How to Create Bundles from your Matter

Adam Field - 2026-05-22 - Comments (0) - Matters

How to Merge / Bundle Documents

Training Guide Video Link: https://youtu.be/_6E1mFmhhLU?si=Y4gR2vMnjRwKVM8v

The Merge to PDF feature in Yao allows you to combine multiple documents from a matter into a single bundled PDF. You can customise the order of documents and rename each entry, creating a table of contents within the final merged file.

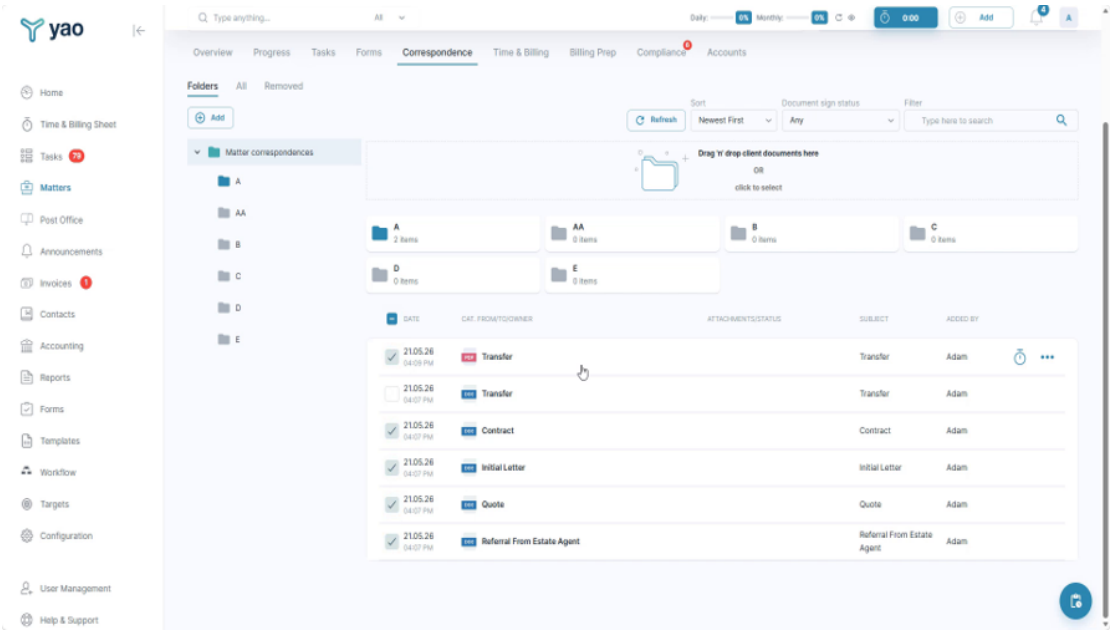
This guide is based on the Correspondence tab within a matter. All steps and screenshots are taken directly from the source video.

Steps

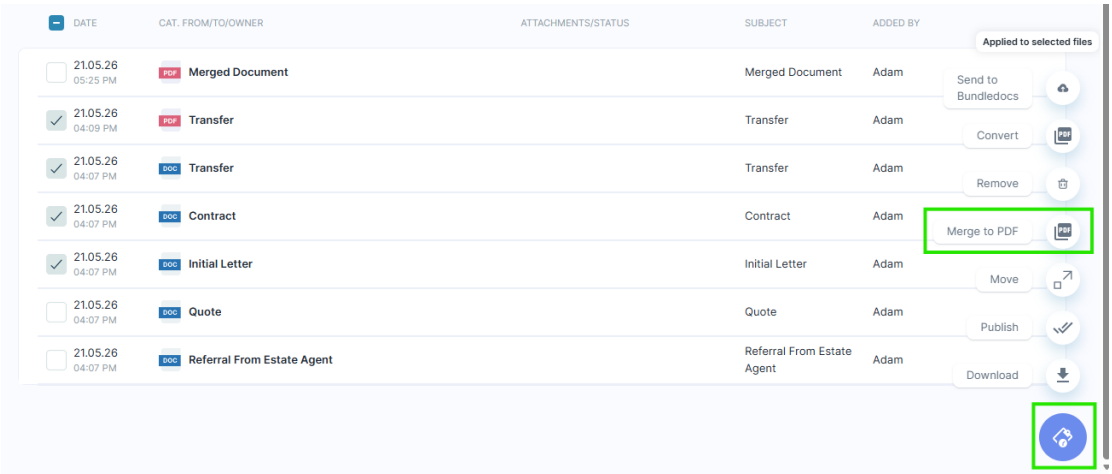
1. Open the relevant matter and click on the **Correspondence** tab at the top of the matter page.

2. Tick the checkbox next to each document you wish to include in the bundle. You can select as many documents as required.

To select all documents at once, tick the checkbox in the column header at the top of the list (next to the **DATE** column).

