

WESTLAW FORM BUILDER

How to create and manage alerts

Alerts are notifications that are set on individual forms. When these alerts are activated, it means there has been a change in the form's format or language that is substantial and may affect the legal sufficiency of the form. When this happens, you should rebuild the updated forms.

Accessing Alerts

Alerts can be accessed from the link in the global toolbar in the upper, right area of any page.

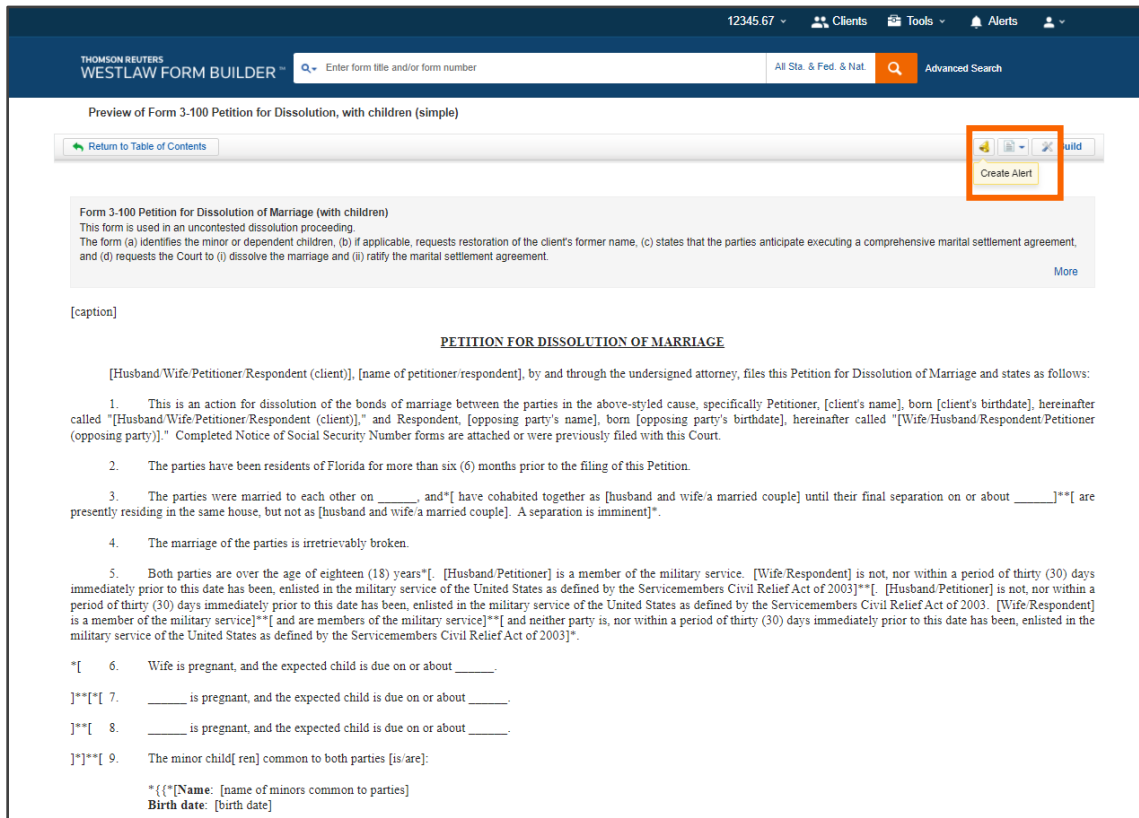
The screenshot displays the Westlaw Form Builder interface. At the top, the global toolbar includes the number '12345 67', a 'Clients' icon, a 'Tools' dropdown, and an 'Alerts' icon (a bell) which is highlighted with a red box. Below the toolbar is a search bar with the text 'Enter form title and/or form number' and a search button. The main content area is divided into several sections: 'Browse' with a grid of jurisdictions and topics, 'Favorites' with 'My Favorites' and 'Frequently Used Items', 'Resource Tools' with a list of legal tools, 'Quick-Start Videos', and 'Recent Documents' with a list of legal forms.

Creating an Alert

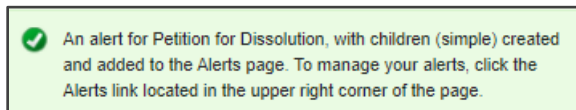
You can create an alert for any form on Form Builder. You can set up an alert from the Form Preview page, a results list, the Clients page, the Form Sets page, and the Custom Forms page.

You may create alerts on as many forms as you would like and set up email notifications for yourself and others in your firm, company, or organization.

