WESTLAW FORM BUILDER

How to create and manage clients

The Clients feature helps you organize clients and matters, share your work with others in your firm, company, or organization, and view in progress or completed documents.

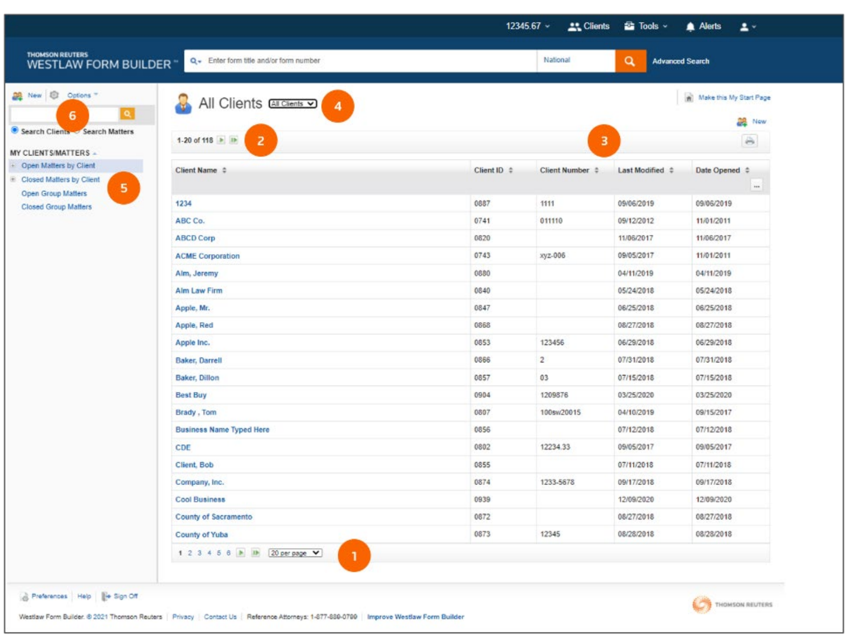
Accessing Clients

To access Clients, select **Clients** in the task bar in the upper right of any page.

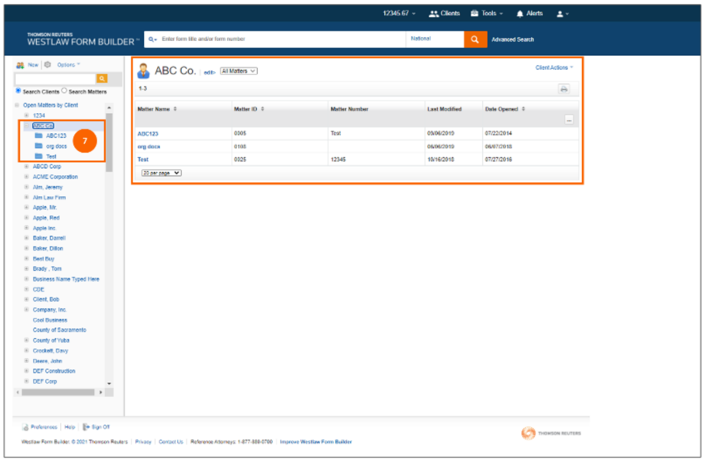
Viewing Clients

The Clients landing page displays a list of all clients in the firm, company, or organization on the right side. The left pane contains a search and browse function to easily navigate to clients and matters.

1. By default, clients or matters appear in groups of 20. To change this, go to the bottom of the page and **select 50 or 100 per page** in the drop-down menu.
2. Select the Singular **green arrow** to advance to the next group or go back to the previous group. Select the **green skip** button to go to the first page or last page of clients or matters.
3. The screen displays the Client Name, the Client Number, when the Client was Last Modified, and the Date Opened. Select the ellipses next to the Date Opened header to modify what columns appear for the client.
4. You can filter the clients to view only clients you have created by selecting **My Clients** in the drop-down menu next to the **All Clients** title at the top of the page.
5. Additionally, select the headers in the **MY CLIENTS/MATTERS** section in the left pane. Open Matters by Client, Closed Matters by Client, Open Group Matters, or Closed Group Matters, will show only the selected matters or clients with the reflected status.
6. To search for a specific client or matter, first select the appropriate radio button under the Search field at the top left of the screen, **Search Clients** or **Search Matters.** Then, type a term into the field. Results will auto-populate directly underneath the field. Continue typing until you see the correct client or matter and select it.



