How to Add a File Note or Call Note to a Matter in Yao

Max Mazo - 2025-11-03 - Comments (0) - Matters

How to Add a File Note or Call Note to a Matter in Yao

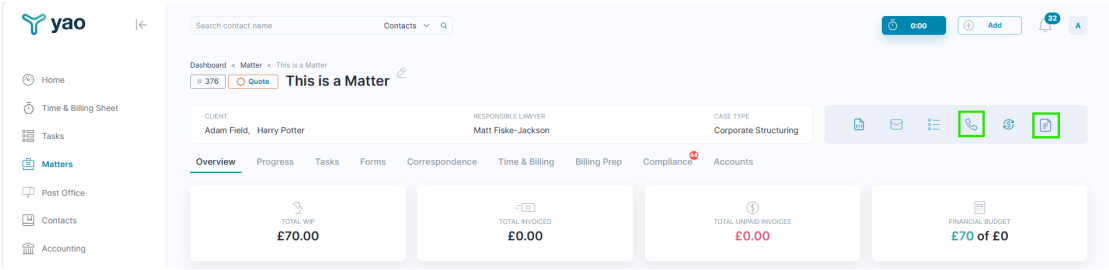
This guide explains the simple process of adding a file note or a call note to any active matter in Yao. Both note types are essential for maintaining a comprehensive and accurate record of all communication and internal actions, which is vital for efficient practice management. This action can be performed quickly from any screen within a matter using the central **Actions** tray.

Adding a File Note

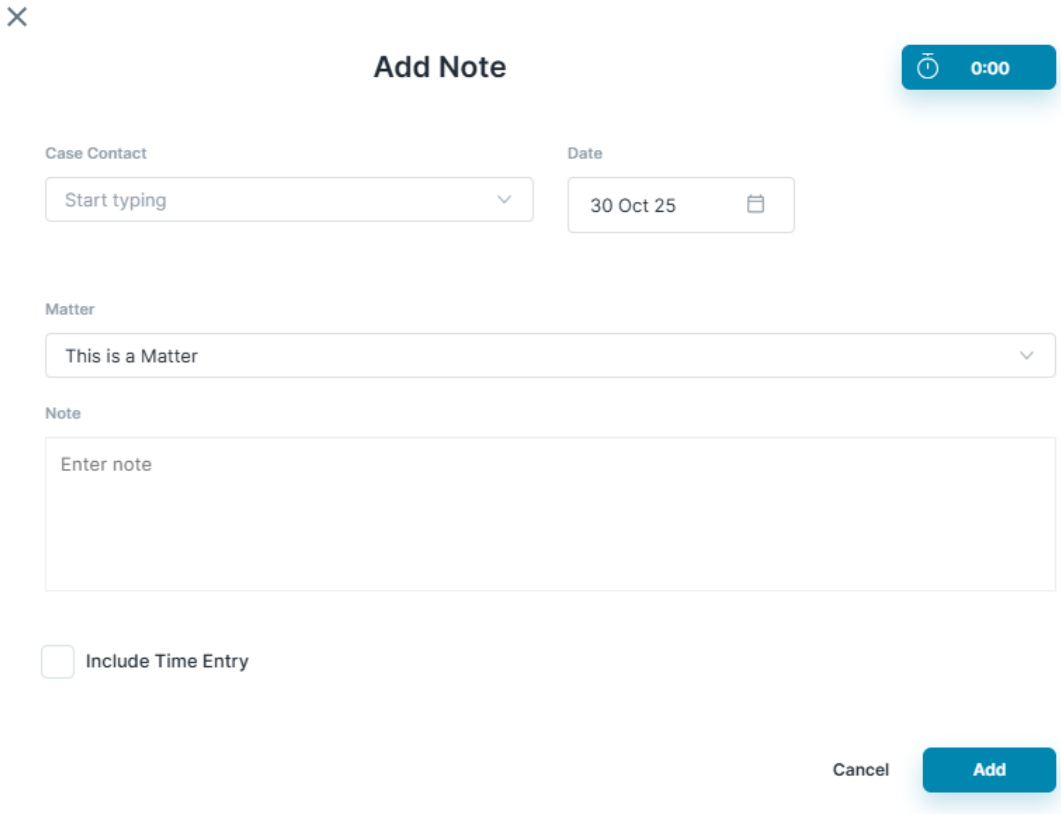
A file note is used to log internal actions, observations, or brief discussions which should be recorded in the matter's history.

