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How to Manage Time and Billing in Yao

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How to Manage Time and Billing in Yao

Yao provides several ways for lawyers and support staff to track and manage time and billing, which is essential for ensuring accurate and professional financial records. This guide will walk you through the various methods of recording time and how to manage those records for billing purposes.

Link to Video Guide: <https://youtu.be/Vg7zB2h--xE>

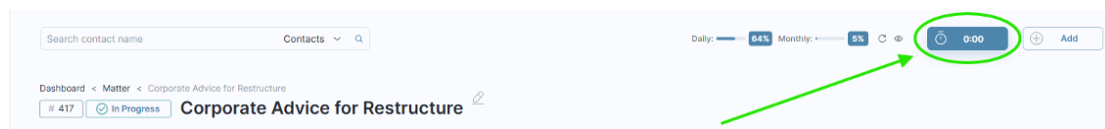
Prerequisites

- **Existing Client/Matter:** You must have a client and matter already set up to associate time entries with.

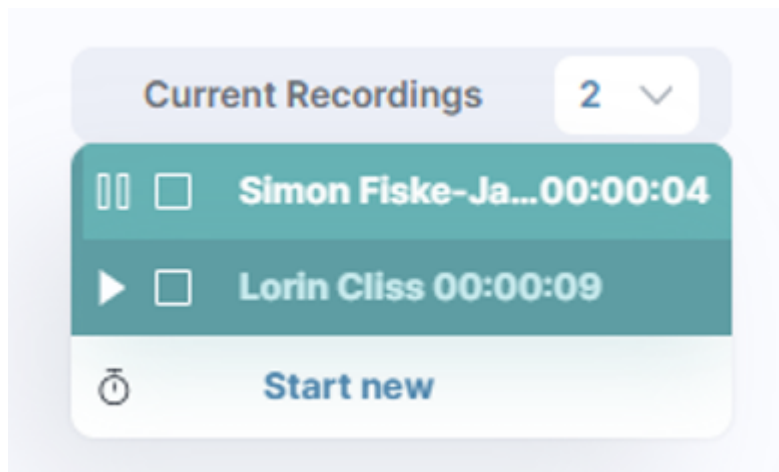
Adding Time Entries via the Stopwatch

Yao's built-in stopwatch is a convenient way to record time as you work, which ensures that no billable minutes are missed.

1. **Locate the Stopwatch:** In the upper-right corner of the Yao interface, click the **Stopwatch icon** (it looks like a small clock).



1. **Start a New Recording:** Click the **Start** button to begin recording time. Yao automatically associates the entry with the matter you are currently viewing. *The stopwatch will begin counting, and the icon will show a play symbol.*
2. **Switch Between Recordings:** Click the **number** in the stopwatch dropdown menu to see a list of current and paused recordings. While you can only have one active recording at a time, you can have multiple paused recordings. *You can then select a different matter to start or resume a recording.*

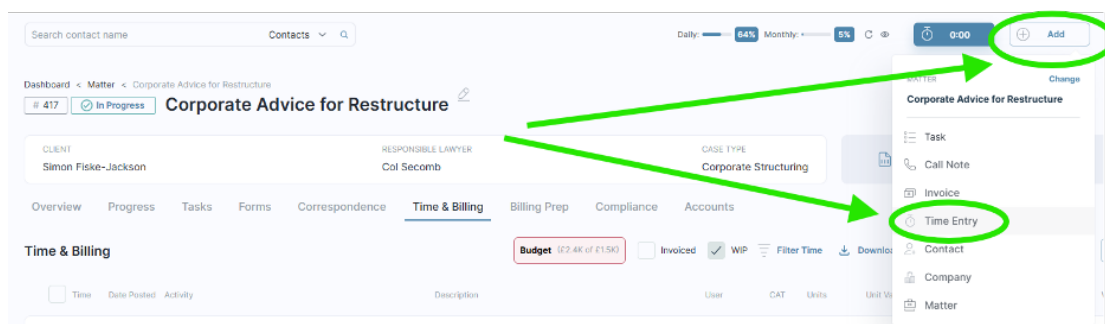


Manually Adding Time Entries

Sometimes, you may need to add a time entry for work already completed, such as a phone call or a task performed away from your computer.

