



Lexis Practice Advisor®
advancing what's possible

Lexis® Smart Forms User Guide

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Introduction to Lexis® Smart Forms

Lexis Smart Forms are automated legal templates that provide trusted up-to-date content delivered on a powerful technology platform. The templates come in the form of interactive interviews that can build documents with the right data and clauses based on user answers. The interviews can support multiple data types, enabling easy population of the document based on interview answers supplied as free text, date selections, radio button selections, etc.

Completed forms built using Lexis Smart Forms can be downloaded as Word files (.docx) or PDF. Interview answers can also be saved and imported into other Smart Forms interviews.

1 Finding Smart Forms


Smart Forms are included in select Lexis Practice Advisor® practice areas. Navigate Lexis Practice Advisor as you normally would, by browsing in the Task List or using the Search bar to find forms. If there are Smart Forms available in your browse or search results list, you will see a “Lexis® Smart Forms” check box at the end of the list of filters. Check the box to see just the Smart Forms in your browse or search results list. Smart Forms are labelled in browse and search results with an information button. Hover over the button to get more information about Smart Forms.

This screenshot shows a search results page in Lexis Practice Advisor. On the left, there is a filter sidebar with sections for 'Jurisdiction' (listing U.S. Federal, International, California, Delaware, and Non-jurisdictional) and 'Source' (listing Corporate and M&A Topics). At the bottom of the sidebar, the 'Lexis® Smart Forms' checkbox is checked and highlighted with a red circle, with a '[New!]' badge next to it. The main content area displays search results for 'Asset Purchase Agreement (Pro-Buyer) (Short Form) (DE)'. The first result is a detailed description of the form, followed by a list of related forms: '4. Asset Purchase Agreement (Division of Seller's Business) (DE)', '5. Bill of Sale (Asset Purchase Agreement)', and '6. Bill of Sale (Asset Purchase Agreement)'. Each result includes a brief description and a 'Form Type' label (LPA Authored Forms).

This screenshot shows a search results page in Lexis Practice Advisor. The top navigation bar includes a 'Sort by' dropdown set to 'Document title (A-Z)'. The left sidebar shows filters for 'Insurance', 'Legal Services', 'Form Type', and 'Lexis® Smart Forms' (checked). The main content area displays search results for 'Advertising Agency Services Agreement (Pro-Advertiser)'. The first result is a detailed description of the form, followed by a list of related forms: '11. Affiliate Network Participation Agreement', '12. Agency Agreement (Export Sales Exclusive) (TX)', and '13. Agency Agreement (Export Sales Exclusive) (TX)'. Each result includes a brief description and a 'Form Type' label (Expert Forms). A 'More about Lexis® Smart Forms' tooltip is visible over the 'Smart Form' icon, showing a three-step process: Step 1 (Answer questions), Step 2 (Build document), and Step 3 (Download document). The tooltip also includes a note: 'Note: Smart Forms help you save time and reduce the risk of errors by building your document with the relevant content and clauses based on answers you provide in an automated questionnaire.'

You can see all Smart Forms available on your Lexis Practice Advisor subscription by clicking on the link in the Smart Forms pod on select practice area pages.

Lexis® Smart Forms



Save time and reduce the risk of errors by building your document based on answers you supply to an interactive questionnaire.

See your Smart Forms

Lexis Practice Advisor®

Practice Areas

Search Lexis Practice Advisor

Corporate and M&A

Ask Our Authors

History

Help

More

Home / Corporate and M&A / Smart Forms

Smart Forms | Actions

Narrow By

Practice Area

New York Business & Commercial24

Florida Business & Commercial23

California Business & Commercial21

Corporate Counsel21

Texas Business & Commercial21

More

Jurisdiction

Delaware9

New York2

Non-jurisdictional19

Select multiple

Smart Forms (33)

Sort by: Document title (A-Z)

1. Advertising Agency Services Agreement (Pro-Advertiser)

Smart Form ⓘ

Jurisdiction: Non-jurisdictional | Form Type: Expert Forms

2. Agreement For Sale of Goods (Pro-buyer, short form)

Smart Form ⓘ

Form Type: Expert Forms

3. Agreement For Sale of Goods (Pro-seller, short form)

Smart Form ⓘ

Form Type: Expert Forms

4. Amendment Agreement

2 Accessing Smart Forms

Lexis Practice Advisor forms that have the Smart Forms feature include a “Build Your Document” button at the top of the screen. When you click on “Build Your Document,” the start screen will open in your default browser in a new tab or window.

