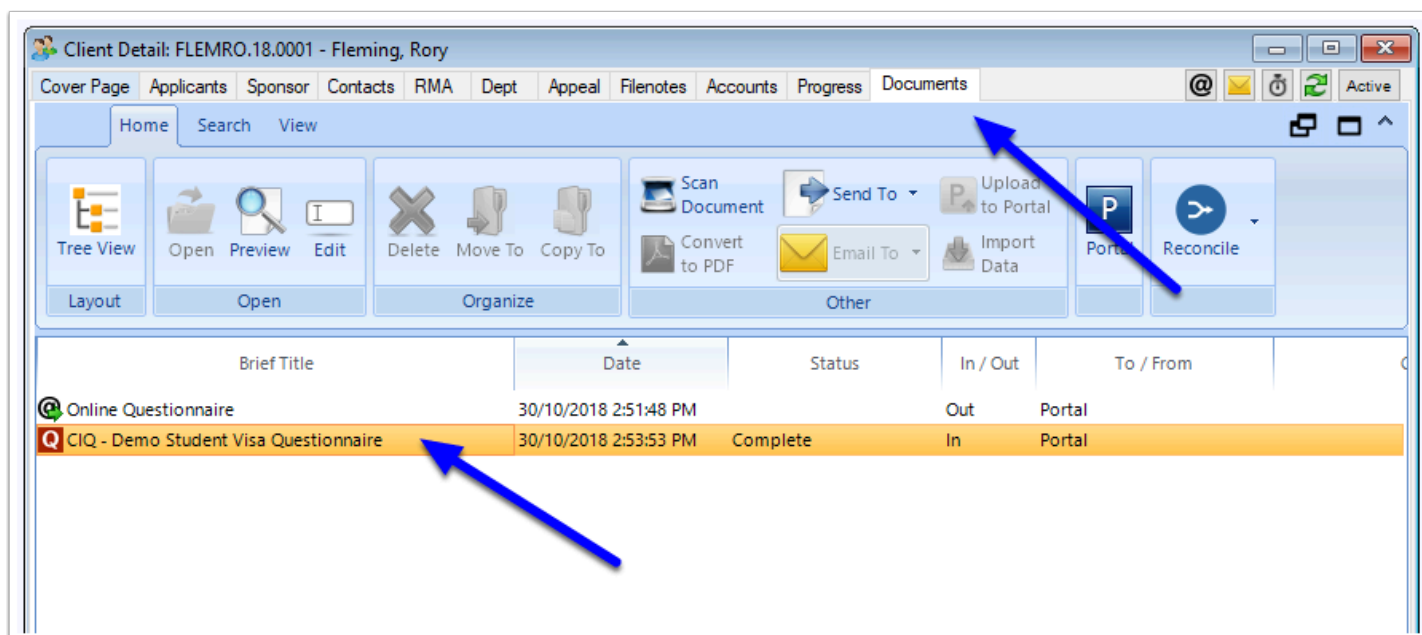


How to return a Web Questionnaire to the client for editing

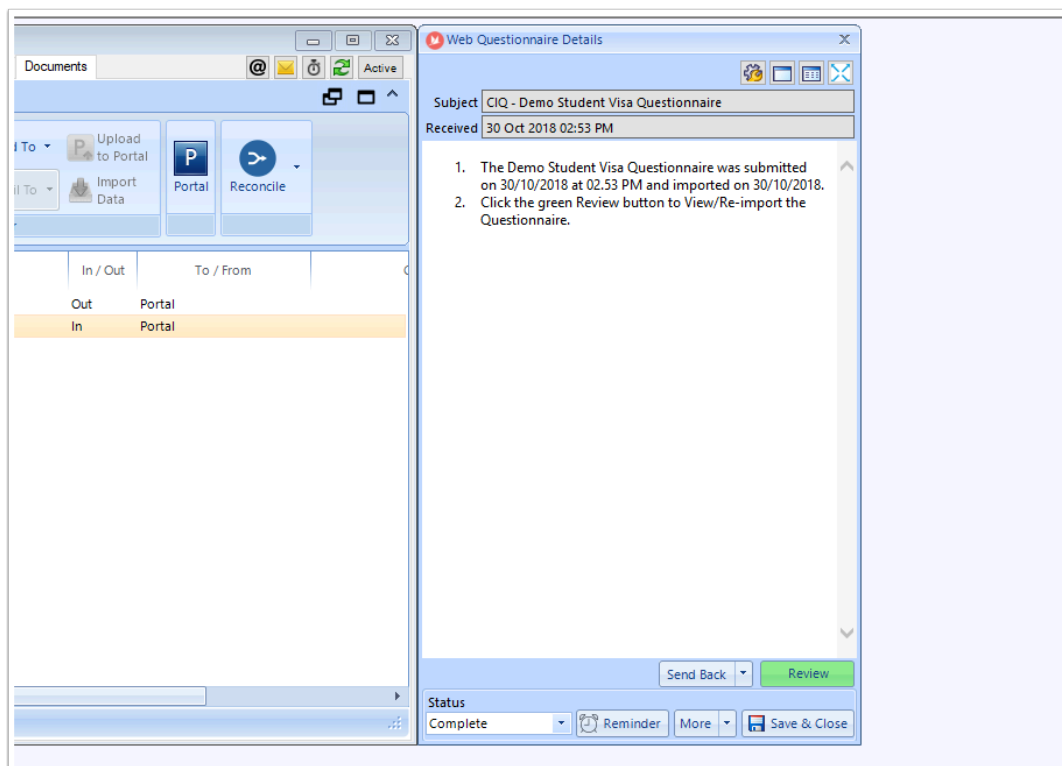
The Web Questionnaire's allow you to collect information for your client that is relevant to their application. Once a client submits their Questionnaire they are prevented from making further changes. However there will be occasions where the client has not answered or completed correctly all of the questions and you will required to return the