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How to Create and Manage Invoices in Yao

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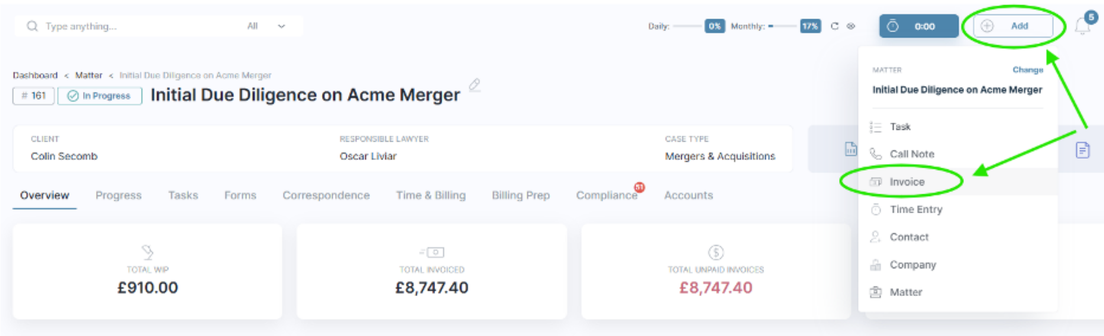
How to Create and Manage Invoices in Yao

Yao provides a flexible suite of tools which allow you to generate professional invoices from billable work, legal fees, and disbursements. This guide covers the various methods for creating an invoice and explains the customisation options which ensure your billing is accurate and compliant.

Creating an Invoice via Quick Actions

The **Quick Action** button is the most direct way to start a new invoice from any screen in Yao.

1. Navigate to the top-right corner of the interface and click the **Add** button.



1. Select **Invoice** from the dropdown menu. *The Add Invoice screen will appear.*

2. In the **Clients** field, select the client or clients which you wish to bill for this matter. Note: *if there is more than 1 client you must add the client(s) to the invoice. If there is only 1 client, they will be added automatically.*

3. Enter any **Fixed Fee** amounts in the provided field and select the appropriate **VAT** or tax position.

4. Scroll to the **Work in Progress** section and click **Allocate All WIP** to pull through all unbilled time entries for the matter. *The individual time entries will now appear at the bottom of the invoice.*

Generating Invoices from Billing Prep

The **Billing Prep** screen is ideal for consolidated billing where you need to filter and select specific entries.

1. Select the **Billing Prep** tab from the main matter navigation menu.

2. Use the **Search by Fee Earner** or **Date Range** filters to narrow down the billable entries.

3. Select the checkboxes next to the specific entries which you want to include in the invoice.

4. Click the **Generate Invoice** button in the upper-right corner. *A new invoice will be created containing only the selected entries.*

Customising Invoice Details and Fees

Yao allows you to add additional costs and modify existing entries directly within the invoice screen.

1. To add extra costs, click the + (plus) icon in the **Legal Fees, Firm Fees,** or **Disbursements** boxes.

2. Select the **Activity** type (such as a 'Bank Transfer Fee' or 'Leasehold Fee') and enter the **Value.**

3. Click **Add** to include the fee. The new fee will immediately be added to the invoice total.

4. To adjust a specific time entry, click the **Write Down** button next to the entry.

5. Use the **Write Down Time Entry** screen to adjust by **Value, Minutes**, or **Rate**.

6. Select a **Reason for Write-down** and click **Apply Write-down.** The adjusted value will reflect in the 'Work Value' column.

Managing Adjustments, Discounts, and Payments

You can apply global changes to an invoice or specify non-standard payment terms.

1. To apply a global uplift, click the **Adjustment** button and enter a percentage. This will increase legal fees and time entries proportionally.

2. To apply a global reduction, click the **Discount** button and enter a percentage. The system will reduce the legal fees and time entries by the specified amount.

3. If the invoice is being paid by someone other than the primary client, enter the name in the **Payable By** field.

4. Customise the **Narrative** field to provide a detailed description for the client. If you wish to use this text for future invoices, check the **Remember for future use** box.

Understanding the Invoice Approval Workflow

Your firm may have specific approval chains which must be completed before an invoice is issued to a client.

1. Click **Save as Draft** or the **Draft Only** toggle if you are not yet ready to submit the invoice for approval.

2. When the invoice is ready, click **Approve** (or **Submit** depending on your role).

3. Monitor the progress in the **Accounts** tab under the **Invoices** sub-tab. The 'Status' column will show if an invoice is a Draft or in the approval process.

4. Once the final approval (e.g., from an Accountant or Supervisor) is granted, the invoice status changes to **Issued.**

5. Issued invoices are automatically added to the matter **Correspondence** and posted to the **Ledger**.