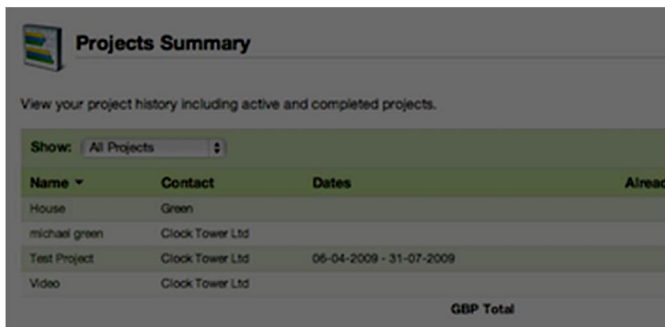
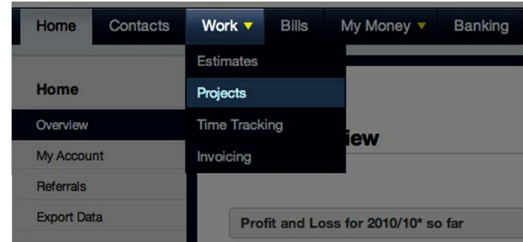


Setting up a Project - OpenBook

How can I set up a project?

From the Work menu, choose Projects.

Click the Add New Project button or create first project button.



1. Choose contact

Choose the client you are carrying out this project for. If you haven't yet set them up as a contact yet, you'll need to do that.

Project

Client Contact: Clock Tower Ltd or [Add a new contact](#)

Project or Contract Name:

Status: Active

Contract/PO Number:

Project-level Invoice Sequence? ☐

2. Project name and status

Give the project a name.

Project

Client Contact: Clock Tower Ltd or [Add a new contact](#)

Project or Contract Name:

Status: Active

Contract/PO Number:

Project-level Invoice Sequence? ☐

3. Time and money

Choose the number of hours you'll be working each day on the project. So if a working day on this project would be 6 hours, put 6.00 in the "Hours per day" box.

Add your billing rate for this project that you want to use on time slips and on the invoices.

Time and Money

Currency: Pounds Sterling

Budget: Hours

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

Hours per day:

Normal Billing Rate: per Hour plus VAT

Setting up a Project - OpenBook

More Options ↑

Is 'Employment' under IR35? ☐

Starting Date 
(dd-mm-yyyy)
Leave blank if this project doesn't have a starting date

Ending Date 
(dd-mm-yyyy)
Leave blank if this project doesn't have an ending date

Project profitability ☒ Show unbillable time on your Project Profitability breakdown