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## How to Create and Assign Letterheads to Precedents

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## How to Create and Assign Letterheads to Precedents

This guide explains how a **Workflow Manager** or **Admin** user can upload a new letterhead and then assign it to a document precedent. This process ensures that all documents generated from that precedent use the correct, branded letterhead automatically, which provides consistency and adherence to your firm's brand guidelines.

### Creating a New Letterhead

This process uploads your organisation's letterhead document and saves it within the Yao system.

1. **Navigate** to the main **Templates** menu on the navigation bar on the left of the screen.
2. The **Templates** menu will now appear.
3. **Select** the **Letterheads** tab at the top of the **Templates** screen.
4. Click the New Letterhead button on the right-hand side of the screen to create a new Letterhead. The blank letterhead modal window will open in a new tab.

**Create new Letterhead Template**

**How to create your letterhead template**

1  
 Create your blank letterhead with Header and Footer information

2  
 Upload the word document here

3  
 Link to a precedent and voila


**Letterhead identification**

Title \*

Description

Tags

**Letterhead Doc Template**



Drag & drop your document here

OR

\* Mandatory fields

1. **Enter** a clear, descriptive name for the letterhead in the **Name** field.
2. **Click** the **Choose File** button or Drag and Drop your letterhead into the document window.
3. Select the Save button to confirm the new letterhead. The new letterhead will now appear in the Letterheads list.

### Assigning the Letterhead to a Precedent

After creating the letterhead, you must assign it to the relevant precedent for it to be used when generating documents.

1. While still in the **Templates** section, **click** on the **Precedents** tab.
2. **Locate** and **select** the specific precedent which you wish to assign the letterhead to.
3. In the precedent's details window, **select** the **Letterhead** field.

## Edit Precedent Template

### Precedent identification

Title \*

Confirming Instructions to Solicitors

Letterhead ⓘ

Letter Head

Form key: **confirming-instructions-to-solicitors**

Description

Standard initial letter to other party solicitors confirming instructions

Tags

Select an option

Requires invoice for Precedent

### Allocate to Case Type / multiple Case Types

Property Purchase ⊘ Property Sale ⊘ Option Agreement ⊘ ... ⊘ Choose

### Document template

Cheatsheet

You uploaded a document, you can Drag & Drop another document here to modify

OR

Download File

Remove Current File

Upload Another

\* Mandatory fields

Cancel

Save

1. From the dropdown list which appears, **choose** the name of the letterhead which you created in the previous section.
2. Click the Save button to apply the change to the precedent. The letterhead is now successfully assigned to the precedent.