How to Create and Configure a Workflow Template

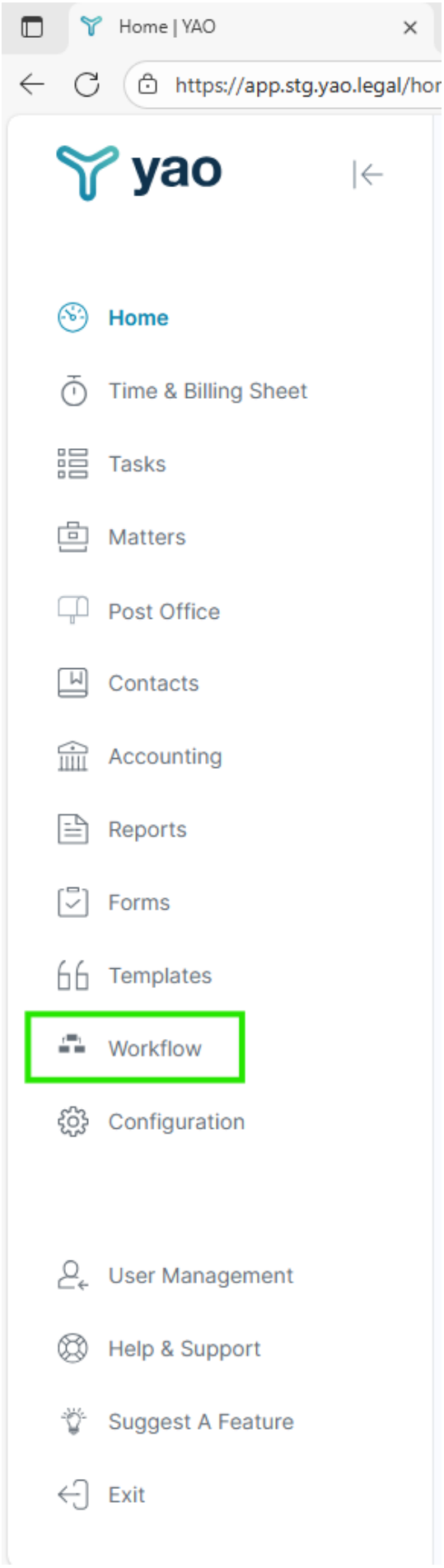
Max Mazo - 2025-10-15 - Comments (0) - Workflows

How to Create and Configure a Workflow Template

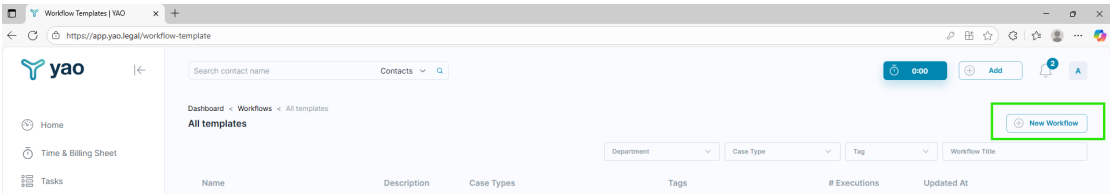
Workflow templates automate repetitive multi-step processes for specific case types, which ensures consistency and compliance across your organisation. Building a custom workflow allows you to define sequential tasks, assignees, and necessary documents, which dramatically increases efficiency for your team. Only users with the Workflow Manager and Admin Template will have access to create workflows.

Creating a New Workflow Template

1. In the left navigation menu, navigate down and select **Workflow**.


Home | YAO
https://app.stg.yao.legal/hor
yao
Home
Time & Billing Sheet
Tasks
Matters
Post Office
Contacts
Accounting
Reports
Forms
Templates
Workflow
Configuration
User Management
Help & Support
Suggest A Feature
Exit

