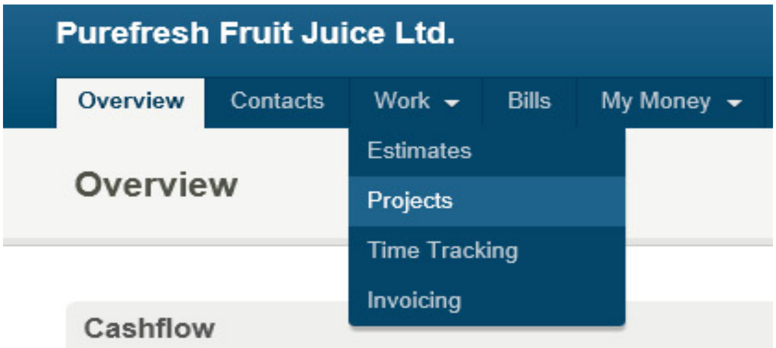
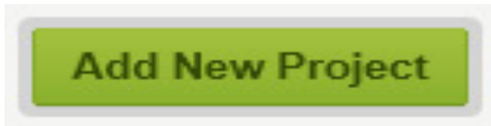
How to create a Project

1. On the top of your screen, click on Projects

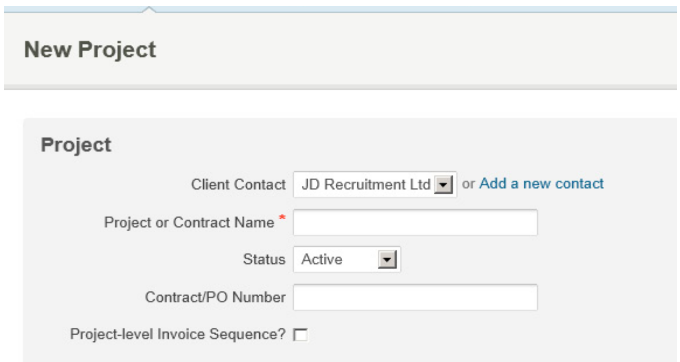


2. At the top right hand corner, you will find a bright green button "Add New Project" click on this



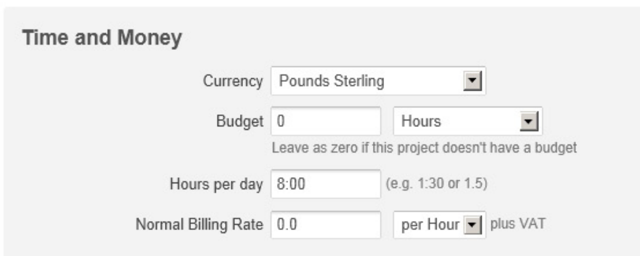
3. Choose the contact for the project and give your project a name.

You can amend the status of the project dependant on what you are working on. If you have a PO number from your client add it here.



4. Choose the number of hours you will be working each day on the project.

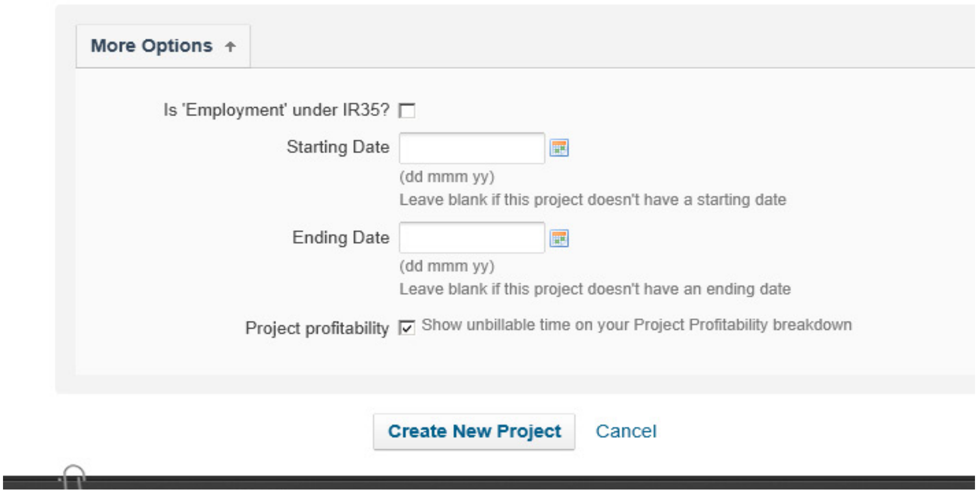
Add your billing rate - this will appear on your time slips and invoices. If you have set a budget for the project, enter it here.



5. Click on the arrow next to More Options.

If you trading inside of IR35, please tick “employment under IR35”. Set Start and finish dates for the Project (please note this is not essential if you do not know the end date)

Click on ‘Create New Project’



Tips:
If you have not created a contact before look at our Creating a Contact guide