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Creating a New Form

Max Mazo - 2026-07-14 - Comments (0) - Forms, Precedents and Templates

Creating a New Form

This guide outlines the steps to create a custom form in Yao, allowing you to capture specific information for different case types.

Link to Video Guide: https://youtu.be/uXfBzlLfc5w

Step 1: Access the Forms Module

1. From the main navigation menu on the left, click on **Forms**.
2. On the Forms screen, click the **+ Add Form** button located in the top-right corner.
    - This opens the "Create New Form Template" page.

Step 2: Configure Form Main Information

Fill out the primary details for your new form template:

- **Title**: Enter a clear, descriptive name for the form (e.g., "Property Information Form").
- A unique **Form Key** is automatically generated based on the title, which is used for linking and coding.
- **Description**: Provide a brief explanation of the form's purpose.
- **Allocate to Case Types**: Select the specific case types this form should be available for (e.g., "Intellectual Property"). This ensures the form only appears in relevant matters.

Step 3: Design the Form Structure (Add Sections and Fields)

Forms are structured into sections, and each section contains one or more fields.

Adding a Section

To organize your form logically, you should create sections (e.g., "Property Section" or "Transaction Section").

1. In the main form creation area, click the  icon next to "Section Title" to add a new section.
2. Enter the **Section Title** and an optional **Section Description**.

Adding Form Fields (Questions)

A form field is the question or prompt presented to the user.

1. Within a section, enter the question or heading into the Form Field text box (e.g., "Insert Property Address").
2. Select the appropriate Response Type from the dropdown menu to define the input format:

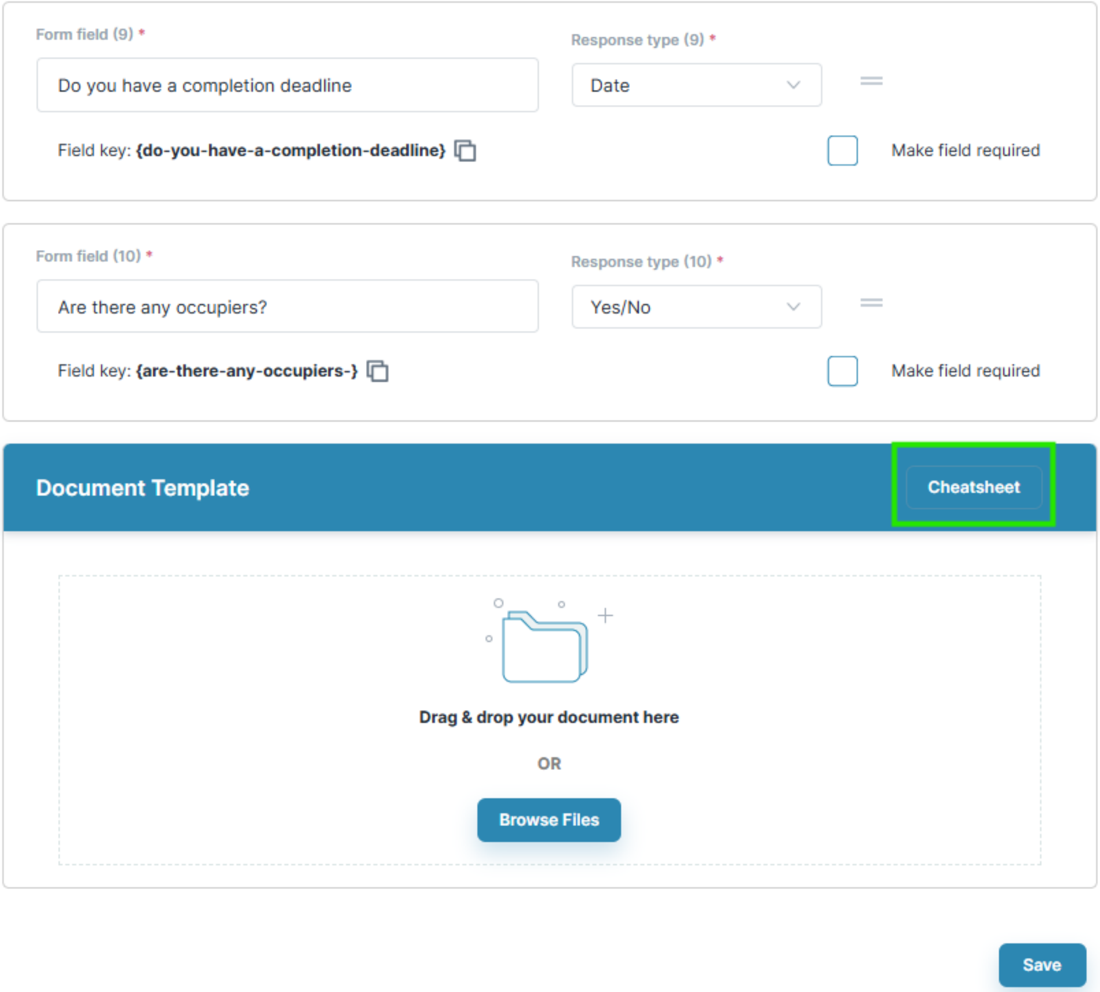
- **Text:** For short, single-line text answers.
- **Paragraph**: For longer, multi-line text answers.
- **Number:** For numerical inputs (e.g., monetary values or quantities).
- **Yes/No:** For binary responses.
- **Date:** For capturing a specific date.
- **List:** For multiple-choice questions. You will then enter the options in the section below.
- **Clause Insert:** Allows the user's selection to insert a pre-defined clause into a document template.
- **Dynamic:** Automatically pulls a specific data point from the matter, or previous form that has been completed.
- **Calculation:** Used for fields that perform a mathematical operation based on other number fields in the form or from values on the matter or a previous form.

