

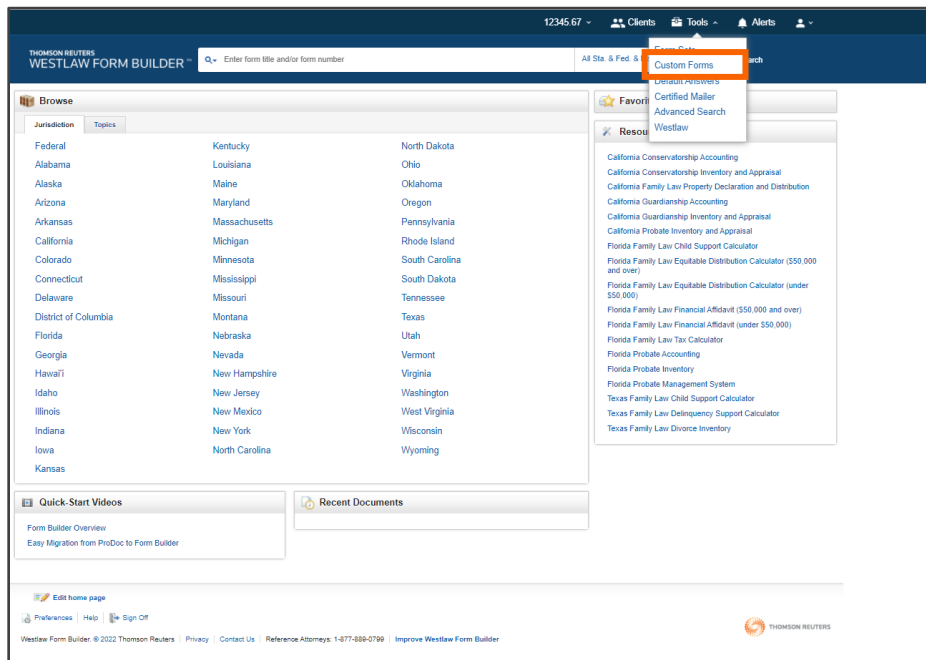
# WESTLAW FORM BUILDER

## How to view, manage, and build Custom Forms

Custom Forms are easy to manage and build in Westlaw Form Builder™.

### VIEWING CUSTOM FORMS

Begin by selecting **Custom Forms** from the **Tools** drop-down menu.

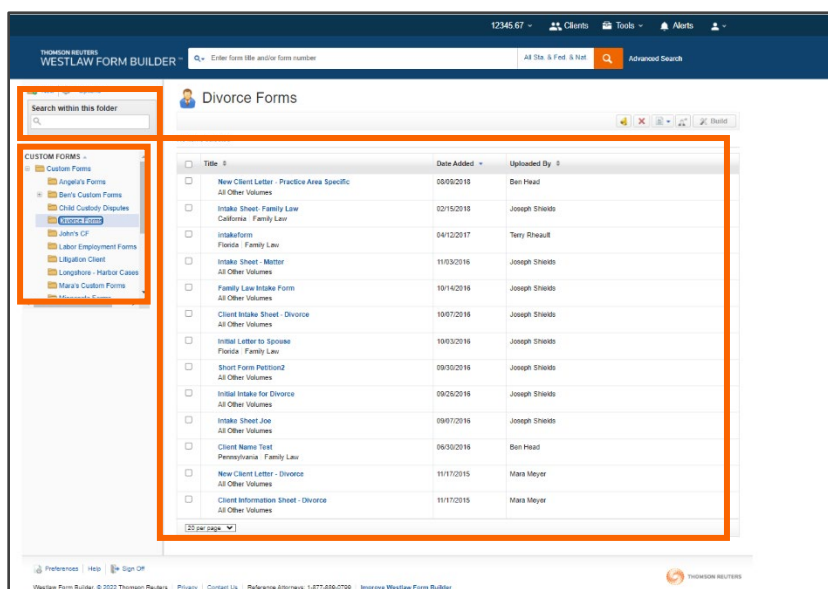


Once you have created and uploaded a custom form, you can view it on the right side of the Custom Forms page. All custom form folders that you have created display in the left column. Use this to navigate and search for your Custom Forms.