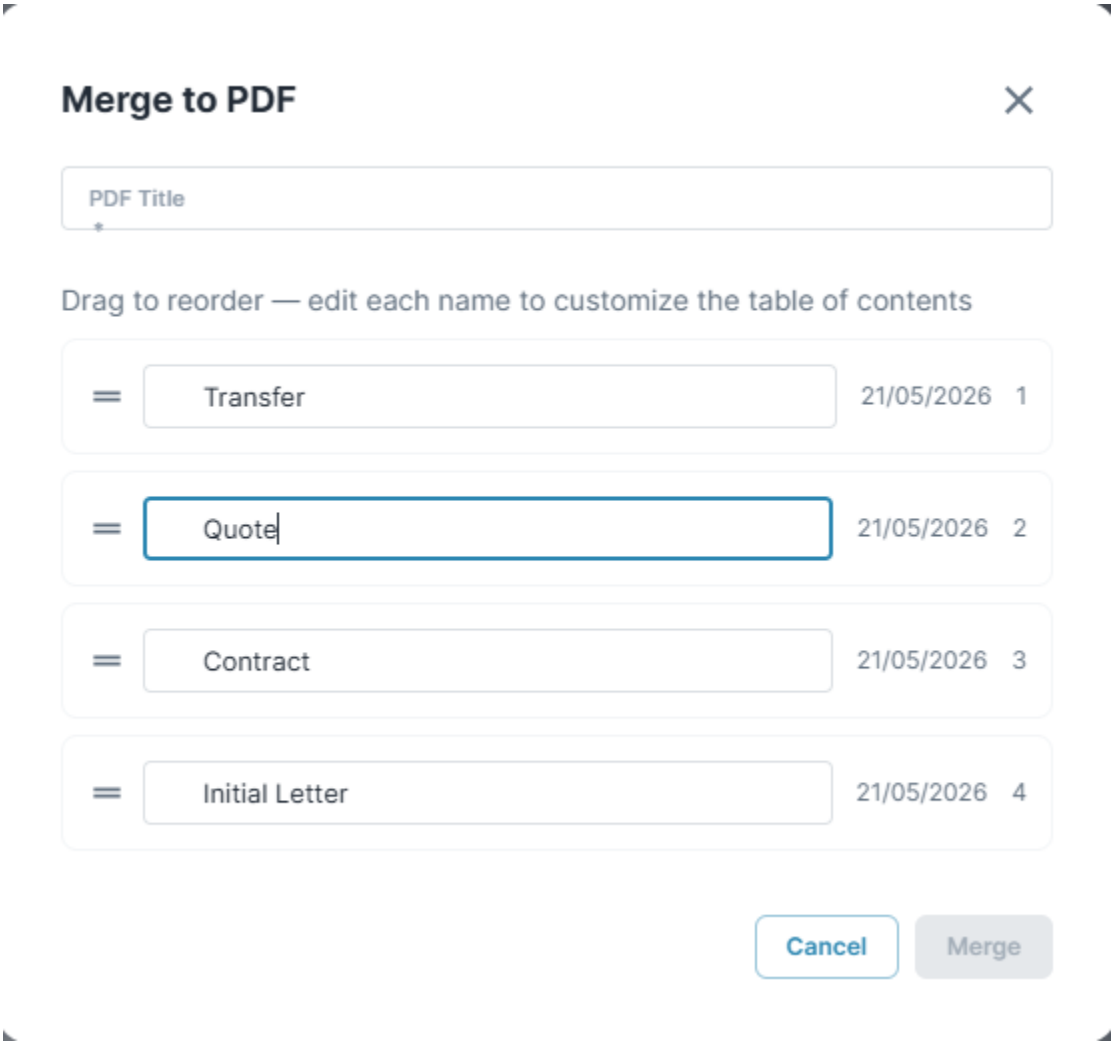


3. Once documents are selected, an **Applied to selected files** toolbar appears on the right-hand side. Click **Merge to PDF**.



4. A **Merge to PDF** window will open. It displays all selected documents in a numbered list, along with the message: *"Drag to reorder — edit each name to customise the table of contents"*

Each entry shows the document name, its date, and its position number in the final bundle.



5. To change the order in which documents appear in the final PDF, drag each row using the drag handle (the two horizontal lines icon) on the left of each entry.

The position number on the right of each row will update automatically to reflect the new order.

6. Click directly into the name field of any document to edit it. This changes how the entry appears in the table

of contents of the final merged PDF. It does not rename the original document.

7. Click into the **PDF Title** field at the top of the modal and type a name for the merged document (for example, *"Merged Document"*). This title will appear as the heading of the final PDF.

Once the title has been entered, the **Merge** button becomes active (highlighted in teal). Click **Merge** to begin the process.

8. A confirmation notification reading **"Documents merged successfully"** will appear in the top-right corner of the screen.

The new merged document will appear at the top of the correspondence list with a **Processing** badge whilst the PDF is being generated.

9. Once processing is complete, click on the merged document in the correspondence list. A preview panel will open on the right-hand side of the screen.

The preview shows the final PDF beginning with a table of contents. Each document entry is listed with its corresponding page number.