

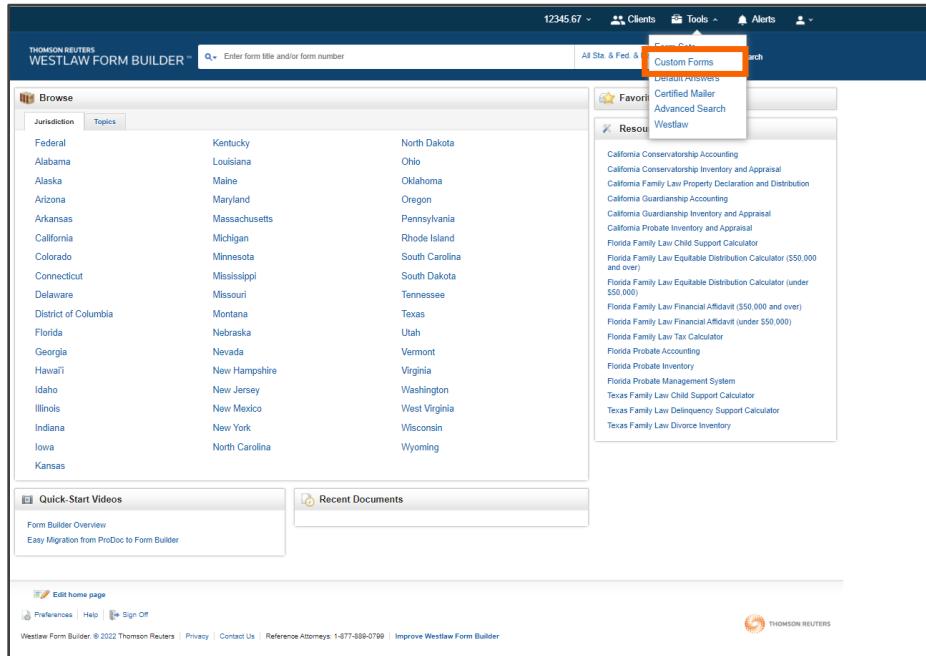
# WESTLAW FORM BUILDER

## 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.



The screenshot shows the Westlaw Form Builder homepage. At the top, there is a navigation bar with links for 'Clients', 'Tools', 'Alerts', and a user profile. Below the navigation bar is a search bar with the placeholder 'Enter form title and/or form number'. To the right of the search bar is a dropdown menu with options: 'All Sta. & Fed. Forms', 'Custom Forms' (which is highlighted with a red box), 'Default Answers', 'Certified Mailed', 'Advanced Search', and 'Westlaw'. The main content area is divided into sections: 'Browse' (with 'Jurisdiction' and 'Topics' tabs), 'Recent Documents' (empty), and 'Results' (a list of form titles). The 'Results' section includes links for California Conservatorship Accounting, California Conservatorship Inventory and Appraisal, California Family Law Property Declaration and Distribution, California Guardianship Accounting, California Guardianship Inventory and Appraisal, California Probate Inventory and Appraisal, Florida Family Law Child Support Calculator, Florida Family Law Equitable Distribution Calculator (\$50,000 and over), Florida Family Law Equitable Distribution Calculator (under \$50,000), Florida Family Law Financial Affidavit (\$50,000 and over), Florida Family Law Financial Affidavit (under \$50,000), Florida Family Law Tax Calculator, Florida Probate Accounting, Florida Probate Inventory, Florida Probate Management System, Texas Family Law Child Support Calculator, Texas Family Law Delinquency Support Calculator, and Texas Family Law Divorce Inventory. At the bottom of the page, there are links for 'Quick-Start Videos', 'Recent Documents', 'Edit home page', 'Preferences', 'Help', 'Sign Off', and footer information including copyright notice and links to 'Privacy', 'Contact Us', 'Reference Attorneys', and 'Improve Westlaw Form Builder'.

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.

