Setting up an Invoice Approval Flow

Adam Field - 2026-05-13 - Comments (0) - Configuration

How to Configure Invoice Approval Flows

Setting up an automated invoice approval flow ensures that all financial outgoings are reviewed by the correct personnel before being finalised. This process streamlines your firm's internal controls and helps maintain financial accuracy within the Yao system.

Link to Video Guide: https://youtu.be/2KmbFRbs6I4?si=_2cXJV6Pr9RMmRlg

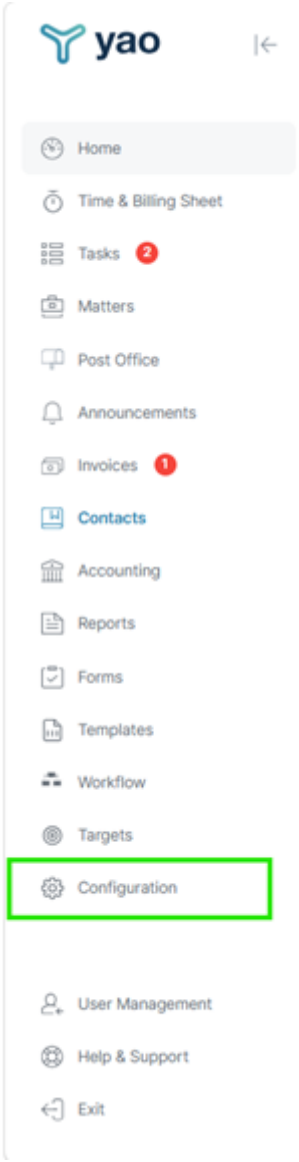
Prerequisites

- **Admin Permissions:** You must be an administrator user to access the configuration settings required for these changes.

Accessing Approval Flow Settings

To begin configuring your workflows, you must navigate to the central configuration area of the platform.

1. Navigate to the sidebar on the left-hand side of the screen and click **Configuration**.



2. In the top horizontal menu bar, select the **Approval Flow** tab.

3. Click the **Invoice** sub-tab located just below the main navigation headings. *The system will display a list of available approval flow types.*

Selecting and Saving an Approval Flow

The Yao system offers several pre-defined approval structures to suit the specific needs and hierarchy of your firm.

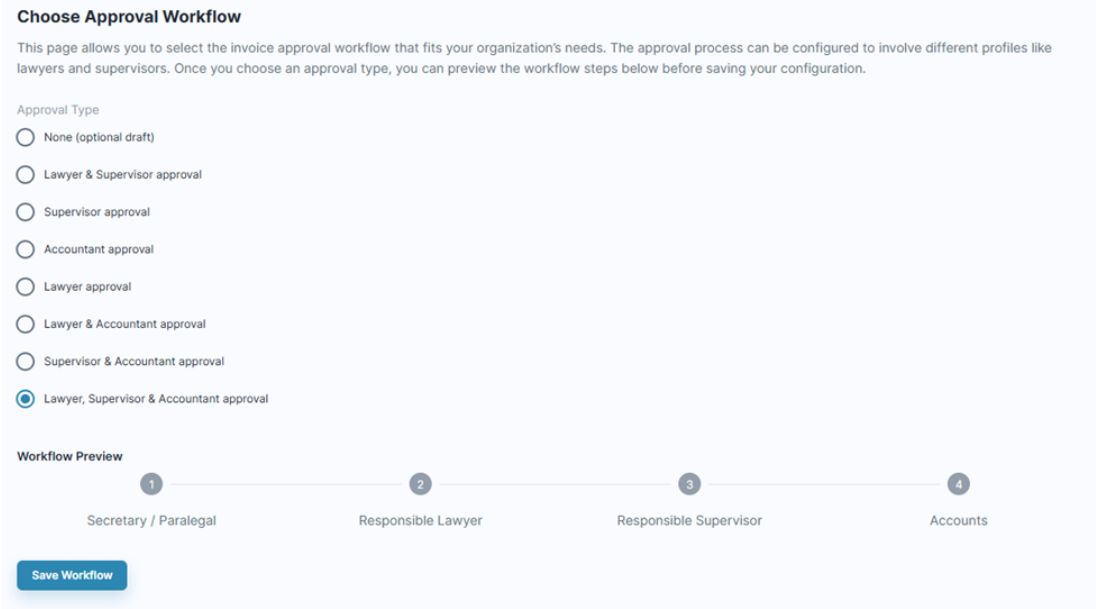
1. Review the **Approval Type** list to identify the flow which best matches your firm's requirements:

- **None (optional draft):** No internal approval is required; invoices are sent directly to your Xero instance.
- **Supervisor approval:** Requires a designated supervisor to review the invoice.
- **Accountant approval:** Requires the accountancy team to review the invoice.
- **Lawyer approval:** Requires the responsible lawyer to review the invoice.

- **Lawyer & Accountant approval:** A two-stage process involving both roles.
- **Supervisor & Accountant approval:** A two-stage process involving both roles.
- **Lawyer, Supervisor & Accountant approval:** A comprehensive three-stage approval process.

2. Select the radio button next to your chosen flow.

3. Review the **Workflow Preview** section at the bottom of the page to see a visual map of the stages the invoice will pass through.



4. Click the **Save Workflow** button at the bottom of the page. *The system will now apply this approval flow to any new invoices created from this point forward.*

Note: Any invoice created after saving these settings will require the specified parties on the matter to approve the document before it is finalised.