

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.

The screenshot shows the 'All Clients' page with the following highlights:

- 1**: A red circle highlights the '20 per page' dropdown menu at the bottom left of the table.
- 2**: A red circle highlights the green 'next' arrow button at the bottom left of the table.
- 3**: A red circle highlights the ellipsis button in the 'Date Opened' column header.
- 4**: A red circle highlights the 'All Clients' title at the top left of the page.
- 5**: A red circle highlights the 'My Clients' dropdown menu in the left sidebar.
- 6**: A red circle highlights the 'Search Clients' radio button in the left sidebar.

MY CLIENTS/MATTERS section (Left Sidebar):

- Open Matters by Client
- Closed Matters by Client
- Open Group Matters
- Closed Group Matters

Search section (Top Left):

- Search Clients (radio button selected)
- Search Matters
- Search form field
- Advanced Search button

Table Headers (Top Right):

- Client Name
- Client ID
- Client Number
- Last Modified
- Date Opened

Table Data (List of clients):

Client Name	Client ID	Client Number	Last Modified	Date Opened
1234	0087	1111	09/06/2019	09/05/2019
ABC Co.	0741	011110	09/12/2012	11/01/2011
ABCD Corp	0820		11/06/2017	11/06/2017
ACME Corporation	0743	xyz-006	09/05/2017	11/01/2011
Aim, Jeremy	0880		04/11/2019	
Aim Law Firm	0840		05/24/2018	
Apple, Mr.	0647		06/25/2018	06/25/2018
Apple, Red	0658		08/27/2018	
Apple Inc.	0553	123456	06/29/2019	06/29/2018
Baker, Darrell	0886	2	07/31/2018	07/31/2018
Baker, Dillon	0657	03	07/15/2018	07/15/2018
Best Buy	0904	1209876	03/20/2020	03/25/2020
Brady, Tom	0897	1099/20015	04/10/2019	08/15/2017
Business Name Typed Here	0856		07/15/2018	07/12/2018
CDE	0902	12234-33	09/05/2017	09/05/2017
Client, Bob	0855		07/11/2018	
Company, Inc.	0874	1233-5878	09/11/2018	09/17/2018
Cool Business	0839		12/09/2020	
County of Sacramento	0872		08/27/2018	08/27/2018
County of Yuba	0873	12345	08/28/2018	08/28/2018

Page Navigation (Bottom Left):

- Page numbers: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100.
- 20 per page dropdown menu.

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 matter folder in the left pane, will bring you to the selected client's matter page.

Creating a New Client

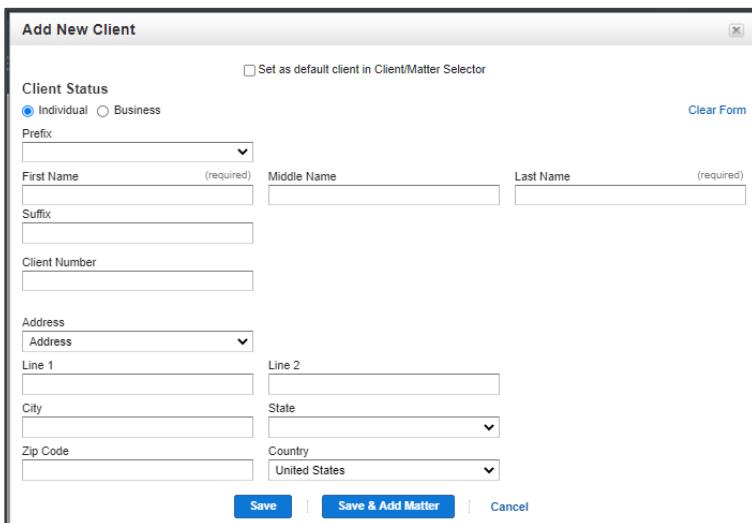
There are two ways to create a client:

- 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.



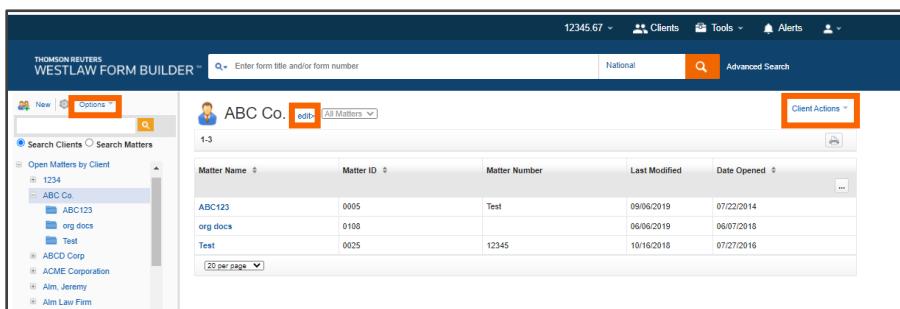
The 'Add New Client' lightbox contains the following fields:

- Client Status:** Individual (radio button selected), Business (radio button)
- Prefix:** (dropdown menu)
- First Name (required):** (text input)
- Middle Name:** (text input)
- Last Name (required):** (text input)
- Suffix:** (text input)
- Client Number:** (text input)
- Address:** (dropdown menu)
- Line 1:** (text input)
- Line 2:** (text input)
- City:** (text input)
- State:** (dropdown menu)
- Zip Code:** (text input)
- Country:** (dropdown menu)
- Set as default client in Client/Matter Selector:** (checkbox)
- Buttons:** Save, Save & Add Matter, Cancel

Editing Client Information

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

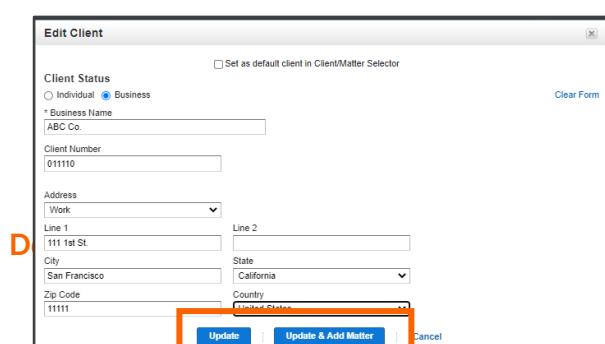
- The **Options drop-down arrow** in the search pane on the left and select **Edit**,
- The **edit** button to the right of the client's name, or
- The **Client Actions drop-down menu** on the far right and select **Edit Client Details**.



Matter Name	Matter ID	Matter Number	Last Modified	Date Opened
ABC123	0005	Test	09/06/2019	07/22/2014
org docs	0108		06/06/2019	06/07/2018
Test	0025	12345	10/16/2018	07/27/2016

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**.

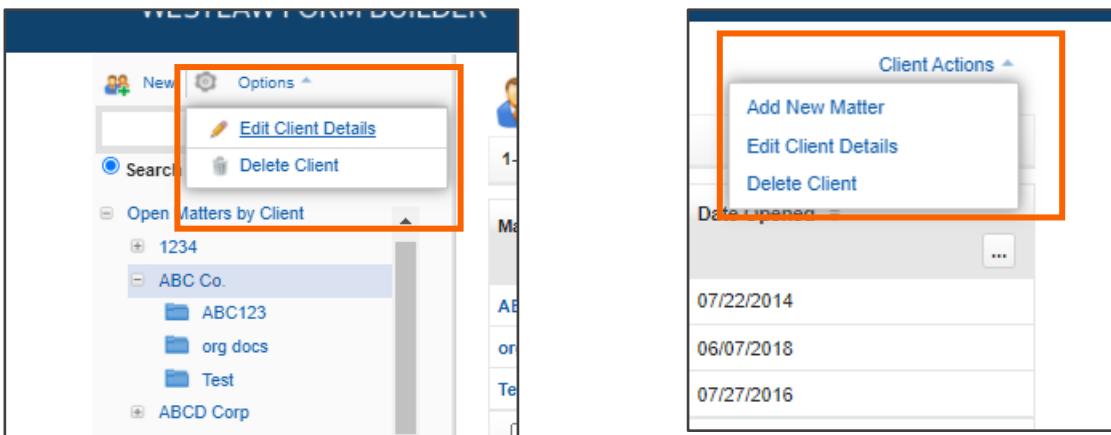


The 'Edit Client' lightbox contains the following fields:

- Client Status:** Individual (radio button), Business (radio button selected)
- * Business Name:** ABC Co. (text input)
- Client Number:** 011110 (text input)
- Address:** Work (dropdown menu)
- Line 1:** 111 1st St. (text input)
- Line 2:** (text input)
- City:** San Francisco (text input)
- State:** California (dropdown menu)
- Zip Code:** 11111 (text input)
- Country:** United States (dropdown menu)
- Set as default client in Client/Matter Selector:** (checkbox)
- Buttons:** Update, Update & Add Matter, Cancel

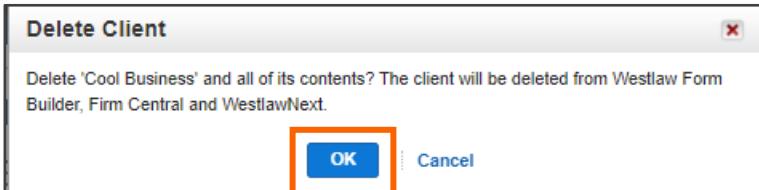
To delete a client, access their client page in Clients.

- 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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