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# How to Create a Precedent within a Matter Folder

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## How to Generate a Precedent from a Folder

### Overview

Link to Video Training Guide: [https://youtu.be/Eqm\\_Z90rjUM](https://youtu.be/Eqm_Z90rjUM)

This guide shows you how to generate a precedent document directly from a folder within a matter's **Correspondence** tab in Yao. Generating a precedent this way automatically picks up the matter's department and case type, helping you find the right template faster and saving the finished document straight into the folder you're working in.

### Before You Start

To follow this guide, you will need:

- Access to an existing matter in Yao.
- Permission to view and add documents within the matter's Correspondence tab.
- At least one precedent template already set up in Yao that matches the matter's department and case type.

### Step-by-Step Instructions

#### Step 1: Open the matter and go to Correspondence

From the matter, select the **Correspondence** tab, then choose the **Folders** view. This displays the folder structure for the matter, including the Documents, Emails, and Scans folders.

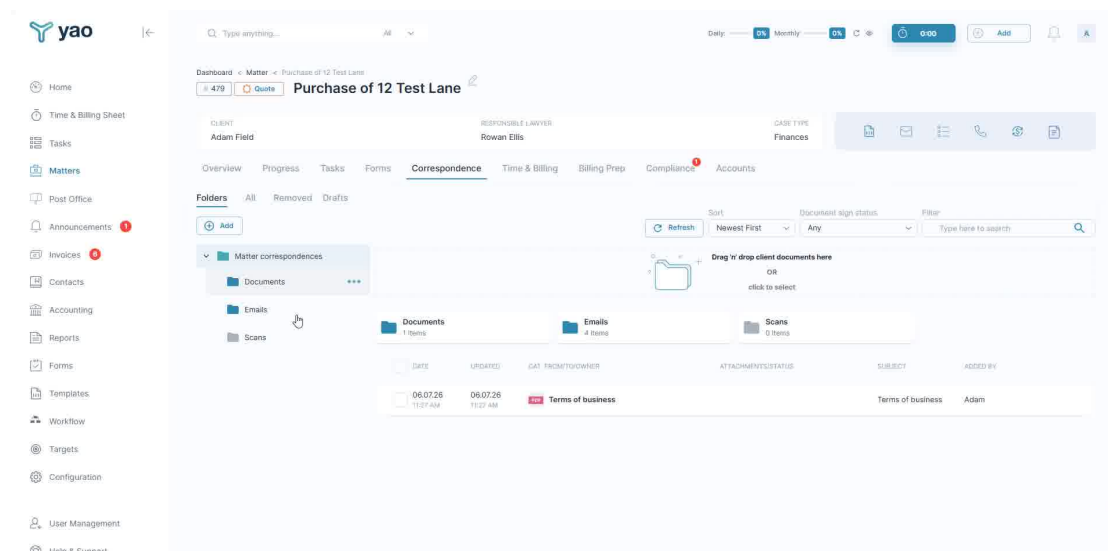


Figure 1: The Correspondence tab, showing the Folders view for a matter.

#### Step 2: Open the folder menu

Hover over the folder you want to generate the precedent into (for example, the Documents folder) and click the three-dot menu icon that appears next to its name.

This opens a menu with four options: **Generate Precedent**, **Send Email**, **Rename**, and **Move**.

