How to Configure Default Forms for Case Types

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This guide outlines the process for assigning default forms to specific case types within the Yao application. Configuring this setting ensures that when a new matter is created under a specific case type, the designated forms are automatically generated and included, thereby streamlining the case initiation workflow.

Navigating to Case Type Settings

1. From the Home screen, navigate to the sidebar on the left-hand side and select Configuration.

2. Within the Configuration screen, locate the navigation tabs at the top of the page and click on Organization.

3. From the options available under Organization, select Case Types.

4. The system will display a list of all existing case types. Locate the specific case type which you wish to modify (e.g., Business Advisory) and click the Edit icon or select the case type to open its details.

Adding Default Forms

1. In the "Update case type" window which appears, scroll down to the bottom of the form until you locate the section labelled Default Forms.

2. Click into the Default Forms search field. A dropdown list containing your pre-existing forms will appear.

3. Select the form or forms which you wish to automatically attach to this case type (e.g., "Client Questionnaire").

Note: You may select multiple forms if required for the specific workflow.

1. Once you have added all necessary forms, click the Save button located at the bottom right of the window to confirm your changes.

- The selected forms will now automatically populate whenever a new matter is created using this case type.