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How to Add, Complete, and Send a Form to a Client within a Matter

Max Mazo - 2026-06-13 - [Comments \(0\)](#) - [Forms, Precedents and Templates](#)

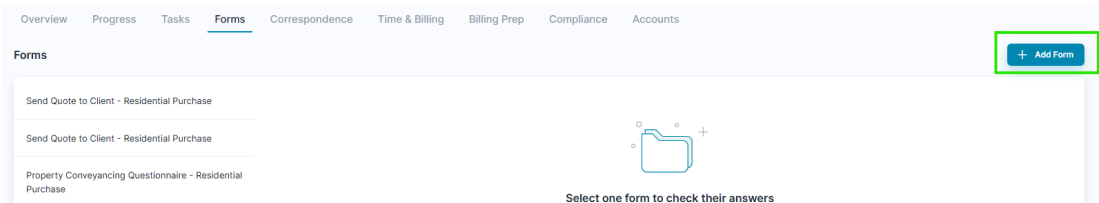
How to Add, Complete, and Send a Form to a Client within a Matter

This guide explains the process which you must follow to add a pre-built form to an existing matter. It also details how to complete a form for internal record-keeping and the steps to send the form directly to your client for their input, which streamlines your data collection process.

Adding a Form to a Matter

To begin, you must first navigate to the correct matter and locate the forms management area.

1. Navigate to the matter to which you wish to add a form.
2. In the matter navigation bar near the top of the screen, click the **Forms** tab.
3. In the upper-right corner of the Forms screen, click the + Add Form button. The 'Add Form' catalogue screen will appear.



1. Browse or use the search field at the top of the screen (**Find form by title**) to locate the required form.
2. Click on the form card to select the form which you wish to add (for example, the **SDLT Form** card).
3. Click the Continue button in the lower-right corner to add the selected form to the matter. The form will now appear in the Forms list of your matter.

Completing a Form for Internal Use

Forms which have been added to a matter can be completed by you or other members of your team directly within the system.

1. On the **Forms** tab of the matter, select the form which you wish to complete (e.g., **SDLT Form**).
2. Fill in the relevant fields with the required data (for example, enter 100,000 into the **Purchase Price** field).
3. Fill in any subsequent fields which require input (e.g., enter 1,000 into the **SDLT Payable** field).
4. Click the Save button in the lower-right corner of the form. A confirmation message will appear briefly, which states: Your document is being processed, give it a few seconds to get the filled form.

Sending a Form to the Client for Completion

You can send a form directly to a client so they can complete the required fields themselves via the client portal.

1. On the Forms tab of the matter, click the Send to Client link which is located under the relevant form title (e.g., under the Client Questionnaire form). A pop-up window titled 'Send to client' will appear.

The screenshot shows a software interface with a top navigation bar containing 'Overview', 'Progress', 'Tasks', 'Forms', 'Correspondence', 'Time & Billing', 'Billing Prep', 'Compliance', and 'Accounts'. The 'Forms' tab is active. On the left, a list of forms is shown, with 'Property Conveyancing Questionnaire - Residential Purchase' selected. The main area displays the form's questions and input fields. At the bottom, a 'Send To Client' button is highlighted with a green box, along with 'Save' and 'Submit' buttons.

1. Within the pop-up, ensure the **Client** radio button is selected.
2. The system will pre-populate the client's name and contact details in the search box below, which you should verify.
3. Click the Send to Client button at the bottom of the pop-up window. A confirmation pop-up will appear, which states that the form has been published to the client portal and provides a shareable link.
4. Click the Copy button, which copies the link for the form to your clipboard, allowing you to send it to the client via your preferred communication method. A brief on-screen message will confirm that the URL has been copied to your clipboard.