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.

Settings		System Settings Billing and Plan
Search	٩	Manage Users Add User
Companies	Persons	Apps Marketplace
Person / Company Categories	Person / Company Categories	Matter Client Positions
Person / Company Sub-categories	Person / Company Sub-categories	Matter 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	🔒 Tasks	Practice Areas & Due Dates
Company Assets Custom Fields		Assignment Rules
Company Relation Types	Task Types	Custom Fields
icenses 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

Within the custom field page, add a new custom field

ngs / Matters Custom Fields / Add Custom Field				
Seneral Info				
Total Records: 30				
				Choose Default Languages 👻
Custom Field (English)	Туре	Actions		
Statement of Accounts	Single Text	÷		Ŵ
Department	List (Multiple-Select)	*	Z	Ŵ
Company Name	Company (Single/Multi)	1	6	<u>ش</u>
Claim Amount	Number	+	6	â
Copy of NDA	Upload Document	+	6	ŵ
Billing Address	List (Multiple-Select)	*	6	â
Claim Fee	Number	+	8	â
	List (Multiple-Select)	1	6	â

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

Custom Field		
Page*	Quality 1	
	General Info 🗸 🗸	
Applicable on*	Litigation Case ×	
Practice Area*	Z 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		

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	0	
Туре*	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 ×	
		v
Save		Cancel

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

Law Firm/Vendor
<i>k</i>
Budget Comment
Type of Practice
Stages
First Instance X V
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.

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

Thank you!