

How to Customize Matter View Page

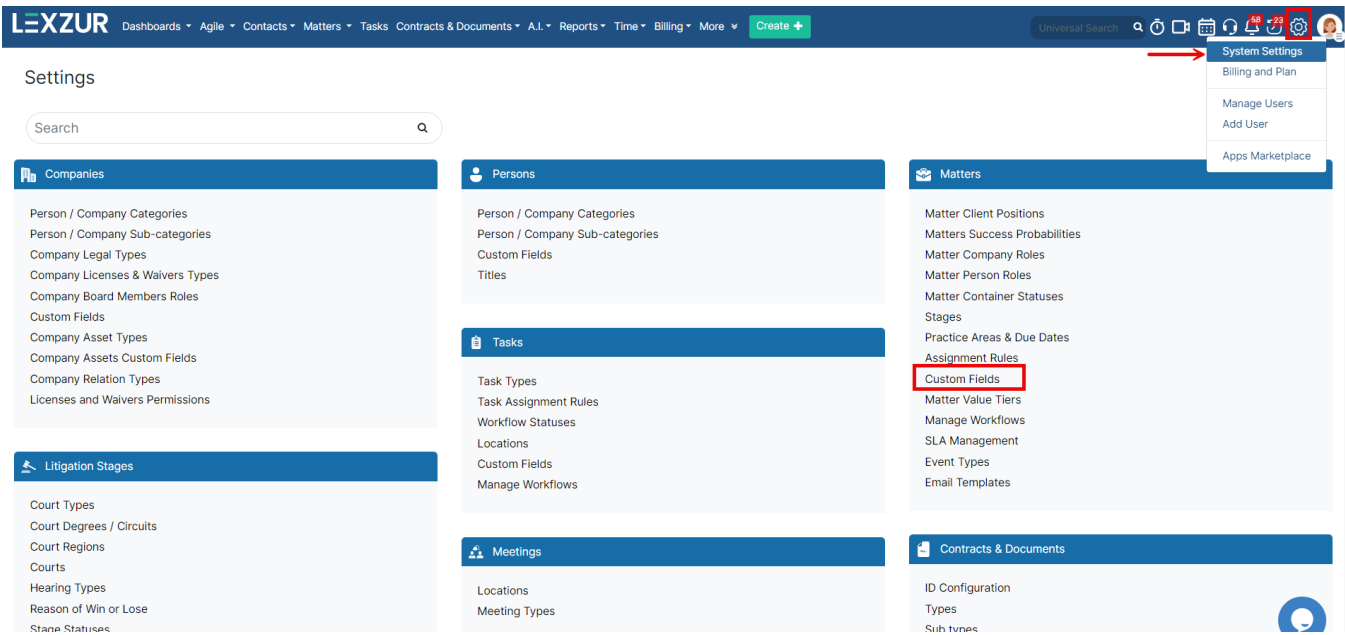
Objectives:

- Customize the matter view page by adding new sections (pages) with custom fields.

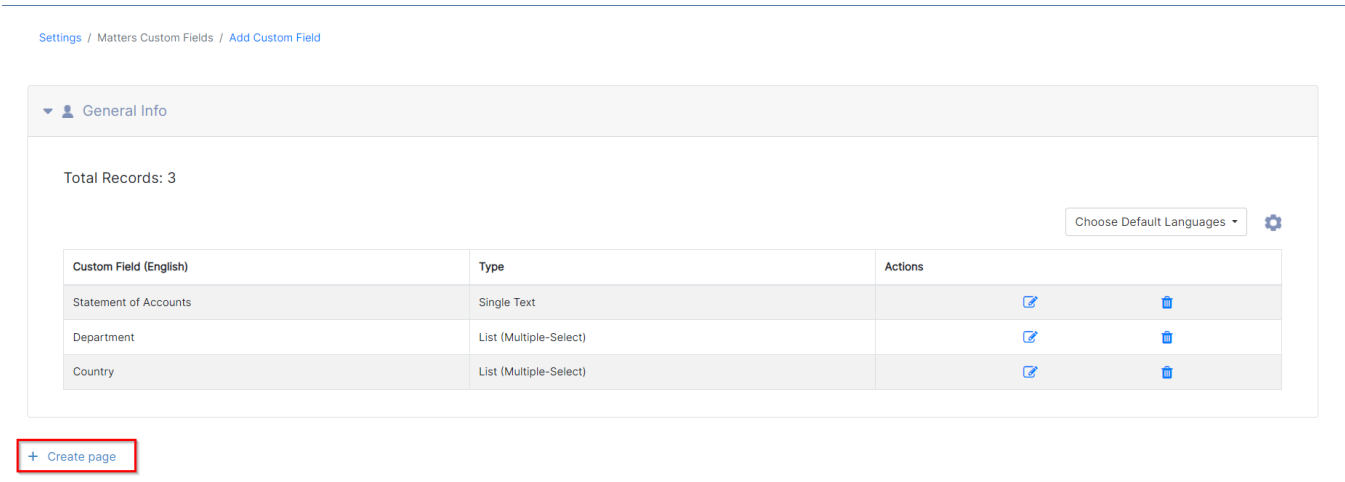
Steps:

LEXZUR provides administrators with the flexibility to customize the Matter View page according to their specific needs. By adding a new tab in the Matters section, administrators can enhance the viewing experience and include additional information using custom fields.

To do so, go to the **System Settings Custom fields under "Matters"**.



Here, you will find an option to create a new page. Click on this option to create a new tab for the Matter View page.



To add a new page, you just need to specify the page name in the default language (*optional*: you can add the name in different languages as well). You can also upload a related page icon if needed.

Add Matter Page

Icon ?

Choose File

No file chosen

Matter Page (English)*

Billing and Financials

Matter Page (العربية)

Matter Page (Français)

Matter Page (Español)

Matter Page (Türkçe)

Matter Page (Русский)

Matter Page (Deutsch)

[⬅ Less Fields](#)

Save

Cancel

Once the new page is added, you can define custom fields that are relevant to your created page. These fields can capture specific information that you want to track for each matter

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

▼

General Info

Total Records: 3

Choose Default Languages ▼

⚙️

Custom Field (English)	Type	Actions
Statement of Accounts	Single Text	<div>✎</div> <div>🗑</div>
Department	List (Multiple-Select)	<div>✎</div> <div>🗑</div>
Country	List (Multiple-Select)	<div>✎</div> <div>🗑</div>

You will be redirected to the custom field page, where you have some mandatory fields to be added:

- **Page:** Link the Custom field to one of the predefined pages.
- **Applicable on:** Specify if it will be added in corporate matters, litigation cases, or both.
- **Practice Area:** Link this field to matters with specific practice areas.
- **Type:** Select the custom field type. Such as Text, Number, Date, URL, List, etc...
- **Custom Field Name:** Give it a name.

Custom Field

Page*
Billing and Financials

Applicable on*
Corporate Matter x

Practice Area*
☒ All

Via Integration*
☐

Type*
Single Text

Custom Field (English)*
Budget Comment

More Fields

Save

Cancel

The new tab with the custom fields will now be visible when viewing matter (Corporate matter or litigation case) details.

LEXZUR

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Universal Search

48

29

M

M00000248 Legal advice on purchase agreement

Matter - Corporate Matter

Save

General Info

Tasks

Reminders

Emails **New**

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Billing and Financials

Trust ?

Paid ?

Due ?

Billable ?

Budget Comment

Invoice Amount Vat (exclu...

Bill Copy

Choose file

Swift Copy

Received

<<

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

Thank you!