

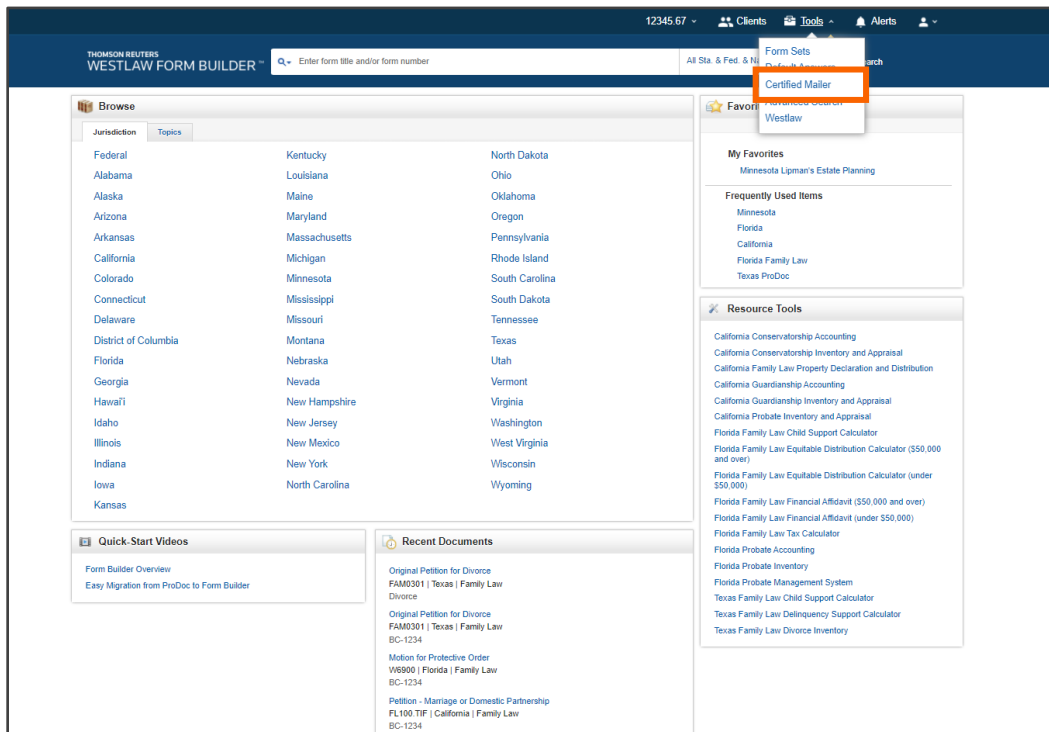
WESTLAW FORM BUILDER

How to create certified mailers

The Form Builder™ Certified Mailer feature makes it easy to print labels for certified mail. Certified Mailer conforms to the United States Postal Service® certified mail requirements when you print on the updated Walz certified mailer labels. You can select clients to include in the mailing and add new recipients who are not in your list of clients.

Accessing Certified Mailer

Go to the **Tools** drop-down in the upper right area of any page and select **Certified Mailer**.



