



[Knowledgebase](#) > [How to guides](#) > [Matters](#) > [How to Convert Documents to PDF within a Matter in Yao](#)

How to Convert Documents to PDF within a Matter in Yao

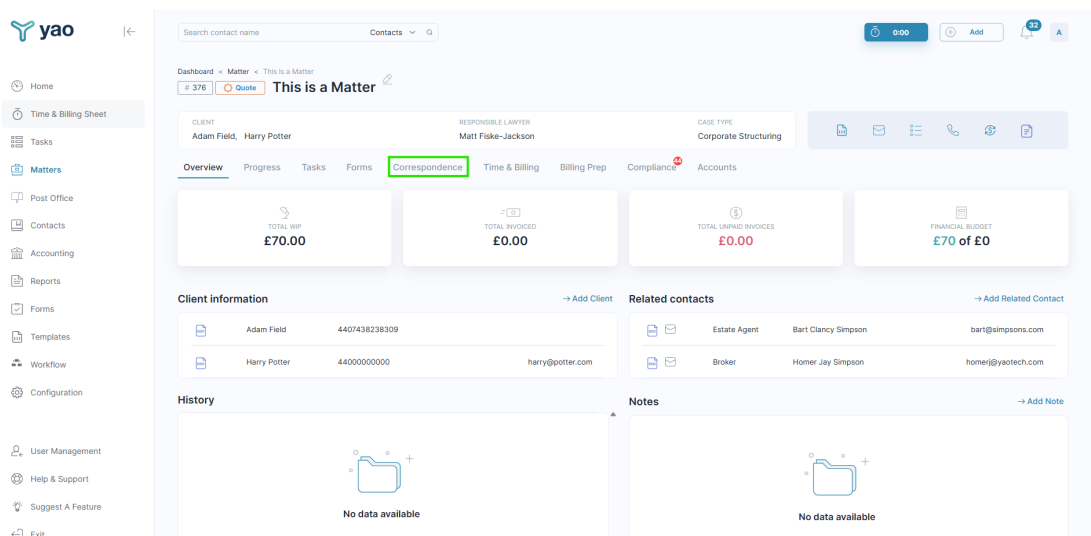
Max Mazo - 2025-11-03 - [Comments \(0\)](#) - [Matters](#)

How to Convert Documents to PDF within a Matter in Yao

This guide details the process of converting an existing document, such as a Microsoft Word or Excel file, to a PDF format directly within the **Yao** Practice Management platform. Converting a file to PDF ensures that the document's formatting remains consistent across all devices, which is what is essential for managing legal documentation.

Converting a Document to PDF

1. **Navigate** to the specific **Matter** which contains the document you wish to convert.
2. Select the **Correspondence** tab, which is located in the top menu alongside **Overview** and **Time & Billing**. This tab holds all of the documentation for the matter.



1. **Locate** the document you want to convert in the main document list. This feature supports multiple file types, including Word and Excel documents.
2. On the far right-hand side of the document row, click the **menu ellipsis** (the three-dot icon) to view the document options.
3. From the drop-down menu, select Convert to PDF.

Dashboard < Matter < This is a Matter

376 Quote This is a Matter

CLIENT: Adam Field, Harry Potter RESPONSIBLE LAWYER: Matt Fiske-Jackson CASE TYPE: Corporate Structuring

Overview Progress Tasks Forms **Correspondence** Time & Billing Billing Prep Compliance Accounts

Folders All Removed

Add Refresh Newest First Any Filter Type here to search

Drag 'n' drop client documents here OR click to select

DATE	CAT. FROM/TO/OWNER	ATTACHMENTS/STATUS	SUBJECT	ADDED BY
30.10.25 11:36 AM	Excel Test		Excel Test	Adam
30.10.25 11:36 AM	Respondent Letter		Respondent Letter	Adam
30.10.25 11:35 AM	Letter to client regarding instruct...		Letter to client regarding instructions	Adam

Convert to PDF

The conversion will begin, and a temporary alert will appear in the top-right corner of the screen, which indicates the process is starting and will take a short while.

1. Click the Refresh button, which is the circular arrow icon located above the document list in the main content pane.

Dashboard < Matter < This is a Matter

376 Quote This is a Matter

CLIENT: Adam Field, Harry Potter RESPONSIBLE LAWYER: Matt Fiske-Jackson CASE TYPE: Corporate Structuring

Overview Progress Tasks Forms **Correspondence** Time & Billing Billing Prep Compliance Accounts

Folders All Removed

Add Refresh Newest First Any Filter Type here to search

Drag 'n' drop client documents here OR click to select

DATE	CAT. FROM/TO/OWNER	ATTACHMENTS/STATUS	SUBJECT	ADDED BY
30.10.25 11:36 AM	Excel Test		Excel Test	Adam
30.10.25 11:36 AM	Respondent Letter		Respondent Letter	Adam
30.10.25 11:35 AM	Letter to client regarding instruct...		Letter to client regarding instructions	Adam

The converted PDF file will now appear in the list alongside the original document.