Managing Contacts in Yao

Max Mazo - 2026-07-14 - Comments (0) - Contacts

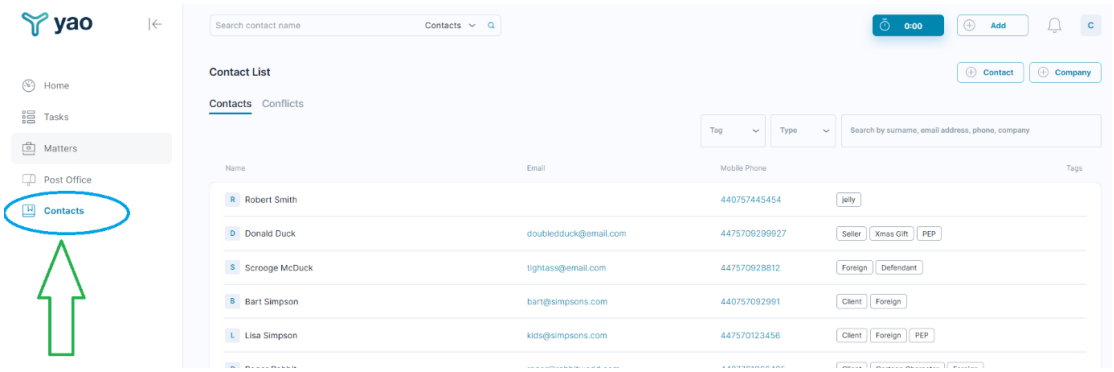
Managing Contacts in Yao

Link to Video Guide: https://youtu.be/Bgzoe8fPmcE

This section guides you through finding, creating, and managing contact information within the Yao legal practice management software.

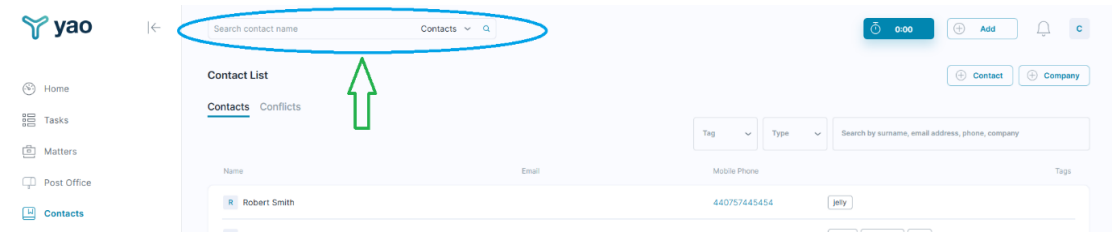
Finding and Accessing Contacts

You can access the main Contacts section using the primary navigation menu located on the left-hand side of the Yao interface.



Alternatively, you can use the universal search bar situated at the top of the screen. This powerful search tool allows you to find entries by:

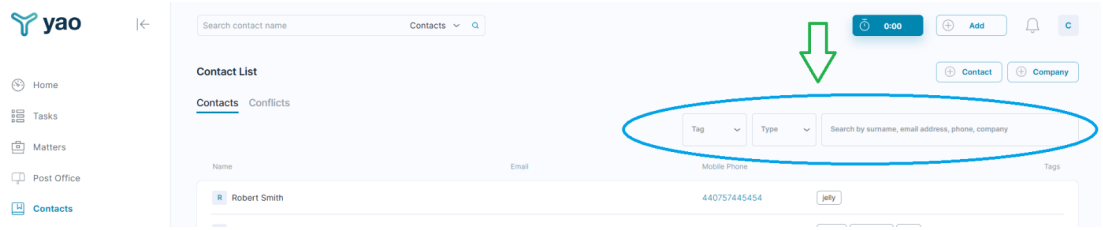
- **Contact name**
- **Matter name**
- **Matter number**



Within the dedicated Contacts section, you can further refine your search using specific criteria such as:

