



[Knowledgebase](#) > [How to guides](#) > [Accounting](#) > [How to Bulk Invoice](#)

How to Bulk Invoice

Adam Field - 2026-08-12 - [Comments \(0\)](#) - [Accounting](#)

How to Generate Bulk Invoices in Yao

Link to Video Training Guide: <https://youtu.be/eKgO0E8qHd4>

[Accounting](#) > [Invoices](#) > [Bulk Invoicing](#)

This guide shows how to generate draft invoices in bulk for several matters at once, using each matter's unbilled work in progress (WIP), from the **Bulk Invoicing** tab in Yao.

Where to find this

[Dashboard](#) > [Accounting](#) > [Invoices](#) > [Bulk Invoicing](#)

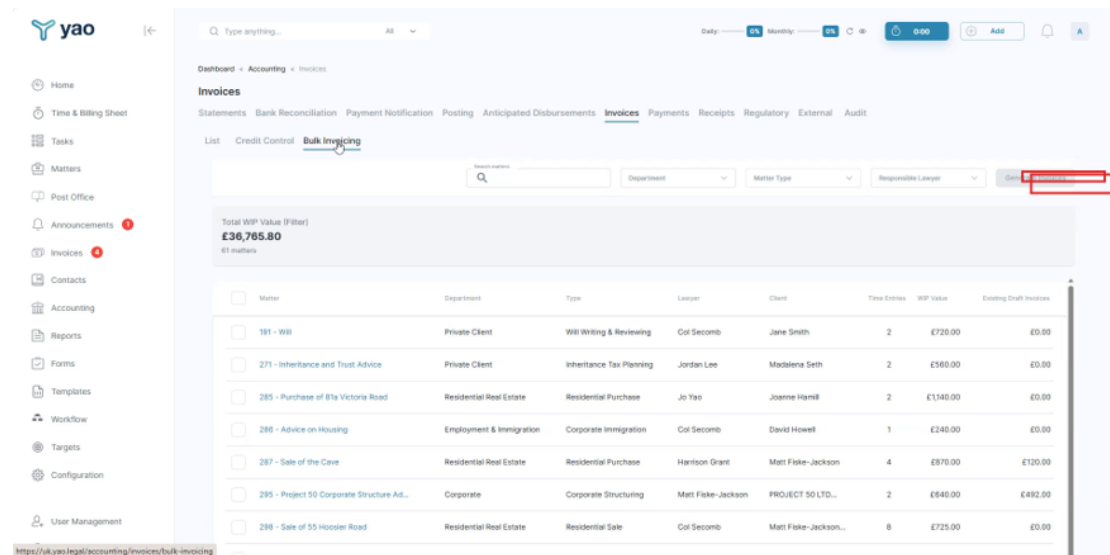
Steps

1. From the left-hand navigation menu, click **Accounting**.
2. On the **Accounting** page, click the **Invoices** tab. This sits in the sub-navigation bar alongside **Statements**, **Bank Reconciliation**, **Payment Notification**, **Posting**, **Anticipated Disbursements**, **Payments**, **Receipts**, **Regulatory**, **External** and **Audit**.
3. On the **Invoices** page, click the **Bulk Invoicing** tab (next to **List** and **Credit Control**).

Matter	No	Date	Due Date	Subtotal	VAT	Total	Outstanding	Status	Pending Approval	Action	Actions
469	905	12.08.2026	26.08.2026	£158.00	£31.80	£190.80	£190.80	ISSUED		Open	⋮
303		07.08.2026	21.08.2026	£200.00	£40.00	£240.00	£240.00	DRAFT	Responsible Supervisor	Open	⋮
303		07.08.2026	21.08.2026	£200.00	£40.00	£240.00	£240.00	DRAFT	Responsible Supervisor	Open	⋮
426	904	06.08.2026	20.08.2026	£4,000.00	£800.00	£4,800.00	£4,800.00	ISSUED		Open	⋮
369	903	04.08.2026	18.08.2026	£954.00	£124.20	£778.20	£778.20	ISSUED		Open	⋮
369	902	04.08.2026	18.08.2026	£400.00	£80.00	£480.00	£480.00	ISSUED		Open	⋮
369	901	04.08.2026	18.08.2026	£911.00	£140.00	£951.00	£951.00	ISSUED		Open	⋮
486		29.07.2026	12.08.2026	£909.83	£161.97	£971.80	£971.80	DRAFT	Responsible Supervisor		⋮
271	899	27.07.2026	10.08.2026	£90.00	£18.00	£108.00	£108.00	ISSUED		Open	⋮
Paid Invoices				£385,863.86	Unpaid Invoices		£791,043.20	Total Invoiced		£1,208,104.97	

The **Bulk Invoicing** tab, next to **List** and **Credit Control**.