1. The **Field Key** is automatically generated. Use this key for mapping data to document templates.
2. Optionally, check the **Make field required** box to ensure the user must complete the field.
3. Click the + icon to add another form field to the current section.

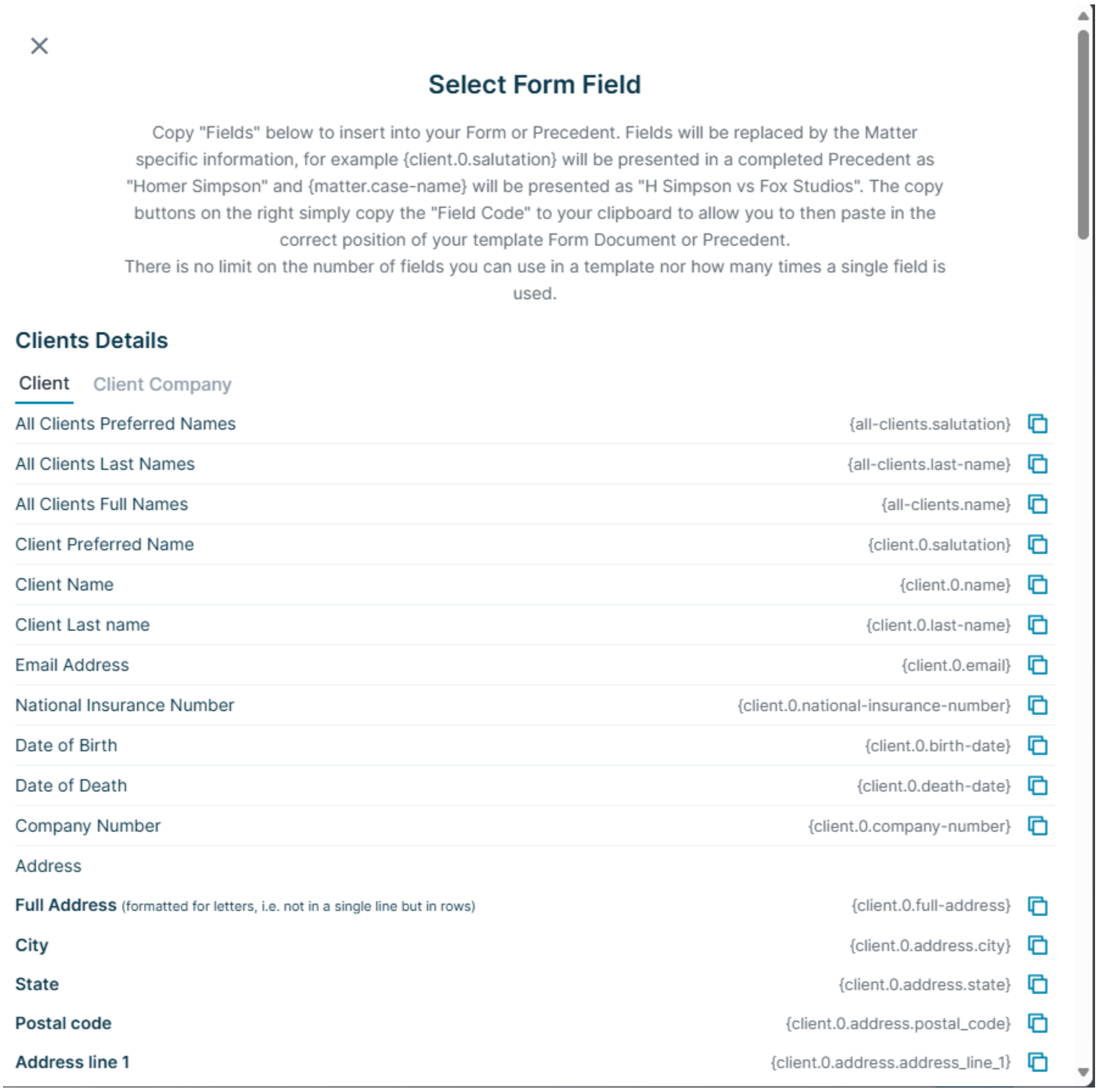
Step 4: Map Fields to a Document Template

