How to Publish Documents to the Client Portal

Adam Field - 2026-05-29 - Comments (0) - Matters

How to Publish Documents to the Portal

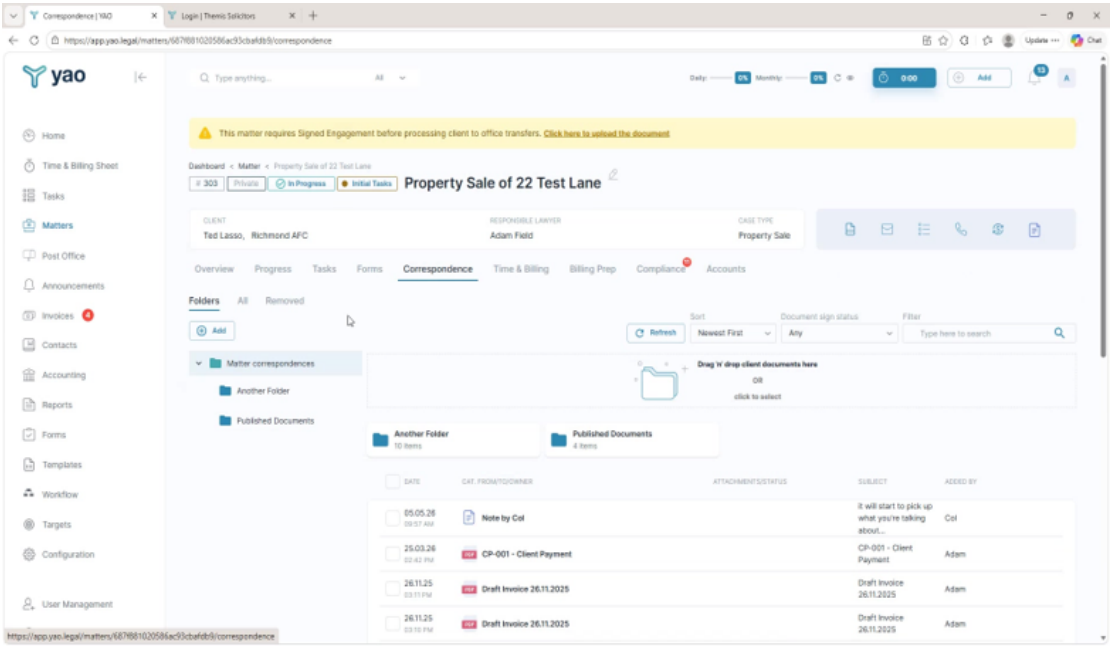
Link to Video Training Guide: https://youtu.be/R79TTORNaA4?si=fznvkq0hCCiljJ9G

Overview

This guide explains how to publish documents from a matter in Yao so that they become visible to clients via the client portal. It covers locating the **Correspondence** tab, using the **Published Documents** folder, publishing individual files, and viewing the result from the client's perspective.

Step 1 – Navigate to a Matter and Open the Correspondence Tab

From the Yao home screen, open the relevant matter. Once inside the matter, click the **Correspondence** tab.



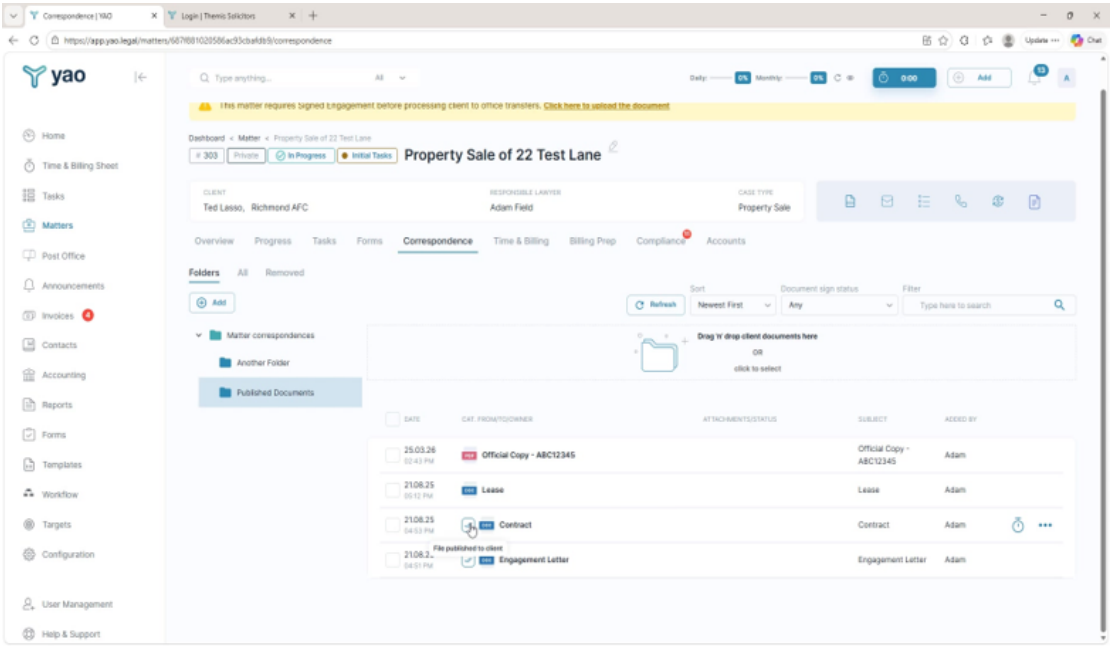
Step 2 – Locate the Published Documents Folder