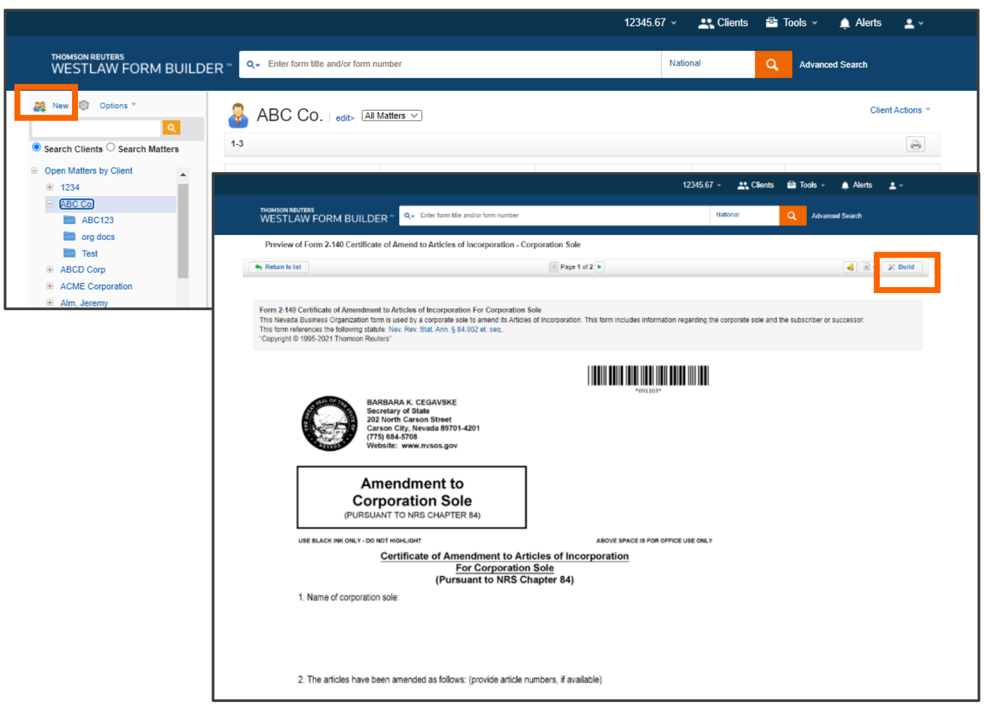
7. Select a client's name in the left pane or in a table on the right to view their client page. The table shows all matters associated with that client. Selecting a matter in this table, or a mater folder in the left pane, will bring you to the selected client's matter page.



Creating a New Client

There are two ways to create a client:

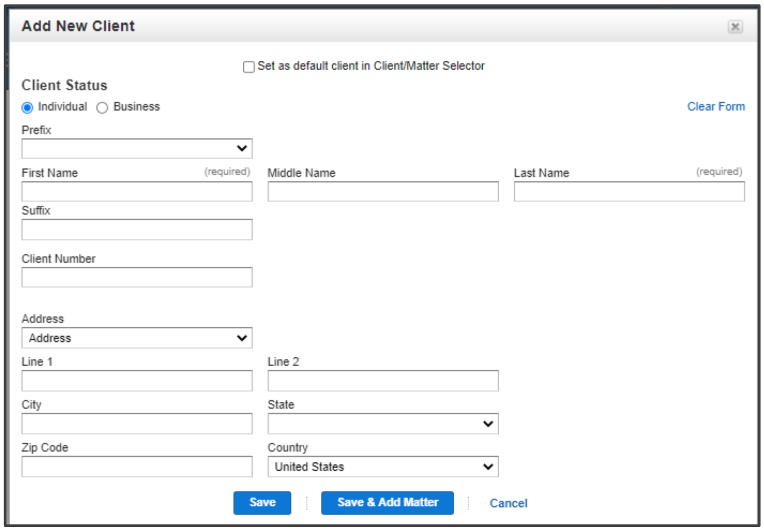
- From Clients, navigate to a client list and select the **New** button in the upper right or left of the page.
- Selecting **Build** from anywhere in Form Builder will display the Select Client Matter to Begin Form. Next, select the New Client button next to the Client drop-down menu.



In either case, the Add New Client lightbox will appear.

Fill in the fields. If you select the radio button for **Individual**, you must include a first and last name. You also have the option to create a new business client by selecting the radio button for **Business**. If you select the **Set as default client in Client/Matter Selector** check box, the newly created client's name, or any existing client, will appear by default in the Client field in the Selector lightbox when you build forms.

