

WESTLAW FORM BUILDER

How to download and modify Master Forms

You may download an existing master form, modify it, and upload it to Form Builder™ as a Custom Form, known as a Modified Master Form (MMF). The difference between a downloaded Master Form and a Blank Form is the Master Form contains question numbers in the body of the form and may be modified only by adding or deleting text. Question numbers may not be added or deleted.

Downloading a Master Form

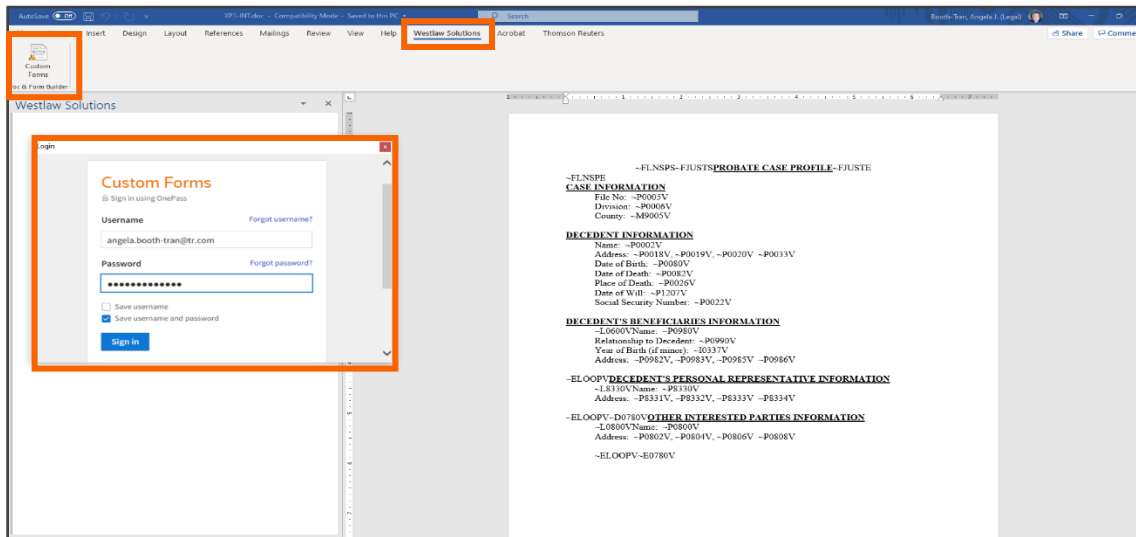
To download a Master Form, navigate to its preview page. Select the **Download Master Form** button in the toolbar in the upper right area of the page. The **Download Master Form** lightbox appears.

Select **Download** and save the Master Form to your computer.

The screenshot displays the Westlaw Form Builder interface. At the top, there is a navigation bar with the Thomson Reuters logo, a search bar, and various utility icons. The main content area shows a preview of a form titled 'Interview Client Interview Sheet'. The form includes sections for 'CASE INFORMATION', 'DECEDENT INFORMATION', 'DECEDENT'S BENEFICIARIES INFORMATION', 'DECEDENT'S PERSONAL REPRESENTATIVE INFORMATION', and 'OTHER INTERESTED PARTIES INFORMATION'. A toolbar in the upper right corner of the preview area contains several icons, with the 'Download Master Form' icon highlighted by a red box. A lightbox titled 'Download Master Form' is open in the foreground, showing options to 'Download Form(s)' (Save the form(s) to your computer.) and 'Share with Client' (Allow your client to view and complete the form(s) via the Client Portal.). A 'Share' button is visible next to the 'Share with Client' option. At the bottom of the lightbox, there are links for 'Go to Client', 'Go to Start Page', and a 'Download' button, which is also highlighted by a red box.