Within the **Correspondence** tab, select the **Folders** sub-tab. You will see a folder tree on the left-hand side under **Matter correspondences**. The folders visible in the view are:

- Another Folder
- Published Documents

Note: It is recommended to have a folder named **Published Documents** in your matter correspondence. This keeps published files clearly organised and easy for clients to find. Creating this folder is not essential — you can publish from any folder — but it is strongly encouraged as good practice.

Click on **Published Documents** in the folder tree to view its contents.



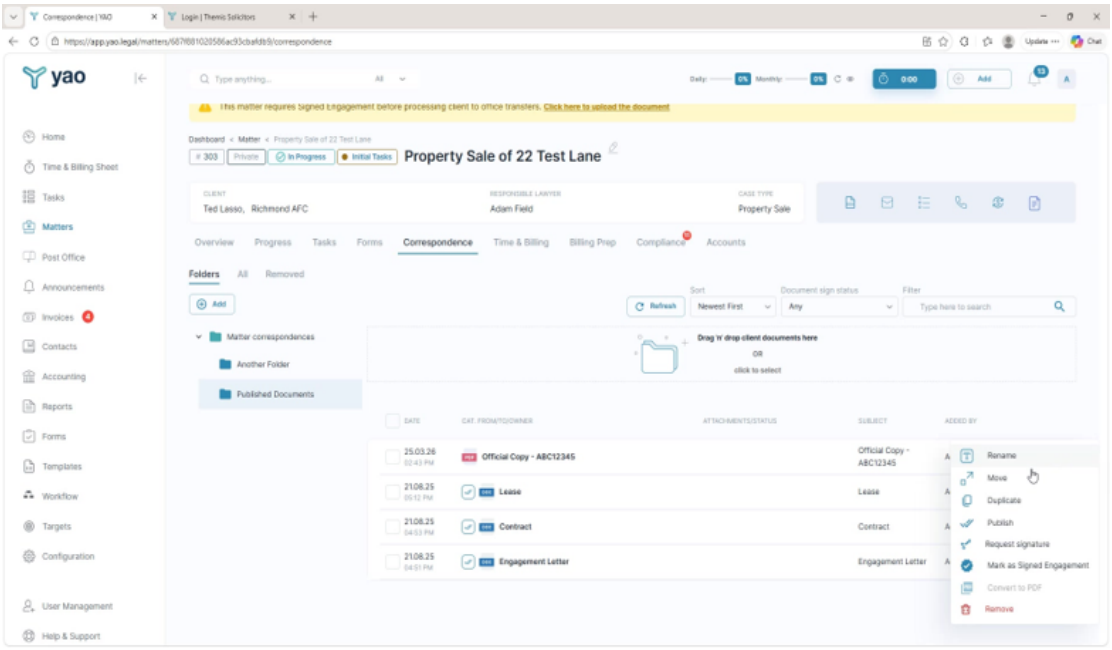
Step 3 – Publish a Document to the Portal

To publish a document to the client portal, hover over the document row. A three-dot menu icon (…) appears on the right-hand side of the row.

1. Hover over the document you wish to publish.

2. Click the three-dot menu (…) to open the options menu.

3. Click **Publish** from the list of options.



The options shown in the menu are:

- Rename
- Move
- Duplicate
- **Publish** — this is the option used to make the document visible on the client portal.
- Request signature
- Mark as Signed Engagement
- Convert to PDF

- Remove

Once published, a tick icon will appear next to the document in the folder view, indicating that it has been published to the client.

