## How to Customize Matter View Page

## **Objectives:**

• Customize the matter view page by adding new sections (pages) with custom fields.

## Steps:

LEXZUR provides administrators with the flexibility to customize the Matter View page according to their specific needs. By adding a new tab in the Matters section, administrators can enhance the viewing experience and include additional information using custom fields.

To do so, go to the System Settings Custom fields under "Matters".

EXZUR Dashboards - Agile - Contacts - Ma	atters • Tasks Contracts & Documents • A.I. • Reports • Time • Billing • More • Creat	
Settings		System Settings Billing and Plan
Search	Q	Manage Users Add User
Sourcin		Apps Marketplace
Companies	🐣 Persons	Matters
Person / Company Categories	Person / Company Categories	Matter Client Positions
Person / Company Sub-categories	Person / Company Sub-categories	Matters Success Probabilities
Company Legal Types	Custom Fields	Matter Company Roles
Company Licenses & Waivers Types	Titles	Matter Person Roles
Company Board Members Roles		Matter Container Statuses
Custom Fields		Stages
Company Asset Types	a Tasks	Practice Areas & Due Dates
Company Assets Custom Fields		Assignment Rules
Company Relation Types	Task Types	Custom Fields
Licenses and Waivers Permissions	Task Assignment Rules	Matter Value Tiers
	Workflow Statuses	Manage Workflows
	Locations	SLA Management
Litigation Stages	Custom Fields	Event Types
	Manage Workflows	Email Templates
Court Types		
Court Degrees / Circuits		
Court Regions	Meetings	Contracts & Documents
Courts		
Hearing Types	Locations	ID Configuration
Reason of Win or Lose	Meeting Types	Types
Stane Statuses		Sub types

Here, you will find an option to create a new page. Click on this option to create a new tab for the Matter View page.

Settings / Matters Custom Fields / Add Custom Field				
🝷 💄 General Info				
Total Records: 3			Choose Defa	ult Languages 👻 🔅
Custom Field (English)	Туре	Actions		
Statement of Accounts	Single Text		0	â
Department	List (Multiple-Select)		6	â
Country	List (Multiple-Select)		8	â
Create page				

To add a new page, you just need to specify the page name in the default language ( *optional*: you can add the name in different languages as well). You can also upload a related page icon if needed.

Add Matter Page		×
Icon 😯	Choose File No file chosen	
Matter Page (English)*	Billing and Financials	
(الحربية) Matter Page		
Matter Page (Français)		
Matter Page (Español)		
Matter Page (Türkçe)		
Matter Page (Русский)		
Matter Page (Deutsch)		
	Less Fields	
Save		Cancel

Once the new page is added, you can define custom fields that are relevant to your created page. These fields can capture specific information that you want to track for each matter

		Choos	e Default Languages 🔹 🔅
Custom Field (English)     Type       Statement of Accounts     Single Text		Choos	e Default Languages 👻 📅
Statement of Accounts Single Text			
	Actions		
		Ø	Ŵ
Department List (Multiple-Select)		Ø	Ŵ
Country List (Multiple-Select)		Ø	â

You will be redirected to the custom field page, where you have some mandatory fields to be added:

- Page: Link the Custom field to one of the predefined pages.
  Applicable on: Specify if it will be added in corporate matters, litigation cases, or both.
  Practice Area: Link this field to matters with specific practice areas.
  Type: Select the custom field type. Such as Text, Number, Date, URL, List, etc...
  Custom Field Name: Give it a name.

Page*	Billing and Financials ~	
Applicable on*	Corporate Matter ×	
Practice Area*	Z All	
Via Integration*		
Type*	Single Text -	
Custom Field (English)*	Budget Comment	
	More Fields	

The new tab with the custom fields will now be visible when viewing matter (Corporate matter or litigation case) details.

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M00000248 Legal advice of Matter - Corporate Matter	on purchase agreement								Save
💼 General Info	m Trust	9	Paid	9	Due		?	Billable	3
📋 Tasks									
Reminders	Budget Comment				Invoice Amount Vat (exclu				
Emails New	Bill Copy	Choose file			Swift Copy	Received			*
Bills	вшеору	Choose his			Switt Copy	Necened			
Tachments									
Expenses									
🝈 Time Entries									
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hatters 🖄									
Contracts & Documents									
🗱 Settings									
Billing and Financials									
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For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!