The screenshot shows the Lexis Practice Advisor interface. At the top, there is a navigation bar with the Lexis Practice Advisor logo, a search bar, and various menu items like 'Practice Areas', 'Corporate and M&A', 'Ask Our Authors', 'History', 'Help', and 'More'. Below the navigation bar, the document title 'Document: Certificate of Formation (DE Series LLC)' is displayed. The main content area features a 'Smart Form' section with a 'Build Your Document' button. Below this, there is a 'Form Summary' section. On the right side, there is an 'About This Document' sidebar with links for 'Quick Download' and 'Drafting Notes', and a note that the document was updated on 07/05/2018.

The screenshot shows the Lexis Smart Forms interface for the 'Certificate of Formation (DE Series LLC)'. The page has a dark header with the Lexis Smart Forms logo. Below the header, the title 'Certificate of Formation (DE Series LLC)' is displayed. The main content area contains a paragraph of text explaining the requirements for forming a Series LLC in Delaware. At the bottom of the page, there are three buttons: 'Quit', 'Skip', and 'Next'.

3 Interview Progress

Each screen in the interview will show you the name of the form that will be built based on your answers, which topic you are in in the interview, and the number of questions answered and remaining. Answer fields may be free text fields, drop-down menus, radio buttons, date selectors, or check boxes.

Lexis® Smart Forms

Certificate of Formation (DE Series LLC) in progress. 1

Hide Interview Progress 2

Topic Progress

Formation ☒

Limited Liability Company ☒

Registered Address 3 ☐

Signatory ☐

Interview Progress 4

6 Questions Answered

6 Questions to Answer (Min)

Q Preview

Registered Address 5

Registered Agent Name Jane Doe 6

Address 742 Evergreen Terrace

City Springfield

State 7 Select an answer

ZIP Code 8

Quit Back Save Skip Next

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NO.	ITEM	DESCRIPTION
1	Form in Progress	Form title with the additional words “in progress...” indicating that the interview is in progress.
2	Hide/Show Interview Progress	Click to hide the progress pane. Click again to show the progress pane.
3	Topic Progress	The topic highlighted in white denotes the topic of the interview that the user is on.
4	Count of Questions Answered	Indicates the number of questions answered in the interview and the number remaining to be answered. Hover over the red progress bar to check the progress in percentage form.
5	Topic Title	Title of the topic, which reflects the title in the Topic Progress pane.

6	Answer Field	Text answers should be written here. Other types of answer fields may include radio buttons, check boxes, date selectors, and drop-down menus.
7	Asterisk	Signifies an answer that is mandatory to progress to the next interview topic.
8	Quit	Quits the Smart Forms interview. The user will be taken to the Lexis Practice Advisor home page.

4 Navigating the Interview Topics

You can jump from one interview topic to another by clicking on the topics in the Topic Progress pane. If you jump to a different topic, you will see a pop-up box prompting you to commit to your answers in the current screen before jumping (Commit), jump to the new topic without committing to your answers (Jump), or cancel. Select “Don’t ask me again – always take this action” before clicking on Jump or Commit to make it your default action. You can change this setting in your session configuration. Note that by selecting Jump, you will lose the answers you have entered in the current interview topic.

Lexis® Smart Forms

Certificate of Formation (DE Series LLC) in progress. 1

Hide Interview Progress 2

Topic Progress

- Formation ☒
- Limited Liability Company ☒
- Registered Address 3**
- Signatory ☐
- Interview Progress 4
 - 6 Questions Answered
 - 6 Questions to Answer (Min.)

