

USER DEFINED FIELD FORMS

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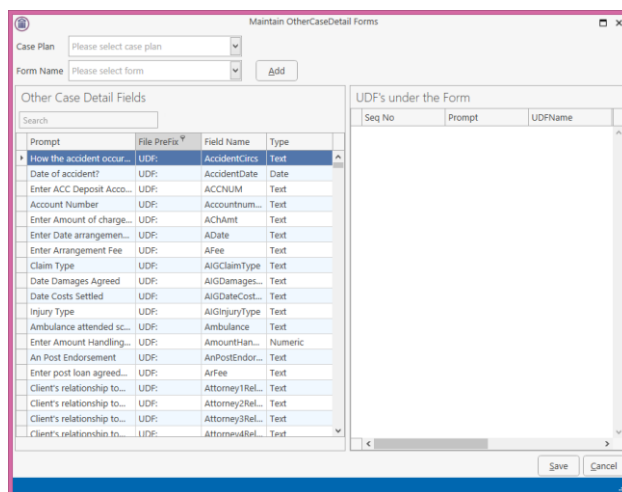
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UDF Forms

Certain cases/matters may need you to capture specific information that will require you to create UDF fields in Keyhouse. These fields can be gathered together using UDF Forms.

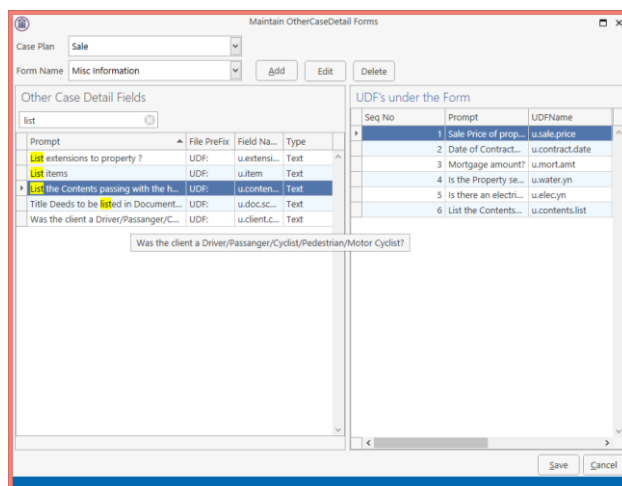
Create a UDF Form

1. Select the Setup Tab and then select UDF Form Details



Prompt	File Prefix	Field Name	Type
How the accident occur...	UDF:	AccidentCircs	Text
Date of accident?	UDF:	AccidentDate	Date
Enter ACC Deposit Acco...	UDF:	ACCNUM	Text
Account Number	UDF:	Accountnum...	Text
Enter Amount of charge...	UDF:	ACHAmt	Text
Enter Date arrangemen...	UDF:	ADate	Text
Enter Arrangement Fee	UDF:	AFee	Text
Claim Type	UDF:	AIGClaimType	Text
Date Damages Agreed	UDF:	AIGDamages...	Text
Date Costs Settled	UDF:	AIGDateCost...	Text
Injury Type	UDF:	AIGInjuryType	Text
Ambulance attended sc...	UDF:	Ambulance	Text
Enter Amount Handling...	UDF:	AmountHan...	Numeric
An Post Endorsement	UDF:	AnPostEndor...	Text
Enter post loan agreed...	UDF:	ArFee	Text
Client's relationship to...	UDF:	Attorney1Rel...	Text
Client's relationship to...	UDF:	Attorney2Rel...	Text
Client's relationship to...	UDF:	Attorney3Rel...	Text
Client's relationship to...	UDF:	Attorney4Rel...	Text

2. Select the Case Plan to be used.
3. Then click on Add to add a Form Name, enter the Name to be used and click OK.
4. Use the search box under the Other Case Details Fields to find the UDF's required.

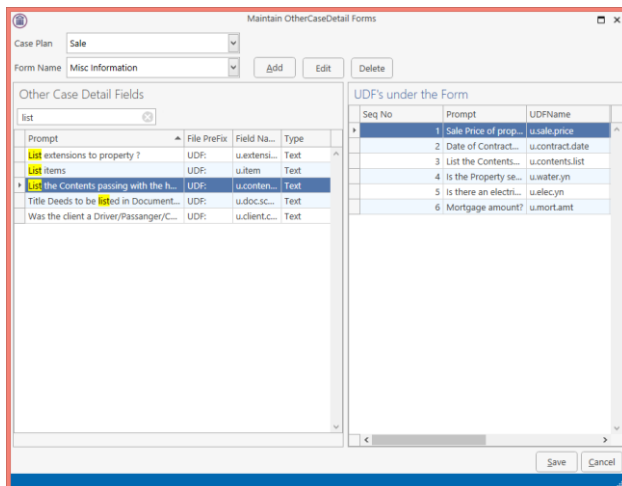


Prompt	File Prefix	Field Name	Type
List extensions to property ?	UDF:	u.extensions...	Text
List items	UDF:	u.item	Text
List the Contents passing with the h...	UDF:	u.contents...	Text
Title Deeds to be listed in Document...	UDF:	u.doc.sc...	Text
Was the client a Driver/Passanger/C...	UDF:	u.client.c...	Text

Seq No	Prompt	UDFName
1	Sale price of prop...	u.sale.price
2	Date of Contract...	u.contract.date
3	Mortgage amount?	u.mort.lamt
4	Is the Property as...	u.walter.yr
5	Is there an electr...	u.elec.yr
6	List the Contents...	u.contents.list

Was the client a Driver/Passanger/Cyclist/Pedestrian/Motor Cyclist?