1. Navigate to the matter you wish to update.

2. In the upper-right corner of the matter screen, locate and click the **Actions** button to open the actions tray.



1. From the drop-down menu which appears, select **Add File Note**.

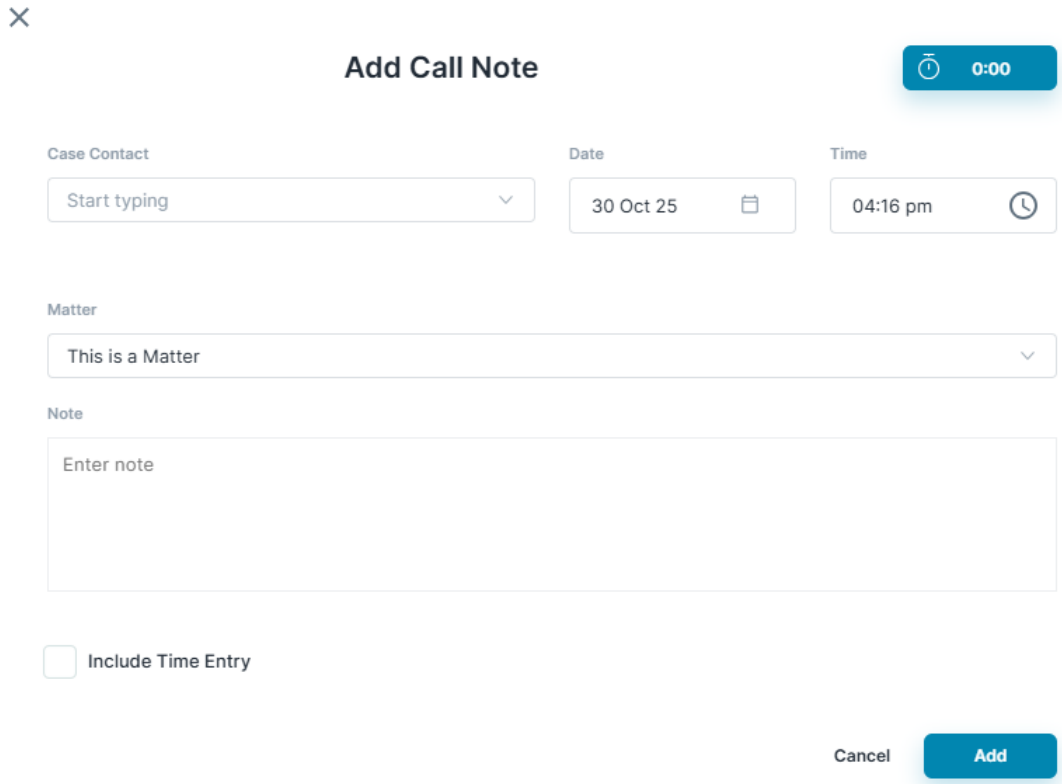


1. In the window which opens, enter a brief, clear heading in the **Subject** field.
2. Use the **Description** field to input the full details of the note.
3. Confirm the **Date** and **Time** are correct. The matter field will be populated automatically by default.
4. Click the Save button at the bottom of the window. The new file note will be instantly logged and visible in the matter's correspondence tab.

Adding a Call Note

A call note is specifically designed to record details of phone calls made to or received from clients, counsel, or other external parties.

1. Navigate to the matter you wish to update.
2. In the upper-right corner of the matter screen, locate and click the **Actions** button to open the actions tray.
3. From the drop-down menu which appears, select **Add Call Note**.



1. Use the **To/From** drop-down menu to specify the contact category for the call (e.g., **Client, Counsel,** or **Other**).

2. Enter a descriptive title for the call in the **Call Subject** field.

3. Set the exact **Call Duration** using the hour and minute selectors.

4. Enter the relevant details and outcome of the call in the main **Description** field.

5. Click the Save button. The call note is now logged, including the time and duration, which ensures accurate billing and record-keeping.