4. The **Bulk Invoicing** tab loads a list of matters that have unbilled time and disbursements (work in progress). In the video this showed a **Total WIP Value (Filter)** of £36,765.80 across 61 matters. Each row lists the **Matter**, **Department**, **Type**, **Lawyer**, **Client**, **Time Entries**, **WIP Value** and **Existing Draft Invoices**.

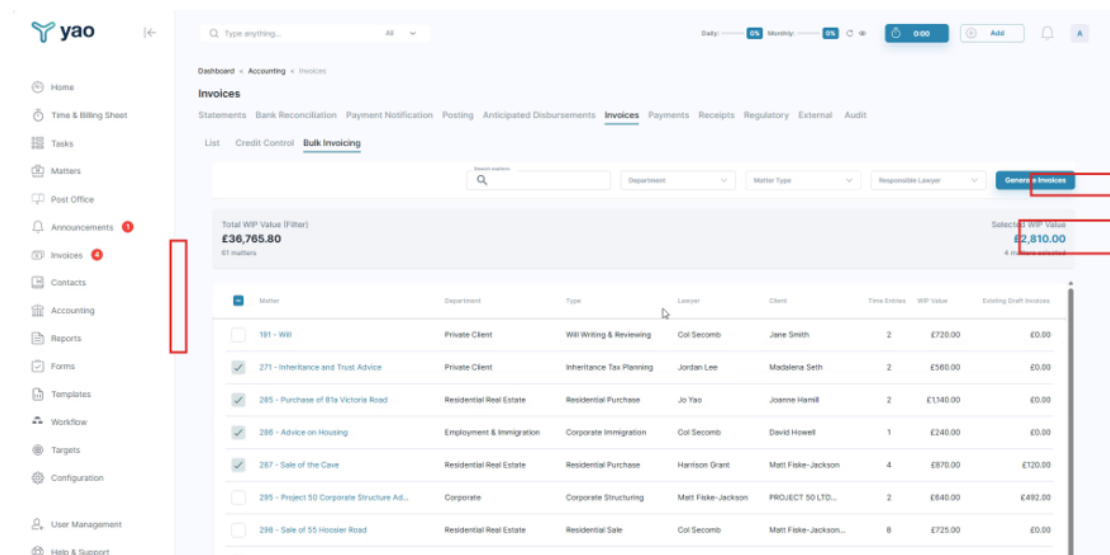


The **Bulk Invoicing** list, with the **Generate Invoices** button greyed out until a matter is selected.

5. If you have a large list of matters, you can narrow it down first using the **Search matters** box, or the **Department**, **Matter Type**, and **Responsible Lawyer** dropdown filters shown above the list, before selecting matters to invoice.

Note: These filter controls were not exercised in the video, so the exact filtering behaviour is not demonstrated here — only that the controls are present and available on this screen.