Questionnaire to them for editing. This article covers how to return a Web Questionnaire to a client.

1. Open the received Web Questionnaire

First you will need to locate the received Web Questionnaire message in either the *Documents* tab of the relevant matter or your Document Inbox (accessed via the **Tasks** button in the main toolbar). Once you have located the Questionnaire message, double click it.

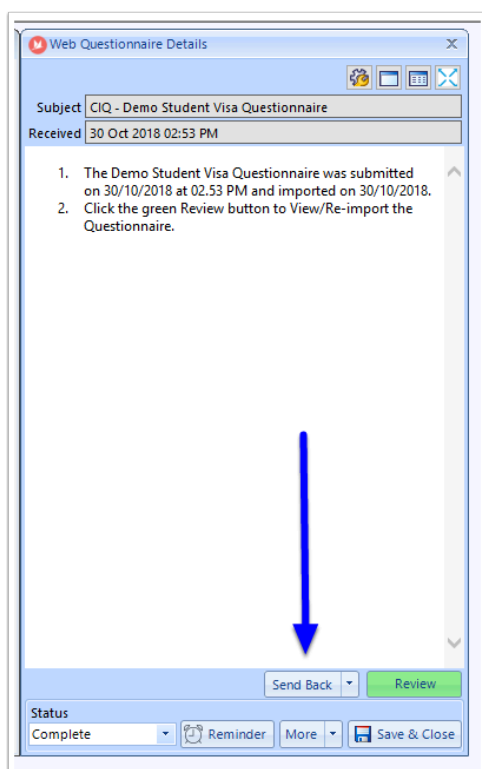


The message window will now open.