If you have a document template that requires the data collected by this form, you can map the fields:

1. In the **Document Template** area, click on **Cheatsheet**.



1. The Cheatsheet window displays a comprehensive list of all available data points (including Client Details, Case Contacts, Matter Details, and the fields from your current form)



1. Click the **Copy** icon next to any field key (e.g., [client.full-name]) to copy it to your clipboard.

2. You can then paste this key directly into your document template to insert the corresponding data.

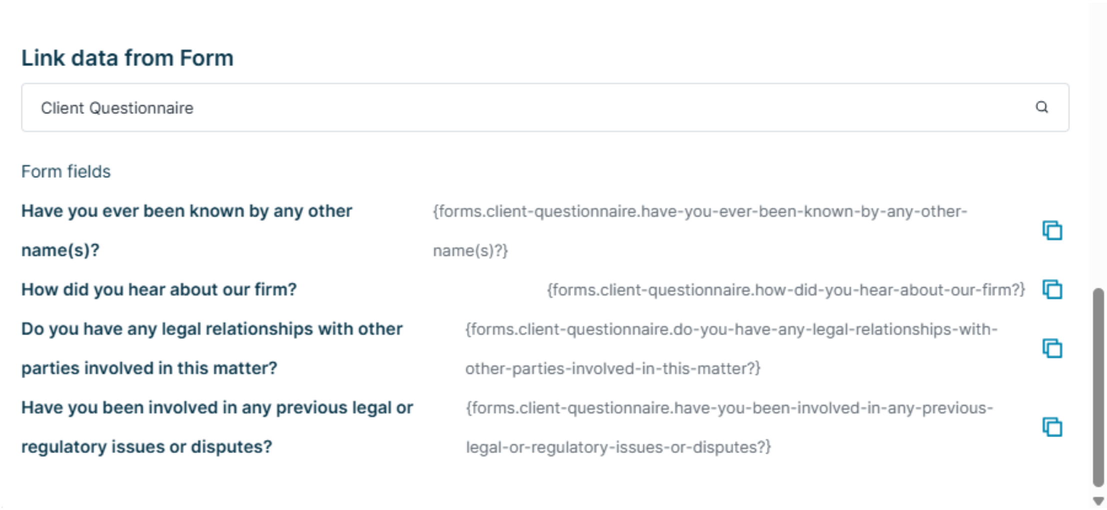
- Alternatively, you can drag and drop a document here, or browse your files to upload a template and paste the keys directly into the document.

Step 5: Link Data from Other Forms (Optional)

You can pull data from other existing forms into the current form:

1. In the Link Data from Form area, use the search bar to find and select a previously created form (e.g., searching for "Client Questionnaire").

2. All fields from the selected linked form will now be available under the "Current Form" section for mapping or reference.



Step 6: Save the Form

When you are finished designing your form, scroll to the bottom of the page and click the **Save** button. The new form template will now appear in your list of Forms and you can use this within your workflows or add into matters.