Step 4 – Viewing the Document as a Client

After publishing, clients can access their documents by logging in to the client portal. The portal URL is unique to your firm. To locate your portal URL, please reach out to your firm's Yao administrator.

Logging In to the Client Portal

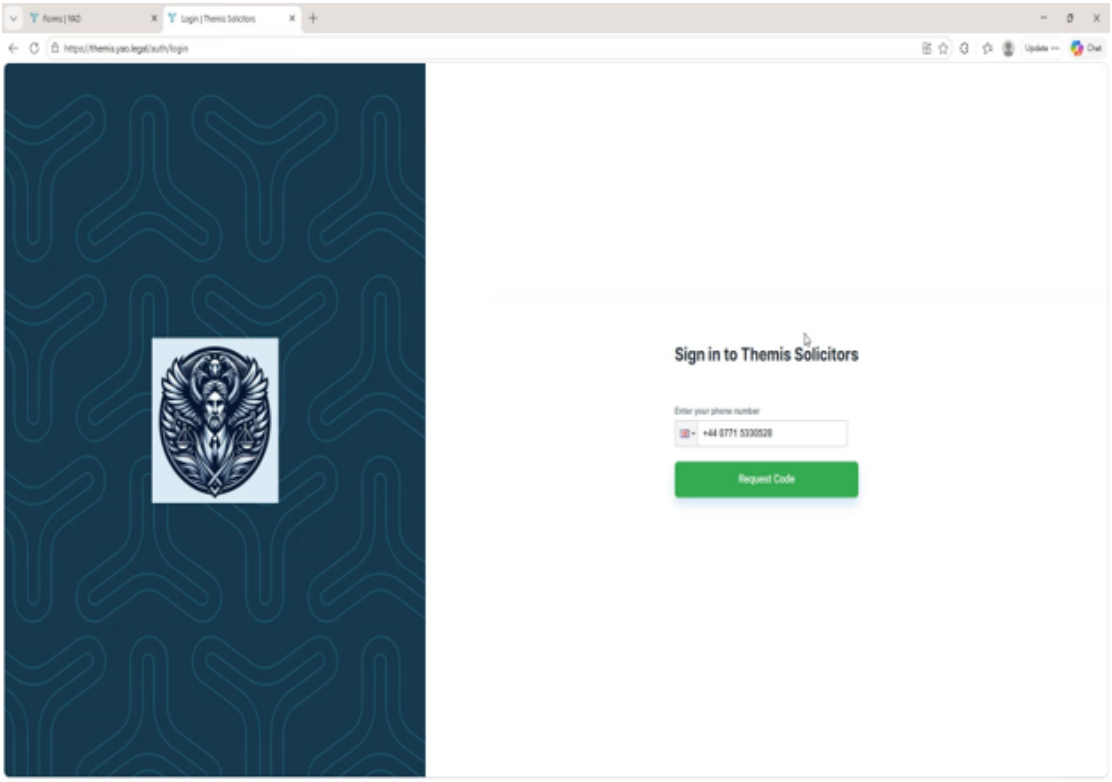
1. Navigate to your firm's portal URL in a web browser.