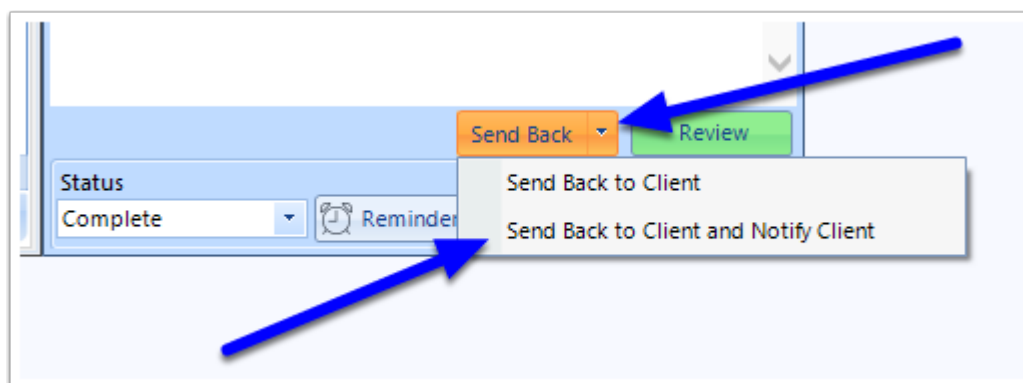


2. Click Send Back

Next, click the **Send Back** button.

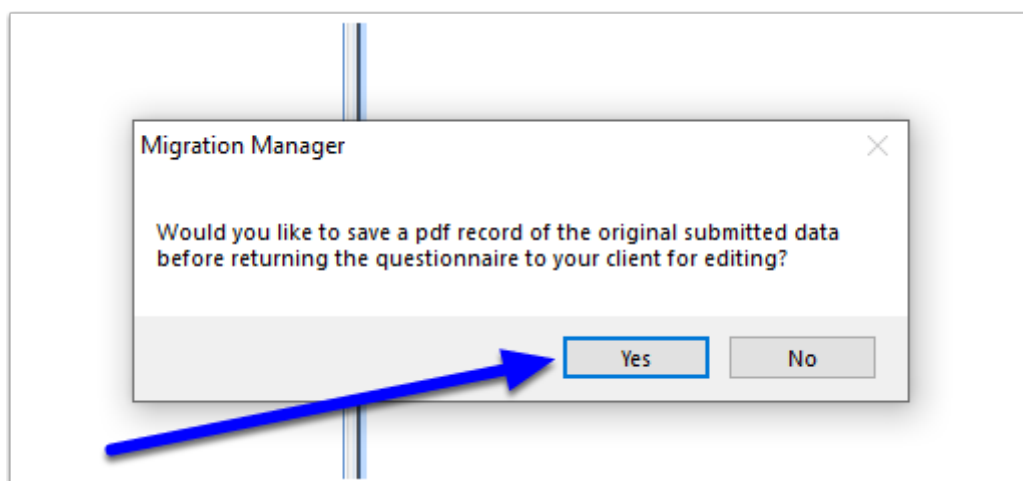


Note that if you want to also send an email notification to the client to check their Portal, click the dropdown arrow and choose **Send Back to Client and Notify Client**.