Select the **plus** or **minus** icons next to folders to expand or collapse their contents. The Custom Forms folder is the default folder and cannot be deleted.

To search for a specific form title, enter your terms in the **Search Form Title** field and select **Search**.

Select a **folder** to view the Custom Forms contained within it on the right. The titles of all custom forms in the folder are displayed, along with the date added and the person who uploaded the form. This page provides functions that are similar to the Results page when you browse or search for forms in Form Builder.



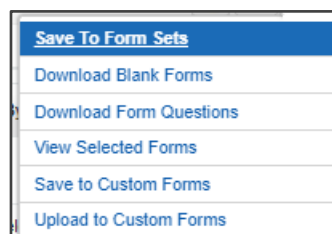
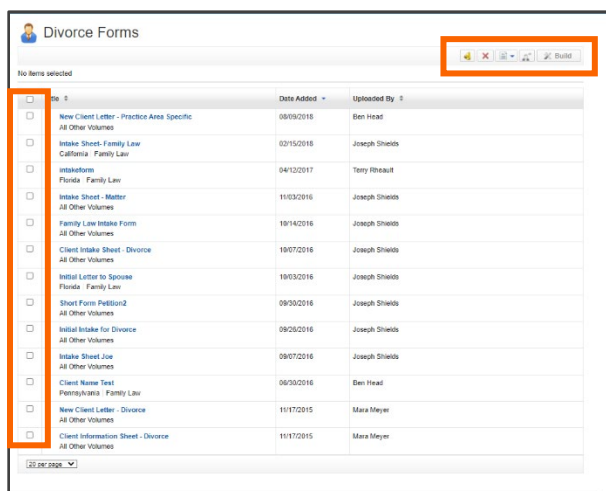
## MANAGING CUSTOM FORMS

This page provides functions for Custom Forms that are similar to the Results page when you browse or search for forms in Form Builder.

In the top right area of the page you'll find your **function options**. For each, you must first select the form you would like by selecting the **check box** preceding the Title or select the **Select all** check box.

The options you have include:

- 1) The **red "X"** allows you to delete a form.
- 2) **Save to Form Set** allows you to add one or more custom forms to a public or private form set. A form set is a collection of forms to be built together.
- 3) **Download Blank Forms** allows you to download a copy of the custom form(s) with empty answer blanks.
- 4) **Download Form Questions** enables you to download a document containing all the questions for the custom forms you selected. This function consolidates all the information you need to collect in one place without having to go through all the forms. It only downloads the questions themselves, even if you have already completed the forms.
- 5) **View Selected Forms** allows you to see which forms you have selected, which is helpful if you have selected forms across multiple pages.



## PREVIEWING CUSTOM FORMS

Select the hyperlink to the form Title that you're interested in viewing.

The screenshot shows the Thomson Reuters Westlaw Form Builder interface. On the left, there is a sidebar with a search bar and a list of folders including 'Ben's Custom Forms', 'Child Custody Disputes', 'Divorce Forms', 'John's CF', 'Labor Employment Forms', 'Litigation Client', 'Longshore - Harbor Cases', 'Mara's Custom Forms', 'Minnesota Forms', 'Non-Binding Arbitration Fo', 'Probate', and 'Tim's Client - Kamenie form'. The main area displays a list of forms under the 'Divorce Forms' category. The list has columns for 'Title', 'Date Added', and 'Uploaded By'. The first form, 'New Client Letter - Practice Area Specific', is highlighted with a red box. Other forms include 'Intake Sheet- Family Law California - Family Law', 'Intakeform Florida - Family Law', 'Intake Sheet - Matter All Other Volumes', 'Family Law Intake Form All Other Volumes', 'Client Intake Sheet - Divorce All Other Volumes', 'Initial Letter to Spouse Florida - Family Law', 'Short Form Petition2 All Other Volumes', 'Initial Intake for Divorce All Other Volumes', 'Intake Sheet Joe All Other Volumes', 'Client Name Text Pennsylvania - Family Law', 'New Client Letter - Divorce All Other Volumes', and 'Client Information Sheet - Divorce All Other Volumes'.