Preview

Registered Address 5

Registered Agent Name **Jane Doe 6**

Address **742 Evergreen Terrace**

City **Springfield**

State: **7** **Select an answer**

ZIP Code

8 **Quit**

< Back Save >> Skip Next >

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×

Jump from the topic 'Advertising Agency - > Signatory' to 'Agreement'?

Your answers have not been saved from this page.

You can choose to:

- jump now, ignoring answers from the page (don't commit)
- commit your answers *and* jump to this topic if possible
- cancel and use next to proceed with the interview

Jump

Commit

Cancel

☐ Don't ask me again - always take this action

If you click on the topic you are currently in, you will see a pop-up box that will allow you to reload the topic. This is useful if you want to delete the answers that have been entered into the screen and start over. As with the Jump pop-up box, you can select “Don’t ask me again – always take this action” before clicking on Reload to make it your default action. You can change this setting in your session configuration.

Lexis®
Smart Forms

Certificate of Formation (DE Series LLC) in progress...

Hide Interview Progress

Topic Progress

Formation ☒

Limited Liability Company ☒

Registered Agent and Office ☐

Signatory ☐

Interview Progress

2 Questions Answered

5 Questions to Answer (Min.)

Preview

Registered Agent and Office

Drafting Note

The registered office must be located in the State of Delaware. The registered agent must be located in the State of Delaware and may be the company itself located at the registered office, an individual at the registered office, or a third-party registered agent located in the state that is retained by the company. 6 Del. C. § 18-104.

The Delaware Division of Corporations maintains a list of registered agents for hire in Delaware on its website at corp.delaware.gov/agents.

Name

Jane Doe

Address

742 Evergreen Terrace

City

Springfield

ZIP Code

Quit

Back

Save

Skip

Next

×

Reload the topic 'Agreement'?

Your answers have not been saved from this page.

You can choose to:

- reload the topic, reviewing previously committed answers if any
- cancel and use next to proceed with the interview

Reload

Cancel

☐ Don't ask me again - always take this action

To go back and forth between interview screens, click the Back or Next buttons. Skip allows you to go from an interview screen to the document preview by skipping all non-mandatory questions.

Lexis®
Smart Forms

Certificate of Formation (DE Series LLC) in progress...

Hide Interview Progress

Topic Progress

Formation ☒

Limited Liability Company ☐

Registered Address ☐

Signatory ☐

Interview Progress

1 Question Answered

9 Questions to Answer (Min.)

Preview

Limited Liability Company

Name

This document establishes the following series of:

☐ members.

☐ managers.

☐ limited liability company interests.

Series rights and limitations:

☐ Static

Jump from the topic 'Limited Liability Company' to 'Registered Address'?

Your answers have not been saved from this page.

You can choose to:

- jump now, ignoring answers from the page (don't commit)
- commit your answers and jump to this topic if possible
- cancel and use next to proceed with the interview

Jump

Commit

Cancel

☐ Don't ask me again - always take this action.
(You can change this selection in session configuration)

Reload the topic 'Limited Liability Company'?

Your answers have not been saved from this page.

You can choose to:

- reload the topic, reviewing previously committed answers if any
- cancel and use next to proceed with the interview

Reload

Cancel

☐ Don't ask me again - always take this action.
(You can change this selection in session configuration)

Quit

< Back

Save

>> Skip

Next >

11

12

13

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NO.	ITEM	DESCRIPTION
9	Jump pop-up window	Enables the user to navigate to another topic and either (1) commit to the answers before jumping, which will save the answers on the screen or (2) jump without committing, which will delete the answers on the screen. The user can choose to always take one or the other action by selecting “Don’t ask me again – always take this action.”
10	Reload pop-up window	Enables the user to reload the topic. Any answers written will be lost if the topic is reloaded. The user can choose to always take this action when the current topic is reloaded by selecting “Don’t ask me again – always take this action.”
11	Back	Takes the user back to the previous screen in the interview.
12	Skip	Skip to the document preview. If the interview has any mandatory questions that have not been answered, then clicking Skip will show the user the mandatory questions that remain in the interview.
13	Next	Takes the user to the next screen in the interview.

To go back and forth between interview screens, click the Back or Next buttons. Skip allows you to go from an interview screen to the document preview by skipping all non-mandatory questions.

