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.

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 ✕ Corporate Matter ✕
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*   General Info   ⌄
Applicable on*   Litigation Case ✕   Corporate Matter ✕
Practice Area*   ☑ All
Via Integration*   ☐
Type*   List (Multiple-Select)   ⌄
Custom Field (English)*   [   ]

List Options*   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)
                               User (Single/Multi)

      Save   Cancel

Custom Field   ✕

Page*   General Info   ⌄
Applicable on*   Litigation Case ✕   Corporate Matter ✕
Practice Area*   ☑ All
Via Integration*   ☐
Type*   List (Multiple-Select)   ⌄
Custom Field (English)*   Department
                               More Fields
List Options*   HR Department ✕   Accountant ✕   Finance ✕   Legal Department ✕

      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.

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.

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

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!