

How to Create Custom Fields

Objectives

- Add and Manage Custom Fields (for example Matter's Custom Fields)
- Fill in Custom fields from the module's page.

Steps

LEXZUR empowers users to tailor their experience by creating custom fields, ensuring that you can capture additional information precisely where it's needed. Custom fields can be customized at various levels, including companies, persons, matters, contracts, and tasks, allowing you to adapt your workspace to your specific requirements.

Managing these custom fields is a straightforward process.

Simply navigate to the **system settings** page of each module to oversee your custom fields.



Here, you can edit, move, delete, or introduce new fields as per your evolving needs.

Settings / Matters Custom Fields [Add Custom Field](#)

Total Records: 14

Choose Default Languages

Custom Field (English)	Type	Actions
Statement of Accounts	Single Text	
Department	List	
Company Name	Company (Single/Multi)	
Related user name	User (Single/Multi)	
Claim Amount	Number	
Copy of NDA	Upload Document	
Billing Address	List	
Claim Fee	Number	
Country	List	
Custom Field	Single Text	
Name of First Party	Single Text	
Sub- Practice Area	List	
Reference	URL	

For instance, if you want to add custom fields in matters, you'll start by specifying its applicability, whether it is related to **corporate matters**, **litigation cases**, or both.

You can select relevant **practice areas**, Give it a **name**, and define its **type**.

Custom Field



Page*

General Info

Applicable on*

Litigation Case x Corporate Matter x

Practice Area*

☒ All

Via Integration*

☐

Type*

Single Text

Custom Field (English)*

Billing Address

[More Fields](#)

Save

Cancel

Custom fields in LEXZUR encompass a variety of types, including single text, date, list, contact, user, number, upload button, or URL.



You can add your own **List** options simply type the name and add it.

Custom Field



Page*

Applicable on*

Practice Area* ☒ All

Via Integration* ☐

Type*

List (Multiple-Select)

Single Text

Text Box

Date

Date & Time

List (Single-Select)

List (Multiple-Select)

Cascading List (2-Layers)

Cascading List (3-Layers)

Company (Single/Multi)

Person (Single/Multi)

Time (Single/Multi)

Custom Field (English)*

List Options*

Save

Cancel

Custom Field



Page*

Applicable on*

Practice Area* ☒ All

Via Integration* ☐

Type*

Custom Field (English)*
[More Fields](#)

List Options*

Save

Cancel

Furthermore, you have the option to create Cascading custom fields, that allow you to create hierarchical structures.



Learn more about how to create a cascading custom field [here](#).

Custom Field

Page*

General Info

Applicable on*

Litigation Case Corporate Matter

Practice Area*

☒ All

Via Integration*

☐

Type*

Cascading List (2-Layers)

Custom Field (English)*

Management Department

More Fields

List Options*

Managing Partner

Child List (English)*

CEO

More Fields

Management Department

CEO

Managing Partner

options

Save

Cancel

These custom fields can be conveniently filled out from the detailed pages of matters.

M00000287 Legal Opinion on Service Agreement

Matter - Corporate Matter

Cancelled Closed In Progress More

Save Actions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Tasks

Reminders

Emails New

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Status Comments

Custom Fields

Statement of Acco...

Department

Choose

Copy of NDA

Choose file

NDA-Lauren Travis.docx

Billing Address

USA

Country

Choose

Custom Field

Name of First Party

Sub- Practice Area

Choose

Reference

https://drive.google.com/drive/u/0/folders/1qPz7

External Advisor

Add Save Cancel

Shared With

Everyone

Set as Private

Date & Times

Arrival Date

2023-07-04

Filed on

2023-08-29

Due Date

2023-09-28

Notify me before

Closed On

2023-09-08

Estimated Effort

Effective Effort...

0

Related Companies

Add New

BLP Industry

Persons

Add New

Elise Khoury

Custom fields also enable document uploads, allowing you to attach essential files directly within the system.

Furthermore, the URL type permits the inclusion of external links, offering seamless access to external documents hosted on cloud management solutions or other platforms. (Example Reference field.)

The contact or user types facilitate searching for existing companies, persons, or users, streamlining data retrieval.

Cancelled

Closed

In Progress

More

Save

Actions

Due 0.00 USD

Billable 0.00 USD

Legal opinion

System Workflow (default)

Start typing

None

0

People

Assigned Team All Teams

Assignee Carolina Robinson

Referred By Start typing

Requested By Start typing

Company Name

Related user ... sam

Sam Marven

Billing Preference

Billing Method Hourly Rate



Custom fields could be used in the customized reports you build.

Reports / Build your Report

Build your Report

Choose from the saved reports:

Report Columns List

Statement of Accounts

Department

Company Name

Related user name

Claim Amount

Copy of NDA

Billing Address

Claim Fee

Country

Custom Field

Name of First Party

Sub- Practice Area

Reference

0 items selected

Additional filters:

Matter Client Positions

Filed on

Opponent Nationality

Matter Category

Limit Results to

Submit

You can create custom fields for any other module within LEXZUR (Tasks, Companies, Persons, Contracts, Matters)

In Companies and Matters, for example, you have the option to customize the view page by incorporating new sections (pages) enriched with custom fields.

General Info

Company Branches

Total Records: 2

Choose Default Languages ▾ ⚙

Custom Field (English)	Type	Actions
Country	List	⌵ ✎ 🗑
Branch Address	Single Text	⌵ ✎ 🗑

[+ Create page](#)

General Info

Financial

Total Records: 1

Choose Default Languages ▾ ⚙

Custom Field (English)	Type	Actions
Budget	Text Box	⌵ ✎ 🗑

[+ Create page](#)

✔ Learn more about how to customize the **Company** and **Matter** View page

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

Thank you!