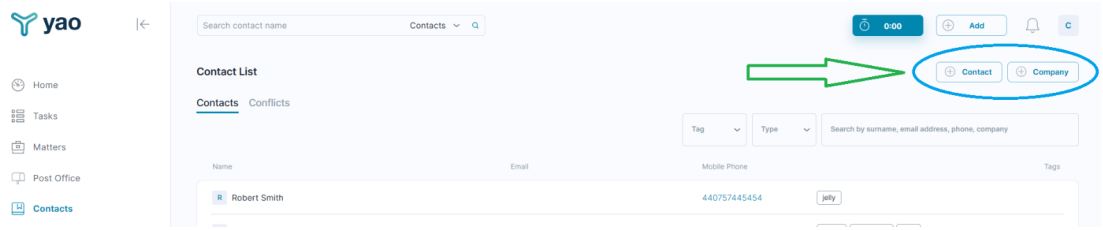
- Name
- Email address
- Phone number
- National Insurance number
- Tax File number

Filters are also available within the Contacts section to help you narrow down your results efficiently.



Creating New Contacts

When you are in the Contacts section, look to the top-right corner for options to add new entries:



Add Contact: Select this to create a record for an individual person.

1. **Add Company:** Select this to create a record for a company or organisation.

Adding an Individual Contact

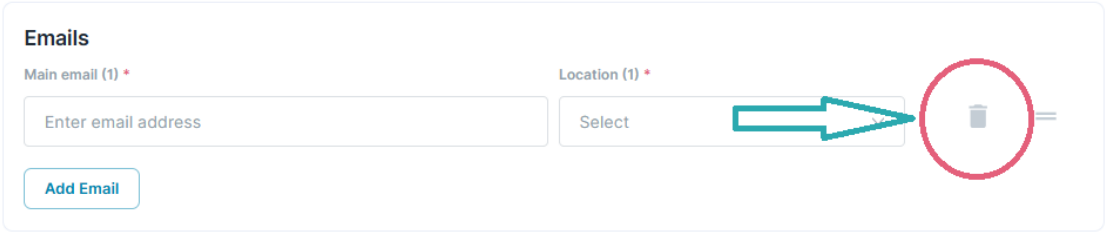
When adding a new contact, pay attention to fields marked with a red asterisk (*), as these are mandatory. To save a basic contact record, you will typically need to provide at least a **First Name** and **Last Name**.

Basic Information

- **Name Fields:** Enter the contact's official first and last names.
- **Preferred Name:** You have the option to enter a Preferred Name. For instance, if a contact named 'Robert' prefers to be called 'Rob', entering 'Rob' here allows correspondence generated through Yao to use this informal name where suitable.

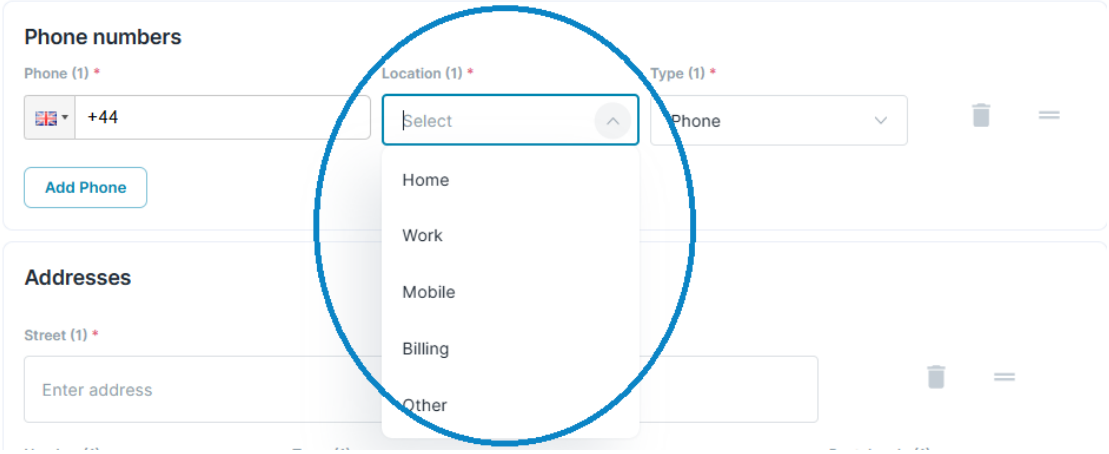
Email Addresses

- Click the **Add email** button to input an email address.
- You can add multiple email addresses for a single contact by clicking the button again.
- To remove an email address, use the corresponding delete option next to the entry you wish to remove.