The screenshot shows the Westlaw Form Builder interface. The top navigation bar includes '12345.67', 'Clients', 'Tools', 'Alerts', and a search bar. The main content area is titled 'Divorce Forms' and displays a list of custom forms. A red box highlights the top right corner of the list area, which contains buttons for 'Edit', 'Delete', 'Select All', and 'Build'. The list includes various forms such as 'New Client Letter - Practice Area Specific', 'Intake Sheet - Family Law', 'Intake Sheet - Florida', 'Initial Letter to Spouse', 'Short Form Petition2', 'Initial Intake for Divorce', 'Intake Sheet Joe', 'Client Name Test', 'New Client Letter - Divorce', and 'Client Information Sheet - Divorce'. The interface also features a sidebar with a 'CUSTOM FORMS' tree view and a search bar.

## 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.

The screenshot shows the Westlaw Form Builder interface with a red box highlighting the top right corner of the list area, which contains buttons for 'Edit', 'Delete', 'Select All', and 'Build'. The list area shows a table with columns for 'Title', 'Date Added', and 'Uploaded By'. The 'Title' column lists various forms, and the 'Date Added' and 'Uploaded By' columns show the date and user for each. A red box highlights the 'Select All' checkbox at the top left of the list area. The sidebar and search bar are also visible.

**Save To Form Sets**  
[Download Blank Forms](#)  
[Download Form Questions](#)  
[View Selected Forms](#)  
[Save to Custom Forms](#)  
[Upload to Custom Forms](#)

## How to view, manage and build Custom Forms

## QUICK REFERENCE GUIDE

## PREVIEWING CUSTOM FORMS

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

12345.67 • Clients Tools Alerts

THOMSON REUTERS  
WESTLAW FORM BUILDER

Enter form title and/or form number

All Sta. & Fed. & Nat. Advanced Search

New Options Search within this folder

Divorce Forms

No items selected

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

25 per page

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

12345.67

THOMSON REUTERS  
WESTLAW FORM BUILDER  Enter form title and/or form number  All Sta. & Fed. & Nat.

Preview of Form New Client Letter - Practice Area Specific

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

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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

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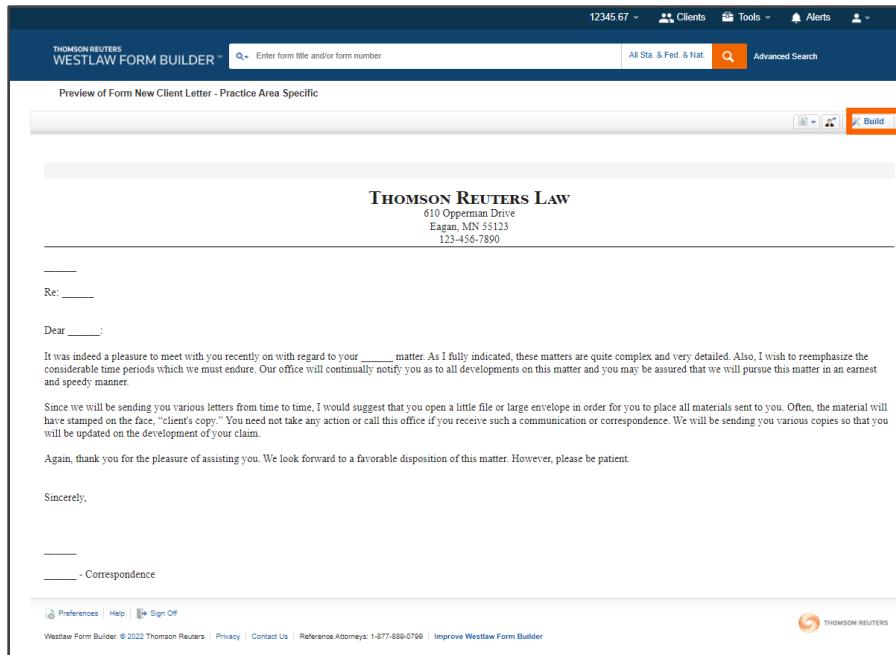
Preferences | Help | Sign Off

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### BUILDING A CUSTOM FORM

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



12345 67 ~ Clients Tools Alerts

Enter form title and/or form number

All Sta. & Fed. & Nat. Advanced Search

Preview of Form New Client Letter - Practice Area Specific

Build

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

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

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

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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

Preferences | Help | Sign Off

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