Creating Certified Mailer Labels

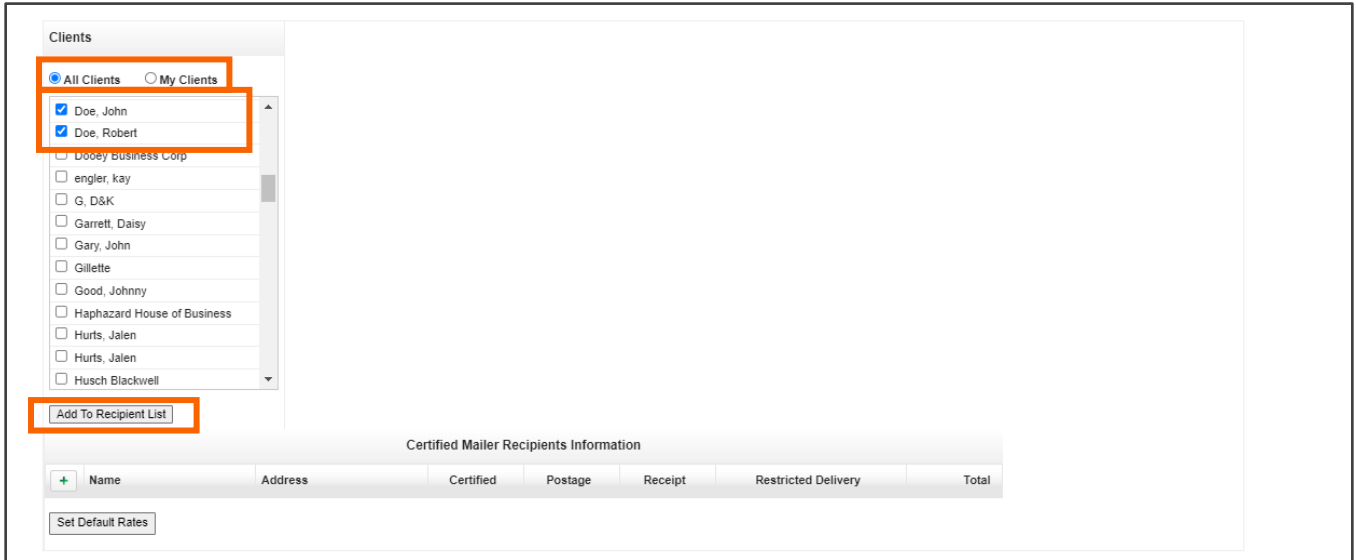
ADDING RECIPIENTS

The Law Firm/Company and Address information is auto populated from the Firm Information tab found in Preferences. Enter text in the fields labeled **Re:** and **Preparer's Initials**.

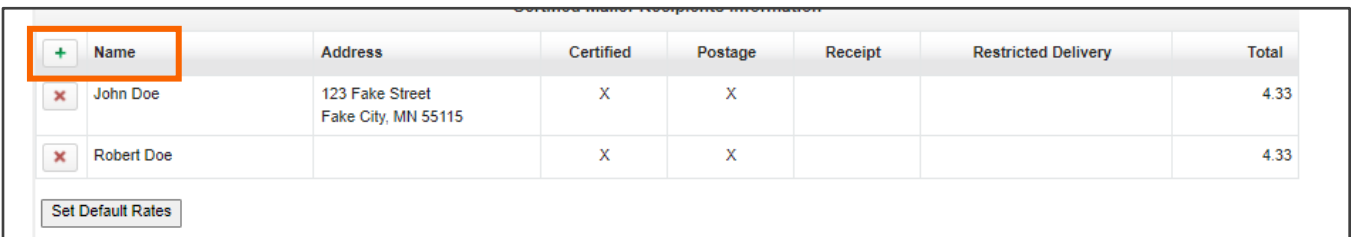
Law Firm/Company: Thomson Reuters	Address: 610 Opperman Drive null, Eagan, MN	Current 2021 Rates Certified fee: 3.75 *Receipt fee: 3.05 Postage fee: 0.58 Restrict fee: 5.85 Note: If you set your own default rates, ensure they are at least equal to the above rates.
Re: <input type="text"/>	Preparer's Initials: <input type="text"/> (Appears on the Return Receipt Requested form)	

Select client to add to the Certified Mailer Recipients list. To add a recipient who is not on the clients list, click the plus (+) button to the left of the "Name" label to create a new recipient to add to the Certified Mailer Recipients list.
 Note: Any non-client recipients and mailing addresses you add here are not saved and do not become a part of your Westlaw Form Builder client database. *The electronic Return Receipt Requested option is not available.
 Reminder: Insert Certified Mailer label sheets into printer before printing the template.