Phone Numbers

- Click the **Add phone** button to input phone or fax numbers.
- Specify the **Type** for each number using the dropdown list (e.g., Home, Work, Mobile, Billing). Note that the number designated as 'Mobile' may be utilised for SMS verification features within Yao.

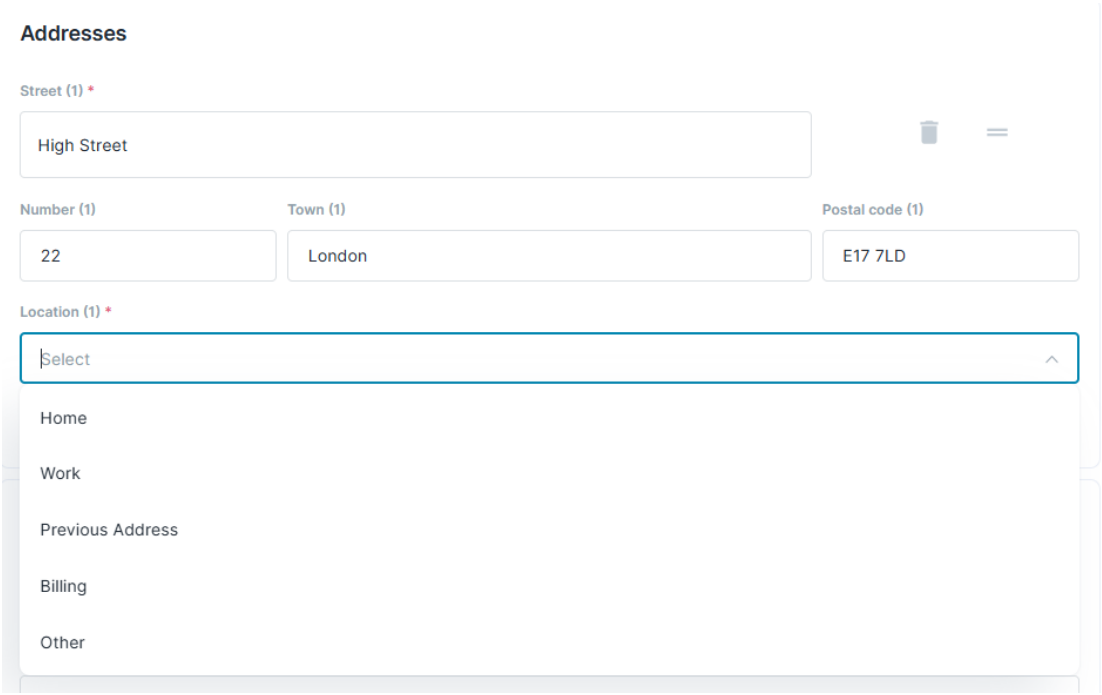


- You can distinguish between standard **Phone**, **Fax**, or **Other** types.
- Add as many numbers as needed, and remove unwanted entries using the delete option.

Addresses

- Add postal addresses in a similar manner to emails and phone numbers.
- Yao features integration with Google Maps. You can start typing an address, and Yao will suggest matches, allowing you to auto-populate the fields. [NEEDS IMAGE REVIEW]

- For each address, assign a **Location** type (e.g., Home, Work, Previous, Billing, Other).



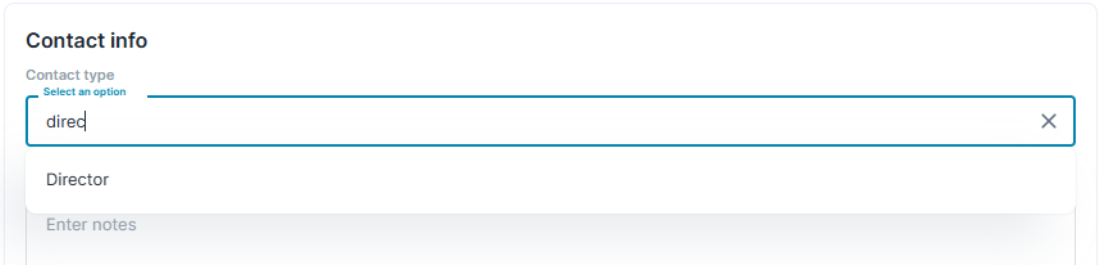
- Addresses are optional; you can add, remove, or update them at any time.

