Tip of the Week: Include Matter Custom Fields in the Matter Export File

Being able to customize fields according to your individual business needs allows you to exercise greater control and flexibility by adding information beyond basic data. These user-defined fields mean you can be as creative and intuitive as needed when storing information under each individual Client and Matter. What's more, Matter custom fields can now be included in the Matter export file. Matter custom fields are also included in the Clients and Matters report when it is run with the Client-Matter report type and outputted to CSV. This week's Tip of the Week takes a look at how to create Matter custom fields, export them, and include it in a report.

Users can set up 'Custom Fields' either under the Clients or the Matters. Click under **Clients>Settings**, and head over to the **Custom Fields** tab. You'll see sub-tabs here to apply Custom Fields either at the **Client** level or **Matter** Level. When you click on 'New Custom Field' on the top right, a window will appear allowing you to specify your needs for this new custom field you wish to create.

You can see a variety of options available under the 'Type' field. Each type will determine how the 'Default Value' field will be formatted.

Add a **Default Value** on this screen to apply universally, or you can leave it blank to allow you to enter different values under each individual Client/Matter. To access Custom Fields under individual Clients and Matters, click on **Clients>Clients & Matters>[click on Client name or Matter name]>Custom Fields** tab.

You can even add Custom Field Groups from under the same screen, but note these can only be applied at the Matter-level.

Export & Report

To export Matter custom fields, click under **Account>Import/Export>Export** tab. When you select 'Matters' from the entity drop-down list, you will see a checkbox below it allowing you to select to 'include custom fields'. Once checked, click on the Export button; this will download a CSV format file.

To pull Matter custom fields into a report, click under the Reports tab. Scroll towards the bottom section and click on the 'Clients and Matters' report. Select the 'Report Type' as 'Clients Matter'. You will then see your customized Matter fields in the report generated.

The benefits of adding data beyond the predetermined and standard fields are vital for the unique needs and requirements of any business, and that's why TimeSolv has worked on allowing our customers to be able to directly access and customize their user interface with their own preferred terminology and specificity.

If you'd like to contact TimeSolv support for help, please call 1.800.715.1284 or contact support.

Contact Support