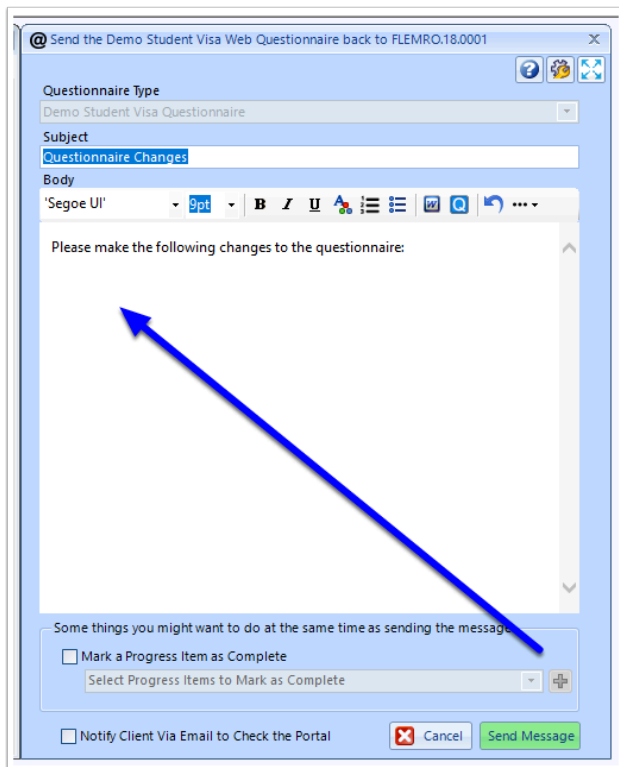
3. PDF Print a Copy

Before sending the Questionnaire back to your client, you will be given an opportunity to generate PDF record of what has previously been provided. It is recommended that you do generate this PDF as once the Questionnaire is returned to the client they will be editing the original results.



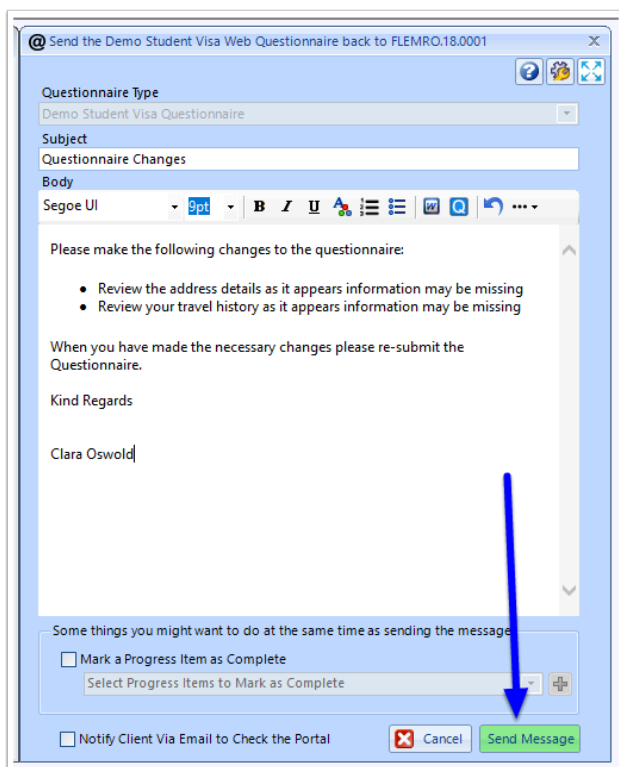
4. Edit the Message

Next you will be presented with a Portal Message which will be used to send the Questionnaire back to the client. With in the body of the message you should insert details about what you need your client to do with the returned questionnaire.