1. **Access the Quick Access Button:** In the upper-right corner, click the **Add** button (a plus sign).
2. **Select Time Entry:** From the dropdown menu, select **Time Entry**. An *Add Time Entry* window will open.
3. **Enter Details:**
 - **Assignee:** Choose the person who performed the work.
 - **Activity:** Select the type of activity from the list (e.g., Attendance, Drafting, Letter).
 - **Date:** Choose the date the work was performed.
 - **Time:** Enter the time in minutes or units.
 - **Description:** Provide a brief summary of the work.

Adjust Rates (Optional): Click the **Assignee Rates** dropdown to select a different rate (e.g., Higher Rate, Inner Rate). You can also manually override the rate by typing a value into the **Overridden rate value** field.



1. **Add the Entry:** Click the **Add** button. *The time entry will be added to the matter's time sheet.*

Adding Time Entries from Correspondence

Yao's integration with correspondence allows you to easily track time spent on letters and other documents.

1. **Navigate to Correspondence:** Click the **Correspondence** tab within a matter.
2. **Hover Over a Document:** Hover your mouse over the document you've worked on.
3. **Select Add Time Entry:** Click the **Time Entry** icon (a clock with a plus sign) which appears. *An Add Time Entry window will open, with the activity and description automatically populated based on the document.*
4. **Confirm and Add:** Verify the details and click the **Add** button. *The entry will be saved to the time sheet.*

Add Time Entry

Initial Due Diligence on Acme Merger - Secomb

Assignee *
Oscar Liviar

Activity
Attendance

Date *
09/02/2026

Duration (minutes) *
25

Units *
5

Measure ⓘ
Duration

Description
Meeting with Pete and Lucy

Override default rate
£ 400

Value
£ 200

Rate: Matter (Initial Due Diligence on Acme Merger)

Assignee Rates

Cancel Add

Managing Time Records for Billing

Once time has been recorded, you can review and adjust those records before generating an invoice.

1. **Access Time & Billing:** Click the **Time & Billing** tab within a matter to view all recorded time.
2. **Edit or Delete Entries:** Click the **three dots** icon next to an entry to **Edit** or **Delete** it. *This is useful if you've made a mistake or need to update the description or time.*
3. **Make Adjustments in Billing Prep:** Click the **Billing Prep** tab to make more complex adjustments.

4. **Set as No Charge:** Click the **To Bill** status to change it to **No Charge** if the work should not be invoiced.
5. **Write Down an Entry:** Click the **three dots** icon next to an entry and select **Write down**.
 - Adjustment Method: Choose to write down by Value, Minutes, or Rate.
 - Enter the New Value: Enter the adjusted value, time, or rate.
 - Select a Reason: Choose a reason for the adjustment (e.g., Client requested reduction, Internal policy adjustment).
1. **Apply the Adjustment:** Click the **Apply Write Down** button. *The adjustment will be applied, and the updated value will be reflected in the matter's billing records.*

✕ Write Down Time Entry

Original Entry

Fee Earner: Oscar Liviar

Date: 09 Feb 26

Hours: 02:05

Rate: £40.00

Original Value: £840.00

Adjustment Method

By Value

By Minutes

By Rate

Adjusted Minutes

Adjusted Rate

Adjusted Value

£ 125

£ 40

£ 750

Write-down Impact

Write-down Amount: £90.00

Write-down %: 10.7%

New Effective Rate: £360.00/hour

Final Billed Value: £750.00

Reason for Write-down *

Client relationship consideration

Cancel

Apply Write-Down