Contact Type (Tags)

- The **Contact Type** field functions as a tagging system to help you categorise and organise your contacts.

- You can either select from a list of pre-existing tags or create a new one on the fly.

- To create a new tag, simply type the desired term (e.g., "Client," "Expert Witness," "Counsel") into the field and press Enter. This tag will then be available for future use.



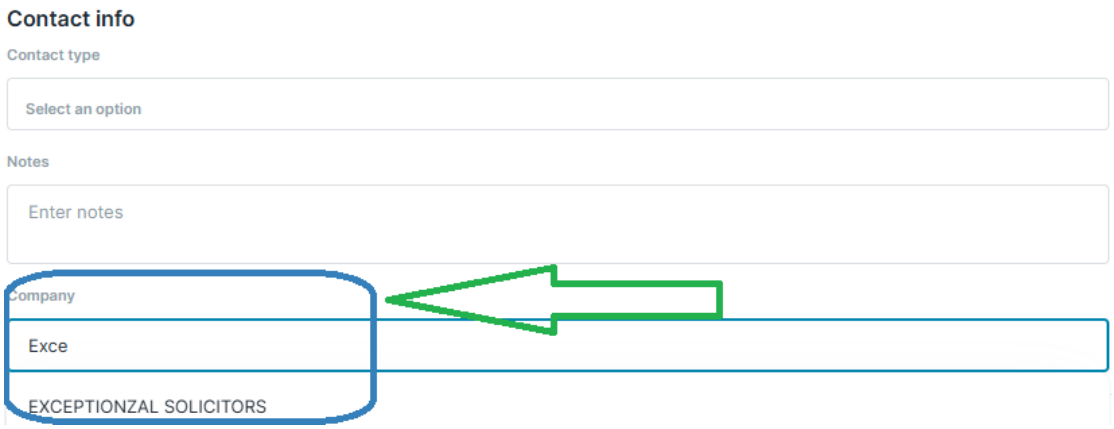
Notes

- A simple **Notes** field is provided for any general remarks or miscellaneous information you wish to record about the contact.

Linking to a Company

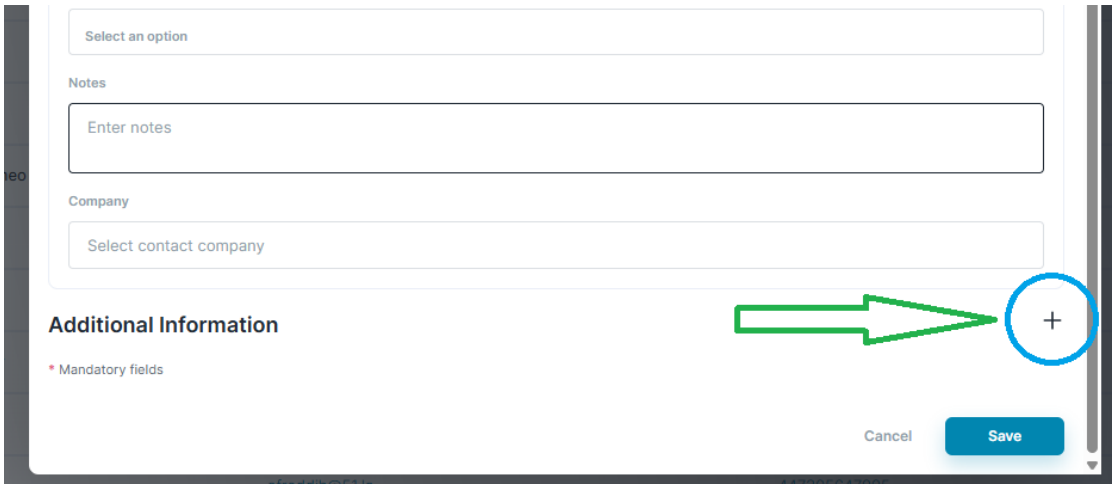
- If the individual contact is associated with a company which already exists as a contact record in Yao, you can link them using the **Company** field.

- Start typing the company name, and select the correct one from the list which appears. This formally associates the individual with that organisation within Yao.



Additional Information

- Expand the **Additional Information** section to reveal fields for more specific data.



