How to Add Internal Comments to Invoices

Max Mazo - 2026-06-13 - Comments (0) - Time entry and recording

How to Add Internal Comments to Invoices

This guide explains the process of adding comments to draft invoices within the Yao platform. This feature allows team members to communicate necessary adjustments, such as fee corrections or clarifications, directly on the invoice record. Please note that these comments are strictly internal; they appear only within the modal view and are not visible on the final invoice document which is generated for the client.

There are two primary methods to access an invoice to leave a comment: via the **Accounting** section or via a specific **Matter.**

Accessing Invoices via the Accounting Section

If you are an accountant or administrator managing global finances, you may prefer to locate the invoice through the main Accounting dashboard.

1. Navigate to the main sidebar on the left and select **Accounting**.
2. Click on the **Invoices** tab located at the top of the page.
3. Locate the specific invoice which requires a comment from the list.
4. Click on the invoice row to open the details view.
5. The invoice details modal will open.

Accessing Invoices via a Matter

If you are working within a specific case or project, you can access the invoice directly through the Matter file.

1. Navigate to the **Matters** section using the left sidebar.
2. Select the specific matter which you are working on (e.g., "Review of Estate Documents").
3. Within the matter dashboard, click on the **Accounts** tab located in the horizontal menu.
4. Select the **Invoices** sub-tab to view all financial documents associated with this matter.

5. Click on the specific **Draft** invoice which you wish to annotate.

6. The invoice details modal will open.

Adding the Comment

Once you have opened the invoice details using either of the methods above, follow these steps to add your note.

1. Look to the right-hand side of the invoice window to find the Invoice Activity panel.

2. Click into the text field labelled **Add a comment**.

3. Type your message (e.g., "Please adjust so that the TT fee is waived").

4. Click the **Send** button (often represented by an arrow or paper plane icon) to post the note.

5. Your comment will immediately appear in the activity feed with a timestamp.

Any comments added here will remain internal to the system. They will not be printed or rendered on the actual PDF invoice sent to the client.