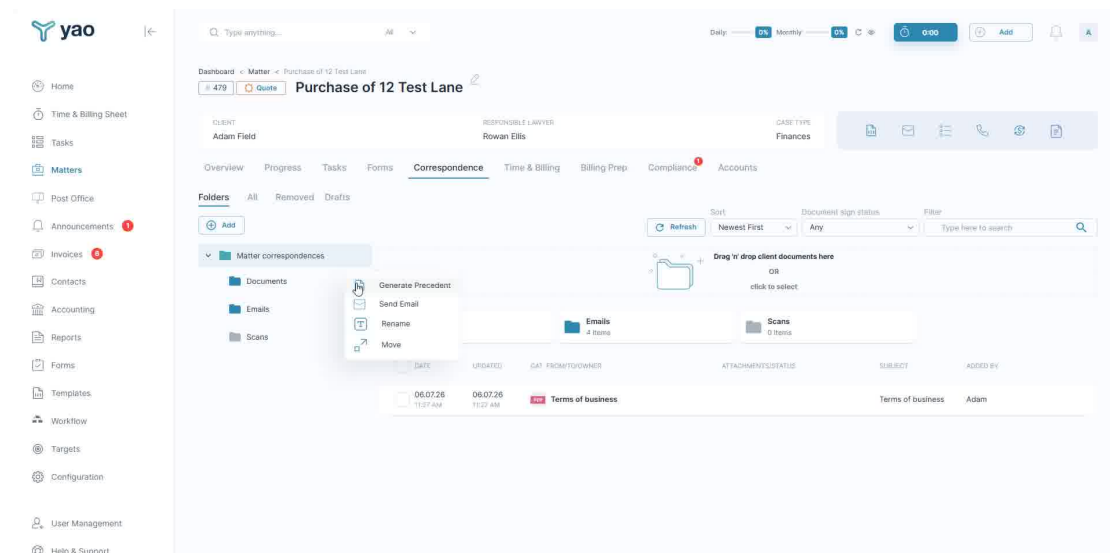


Figure 2: The folder menu, showing the Generate Precedent option.

### Step 3: Select "Generate Precedent"

Click **Generate Precedent** from the menu. This opens the **Find precedent** window, which lists the precedent templates available in Yao.

Yao automatically applies filters based on the matter's own details — in this example, the Department filter is set to "Family & Relationship" and the Case Type filter is set to "Finances", matching the matter itself. The list of precedents, and their associated Case Types, updates accordingly.

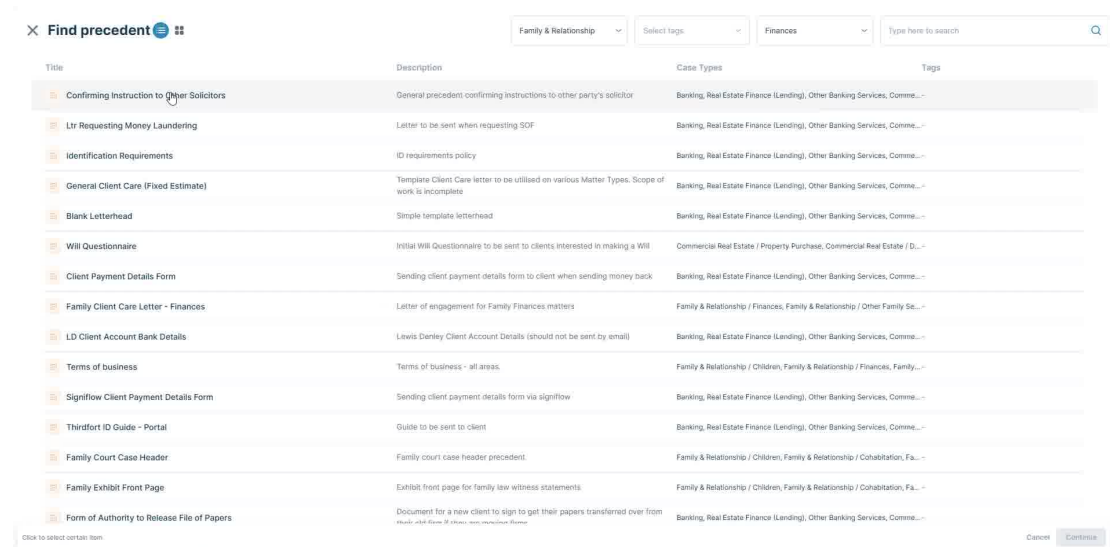


Figure 3: The Find precedent window, with Department and Case Type filters automatically applied to match the matter.

### Step 4: Choose the precedent you need

Browse or search the list, then click on the title of the precedent you want to use. A tick appears next to the selected item, and the **Continue** button becomes active.

You can also use the search box or the tags filter at the top of the window to narrow down the list further.

### Step 5: Generate the document

Click **Continue**. Yao generates the document and displays a confirmation message showing that the document has been created and saved into the folder you selected.