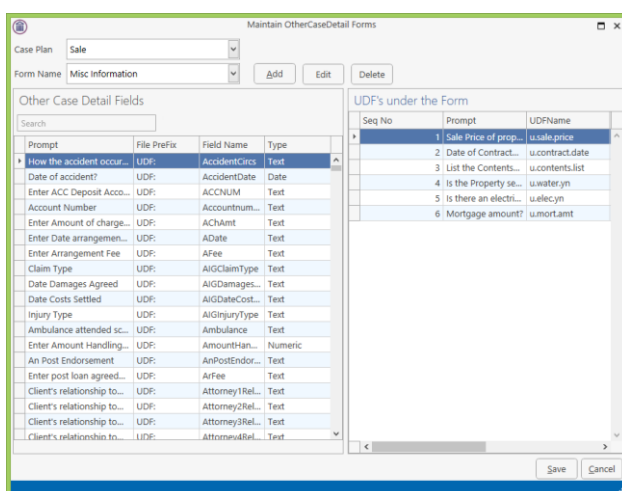
5. The order the items appear in the form can be changed by dragging the item to the new location in the list.



6. To remove a UDF field from the report, right click on the field and select delete.
7. When all items are in place click Save and then OK.
8. If the same UDF Form is required for more than one workflow then it will need to be created again in the second workflow.

Edit a UDF Form

1. Go to the Setup Tab and select the UDF Form Details.
2. Enter the Case Plan associated with the UDF Form to be changed
3. Select the UFD Form to be changed



4. Make the required changes
5. Click Save and OK.

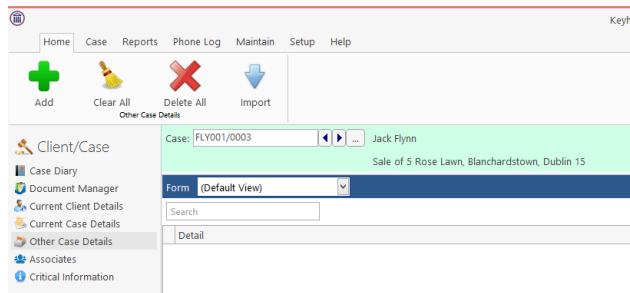
Delete a UDF Form

1. Go to the Setup Tab and select the UDF Form Details.
2. Enter the Case Plan associated with the UDF Form to be changed

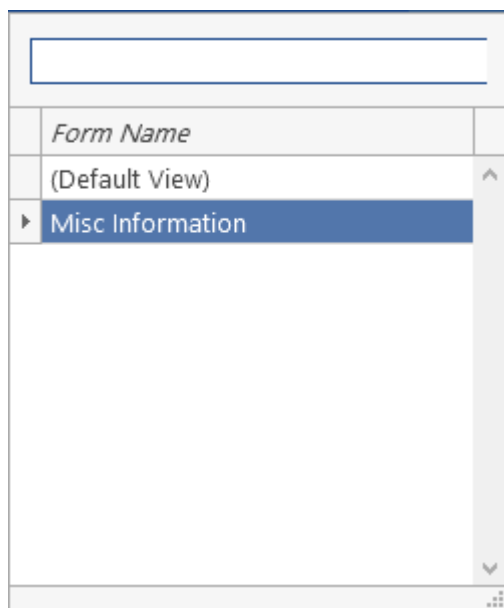
3. Select the UDF Form to be changed
4. Click the Delete Button to remove the form.

Apply the Form to a Matter

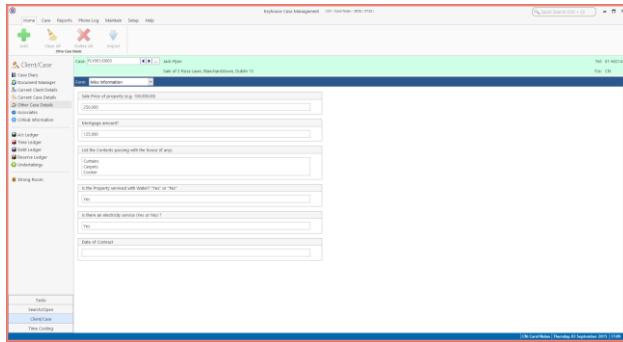
1. Open the required matter and check the correct Case Plan has been selected on the Current Case Details screen
2. Go to the Other Case Details Screen.



3. Click on the down arrow beside Default View and select the required form.



4. The UDF Fields will appear on the screen.
5. Complete the fields as normal.



- The information is now available to use in correspondence if it is included in Case Plan Precedents.