- This area can store details such as:

- Occupation

Date of Birth

Bank Details (Account Number, Sort Code)

Tax-related information

- This section is available when creating both individual and company contact records.

Saving the Contact

Once you have finished entering the contact's details, scroll to the bottom of the form and click the **Add** (or **Save**) button to create the record.

Duplication Check

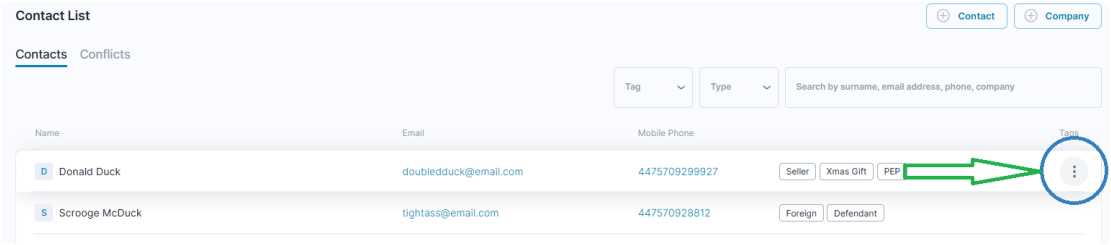
- Upon clicking save, Yao automatically performs a duplication check against your existing database.
- It looks for matches based on key identifiers like postcodes, mobile phone numbers, and email addresses.
- If potential duplicates are detected, Yao will present them for your review.
- You can examine the potential match. If you determine the new entry is genuinely distinct (e.g., different people sharing a common address or phone number), you may be able to provide a reason or simply select **Save Anyway** to proceed with creating the new contact record.

Editing an Existing Contact

Yao provides several convenient ways to access and modify the details of an existing contact record. Here are the primary methods:

1.Editing from the Main Contacts List

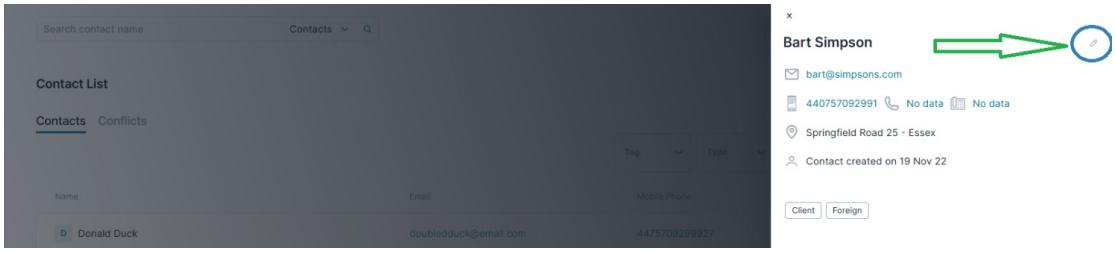
- Navigate to the main **Contacts** section from the left-hand navigation menu.
- Locate the contact you wish to modify in the list.
- Hover your mouse cursor over the contact's row. A set of action buttons, often including an ellipsis icon will appear towards the right-hand side of that row



- Click on the ellipsis icon to open a small menu.
- Select the **Edit** option from this menu.
- The full contact details screen will open, allowing you to make the necessary changes.
- Once you have finished editing, ensure you click the Save button, usually located at the bottom of the screen, to apply your changes.

2. Editing via Universal Search

- Use the universal search bar located at the top of the Yao interface to search for the contact by name or other known details.
- Click on the correct contact's name when it appears in the search results.
- This action will typically open an information panel, often sliding in from the right side of the screen, displaying a summary of the contact's details and associated matters.
- Look for an **edit icon**, commonly represented as a small pencil, located in the upper-right corner of this information panel.



- Click this edit icon.
- You will be taken to the full contact details screen where you can modify the information.
- Click **Save** to confirm your edits.

3. Editing from within a Matter

- Open the specific **Matter** with which the contact is associated.
- Ensure you are on the **Overview** screen for that matter.
- Within the Overview screen, locate the section displaying the client or other key contacts linked to the matter.
- Click on the name of the contact whose details you need to edit.
- Similar to using the universal search, this will usually open the contact information panel from the right.
- Click the **edit icon** (pencil) found in the top-right corner of this panel.
- This action opens the full contact editing screen. Make your required amendments.
- Remember to click **Save** to finalise the changes.