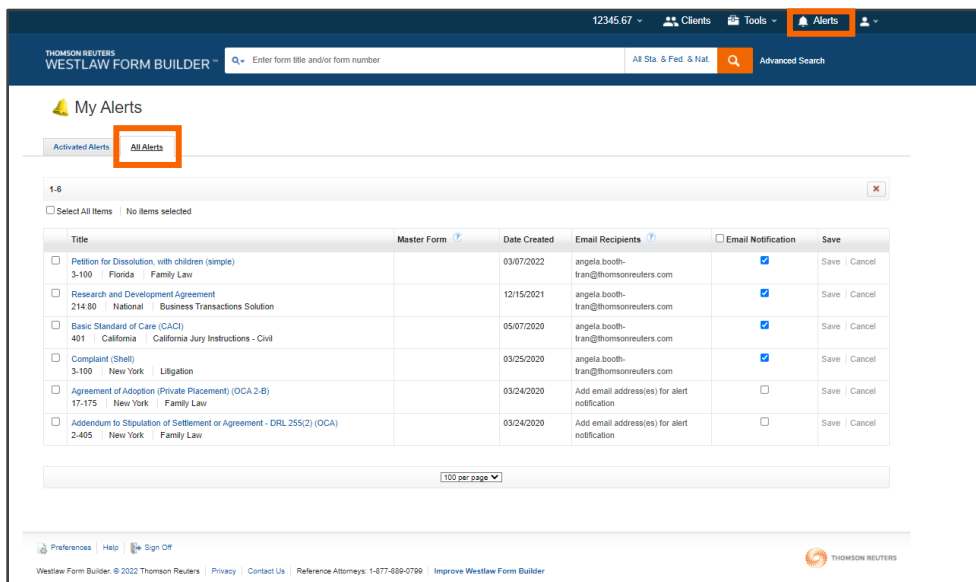
Select the form(s) for which you want to create an alert. To create alerts for multiple forms at once, select the check box preceding each form. You may create up to 100 alerts at a time. Select the **Create Alert** button in the top, right area of the page.



A confirmation lightbox will appear.



Once an alert has been created for a form, the form is listed on the My Alerts page on the **All Alerts** tab. Selecting **Alerts** on the global toolbar takes you to the Activated Alerts tab. The All Alerts tab shows all forms for which you created alerts, as well as other information, including the title, master form link, the date the alert was created, and the email recipients.

