

CosmoLex | BILLING INTEGRATION



Export Options -Client/Matter Information
Users will need to manually export client/ matter information.

Frequency
The sync can be scheduled to run on the hour or every half-hour.



Export Options -Transactional/Cost Information
Papercut will automatically export a CSV file to a Windows folder on a scheduled basis.
The importing of data (cost recovery) into CosmoLex is always manual.
The transaction import uses the standard Expense Entry import tool built into CosmoLex.

Frequency
Daily, weekly, or monthly.



Required Modules

- Both the export of matters to PaperCut and the import of charges from PaperCut use the CosmoLex's native import and export functionality. No additional modules are required.

Data Export From CosmoLex (To PaperCut)

- Client/ matter information can be manually exported from CosmoLex using CosmoLex's native Matter export functionality.

Data Import To CosmoLex (From PaperCut)

- Papercut will automatically export a CSV file to a Windows folder on a scheduled basis.
- The importing of data (cost recovery) into CosmoLex is always manual.
- The transaction import uses the standard Cost Recovery import tool built into CosmoLex.

Vendor Support

- The customer does not need to schedule time with CosmoLex vendor support. ACDI is very familiar with working with CosmoLex.

Scheduling

- If the customer chooses to manually export data from CosmoLex, then the CosmoLex integration can typically take place on the same day as the PaperCut installation.
- If the customer is working with a Managed Service Provider (MSP), please allocate extra time for the MSP to set up the correct permissions for database access.