1. On the Workflow Templates dashboard, click the **New Workflow** button, which is located in the upper-right corner.

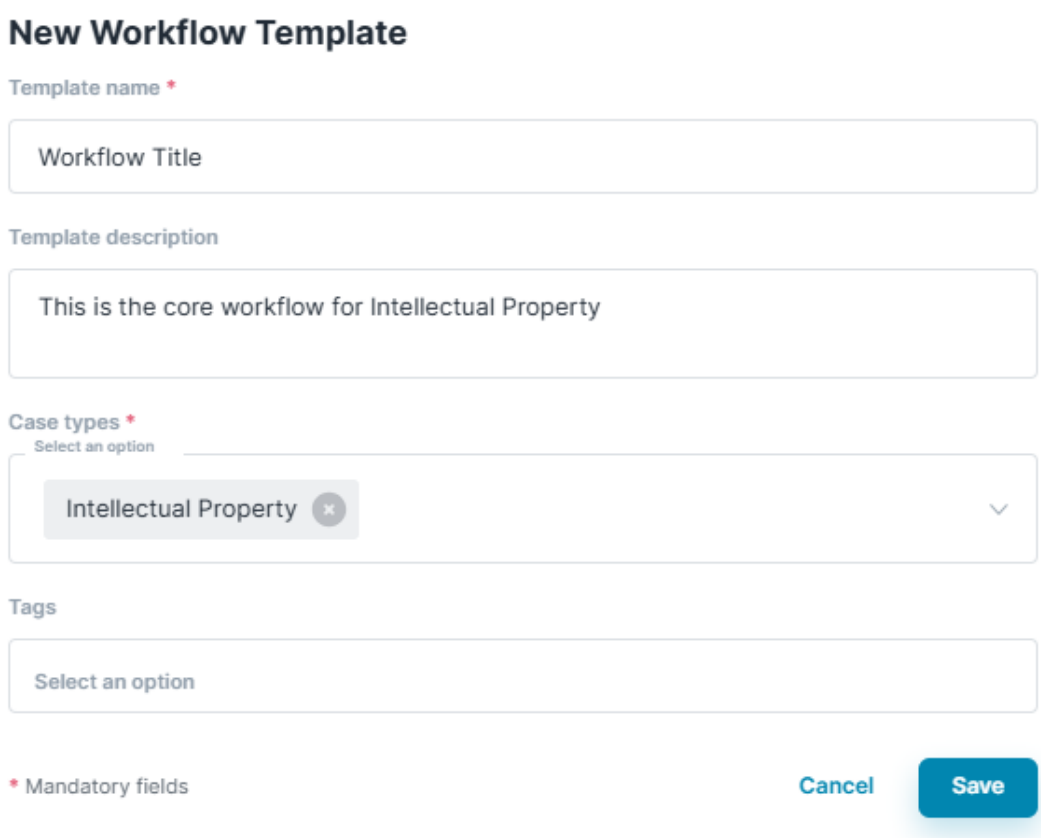


1. The **New Workflow Template** dialogue box will appear.

2. In the **Template name** field, enter a clear title for the automated process, such as Client Onboarding.

3. In the **Template description** field, enter a brief summary of the workflow's purpose.

4. Use the dropdown menus to select the appropriate **Case Types, Tags**, and **Mandatory fields** which will be associated with this template.

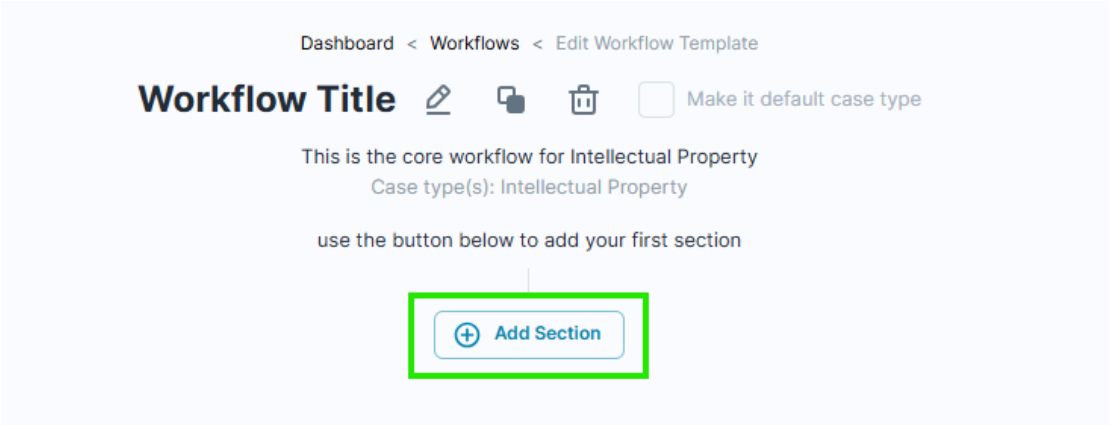


1. Click Save. The new Workflow Template screen will load, ready for you to add sections and tasks.

Adding Sections and Tasks

Workflows are structured into **Sections**, which typically represent a phase in the overall process (e.g., Engagement, Due Diligence), and sequential **Tasks**, which are the individual actionable steps within that phase.

