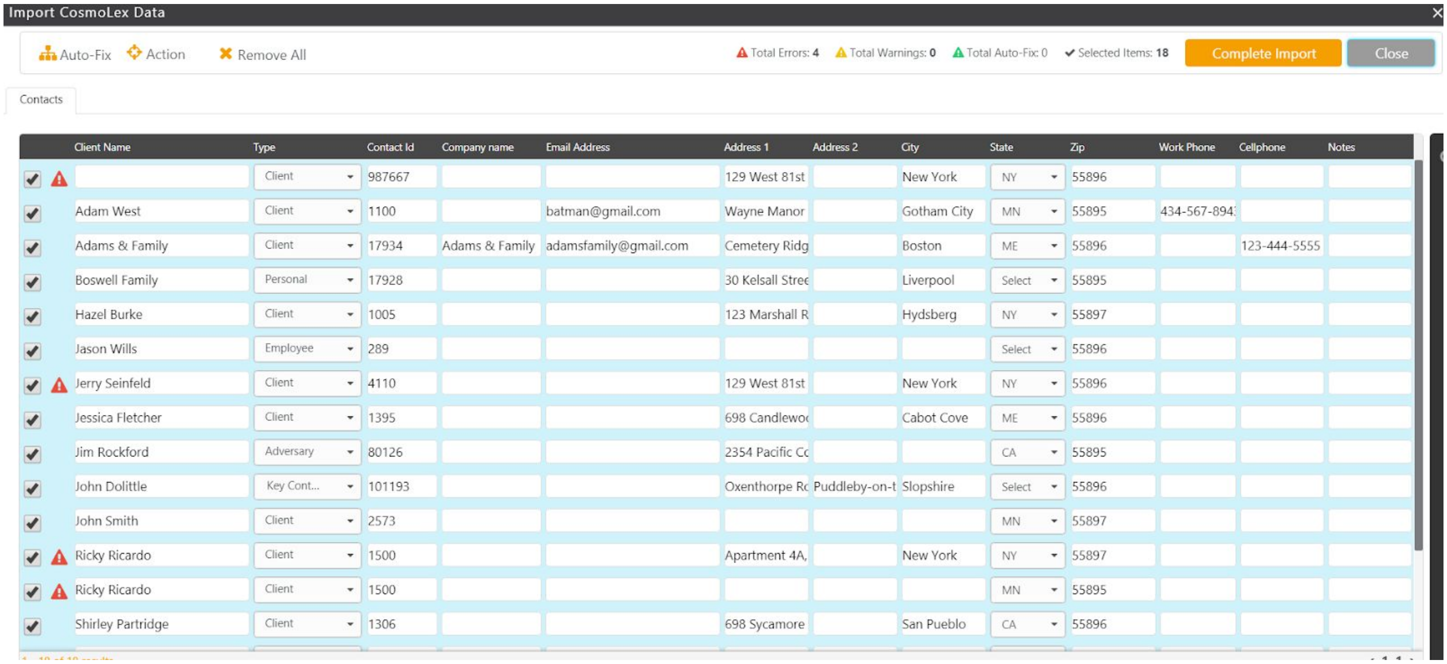


The next window is a **temporary area** in which any issues with the data can be addressed PRIOR to import. On this screen you will notice in the top area the counts of total Errors (red), Warnings (yellow) and Auto Fix items (green)

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

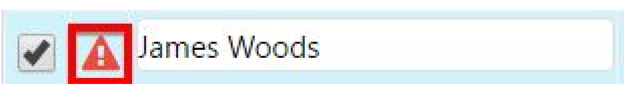
Warnings - Issues which the import identifies and can correct for you

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

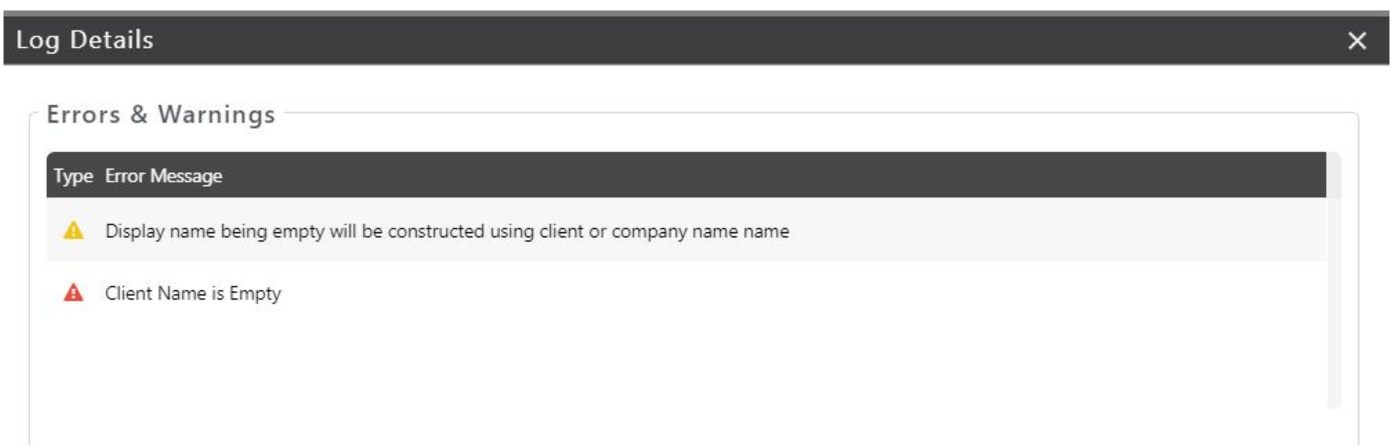


There is also a filter marked "Show" in which you can filter in Warnings, Errors or Auto Fix Items.