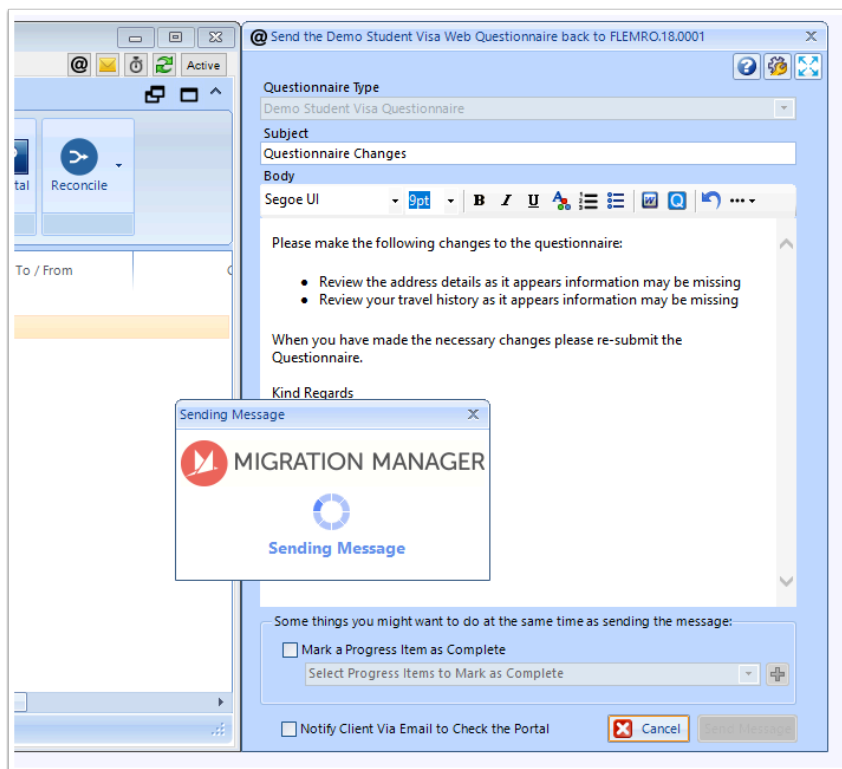


5. Send the Message

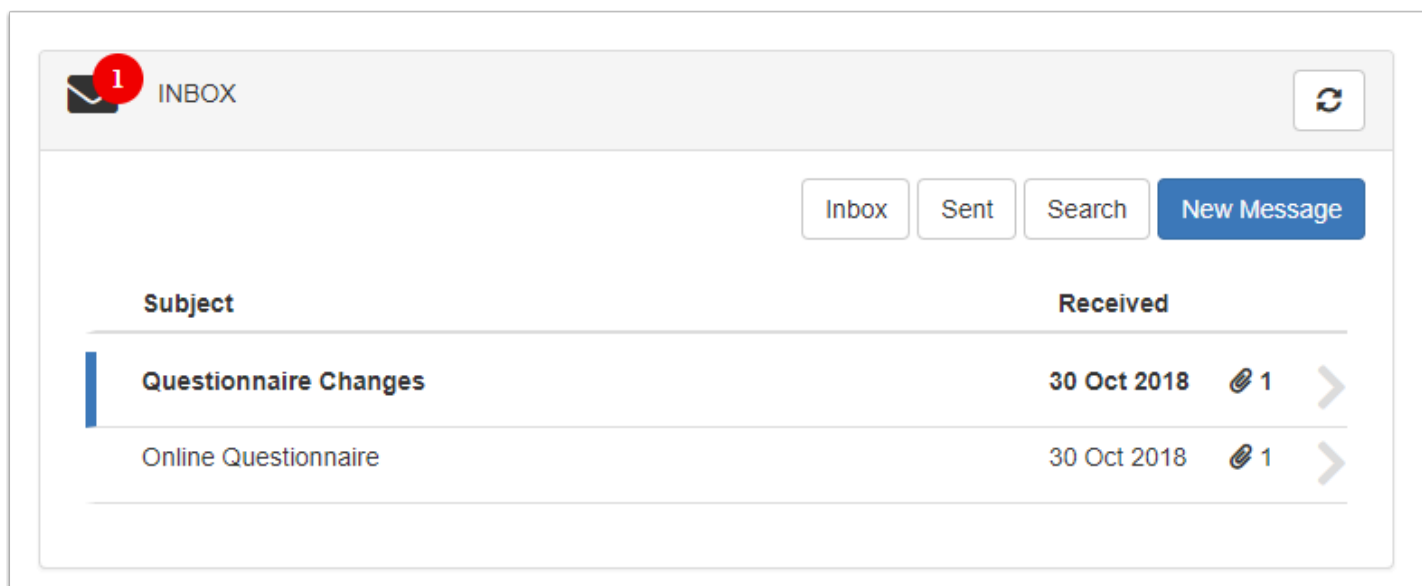
When you have completed the message, click **Send Message**



The message and the attached questionnaire will now be send to the client.



Your client will now proceed to receive a Portal Message with the Questionnaire attached.



6. Close the original message

Depending on your settings the original message may still be open. Click **Save & Close**.