Modifying a Master Form

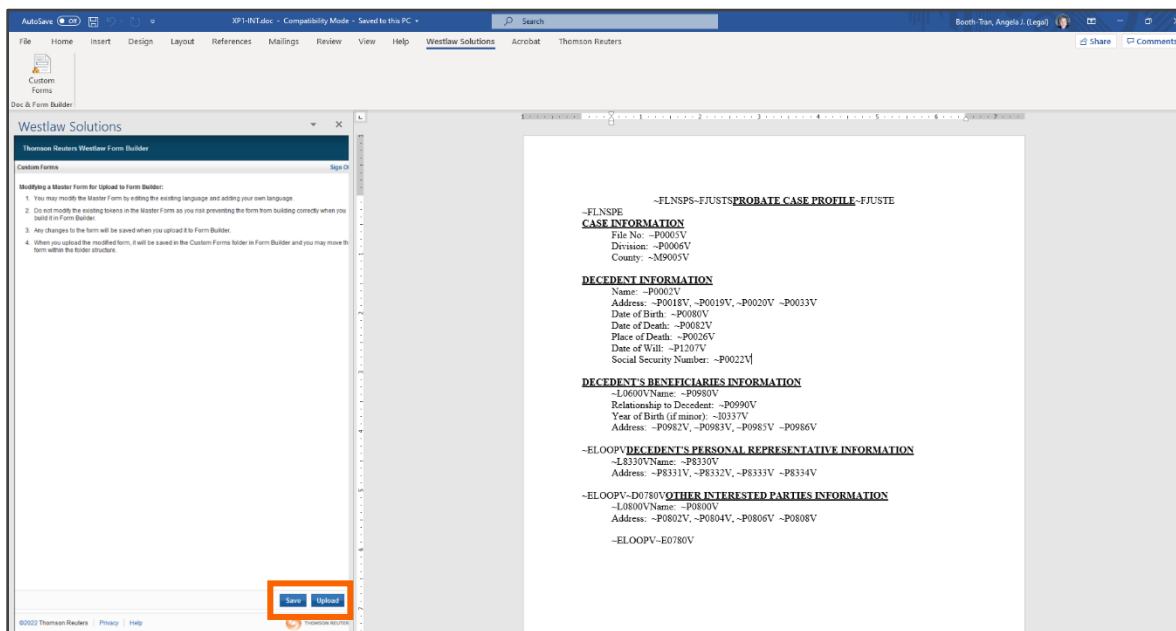
To modify the master form, open the file in Microsoft® Word®. Select the **Westlaw Solutions** tab and then select **Custom Forms**. Enter your OnePass username and password.



For a Master Form, you may modify the existing text by adding your own language and/or moving or deleting text in the master form. You cannot, however, change, add, or erase questions. This will compromise the integrity of the Master Form, and it may not build correctly in Form Builder.

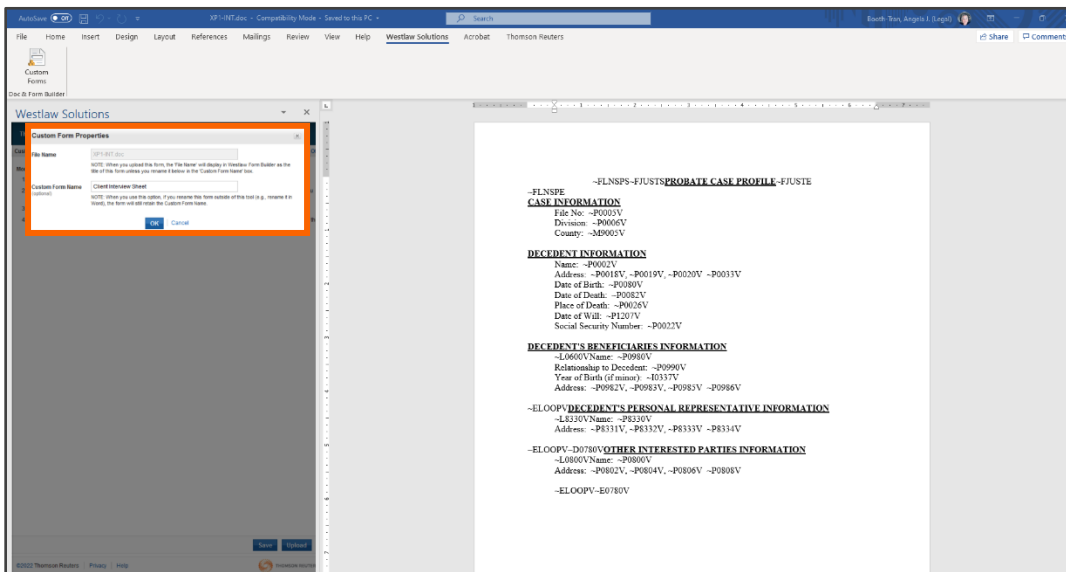
When you have finished modifying the Master Form, select **Save** to save a version to your computer.

