How to Create a Custom Invoice

Adam Field - 2026-05-13 - Comments (0) - Forms, Precedents and Templates

How to Create a Custom Invoice Template

This guide provides instructions on how to set up a custom invoice template within the Yao system. By creating custom templates, you can ensure that your firm's billing documents are professional, consistent, and tailored to your specific requirements.

Link to Video Guide: https://youtu.be/GySazI0KSvw?si=KYIBuS1mN4jWar7Z

Prerequisites

- A pre-constructed invoice document (.docx) which contains the desired layout and branding.
- Access to the **Templates** menu within the Yao platform — admin and workflow manager user permissions.

Navigating to Invoice Templates

1. On the left-hand sidebar, navigate to the **Templates** menu.

2. From the tabs which appear along the top of the page, select **Invoices**.

3. Click the blue **+ Add Invoice Template** button located in the upper-right corner to open the creation modal.

Using Merge Codes and the Cheat Sheet

To ensure your invoice automatically populates with the correct data from your cases, you must use specific merge codes within your document.

1. Within the **Create new Invoice Template** modal, click the **Cheatsheet** button to view available codes.

2. Identify the codes you require, such as **{matter.case-name}** or **{invoice.number}**, and copy them into your document.

My Custom Invoice

Invoice Payable By:	{invoice.payable-by}
Matter Name:	{matter.case-name}
Matter Reference	{matter.number}
Invoice Number	{invoice.invoice-number}
VAT Registration Number	XXXXXXXX

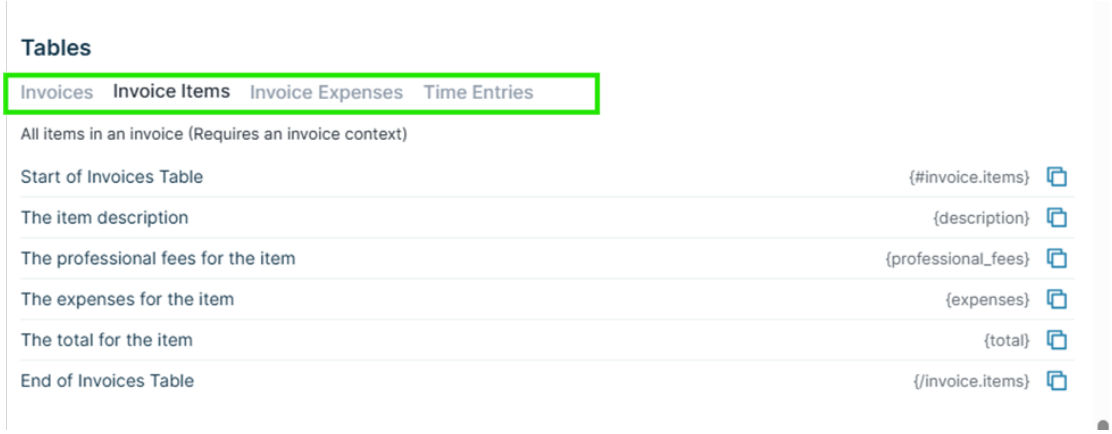
DESCRIPTION	AMOUNT	VAT
{#invoice.items}{description}	{professional_fees}{expenses}	{vat}{/invoice.items}
	{invoice.subtotal}	**{invoice.vat}**

Balance Due	**{invoice.total}**

3. For tables (such as Invoice Items, Expenses, or Time Entries), you must adhere to the following rules:

- **Start the table:** Use the hashtag merge code (e.g., **{#invoice.items}**).
- **End the table:** Use the forward-slash merge code (e.g., **{/invoice.items}**).
- Ensure all merge codes for a specific table are placed on the same line to construct the table correctly.

Uploading and Saving the Template



1. In the **Invoice identification** section, enter a **Title** for your template.

2. Provide an optional **Description** and any relevant **Tags** to help categorise the template.

3. In the **Allocate to Case Type** field, choose the specific case types which this invoice should be available for.

4. Under **Document template**, drag and drop your file into the box or click **Browse File** to select it from your computer.

5. Click the **Save** button in the bottom-right corner. *The new template will now appear in your list of invoice templates.*

Configuring Default Invoices

1. Navigate to the **Configuration** menu.

2. Select **Case Types**.

3. Select a case type and assign your new custom invoice as the default for that type.

4. If a default is not set, you must manually select the custom invoice template from the Invoice modal screen list whenever you are generating a new invoice.