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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

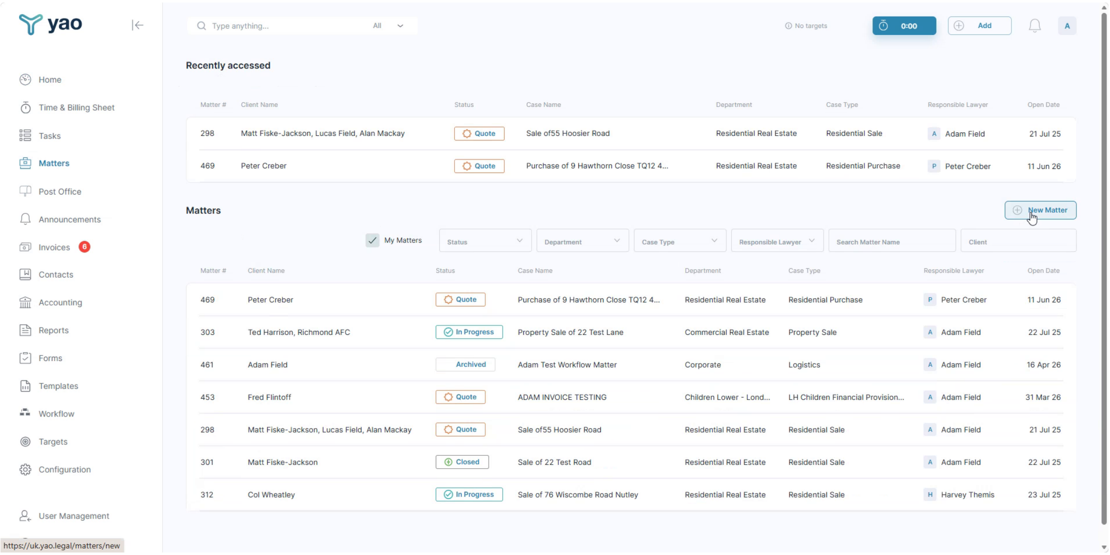
Prerequisites

- 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.

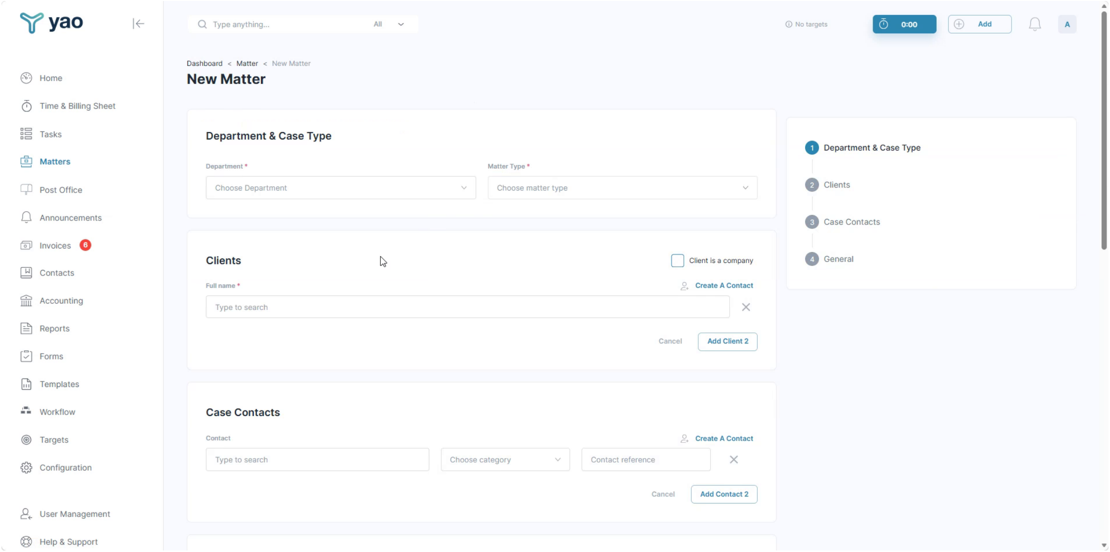
Step 1: Start a New Matter

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



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.

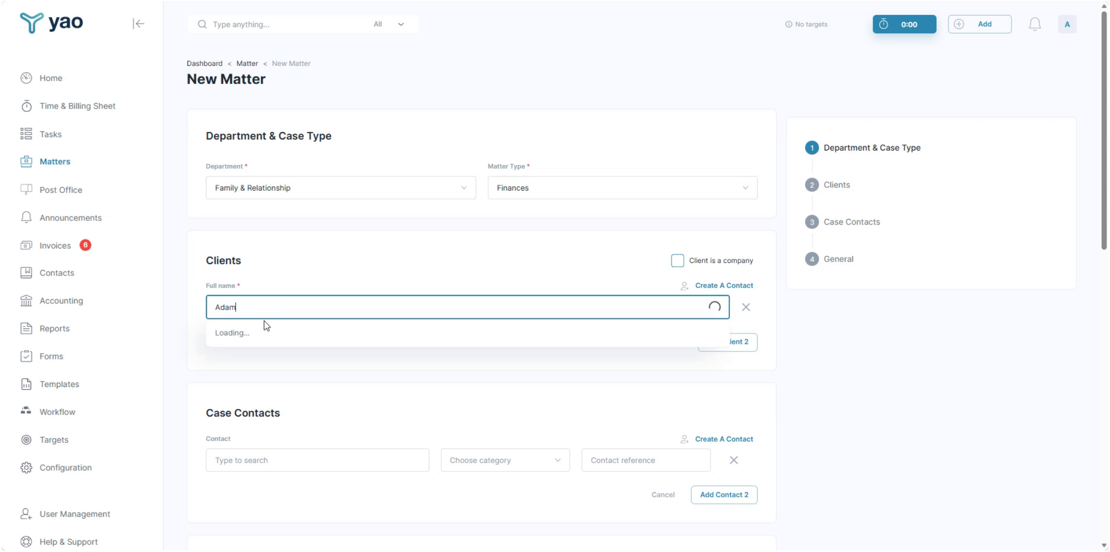
Step 3: Add Clients

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**.



