How to Create Cascading Custom Fields
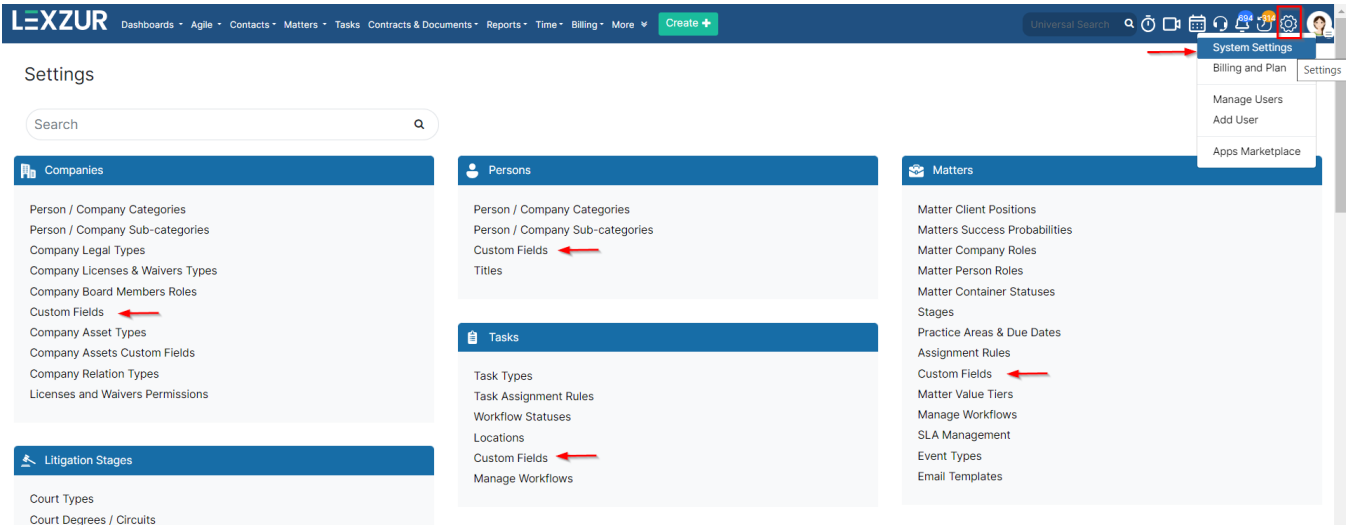
Objectives:

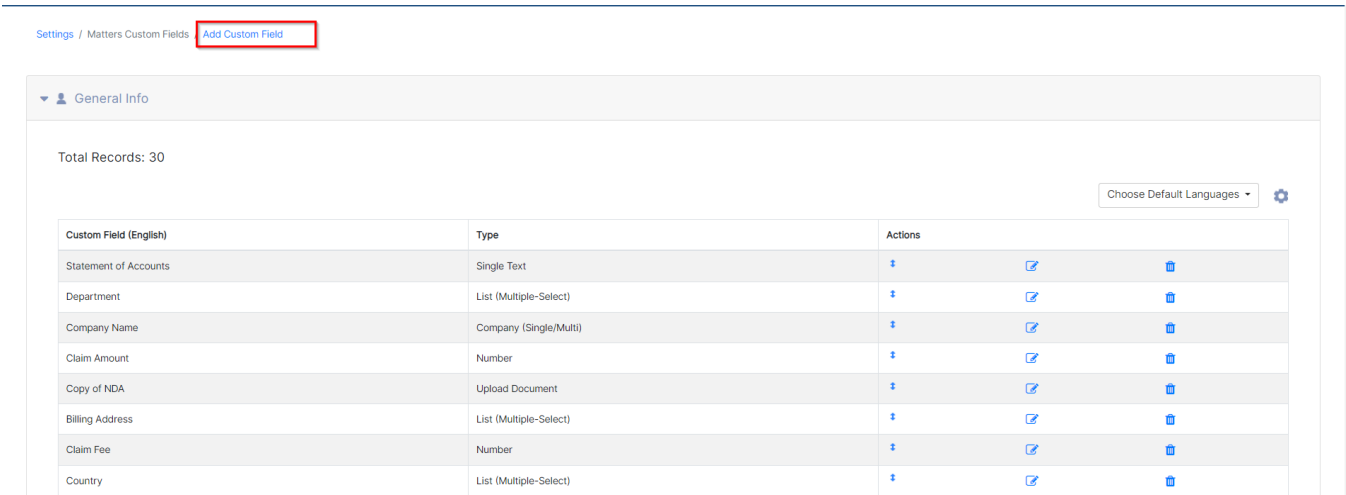- Create Cascading Custom Fields

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 ×

Practice Area*   ☑ All

Via Integration*   ☐

Type*   Cascading List (2-Layers)   ⌄

Custom Field (English)* Stages

                         More Fields

List Options*   First Instance ×   Appeal ×

Child List (English)*   Stages Details

                         More Fields

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

                         More Fields

List Options*   First Instance ×   Appeal ×

Child List (English)*   Stages Details

                         More Fields

Stages   Stages Details

First Instance   Commercial ×   Administrative ×   Criminal ×   🗑

Appeal   Insurnace ×   Civil ×   🗑

Save   Cancel

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

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

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

Thank you!