2. Enter your phone number on the login screen.

3. Click **Request Code**.

4. Type the code received by SMS into the four boxes displayed.

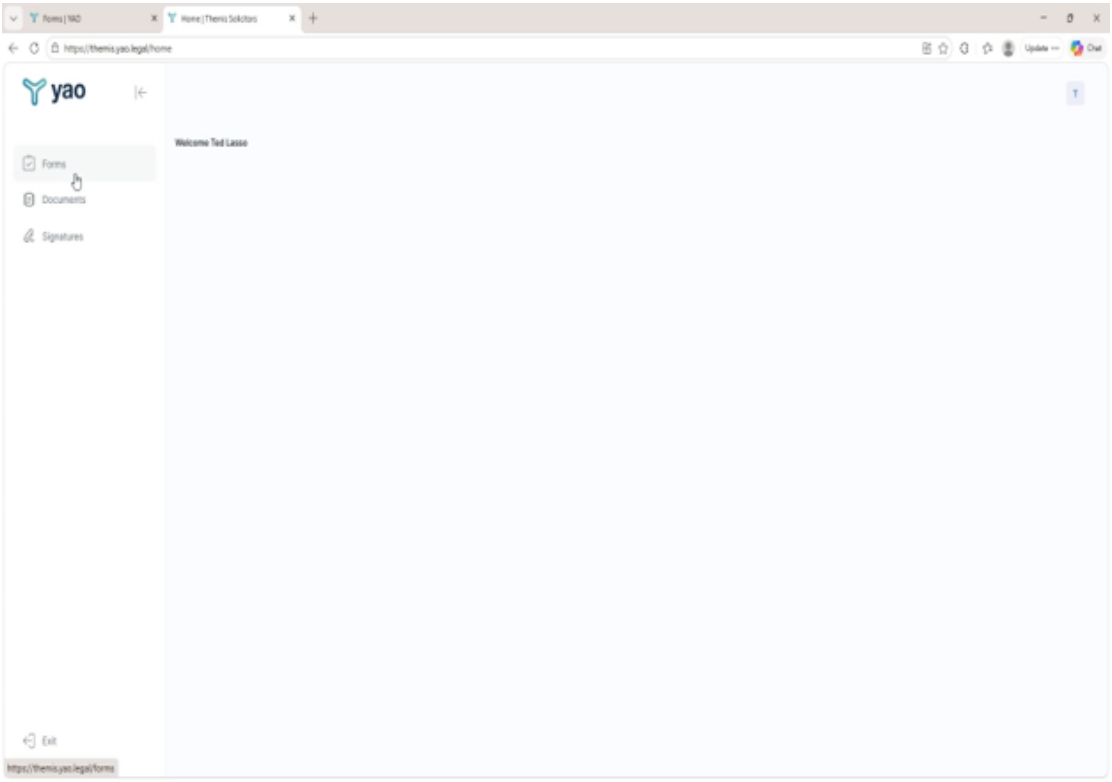
5. Click **Login**.



Navigating the Portal

Once logged in, the client portal displays a welcome message and a navigation menu on the left-hand side with the following options:

- Forms
- Documents
- Signatures

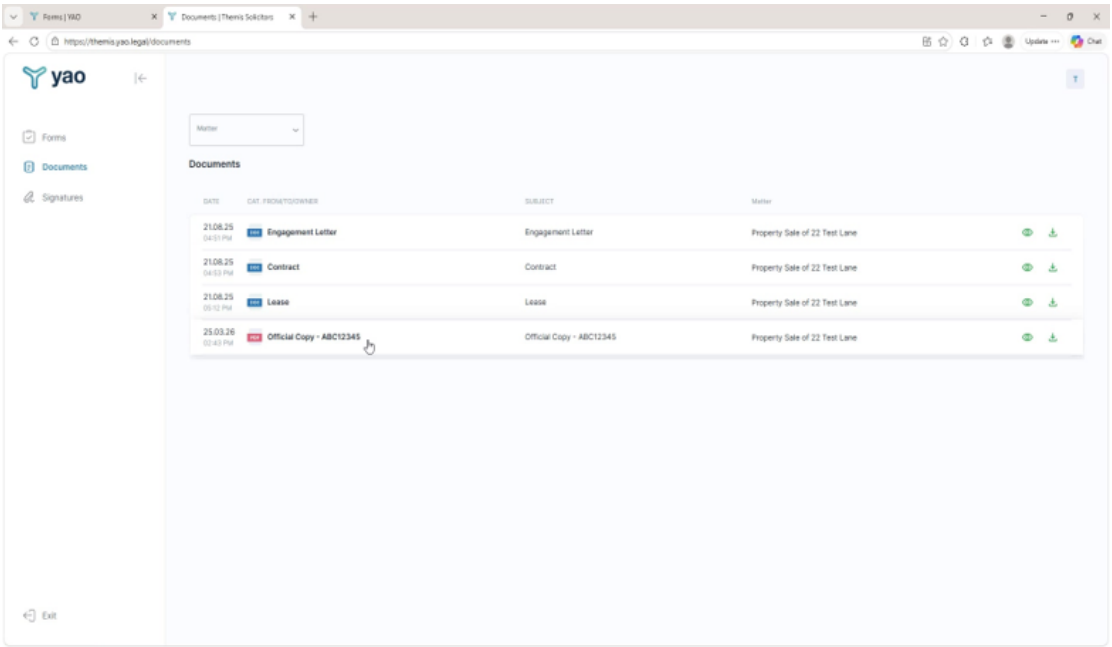


Viewing Published Documents

Click **Documents** in the left-hand navigation. The Documents screen displays all files that have been published to the client from within Yao. Each row shows:

- Date
- Document type and file name
- Subject
- Matter reference

Clients can view or download each document using the icons on the right-hand side of each row.



For further assistance, please contact your firm's Yao administrator.