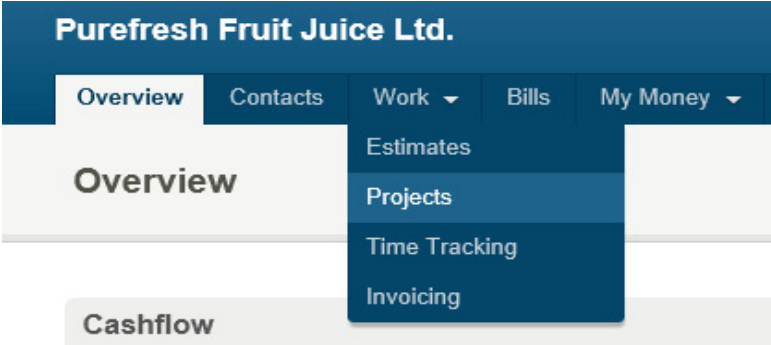


How to create a Project

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.

New Project

Project

Client Contact: JD Recruitment Ltd or Add a new contact

Project or Contract Name:

Status: Active

Contract/PO Number:

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.

Time and Money

Currency: Pounds Sterling

Budget: 0 Hours

Leave as zero if this project doesn't have a budget

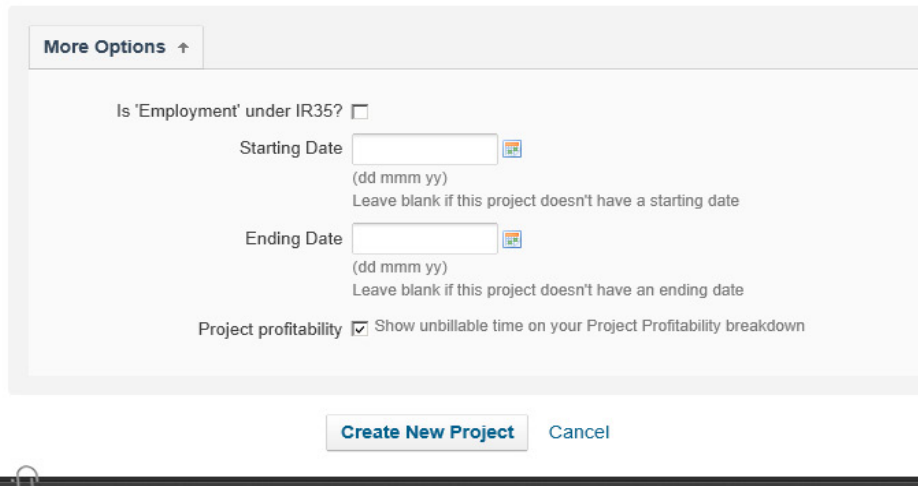
Hours per day: 8.00 (e.g. 1:30 or 1.5)

Normal Billing Rate: 0.0 per Hour 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' panel 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 panel are two buttons: **Create New Project** and **Cancel**.

Tips:

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