

## How to create a Project

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

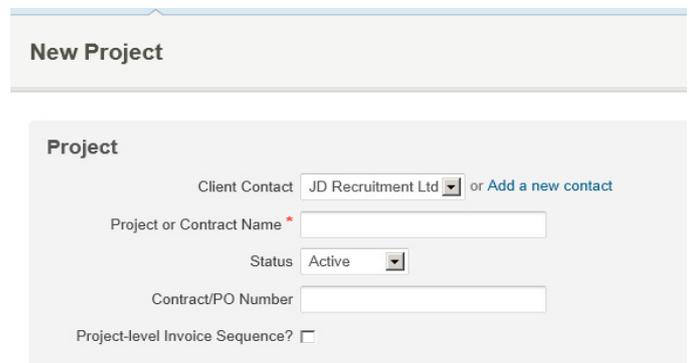


2. At the top right hand corner, you will find a bright green button "Add New Project" click on this



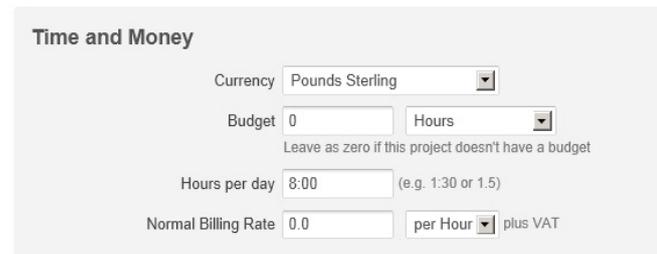
3. Choose the contact for the project and give your project a name.

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.

A screenshot of the 'New Project' form. The form has a title 'New Project' and a section 'Project'. It includes fields for 'Client Contact' (set to 'JD Recruitment Ltd'), 'Project or Contract Name', 'Status' (set to 'Active'), and 'Contract/PO Number'. There is also a checkbox for 'Project-level Invoice Sequence?'.

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

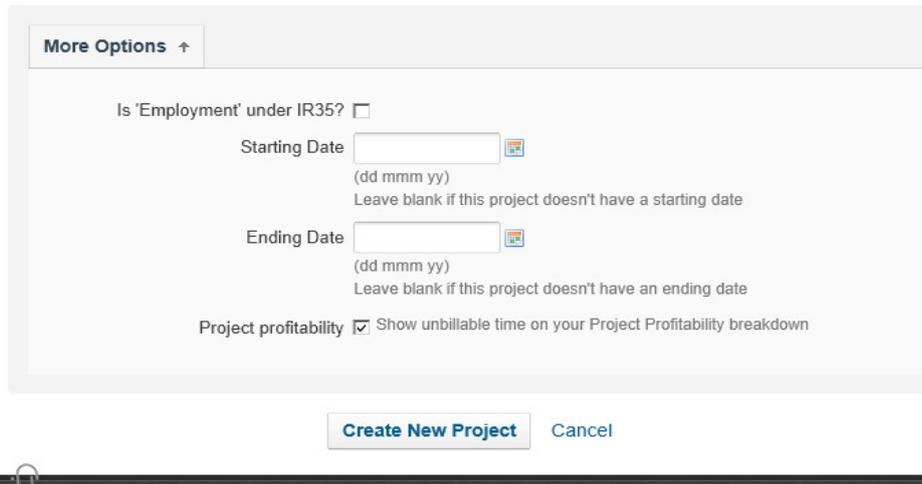
Add your billing rate - this will appear on your time slips and invoices. If you have set a budget for the project, enter it here.

A screenshot of the 'Time and Money' form. It includes fields for 'Currency' (set to 'Pounds Sterling'), 'Budget' (set to '0'), 'Hours per day' (set to '8:00'), and 'Normal Billing Rate' (set to '0.0'). There are also dropdown menus for 'Hours' and 'per Hour', and a checkbox for 'plus VAT'.

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’



The screenshot shows a 'More Options' form with the following fields and options:

- More Options** (with an upward arrow)
- Is 'Employment' under IR35?**
- Starting Date**    
(dd mmm yy)  
Leave blank if this project doesn't have a starting date
- Ending Date**    
(dd mmm yy)  
Leave blank if this project doesn't have an ending date
- Project profitability**  Show unbillable time on your Project Profitability breakdown

At the bottom of the form are two buttons: **Create New Project** and **Cancel**.

**Tips:**

If you have not created a contact before look at our [Creating a Contact guide](#)