To see what may be wrong with a certain item, click on the Caution Symbol to the left.



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



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. The good news is I can update this directly in the import screen.

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.

For this example, I will fix the error regarding the missing client name. Once back, the caution symbol will change from Red to Yellow. You can edit the text in many fields if needed.

ACTION MENU

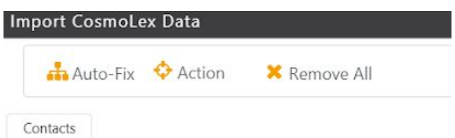
The "Action" menu provides various features to make bulk edits to your data right within this temporary area.

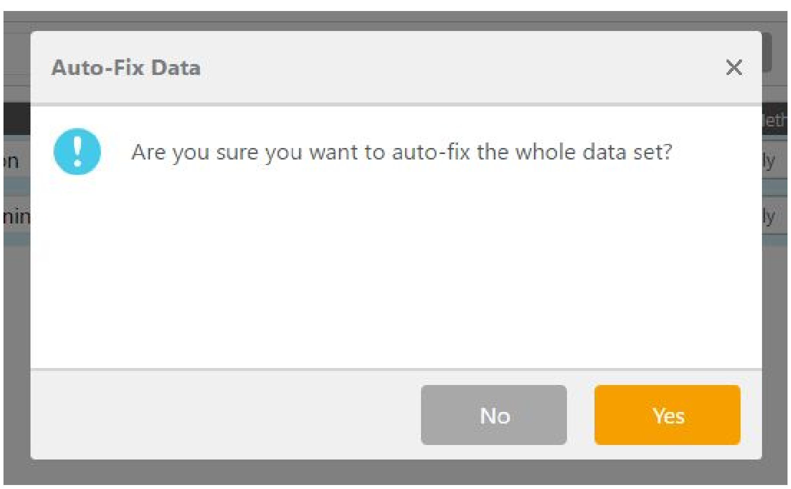
- You could use "Find and Replace" or "Swap Column Data" to apply bulk updates.
- You could also use other logical functions such as "Remove Duplicated Contacts" if your data requires those cleansing edits.

You can make these various fixes over a period of time if you would like. To leave, click CLOSE at the top right and when you return; your data will still be there.

COMPLETING THE IMPORT

Once the data looks good and you have resolved all the errors, you can click "Auto-Fix" in the top left corner. This will show a warning in a pop-up.

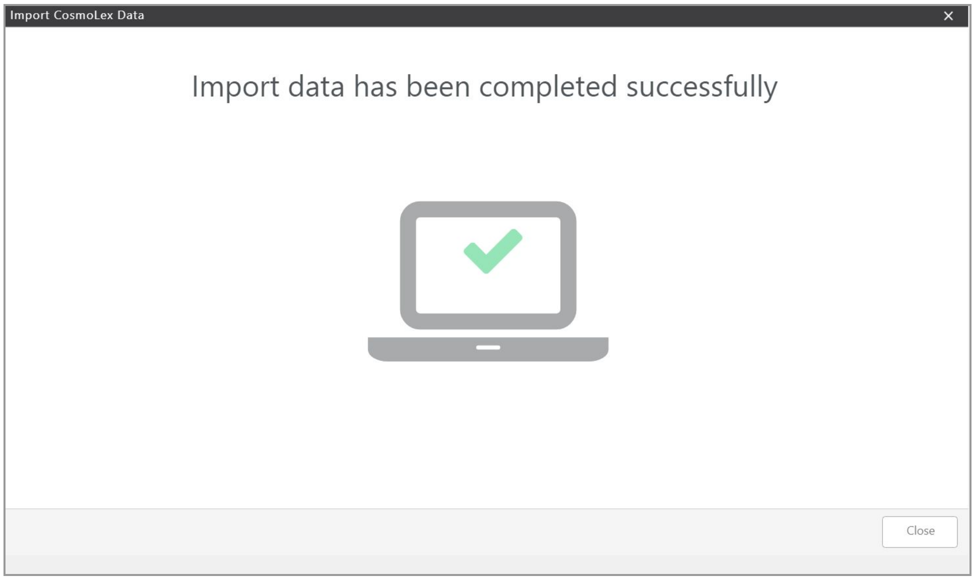




Once you click YES, you will see any warning symbols now turn green (for auto-fixed) and the summary at the top will update.

You can then complete the import by clicking the "Complete Import" Button at the top right.

You will then receive a confirmation message



Once you close this window, the application will refresh and display all of the imported data

SOME TIPS

- To get back to this screen, again, hold SHIFT and click the help '?' Icon. You will be taken back to this import screen with the data still in place.
- 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.
- You want to be sure to address all errors (red) to successfully complete the import.
- If after reviewing the warnings and agreeing to the fixes, you can click the "Auto Fix" button for those fixes to take place automatically.

Section-1 Signoff Checklist:

❏ Verify # of Contacts, Matters, Relations, Notes, Tasks, and Events imported into CosmoLex matches with your Legacy Software.

❏ Spot check some Contacts and Matters to ensure all imported information is displaying in the appropriate fields.