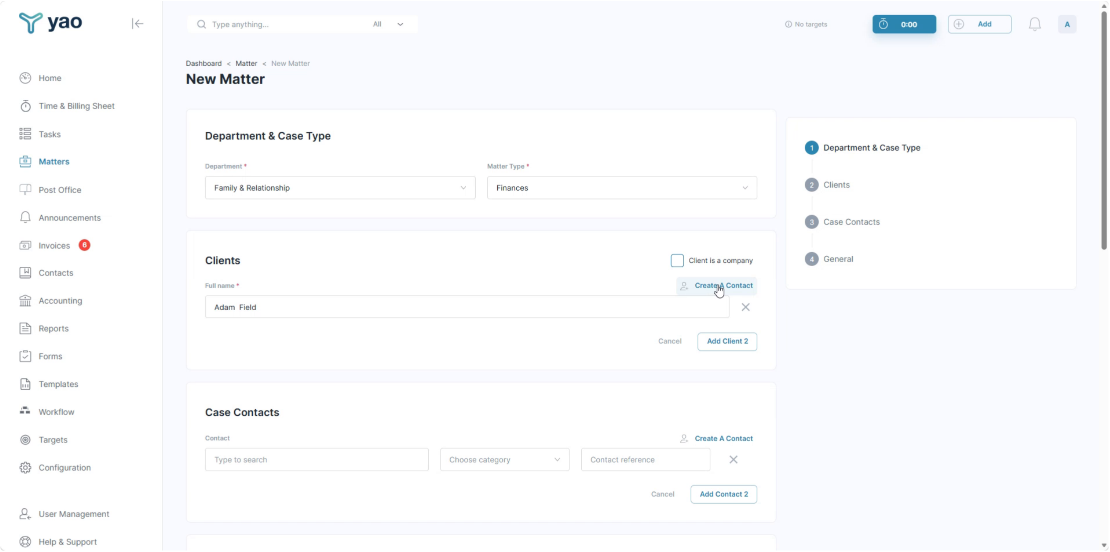
Step 4: Add Case Contacts

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**.

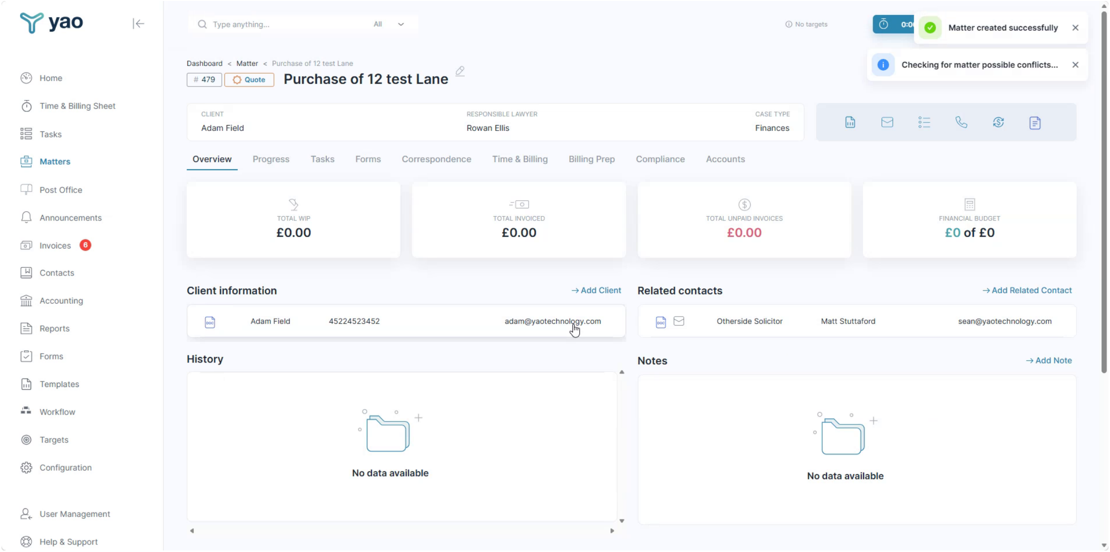
9. Optionally, enter text in the **Subject for client correspondence** and **Subject for other party correspondence** fields.

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.


yao
Home
Time & Billing Sheet
Tasks
Matters
Post Office
Announcements
Invoices
Contacts
Accounting
Reports
Forms
Templates
Workflow
Targets
Configuration
User Management
Help & Support
Type anything...
All
No targets
Matter created successfully
Checking for matter possible conflicts...
Dashboard < Matter < Purchase of 12 test Lane
479
Quote
Purchase of 12 test Lane
CLIENT
Adam Field
RESPONSIBLE LAWYER
Rowan Ellis
CASE TYPE
Finances
Overview
Progress
Tasks
Forms
Correspondence
Time & Billing
Billing Prep
Compliance
Accounts
TOTAL WIP
£0.00
TOTAL INVOICED
£0.00
TOTAL UNPAID INVOICES
£0.00
FINANCIAL BUDGET
£0 of £0
Client information
→ Add Client
Adam Field
45224523452
adam@yaotechnology.com
Related contacts
→ Add Related Contact
Otherside Solicitor
Matt Stuttaford
sean@yaotechnology.com
History
No data available
Notes
→ Add Note
No data available