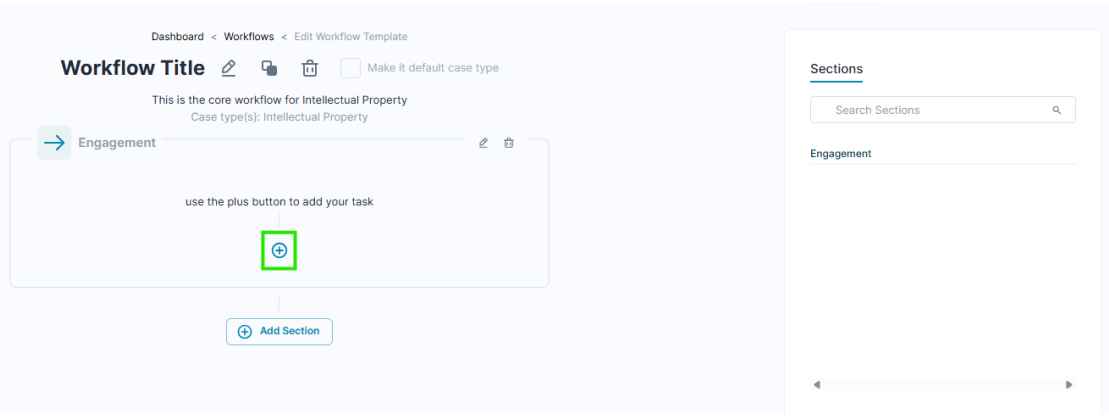
1. On the main workflow screen, click the **Add section** button in the centre of the screen.



1. In the **New Section** dialogue box, enter a descriptive **Section name**, such as Engagement.

2. Click Save. The new section will appear on the workflow canvas.

3. Inside your newly created section, click the **plus icon (Add Task)** to open the **New Task** dialogue box.



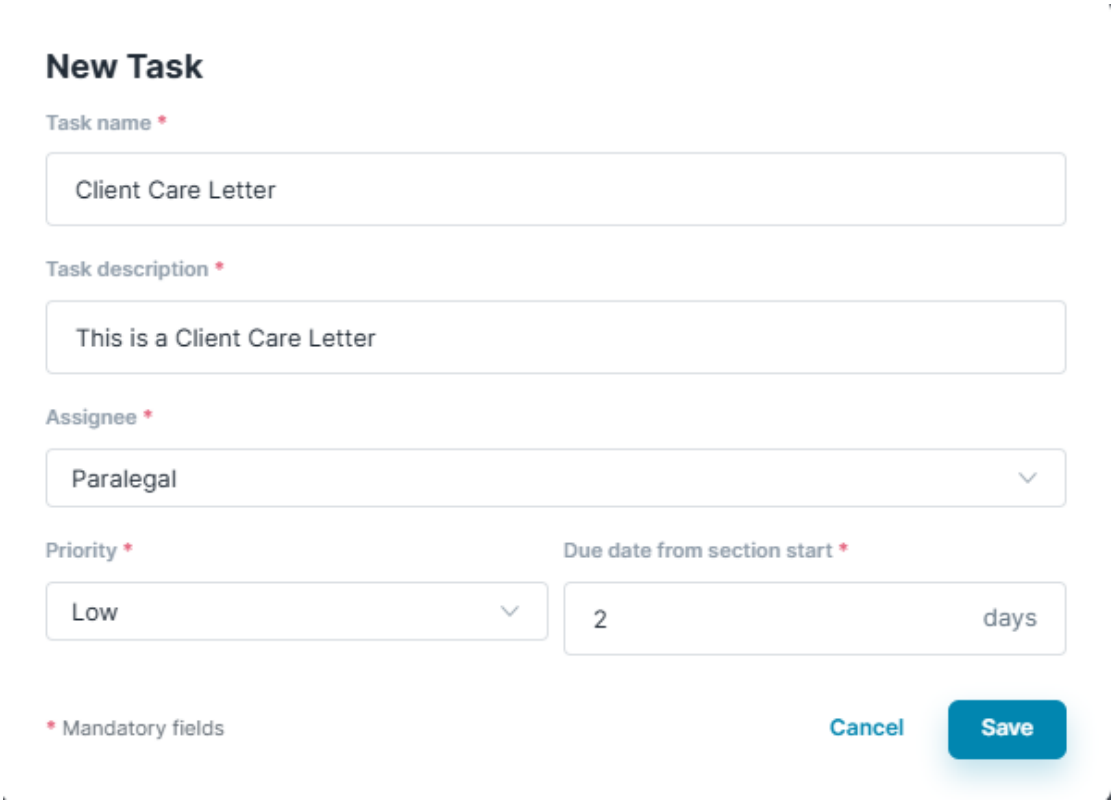
1. Complete the mandatory task fields:

- **Task name**: Enter an action-oriented name for the task, such as Confirm client details.