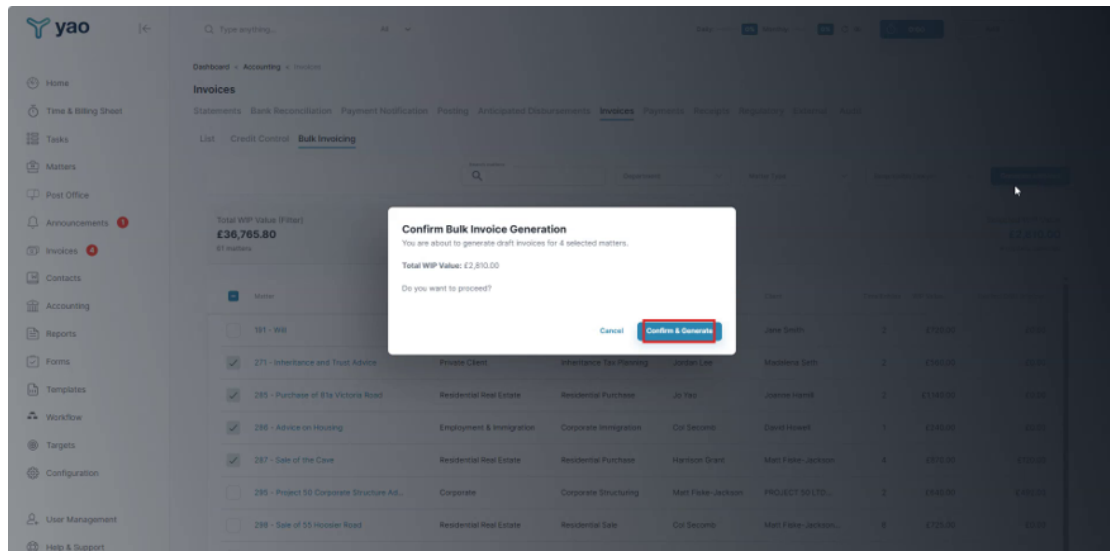
6. Tick the checkbox next to each matter you want to include in this invoice run. You can also use the checkbox in the table header to select or deselect all visible matters at once. As you select matters, the **Selected WIP Value** and matter count at the top right of the list update to match your selection. In the video, four matters were selected — 271 - Inheritance and Trust Advice, 285 - Purchase of 81a Victoria Road, 286 - Advice on Housing, and 287 - Sale of the Cave — giving a **Selected WIP Value** of £2,810.00.



Four matters selected, with the **Selected WIP Value** and matter count updated and **Generate Invoices** now active.

7. Once at least one matter is selected, the **Generate Invoices** button (top right of the list) becomes active. Click **Generate Invoices**.

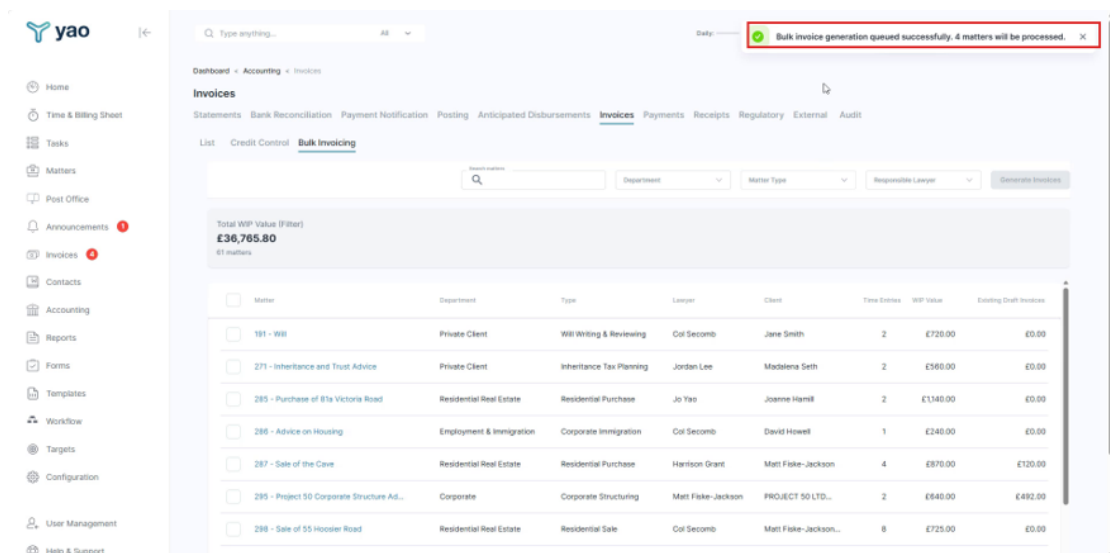
8. A **Confirm Bulk Invoice Generation** dialog opens, showing the number of selected matters and the Total WIP Value, and asking "Do you want to proceed?" Click **Confirm & Generate** to continue.



The **Confirm Bulk Invoice Generation** dialog.

Note: Clicking **Cancel** on this dialog was not demonstrated in the video, so its result is not covered here.

9. A green confirmation message appears: “Bulk invoice generation queued successfully. X matters will be processed.” This confirms the request has been submitted.



The confirmation message shown after clicking **Confirm & Generate**.

Result

The bulk invoice generation request for the selected matters is queued for processing. The video ends at this confirmation message, so this guide does not describe what happens next.