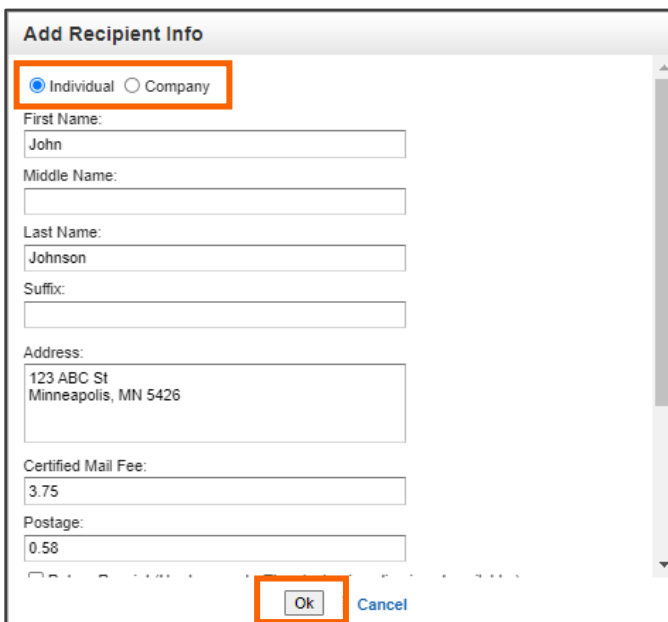
Filter the clients by selecting the **All Clients** and **My Clients** radio buttons. Select the clients you want to add to the recipient list by **checking the box** next to each client and selecting **Add To Recipient List**.



The recipients will populate as illustrated below. To add recipients that are not clients, select the **plus** button next to the **Name** column.



An **Add Recipient Info** lightbox will appear. Select the radio button for whether the recipient is an **Individual** or a **Company**. Enter the appropriate information in the fields and select **Ok**.



Client address information is automatically populated from the clients' database in Form Builder. Any non-client recipients and mailing addresses you add here are not saved and do not become part of your Form Builder client database.

To select a recipient to edit, hover your mouse anywhere over that recipient's row and select it. The row will highlight in blue.

	Name	Address	Certified	Postage	Receipt	Restricted Delivery	Total
<input type="checkbox"/>	John Doe	123 Fake Street Fake City, MN 55115	X	X			4.33
<input type="checkbox"/>	Robert Doe		X	X			4.33
<input type="checkbox"/>	John Johnson	123 ABC St Minneapolis, MN 5426	X	X			4.33

Set Default Rates

An **Edit Recipient Info** lightbox will appear. Enter the appropriate information in the fields and select **Ok**.

Edit Recipient Info

Individual Company

First Name:

Middle Name:

Last Name:

Suffix:

Address:

Certified Mail Fee:

Postage:

POSTAL RATES AND FEES

In the right area of the Certified Mailer Recipients Information page, the **Total** field shows the current postal rates. These are automatically updated after a postal rate increase. You may choose to edit these for the current session only or to edit as the default rates for all future mailer sessions.

To edit current session rates, highlight and select any **recipient** to open the **Edit Recipient Info** lightbox.

Certified Mailer Recipients Information

	Name	Address	Certified	Postage	Receipt	Restricted Delivery	Total
<input type="checkbox"/>	John Doe	123 Fake Street Fake City, MN 55115	X	X			4.33
<input type="checkbox"/>	Robert Doe	610 Opperman Dr Eagan, MN 55123	X	X			4.33
<input type="checkbox"/>	John Johnson	123 ABC St Minneapolis, MN 5426	X	X			4.33

Scroll down to see the rate and fee fields. Edit amounts in the fields if needed. To edit the **Return Receipt Fee** and **Restricted Delivery Fee** amounts, you must check the corresponding boxes as these services are optional.

Select **Apply Rates to All Recipients** to make changes to all recipients in your list.

Select **Ok** to save changes.

NOTE: *The Return Receipt is hardcopy only. The electronic option is not available.*

Edit Recipient Info

Name: _____

Address:
123 Fake Street
Fake City, MN 55115

Certified Mail Fee:
3.75

Postage:
0.58

Return Receipt (Hardcopy only. The electronic option is not available.)

Return Receipt Fee:
3.05

Restricted Delivery

Restricted Delivery Fee:
5.85

Total: 4.33

[Apply Rates To All Recipients](#)

Ok Cancel

To set default rates, select **Set Default Rates** on the Certified Mailer Recipients Information page.