- **Assignee**: Select the team member or role, such as **Secretary** or **Responsible Lawyer**, who is responsible for completing this task.

- **Priority:** Choose a priority level, such as **Standard** or **Urgent**, from the dropdown menu.

- **Due date:** Enter the number of **days** within which the task must be completed, starting from the workflow's initiation date.



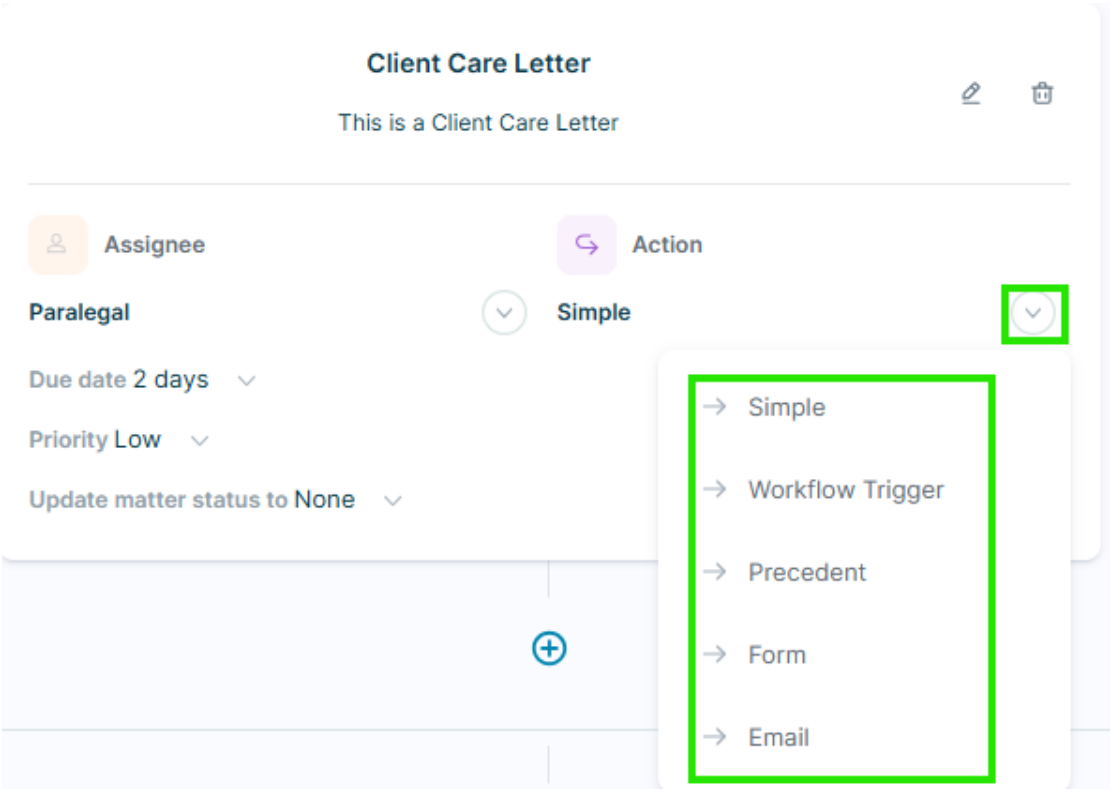
1. Click Save. The task will now appear in the section, detailing the assignee, due date, and priority.

Configuring Task Actions and Status Updates

Each task includes an **Action** type, which defines what the task will achieve upon completion, and a **Status Update**, which governs the client's case status.

1. By default, a new task is set to the **Simple** action type, which is used for basic, tracked actions.
2. Click the **Arrow** button besides Simple on the task to select a different type from the dropdown menu, which can include:

- **Workflow Trigger:** Used to initiate another automated workflow.
- **Precedent:** Used to generate a document or file.
- **Form:** Used to send a data collection form to a contact, which is what streamlines data gathering.
- **Email:** Used to send a pre-configured email template.



1. If you select anything other than **Simple** an additional option will appear on your task to select either the **Workflow, Precedent, Form or Email** to trigger on that task

2. A task can **Update matter status** if you click on the arrow beside this line on the task.

3. Select a status, such as In Progress or On hold, from the dropdown menu. When this task is marked as complete, the client matter status will automatically update to the selected status.

Understanding Workflow Functionality

A complete workflow leverages multiple sections and task actions to ensure every step of a complex process is tracked and compliant. For example, a fully built workflow would include Precedents, Forms, Emails and in some instances additional workflow triggers to make it as efficient as possible.