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How to Add Documents and Emails to a Matter using Drag and Drop

Max Mazo - 2025-10-27 - [Comments \(0\)](#) - [Matters](#)

How to Add Documents and Emails to a Matter using Drag and Drop

This guide provides instructions on how to quickly upload documents and emails from your local machine or external sources, such as an email client, directly into the relevant Matter in Yao. This drag and drop feature simplifies the process of associating all client correspondence, which is essential for accurate record-keeping.

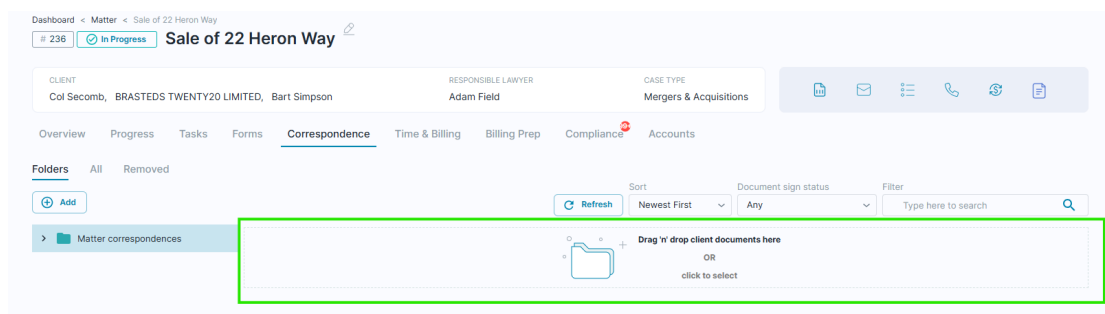
Navigating to the Correspondence Tab

1. Navigate to the Matter page to which you wish to upload documents.
2. In the horizontal menu bar along the top of the Matter overview, click the Correspondence tab. The Matter correspondence screen will load, which is where you will manage all associated documents and communications.

Adding Files via the Drag and Drop Method

This method is the most efficient way to upload multiple documents or emails directly from an external source, such as a file explorer window or an open email application.

1. Click and drag the desired files from your external source (e.g., an email or a local folder) over the Yao application window.
2. Drop the files into the central drop zone on the Correspondence tab, which is marked by a grey outline and the text 'Drag n drop client documents'.



1. The files will begin uploading almost instantaneously, and a green loading bar will appear for each document until the process is complete.

2. Once the uploads are complete, the files will appear in the main document list on the Correspondence tab and are ready to be worked on or amended.

Adding Files via the Click to Select Method

If you prefer to browse your local computer for files, you can use the selection option, which opens your local file explorer.

1. If you wish to select the documents to upload from your local device, simply click anywhere within the drag and drop window.
2. A local file explorer window will open. Navigate to the folder which contains the documents you wish to upload.
3. Select one or multiple documents, and click the Open button in the lower-right corner of the explorer window. The selected documents will upload and appear in the document list on the Correspondence tab.