Setting Up Templates and Precedents

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This guide outlines how to create and manage document precedents, email templates, and letterheads in the Yao legal practice management software.

1. Accessing Templates and Precedents

1. From the **Home** screen, navigate to the main menu on the left side of the screen.
2. Click on **Templates** to open the main templates dashboard.
3. The dashboard defaults to the **Precedents** tab. You can also select the **Letterheads** or **Emails** tabs to manage those templates.

2. Creating a New Document Precedent

A document precedent is a reusable template linked to specific case types and data fields within Yao.

1. Ensure you are on the **Precedents** tab.
2. Click the **+ Add Precedent** button located in the top right corner of the screen.
3. Complete the fields under **Precedent Identification:**

- **Title:** Enter a descriptive name for the document (e.g., "Letter to Solicitor").
- **Letterhead:** Select an existing letterhead from the dropdown menu (e.g., "Yao Letterhead").
- **Form Key (Mandatory)**: Enter a unique key to identify the document template (e.g., "Letter-to-solicitor-3").
- **Precedent Description:** Enter a brief description of the document (e.g., "Error Precedent Description").
- **Requires Invoice for Precedent**: Tick this box if the creation of this document should automatically prompt the generation of a related invoice.

1. Under **Allocate to Case Type / multiple Case Types**, click the **Choose** field to select one or more relevant case types that this document should be available for (e.g., **Business Advisory**).
2. Under **Document template**:

- Click **Cheat Sheet** to view and copy a list of all available merge fields (e.g., client salutation, matter case name) that you can paste into your template document.

- **Upload your document** by dragging and dropping the file into the upload area, or by clicking **Browse File**. The document should be a Microsoft Word file (.docx/.doc/.docm).

1. Once all information is complete and the file is uploaded, click **Save**.

2. This precedent is then readily available to use in the system and workflows

3. Creating an Email Template

Email templates allow for standardised communications using dynamic merge fields.

1. Click on the Emails tab.

2. Click the + Add E-mail Template button.

3. Enter a Title (e.g., "Email to Solicitor") and a brief Description for the template.

4. Enter the content of your email in the body section.

5. To insert merge fields that pull data from the client or matter:

- Use the menu options along the top of the screen (e.g., Clients Details, Matter, Case Contacts) above the email body.

- For example, you can insert {{all:clients:salutation}} for the greeting and {{matter:case-name}} for the subject line reference.

1. Click **Save** when finished.

2. This E-mail is then readily available to use in the system and in workflows

4. Setting up Letterheads

The Letterheads feature allows you to upload and manage branded templates.

1. Click on the **Letterheads** tab.

2. Click the **+ Add Letterhead** button.

3. Follow the on-screen prompts to:

- Create your blank letterhead.

- Upload the Microsoft Word document containing your letterhead.

- Once a letterhead is created, you can then link that to a new or existing precedent.