Certified Mailer Recipients Information							
+	Name	Address	Certified	Postage	Receipt	Restricted Delivery	Total
✖	John Doe	123 Fake Street Fake City, MN 55115	X	X			4.33
✖	Robert Doe	610 Opperman Dr Eagan, MN 55123	X	X			4.33
✖	John Johnson	123 ABC St Minneapolis, MN 5426	X	X			4.33

Set Default Rates

The **Default Mail Rate Settings** lightbox appears. Edit amounts in the corresponding fields. Checking the **Return receipt requested** or **Restricted delivery to addressee** boxes generates these service rates for each recipient in your Certified Mailer Recipient list going forward.

Select **Ok** when you are done making your selections.

You may go back to current rates by selecting **Set to Current Rates**.

NOTE: *The Return Receipt is hardcopy only. The electronic option is not available.*

Default Mail Rate Settings

Any changes you make to these settings will be applied when you add a recipient to the Certified Mailer Recipient list or when you close and re-open the Certified Mailer. *The Return Receipt (Electronic) option is not available.

Certified Mail fee: 3.75
Return Receipt (Hardcopy): 3.05
*Return Receipt (Electronic): N/A
Certified Mail Restricted Delivery: 5.85
Postage: 0.58

Return receipt requested
 Restricted delivery to addressee

Set to Current 2021 Rates

Ok Cancel

DOWNLOAD AND PRINT CERTIFIED MAILER LABELS

When the Certified Mailer Recipients Information is complete, you are ready to download and print Certified Mailer labels. Insert Certified Mailer label sheets into your printer before printing the template.

Select **Download Reports** in the upper right area of the Certified Mailer page.

THOMSON REUTERS
WESTLAW FORM BUILDER

12345 67 Clients Tools Alerts

Enter form title and/or form number All Sta. & Fed. & Nat. Advanced Search

Certified Mailer

Exit **Download Reports**

Law Firm/Company: Thomson Reuters Address: 610 Opperman Drive null, Eagan, MN 55123

Re: []

Preparer's Initials: [] (Appears on the Return Receipt Requested form)

Current 2021 Rates
Certified fee: 3.75 *Receipt fee: 3.05
Postage fee: 0.58 Restrict fee: 5.85
Note: If you set your own default rates, ensure they are at least equal to the above rates.

Select client to add to the Certified Mailer Recipients list. To add a recipient who is not on the clients list, click the plus (+) button to the left of the "Name" label to create a new recipient to add to the Certified Mailer Recipients list.
Note: Any non-client recipients and mailing addresses you add here are not saved and do not become a part of your Westlaw Form Builder client database. *The electronic Return Receipt Requested option is not available.
Reminder: Insert Certified Mailer label sheets into printer before printing the template.

Clients

All Clients My Clients

- County of Yuba
- Crockett, Davy
- Deere, John
- DEF Construction
- DEF Corp
- Demo, Demo
- Document, Jane
- Document, Sample
- doe, Jane
- doe, John
- Doe, John
- Doe, Robert
- Dooley Business Corp

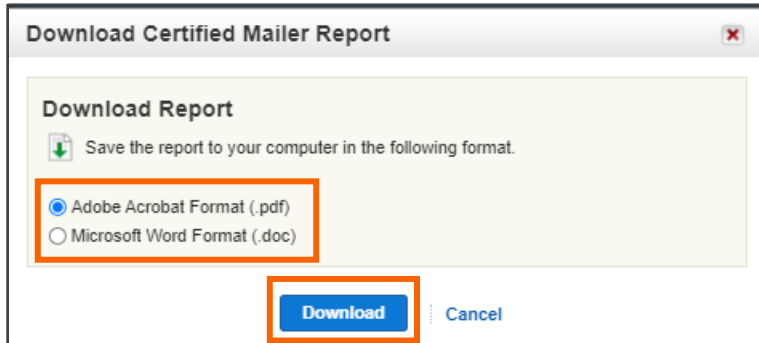
Add To Recipient List

Certified Mailer Recipients Information

Name	Address	Certified	Postage	Receipt	Restricted Delivery	Total
John Doe	123 Fake Street Fake City, MN 55115	X	X			4.33
Robert Doe	610 Opperman Dr Eagan, MN 55123	X	X			4.33

Choose the label format (.pdf or .doc) to save to your computer by selecting the appropriate radio button.

Select Download.



Looking for more information?

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