Lexis® Smart Forms

Certificate of Formation (DE Series LLC) in progress...

Hide Interview Progress

Topic Progress

- Formation ☒
- Limited Liability Company ☐
- Registered Address ☐
- Signatory ☒

Interview Progress

9 Questions Answered
3 Questions to Answer (Min.)

Preview

Limited Liability Company

This document establishes the following series of:

You must select an answer

- ☐ members.
- ☐ managers.
- ☐ limited liability company interests.

Series rights and limitations:

You must select an answer

- ☐ Static
- ☐ Additional Provisions

Quit

Back Save Skip Next

5 Previewing and Saving Your Document

You can preview your document in two ways: (1) within an interview screen by clicking on “Preview” to see the document with the answers entered so far in the interview and (2) at the end of the interview, when a preview is generated with all the answers supplied in the interview.

The document preview at the end of the interview also includes options for downloading the document to your local drive as a Microsoft Word or PDF file.

You can also save all your interview answers by clicking on the Save button. The Save button is available on all interview screens as well as the document preview, so that you can save your answers at any point in the interview. When Save is clicked, an answer file will be saved to your local drive. The answer file can then be imported into any Smart Forms interview, with answers populating the interview to the extent the fields match what is in the answer file.

Lexis® Smart Forms

Certificate of Formation (DE Series LLC) in progress...

Hide Interview Progress

Topic Progress

- Formation ☒
- Limited Liability Company ☒
- Registered Address ☒
- Signatory ☐

Interview Progress

10 Questions Answered
1 Question to Answer (Min.)

Preview 14

Signatory

Drafting Note to Signature

Unless otherwise provided in an LLC Agreement, the Delaware LLC Act states that any person may sign any certificate or amendment or enter into an LLC Agreement or amendment. In most cases, it is prudent for a founding Member to sign the Certificate of Formation.

Authorized Person Name

Quit

Back Save Skip Next

Output Preview

Preview 15 Summary 16

CERTIFICATE OF FORMATION
OF
ABC LLC

This Certification of Formation, dated as of the 23rd day of August, 2018, is being duly executed and filed by the undersigned to form a limited liability company pursuant to Section 18-201 of the Delaware Limited Liability Company Act (the “Act”).

FIRST: The name of the limited liability company (the “Company”) hereby is:
ABC LLC

SECOND: The registered office of the Corporation in the State of Delaware is located at 123 Fourth St., New York, New York 10001. The name of its registered agent at such address is Jane Doe.

THIRD: Pursuant to Section 18-215 of the Act, the following series of managers is established, each series shall be denoted as and the rights and limitations on each series shall be as follows:
The debts, liabilities, and obligations incurred, contracted for or otherwise existing with respect to a particular series of the Company, shall be enforceable against the assets of such series only and not against the assets of the Company generally, or any other series thereof, and none of the debts, liabilities, obligations, and expenses incurred, contracted for or otherwise existing with respect to the Company

OK

Certificate of Formation (DE Series LLC) complete **17**

1. Review the web preview below and click any **active text** to change your answers...
2. Review the **interview summary** at the bottom of this page and click any question to change your answer...
3. When you are happy with the document and your answers, click next to proceed...

✕ Quit

18

Save

Create a **Word/DOCX** document, containing:

- ☒ The document ☒ Drafting notes ☐ Interview summary

Open

19Create a **PDF** document, containing:

- ☒ The document ☒ Drafting notes ☐ Interview summary

Open

**CERTIFICATE OF FORMATION
OF****ABC LLC**

This Certification of Formation, dated as of the **18th** day of **September, 2018**, is being duly executed and filed by the undersigned to form a limited liability company pursuant to Section 18-201 of the Delaware Limited Liability Company Act (the "Act").

FIRST: The name of the limited liability company (the "Company") hereby is:

ABC LLC**20**

SECOND: The registered office of the Corporation in the State of Delaware is located at **123 Fourth St., New York, New York 10001**. The name of its registered agent at such

Interview Summary **21****Formation****Certificate of Formation Date***September 18, 2018***Limited Liability Company****Name***ABC LLC*

This document establishes the following series of:
members.