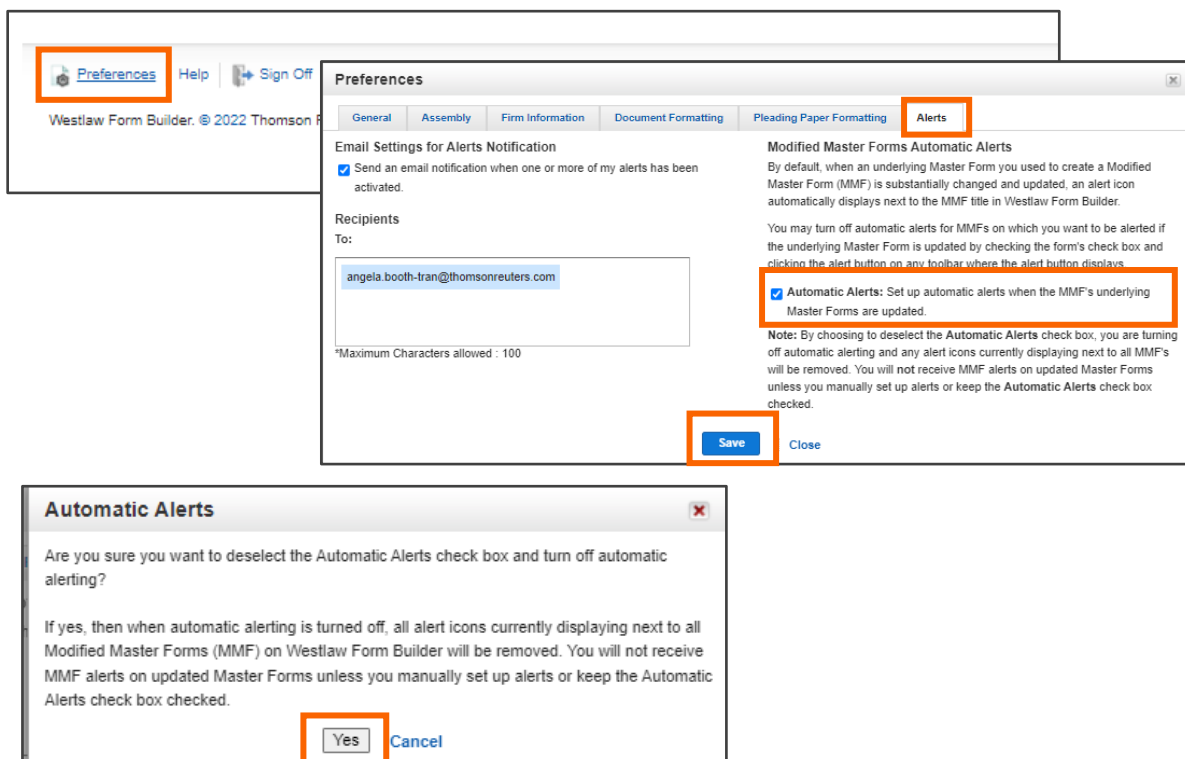


ALERTS ON MODIFIED MASTER FORMS

Whenever you create a modified master form by editing a master form using the Custom Forms plug-in tool and uploading it to a folder on the Custom Forms page in Form Builder, an alert is automatically created for the modified master form (MMF). The alert for an MMF functions the same way that other alerts function. MMFs are also listed on the All Alerts tab in Alerts.

To disable automatic alerts on MMFs:

- Select **Preferences** at the bottom of any page.
- Select the **Alerts** tab
- Deselect the **Automatic Alerts** check box.
- Select **Yes** to confirm the deselection.
- Select **Save**.

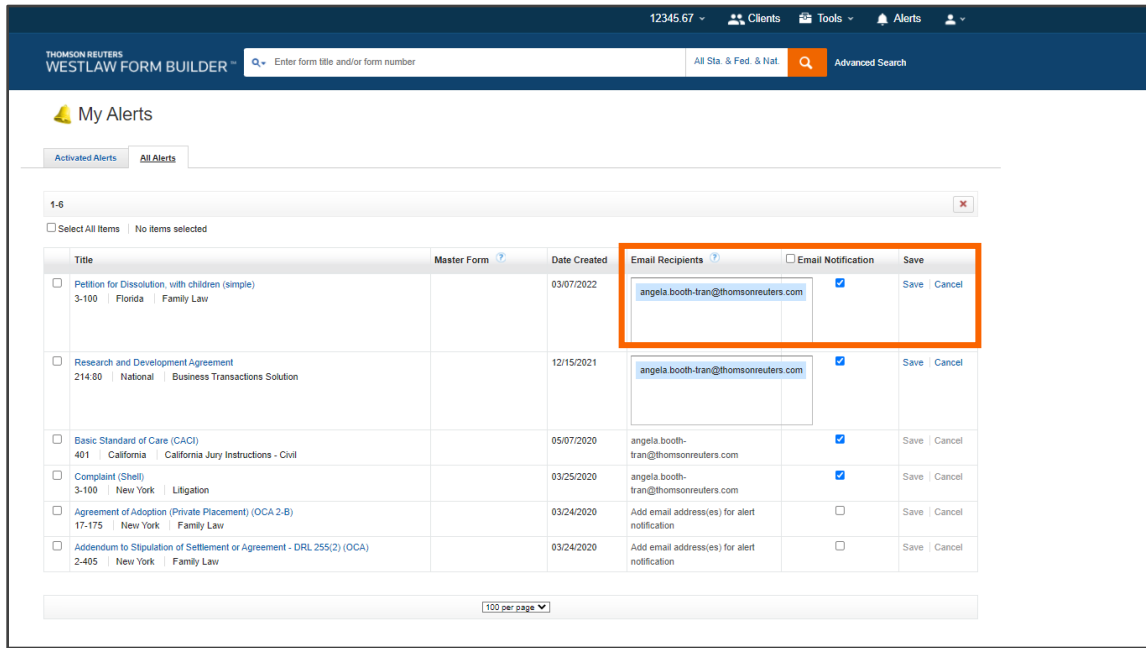


ADDING RECIPIENTS TO AN ALERT

Email notifications can be set up for some or all of your alerts. You can send email notifications to up to 100 people. Email notifications may only be opted out of by the user who created the alert.

Go to the Alerts page and select the **All Alerts** tab. Then, enter at least one email address in the **Email Recipient** field for your desired alert. Press the Tab key or select the field again to add another email address. To delete an email address, hover your mouse over it and select the email when a strike-through line appears.

Select the check box in the **Email Notification** column to turn on the email notifications. Select **Save** to save your changes.

