How to Create and Edit Narratives

Adam Field - 2026-07-07 - Comments (0) - Configuration

How to Create and Edit Narratives

Link to Video Guide: https://youtu.be/Tyy1uMUog1s

Narratives in Yao are configurable text entries organised by Type, such as Payment Notification Narrative, Invoice Narrative, Credit Note, Client Source, Storage Location, Custodian Document Type, Credit Review Status, Write Down Reason, Contact Category, Workflow Tag, Form Tag, and Email Template Tag.

Each narrative has a **Type**, one or more **Departments** it applies to, and a **Text** value. Narratives are managed from the Narratives screen within Configuration, where existing narratives can be searched and filtered, new narratives can be created, and existing narratives can be edited.

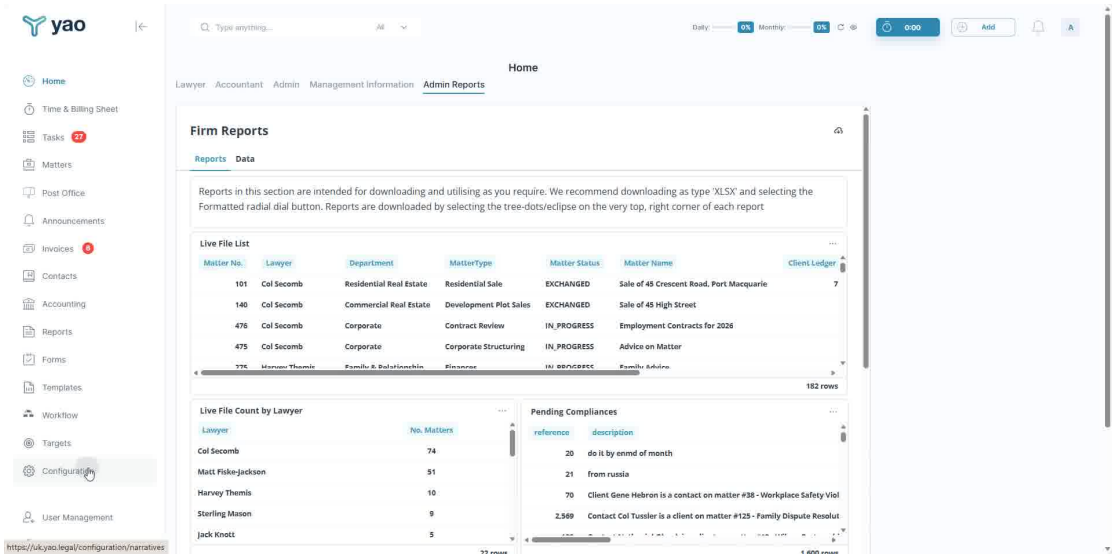
This guide covers how to navigate to the Narratives screen, search and filter existing narratives, create a new narrative, and edit an existing narrative.

Before You Start

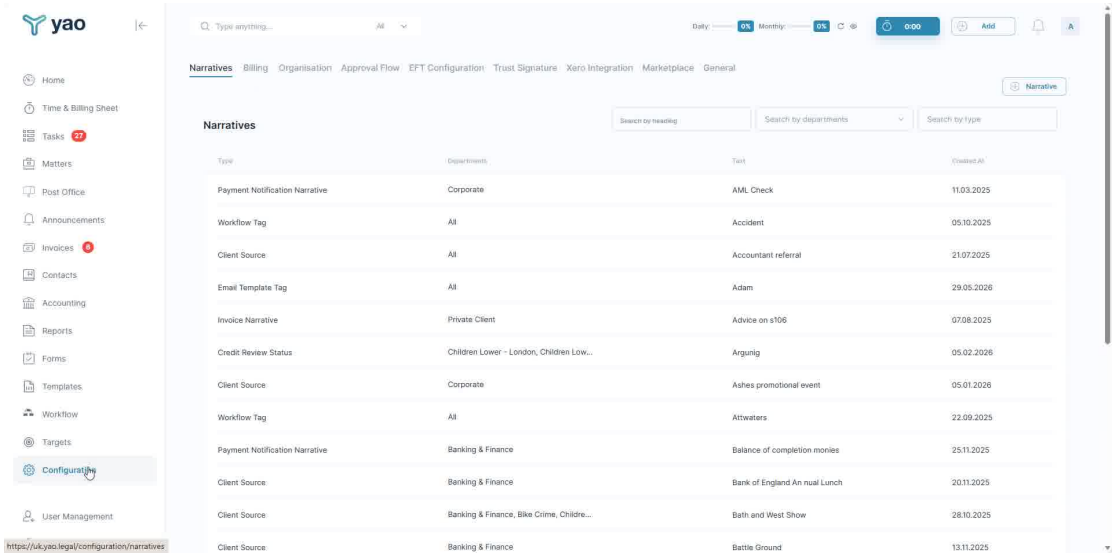
- You will need access to the **Configuration** area of Yao.
- Know which Type of narrative you want to create or edit.
- Know which Department(s) the narrative should apply to.