Title	Date Added	Uploaded By
New Client Letter - Practice Area Specific	08/09/2018	Ben Head
Intake Sheet- Family Law California - Family Law	02/15/2018	Joseph Shields
Intakeform Florida - Family Law	04/12/2017	Terry Rheault
Intake Sheet - Matter All Other Volumes	11/03/2016	Joseph Shields
Family Law Intake Form All Other Volumes	10/14/2016	Joseph Shields
Client Intake Sheet - Divorce All Other Volumes	10/07/2016	Joseph Shields
Initial Letter to Spouse Florida - Family Law	10/03/2016	Joseph Shields
Short Form Petition2 All Other Volumes	09/30/2016	Joseph Shields
Initial Intake for Divorce All Other Volumes	09/26/2016	Joseph Shields
Intake Sheet Joe All Other Volumes	09/07/2016	Joseph Shields
Client Name Text Pennsylvania - Family Law	06/30/2016	Ben Head
New Client Letter - Divorce All Other Volumes	11/17/2015	Mara Meyer
Client Information Sheet - Divorce All Other Volumes	11/17/2015	Mara Meyer

A copy of the form is visible, and all parts of the form that need to be added are shown by blank lines.

The screenshot shows the preview of the 'New Client Letter - Practice Area Specific' form. The form includes a header for Thomson Reuters Law, a 'Re:' field, a 'Dear' field, and several paragraphs of text. The text is as follows:

THOMSON REUTERS LAW  
610 Opperman Drive  
Eagan, MN 55123  
123-456-7890

Re: \_\_\_\_\_

Dear \_\_\_\_\_:

It was indeed a pleasure to meet with you recently on with regard to your \_\_\_\_\_ matter. As I fully indicated, these matters are quite complex and very detailed. Also, I wish to reemphasize the considerable time periods which we must endure. Our office will continually notify you as to all developments on this matter and you may be assured that we will pursue this matter in an earnest and speedy manner.

Since we will be sending you various letters from time to time, I would suggest that you open a little file or large envelope in order for you to place all materials sent to you. Often, the material will have stamped on the face, "client's copy." You need not take any action or call this office if you receive such a communication or correspondence. We will be sending you various copies so that you will be updated on the development of your claim.

Again, thank you for the pleasure of assisting you. We look forward to a favorable disposition of this matter. However, please be patient.

Sincerely,

\_\_\_\_\_

\_\_\_\_\_ - Correspondence

At the bottom of the form, there are links for 'Preferences', 'Help', and 'Sign Off'. The footer includes the text 'Westlaw Form Builder © 2022 Thomson Reuters | Privacy | Contact Us | Reference Attorneys: 1-877-888-0700 | Improve Westlaw Form Builder' and the Thomson Reuters logo.

## BUILDING A CUSTOM FORM

To begin building a Custom Form, select **Build** in the top, right area of the Preview page.

The screenshot displays the Thomson Reuters Westlaw Form Builder interface. At the top, there is a navigation bar with the text "THOMSON REUTERS WESTLAW FORM BUILDER" and a search bar. Below this, the main content area shows a preview of a form titled "Preview of Form New Client Letter - Practice Area Specific". The form content includes the Thomson Reuters Law logo, address (610 Opperman Drive, Eagan, MN 55123, 123-456-7890), and several paragraphs of placeholder text. A "Build" button is highlighted in orange in the top right corner of the preview area. The footer contains links for Preferences, Help, Sign Off, and copyright information.

## Looking for more information?

Visit [legal.solutions.com/formbuilder](https://legal.solutions.com/formbuilder)