



[Knowledgebase](#) > [How to guides](#) > [Matters](#) > [Create a Matter](#)

Create a Matter

Max Mazo - 2026-07-02 - [Comments \(0\)](#) - [Matters](#)

How to Create a Matter

This guide explains how to create a new matter in Yao, including setting the department and case type, adding clients and case contacts, and completing the general matter details.

Link to video Guide: <https://youtu.be/To2MVYmQmFs>

Prerequisites

- You must have access to the **Matters** module in Yao.
- You should know the client's name and the department/matter type the new matter relates to.

Step 1: Start a New Matter

1. From the left-hand navigation menu, click **Matters**.
2. On the Matters screen, click the **+ New Matter** button in the top right corner.

The screenshot shows the Yao web application interface. On the left is a navigation menu with icons for Home, Time & Billing Sheet, Tasks, Matters (highlighted), Post Office, Announcements, Invoices, Contacts, Accounting, Reports, Forms, Templates, Workflow, Targets, Configuration, and User Management. The main area displays a 'Recently accessed' table with two rows of matter data. Below this is a 'Matters' section with a filter bar (My Matters, Status, Department, Case Type, Responsible Lawyer, Search Matter Name, Client) and a table of matters. A '+ New Matter' button is visible in the top right corner of the Matters section.

Matter #	Client Name	Status	Case Name	Department	Case Type	Responsible Lawyer	Open Date
298	Matt Fiske-Jackson, Lucas Field, Alan Mackay	Quote	Sale of 55 Hoosier Road	Residential Real Estate	Residential Sale	A Adam Field	21 Jul 25
469	Peter Creber	Quote	Purchase of 9 Hawthorn Close TQ12 4...	Residential Real Estate	Residential Purchase	P Peter Creber	11 Jun 26

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469	Peter Creber	Quote	Purchase of 9 Hawthorn Close TQ12 4...	Residential Real Estate	Residential Purchase	P Peter Creber	11 Jun 26
303	Ted Harrison, Richmond AFC	In Progress	Property Sale of 22 Test Lane	Commercial Real Estate	Property Sale	A Adam Field	22 Jul 25
461	Adam Field	Archived	Adam Test Workflow Matter	Corporate	Logistics	A Adam Field	16 Apr 26
453	Fred Flintoff	Quote	ADAM INVOICE TESTING	Children Lower - Lond...	LH Children Financial Provision...	A Adam Field	31 Mar 26
298	Matt Fiske-Jackson, Lucas Field, Alan Mackay	Quote	Sale of 55 Hoosier Road	Residential Real Estate	Residential Sale	A Adam Field	21 Jul 25
301	Matt Fiske-Jackson	Closed	Sale of 22 Test Road	Residential Real Estate	Residential Sale	A Adam Field	22 Jul 25
312	Col Wheatley	In Progress	Sale of 76 Wiccombe Road Nutley	Residential Real Estate	Residential Sale	H Harvey Themis	23 Jul 25

The **New Matter** form opens, showing four sections: **Department & Case Type**, **Clients**, **Case Contacts** and **General**.

The screenshot shows the 'New Matter' form in the Yao system. The form is divided into three main sections: 'Department & Case Type', 'Clients', and 'Case Contacts'. The 'Department & Case Type' section has two dropdown menus: 'Department *' and 'Matter Type *'. The 'Clients' section has a checkbox 'Client is a company', a 'Full name *' field with a search dropdown, and an 'Add Client 2' button. The 'Case Contacts' section has a 'Contact' field with a search dropdown, a 'Choose category' dropdown, a 'Contact reference' field, and an 'Add Contact 2' button. A sidebar on the left contains navigation links like Home, Time & Billing Sheet, Tasks, Matters, Post Office, Announcements, Invoices, Contacts, Accounting, Reports, Forms, Templates, Workflow, Targets, Configuration, User Management, and Help & Support. A top navigation bar includes a search bar, a filter dropdown, and buttons for 'Add' and 'Cancel'.

Step 2: Department & Case Type

1. Click the **Department** dropdown and choose the relevant department.
2. Click the **Matter Type** dropdown and choose the relevant case type.

Note: Both **Department** and **Matter Type** are mandatory fields.

Step 3: Add Clients

1. If the client is a company rather than an individual, tick the **Client is a company** checkbox.
2. In the **Full name** field, start typing the client's name and select the correct contact from the search results.
3. If the client does not already exist as a contact, click **Create A Contact** to add them.
4. To add another client to the matter, click **Add Client 2**.

YAO

Dashboard < Matter < New Matter

New Matter

Department & Case Type

Department * Family & Relationship Matter Type * Finances

Clients

Full name * Adam Client is a company Create A Contact

Loading...

Client 2

Case Contacts

Contact Type to search Choose category Contact reference Create A Contact

Cancel Add Contact 2

Step 4: Add Case Contacts

1. In the **Contact** field, start typing the contact's name and select them from the search results, or click **Create A Contact** if they don't already exist.
2. Click the **Choose category** dropdown and select the category that best describes the contact, for example **Otherside Solicitor**, **Counsel** or **Expert**.
3. Optionally, enter a value in the **Contact reference** field.
4. To add another case contact, click **Add Contact 2**.

Step 5: Complete the General Details

1. Enter a name for the matter in the **Matter Name** field. Previously used names are shown as suggestions and can be selected from the list.
2. Click the **Responsible Lawyer** dropdown and select the lawyer responsible for the matter.
3. Click the **Responsible Supervisor** dropdown and select the supervisor for the matter.
4. If required, select a **Paralegal/Assistant** and a **Secretary/Admin** for the matter.
5. If required, select a **Paralegal Group**, **Secretary Group** and **Office**.
6. If required, enter values for **Override default rate**, **Add financial limit** and **Matter Interest Rate**.
7. Toggle **Make it private** under **Permission** if the matter should be restricted.
8. If required, select a **Source of Client Introduction**, **Linked Account** and **External Account**.
9. Optionally, enter text in the **Subject for client correspondence** and **Subject for other party correspondence** fields.

Note: Fields marked with an asterisk (*) are mandatory and must be completed before the matter can be created.

Step 6: Finish

1. Once all required fields are complete, click **Finish**.

A "Matter created successfully" confirmation message will appear, and you will be taken to the new matter's Overview page.

FINANCIAL BUDGET

£0 of £0

£0 of £0

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£0 of £0

Client information

[→ Add Client](#)

Adam Field

45224523452

adam@yaotechnology.com

technology.

Related contacts

[→ Add Related Contact](#)

Otherside Solicitor

Matt Stuttaford

sean@yaotechnology.com

History



No data available

Notes



No data available