Navigating to Narratives

1. From the left-hand navigation menu, click **Configuration**.



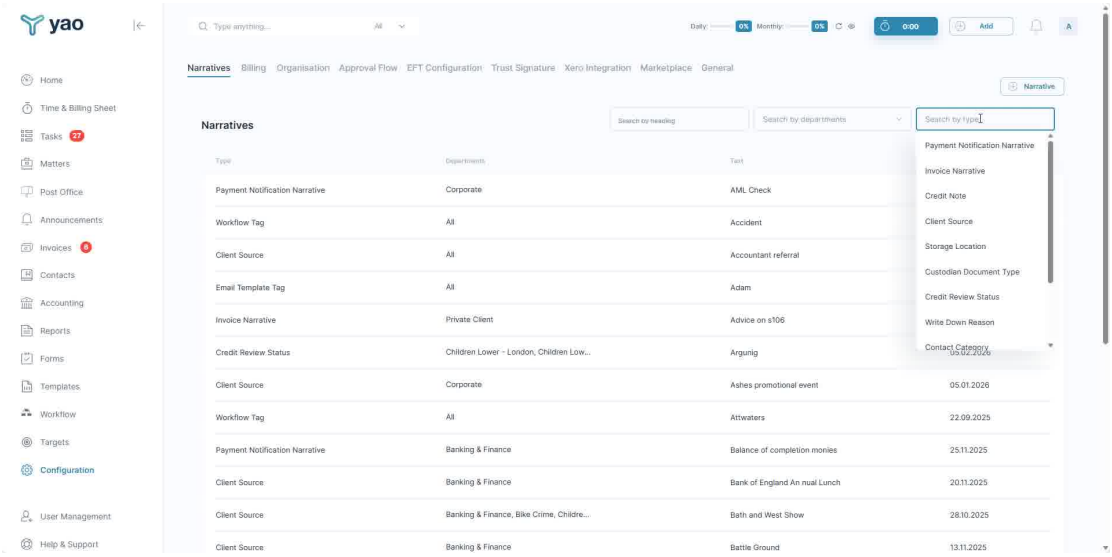
2. The Narratives tab is displayed by default, showing a list of existing narratives with columns for Type, Departments, Text, and Created At.



Searching and Filtering Narratives

1. Use the three search fields above the list — **Search by heading**, **Search by departments**, and **Search by type** — to filter the narrative list.

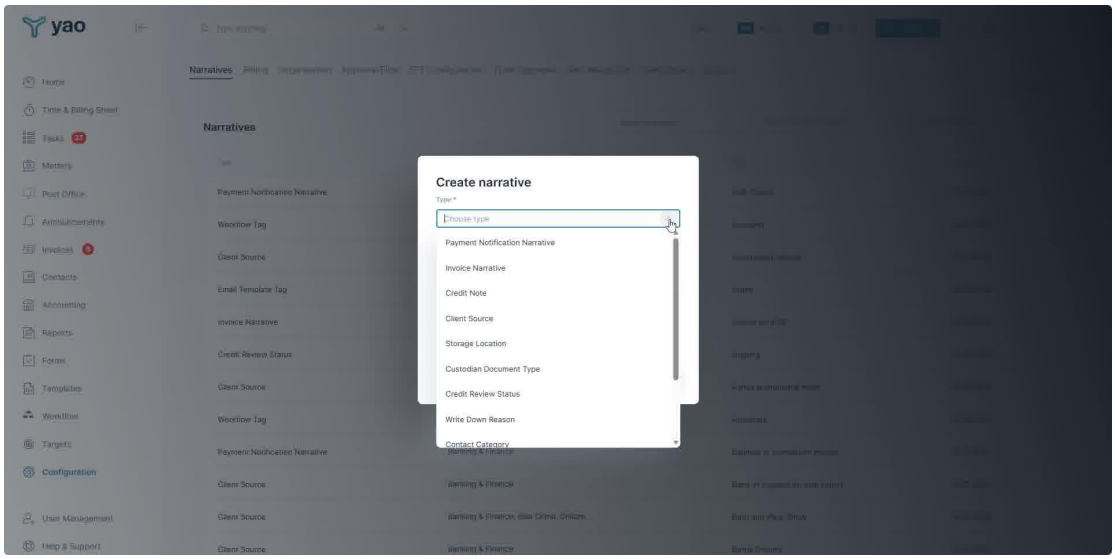
2. Clicking into the **Search by type** field displays a dropdown of the available narrative types, including Payment Notification Narrative, Invoice Narrative, Credit Note, Client Source, Storage Location, Custodian Document Type, Credit Review Status, Write Down Reason, Contact Category, Workflow Tag, Form Tag, and Email Template Tag.