Prev Next

Name of Series

[]

Registered Address**Registered Agent Name***Jane Doe***Address***123 Fourth St.***City***New York***State:***New York*

NO.	ITEM	DESCRIPTION
14	Preview link	Generates a preview of the document using the currently available interview answers.
15	Preview pop-up window	Preview of the document generated based on the currently available interview answers.
16	Summary	A tab within the Preview pop-up window, this shows a list of all the currently available interview answers.
17	Document Preview	At the end of the interview, the Document Preview shows a preview of the document with all available interview answers, download options, and the interview summary.
18	Save	Also available on each interview screen, the Save button enables the user to save the answers to the interview to the user's local drive.
19	Download options	<p>Allows the user to download the document as a Microsoft Word or PDF file. In addition to the document, the user can include Drafting Notes and the Interview Summary in the download.</p> <ul style="list-style-type: none"> • Drafting Notes: Additional guidance about select clauses in the document that may not have been addressed in the interview, such as how and why a clause may need to be revised to fit particular situations and filing or service instructions. Not every document will have Drafting Notes. • Interview Summary: A list of the answers the user supplied in the interview.
20	Active text	When clicked, active text will take the user back to the corresponding question, allowing the user to change the answer. After changing an answer using active text and clicking Next, the user will be taken back to the Document Preview.
21	Interview Summary	A list of the answers the user supplied in the interview. The user can go back to any of the questions in the interview by clicking on the question names (blue text).

6 Previewing and Saving Your Document

As noted above, the Save button is available on every interview screen the Document Preview at the end of the interview. When the Save button is clicked, you will see a screen prompting you to download your answers to your local drive. You can upload saved answers to a Smart Forms interview by clicking on the link on the first interview screen. Answers will populate in the interview to the extent the answers in the upload match the questions in the interview.

After you click Save you will see this screen, where you will be able to select the location on your local drive to save the answer file:

The screenshot shows the 'Saving Answers...' screen within the Lexis Smart Forms interface. The header bar is dark grey with 'Lexis® Smart Forms' in white. Below the header, a light grey bar contains the text 'Saving answers for Certificate of Formation (DE Series LLC)'. The main content area is white and features the title 'Saving Answers...' in bold. Below the title, a paragraph of text reads: 'Click \'Save\' to download your answers to your local drive & then hit \'Next\' to continue. You may re-use these answers in another document session by using the \'load\' link at the beginning of the interview.' At the bottom of the main content area, there are three buttons: a blue button with a download icon and the text 'Save', and two blue buttons labeled '< Back' and 'Next >'. The footer bar is dark grey and contains the LexisNexis logo, 'About LexisNexis®', 'Privacy Policy', 'Terms & Conditions', 'Copyright ©2018 LexisNexis. All rights reserved.', and the RELX Group logo.

When you are in a Smart Form into which you want to import your answers from an answer file, click “Import Saved Answers”:

The screenshot shows the 'Certificate of Formation (DE Series LLC)' screen within the Lexis Smart Forms interface. The header bar is dark grey with 'Lexis® Smart Forms' in white. Below the header, a light grey bar contains the text 'Certificate of Formation (DE Series LLC)'. The main content area is white and features a paragraph of text explaining the requirements for filing a Certificate of Formation in Delaware. In the top right corner of the main content area, there is a link labeled 'Import saved answers' which is circled in red. At the bottom of the main content area, there are three buttons: a blue button with a close icon and the text 'Quit', and two blue buttons labeled '>> Skip' and 'Next >'. The footer bar is dark grey and contains the LexisNexis logo, 'About LexisNexis®', 'Privacy Policy', 'Terms & Conditions', 'Copyright ©2018 LexisNexis. All rights reserved.', and the RELX Group logo.

You will be taken to a screen from which you can select the answer file on your local drive to import into the interview:

Lexis®
Smart Forms

Load answers for Certificate of Formation (DE Series LLC)

Loading Answers...

Select your saved Exari Answer File (.ans) to upload.

Filename No file chosen


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