

How to Create Cascading Custom Fields

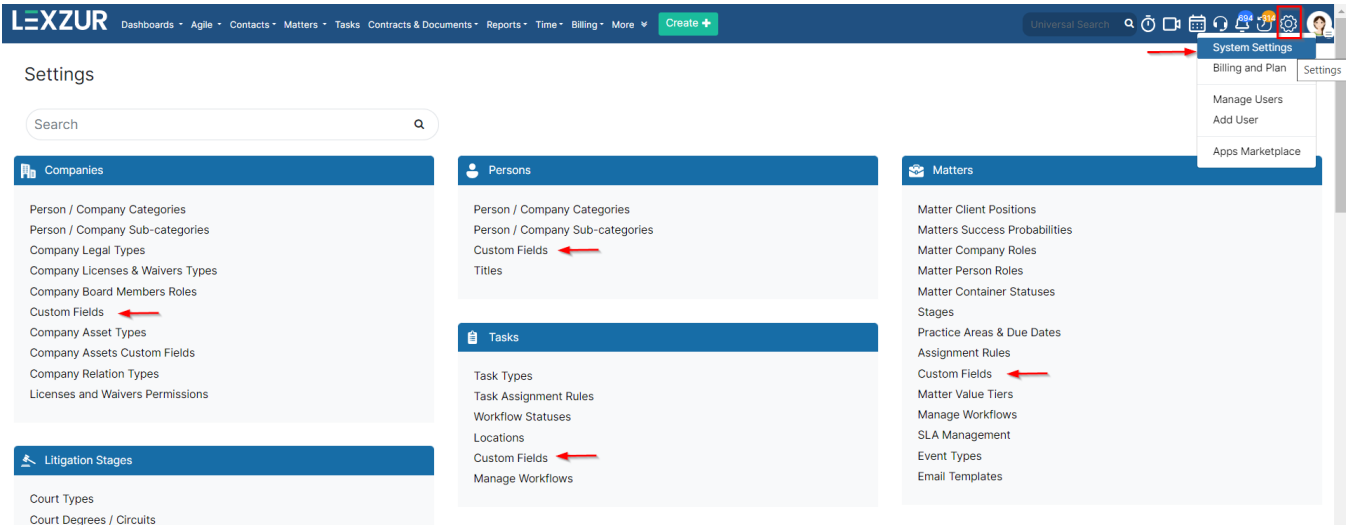
Objectives:

- Create Cascading Custom Fields

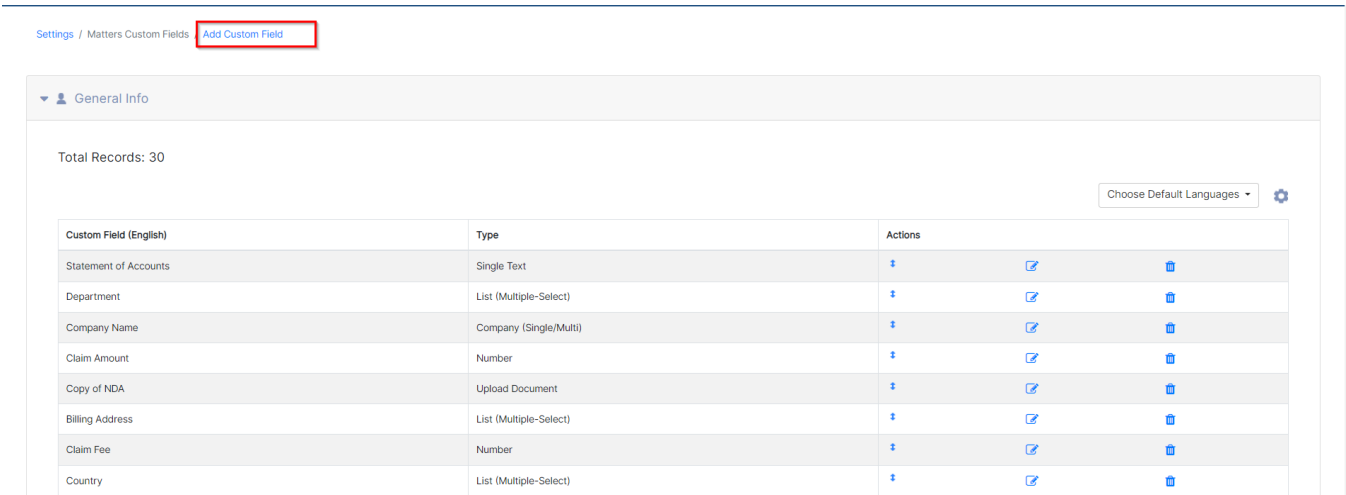
Steps:

Users now can implement cascading custom fields, this feature allows you to pick an option from a dropdown list, and based on your selection, a new set of options will dynamically appear.

To create a cascading custom field, users should navigate to the **System Settings** and select the desired module, such as Matters.



Within the custom field page, add a new custom field



Indicate the related page, whether it applies to matters, cases, or both. Users can further refine the field by selecting applicable practice areas and opting for a cascading list type, choosing between 2 layers or 3 layers.

Custom Field

Page*

General Info

Applicable on*

Litigation Case x

Practice Area*

☒ All

Via Integration*

☐

Type*

Cascading List (2-Layers)

Custom Field (English)*

Stages

List Options*

First Instance x Appeal x

Child List (English)*

Stages Details

Stages

Stages Details

Save

Cancel

Assign a name to the custom field and define the options. For each main option, name the child list and add corresponding sub-options in the subsequent layer.

Custom Field

via integration

☐

Type*

Cascading List (2-Layers)

Custom Field (English)*

Stages

List Options*

First Instance x Appeal x

Child List (English)*

Stages Details

Stages

Stages Details

First Instance

Commercial x Administrative x Criminal x

Appeal

Insurance x Civil x

Save

Cancel

This streamlined process allows for easy data entry directly from the litigation case page.

Add Litigation Case

Cancel

✕ send a notification

Save & Create New

Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fields

Matter rate

Billing Preferences

Law Firm/Vendor

Budget Comment

Type of Practice

Stages

First Instance

Stages Details

select an option

Matter rate

Billing Preferences

When a user selects the initial option, the secondary option list dynamically appears, providing a tailored and efficient approach to data categorization.

Stages

First Instance

First Instance

Appeal

Stages

First Instance

Stages Details

select an option

Administrative

Commercial

Criminal

Billing Preferences

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!