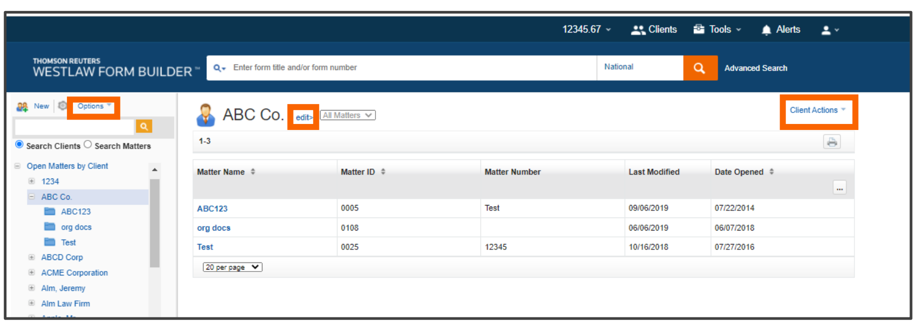
Additionally, you can immediately add a matter for the client by selecting Save & Add Matter from the **Add New Client lightbox**.



Editing Client Information

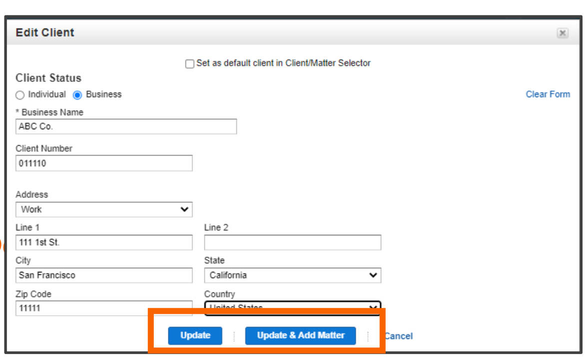
To edit a client's information, access the client page in Clients. Select either:

- The **Options drop-down arrow** in the search pane on the left and select **Edit,**
- The **edit** button to the right of the client's name, or
- The **Client Actions drop-down menu** on the far right and select **Edit Client Details**.



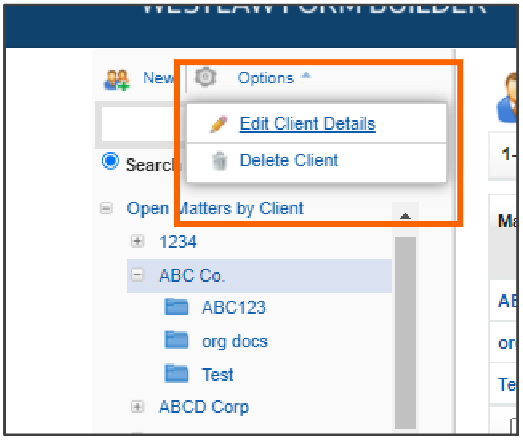
In all cases, an Edit Client lightbox will appear.

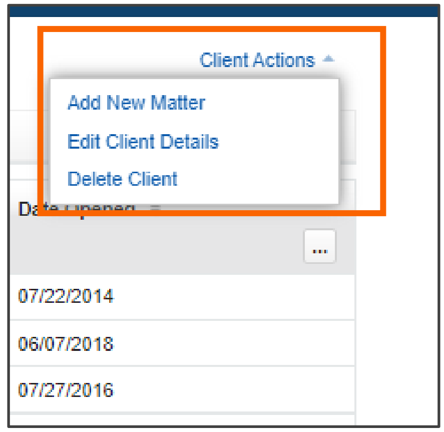
- Make any changes and select **Update**. If you would like to add a matter, select **Update & Add Matter**.



To delete a client, access their client page in Clients.

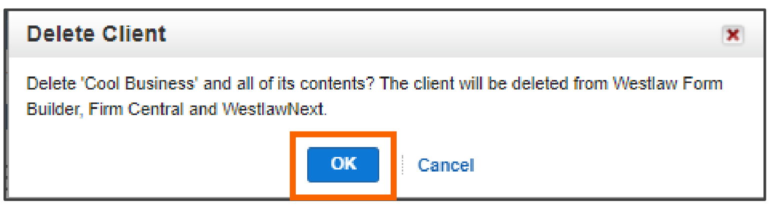
- Select the **Options** drop-down arrow on the left side and select **Delete Client**; or select the **Client Actions** drop-down arrow on the right and select **Delete Client**.





You must close or delete all matters associated with the client before you can delete the client. A Delete Client lightbox will display informing you that this matter will be deleted from all other Thomson Reuters programs, including Form Builder, Firm Central, and Westlaw.

- Select **OK** to delete the client.



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