Creating a New Narrative

1. Click the **+ Narrative** button in the top right corner of the Narratives screen.

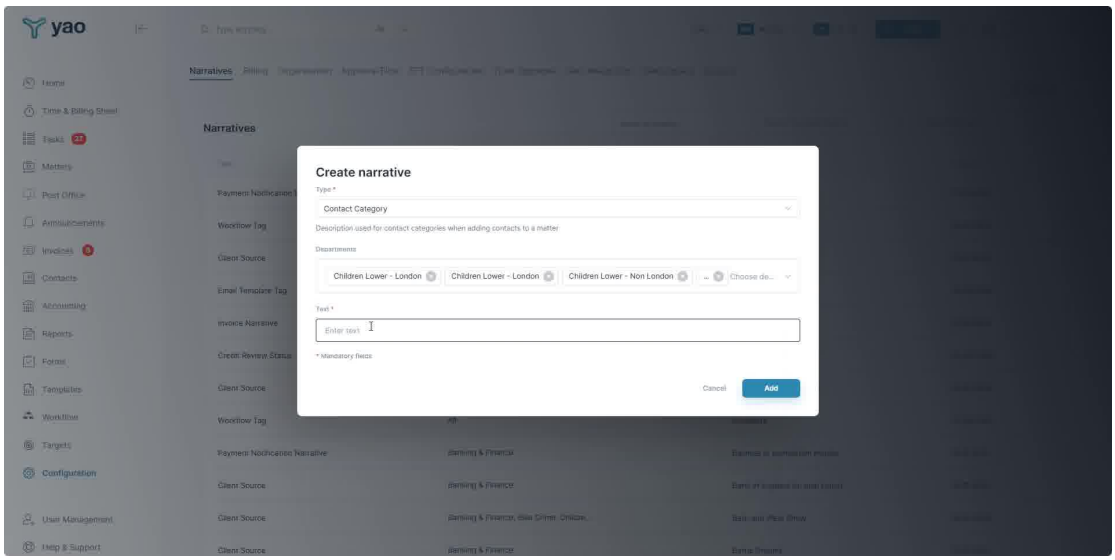
2. In the Create narrative modal, click the **Type** field and choose a type from the dropdown list.



3. Once a type is selected, a short description of that narrative type is displayed beneath the field. For example, selecting Contact Category displays the description: "*Description used for contact categories when adding contacts to a matter.*"

4. Click the **Departments** field and select one or more departments using the checkboxes, or select **Select all** to apply the narrative to every department.

5. Enter the narrative text in the **Text** field.



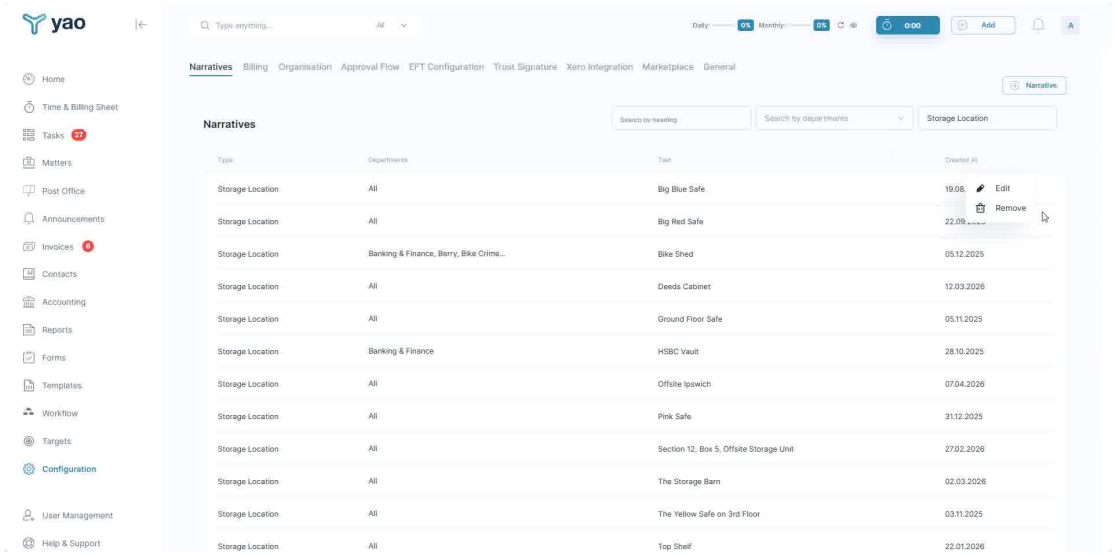
6. Click **Add** to save the new narrative.

7. A confirmation message, "*Narrative created/updated successfully,*" appears in the top right corner of the screen.

Editing an Existing Narrative

1. Use the search filters to locate the narrative you want to edit. For example, searching by type for Storage Location filters the list to show only that type.

2. Hover over a narrative row and click the three-dot (⋮) menu that appears on the right-hand side. This displays **Edit** and **Remove** options.



3. Click **Edit** to open the Update narrative modal, which is pre-filled with the narrative's existing Type and Text.

4. Make the required changes to the Departments or Text fields, then click **Save** to apply the changes, or **Cancel** to close the modal without saving.

The same confirmation message used when creating a narrative — "*Narrative created/updated successfully*" — applies when saving changes to an existing narrative.

Best Practice

- Select specific departments rather than **Select all** when a narrative should only be available to certain teams.
- Use the **Search by type** filter to check whether a similar narrative already exists before creating a new one, to avoid duplicates.

- Use **Cancel** if you open a narrative for editing and decide you do not want to save any changes.