How to Convert Documents to PDF within a Matter in Yao

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

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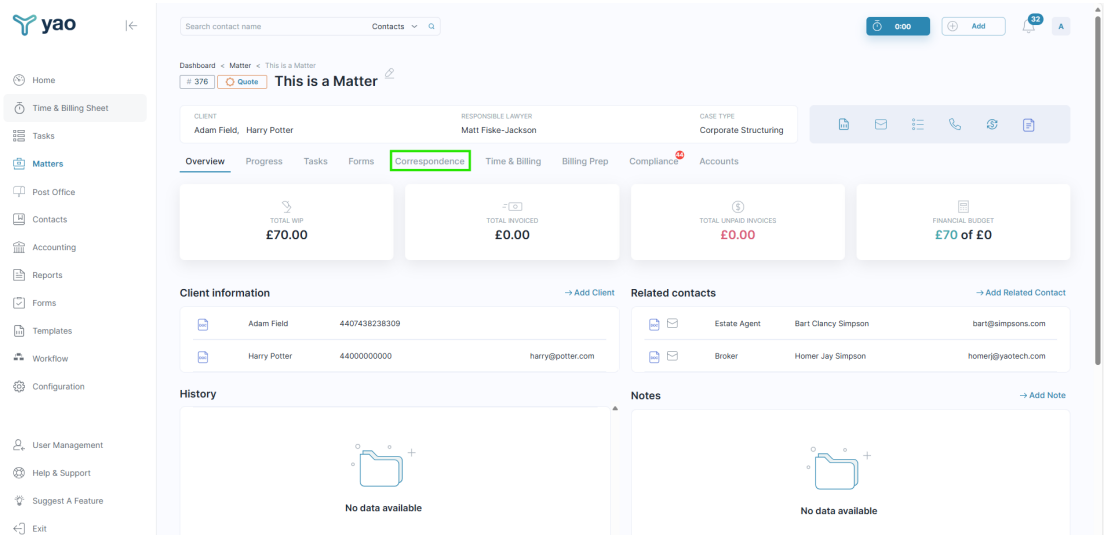
Link to Video Guide: https://youtu.be/Y_hgvggdQU0

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.

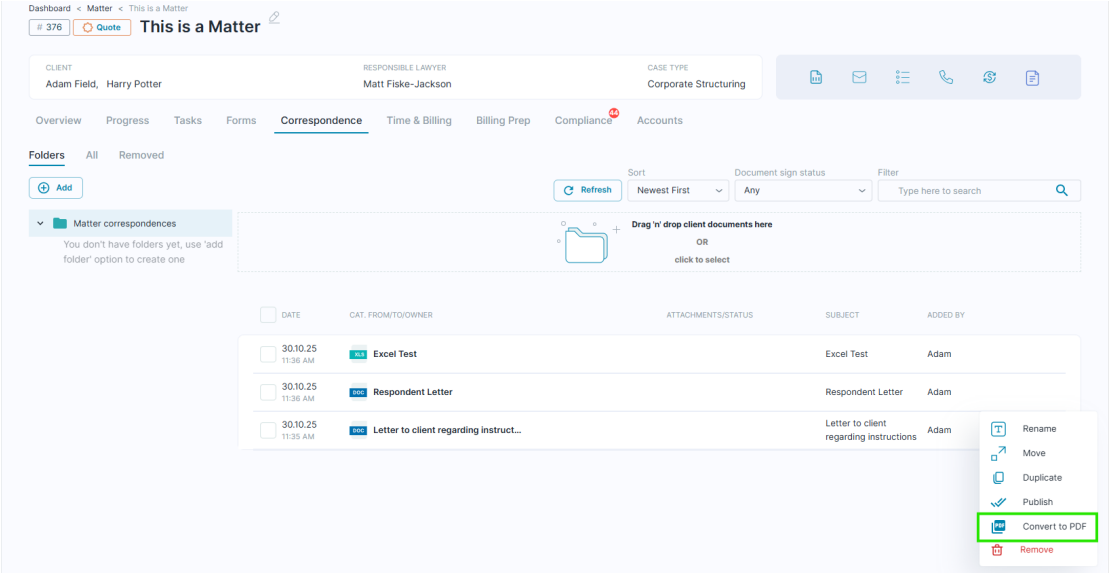
2. Select the **Correspondence** tab, which is located in the top menu alongside **Overview** and **Time & Billing**. This tab holds all of the documentation for the matter.



1. **Locate** the document you want to convert in the main document list. This feature supports multiple file types, including Word and Excel documents.

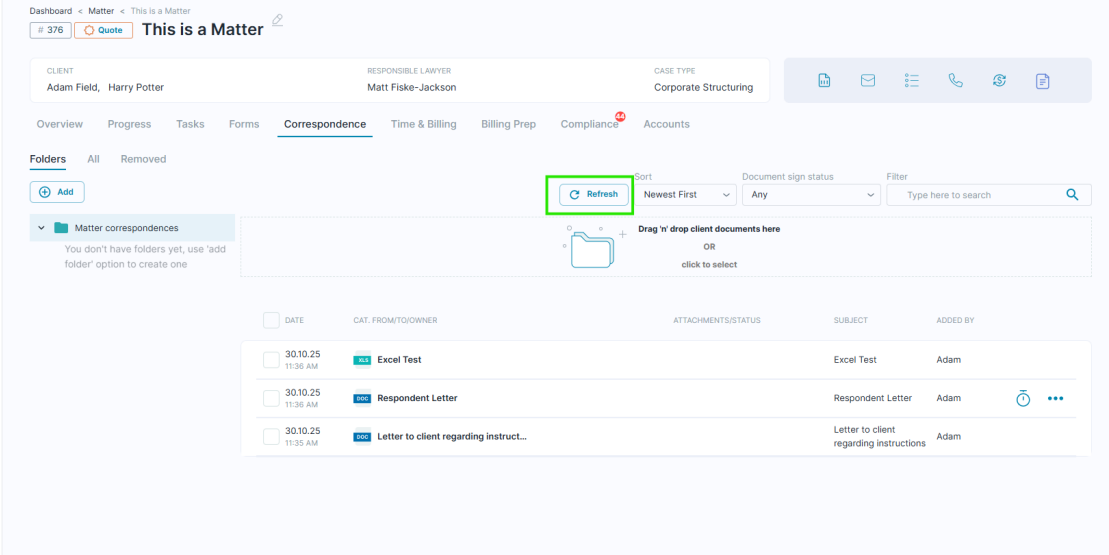
2. On the far right-hand side of the document row, click the **menu ellipsis** (the three-dot icon) to view the document options.

3. From the drop-down menu, select Convert to PDF.



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.



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