CUSTOM FIELD SAMPLE BY

HakeemSolutions LegalOps

Custom Field Examples by Practice Area.

⚖️ Estate Planning

- Marital Status

- County

- Spouse Name

- Beneficiary Count

- Guardian Appointed (Y/N)

- Last Will Signed (Y/N)

- Asset Category (House, Stocks, Trust)

✏️ Family Law

- Case Type (Divorce, Custody, Adoption, etc.)

- Minor Children (Y/N)

- Opposing Party Name

- Child Support Requested (Y/N)

- Mediation Date

- Court County

- Emergency Filing (Y/N)

🚗 Personal Injury

- Injury Type (Neck, Back, Head, etc.)

- Date of Incident

- At-Fault Party

- Insurance Carrier

- Medical Treatment Started (Y/N)

- Police Report Attached (Y/N)

- Referral Source

🌎 Immigration

- Country of Origin

- USCIS Case Type

- Language Preference

- Filing Category (Asylum, Adjustment of Status, etc.)

- Immigration Deadline

- Biometrics Completed (Y/N)

💼 Business / Contracts

- Entity Type (LLC, S-Corp, etc.)

- State of Formation

- Contract Type (Service, NDA, Partnership)

- Effective Date

- Auto-Renew Clause (Y/N)

🔄 How to Use Custom Fields

1. **Trigger Automations**
   → "If Injury Type = 'Head' → send neuro doc packet"
   → "If Marital Status = Married → add spouse fields to document gen"

2. **Personalize Documents**
   → Insert custom fields into retainer, will, contract templates

3. **Filter Dashboards**
   → "Show all clients with Language = Spanish and Intake = Complete"
   → "All family law clients in Miami-Dade with kids"

📩 Want help setting up custom fields or building your triggers?

DM me **"CRM Setup"** and I'll walk you through it or set it up for you 💼⚙️