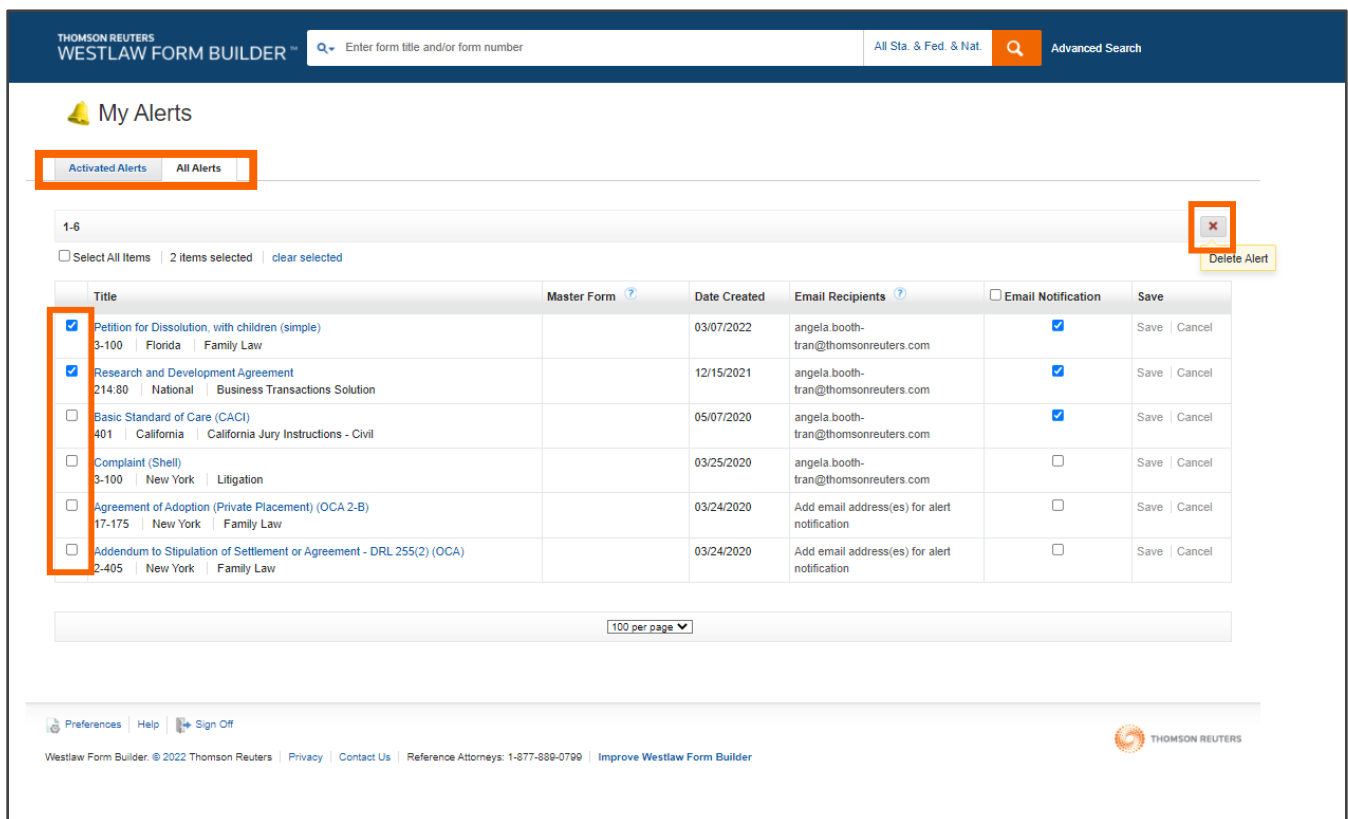


VIEWING A TRIGGERED ALERT

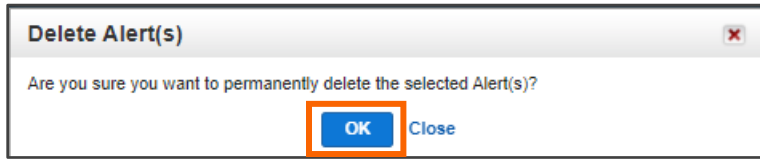
When an alert is triggered, you will immediately receive an automated email from Form Builder. Also, when alerts have been activated, the white Alerts Bell icon changes to yellow and the activated alerts will be listed in the Activated Alerts tab in Alerts.

DELETING AN ALERT

To delete an inactive alert, go the **All Alerts** tab in Alerts. Checkmark the alert(s) you like to delete and select the red X in the top, right area of the page.



Confirm your selection(s) by selecting OK.



NOTE: To delete an active alert, go to the Activated Alerts tab and follow the same process as above.

Looking for more information?

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