To upload the form to Form Builder, select **Upload**.



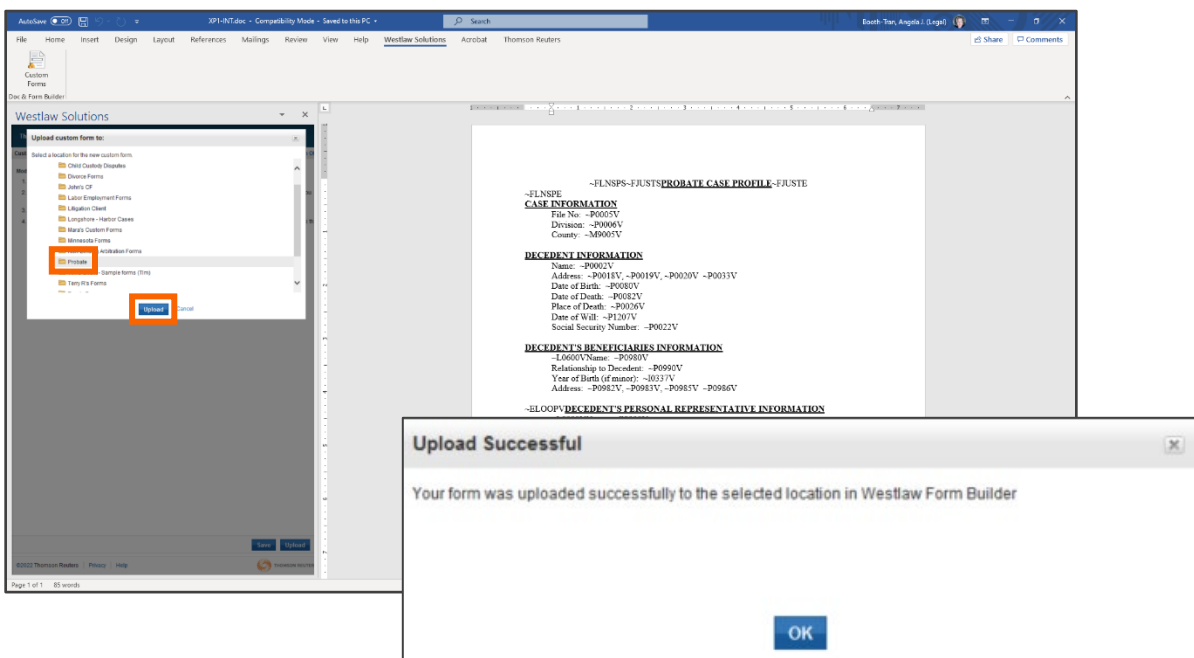
The **Custom Form Properties** lightbox will appear. The **File Name** field will automatically be populated with the file name and cannot be changed. The **Custom Form Name** field is automatically populated with the file name. To change it, enter a new title into the field.

Select **OK**.



The **Upload custom form to lightbox** will appear. It displays the folders you have created in Custom Forms in Form Builder. Select the **folder** you want to upload the form to and select **Upload**.

You will receive a confirmation message that your form was successfully uploaded.



Once you upload the Master Form to Form Builder, it becomes an MMF. Unless you change the setting in Preferences, an alert will automatically be placed on the MMF.

Preferences

General Assembly Firm Information Document Formatting Pleading Paper Formatting **Alerts**

Email Settings for Alerts Notification

Send an email notification when one or more of my alerts has been activated.

Recipients

To:

Enter names, groups, email addresses or select from contacts.

*Maximum Characters allowed : 100

Modified Master Forms Automatic Alerts

By default, when an underlying Master Form you used to create a Modified Master Form (MMF) is substantially changed and updated, an alert icon automatically displays next to the MMF title in Westlaw Form Builder.

You may turn off automatic alerts for MMFs on which you want to be alerted if the underlying Master Form is updated by checking the form's check box and clicking the alert button on any toolbar where the alert button displays.

Automatic Alerts: Set up automatic alerts when the MMF's underlying Master Forms are updated.

Note: By choosing to deselect the **Automatic Alerts** check box, you are turning off automatic alerting and any alert icons currently displaying next to all MMF's will be removed. You will not receive MMF alerts on updated Master Forms unless you manually set up alerts or keep the **Automatic Alerts** check box checked.

Save Close

Looking for more information?

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