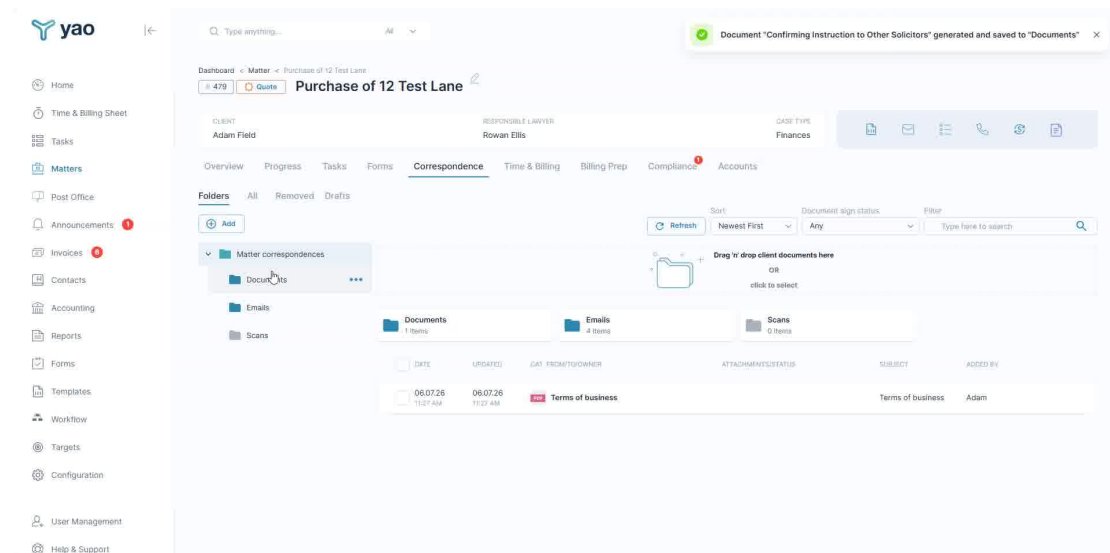


Figure 5: Confirmation message showing the document has been generated and saved to the Documents folder.

## Step 6: Confirm the document has been added

The generated document now appears in the folder's document list, alongside any existing documents. It is added using the exact title of the precedent template that was selected.

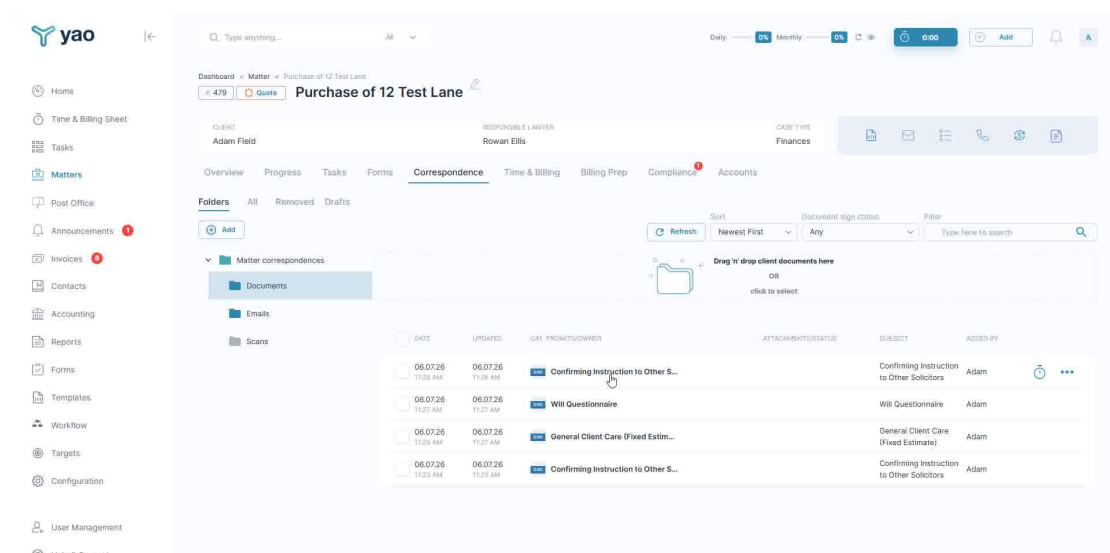


Figure 6: The newly generated precedent document listed in the Documents folder.

## Best Practice

We'd recommend checking that the correct folder is selected before generating a precedent, since the finished document is saved directly into that folder.

We'd also recommend confirming the matter's department and case type are set correctly beforehand, as Yao uses these to automatically filter the list of available precedents.

## Need Further Help?

If you can't find the precedent you're looking for, or a template doesn't appear in the filtered list, contact the Yao Support Team to check that the correct department and case type have been assigned to the template.