

Reckon One Getting Started Guide



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WELCOME

Thank you for choosing Reckon One.

This quick start guide has been developed to assist you in getting started with your book.

The Reckon One Team

INTRODUCTION

Reckon One is software as a service (SaaS) offering which allows users to manage their business and finances from any location via the internet using a computer, tablet or smartphone.

Reckon One is based on a module concept where the user starts with CORE, then adds and pays for the Add on modules that they require to run their business.

CORE allows a business to get started with the ability to Receive Money, Make Payments, run Reports including the BAS as well as budgeting.

The Reckon One modules include:

- **Invoices** – Unlimited invoices and bills
- **Bank Data** – Automatically import transactions from your bank
- **Projects** – Manage projects and jobs
- **Time** – Track time to bill customers and for pay runs
- **Employee Expenses** – Track employee expense claims
- **Payroll** – Manage and pay unlimited employees

All levels of Reckon One can have unlimited users with highly customisable Roles.

Registering for Reckon One

To access Reckon One, you need a Reckon Portal account. The Reckon Portal is where all the Reckon Cloud software is accessed from.


You can sign up for a Reckon Portal account here <https://portal.reckon.com/#/register>


There are **3 options** to use to Sign Up:

1. Filling in Contact Details and creating a New Password – Reckon One will email a “verification” link to the provided email to verify the account. Once you have verified your email, you can login.
2. Sign in with Google i.e. Gmail
3. Sign in with Office 365 i.e. Outlook

Create your Reckon account

Have an account? [Sign in here](#)

 Sign in with Google

 Sign in with Office 365

Contact Details

First Name Last Name

Email (username)

Phone number


Australia

The Password must have minimum 8 characters with an upper case, a lower case, a numeric & a special character.

Enter password

Re-enter password

by signing up you agree to Reckons [terms & privacy policy](#)

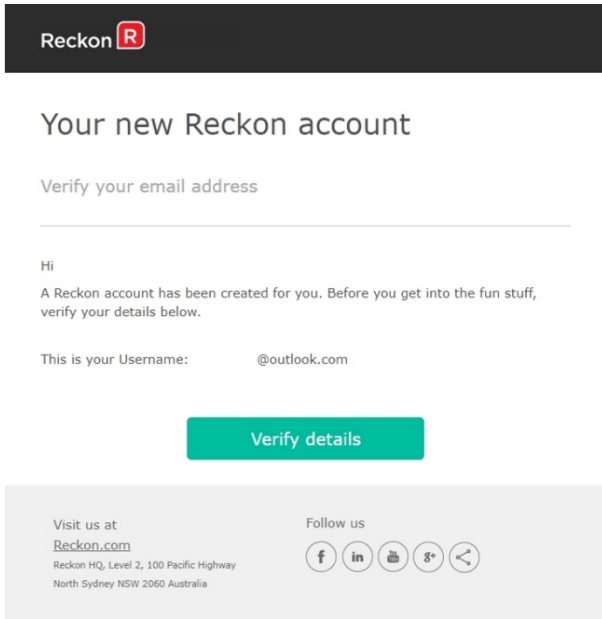
I'm not a robot 
reCAPTCHA
Privacy - Terms

Create Account

Successfully Registered

Activate your Account! Please check your email for an activation link.

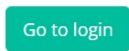
You will then receive an email to verify your details



Click Verify details

Successfully verified

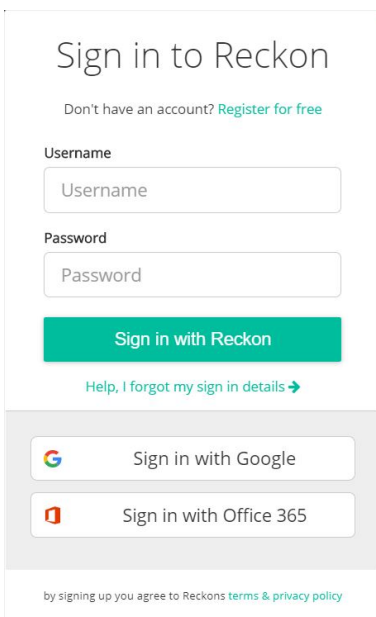
Great, you're all set! To get started head over to the login page!



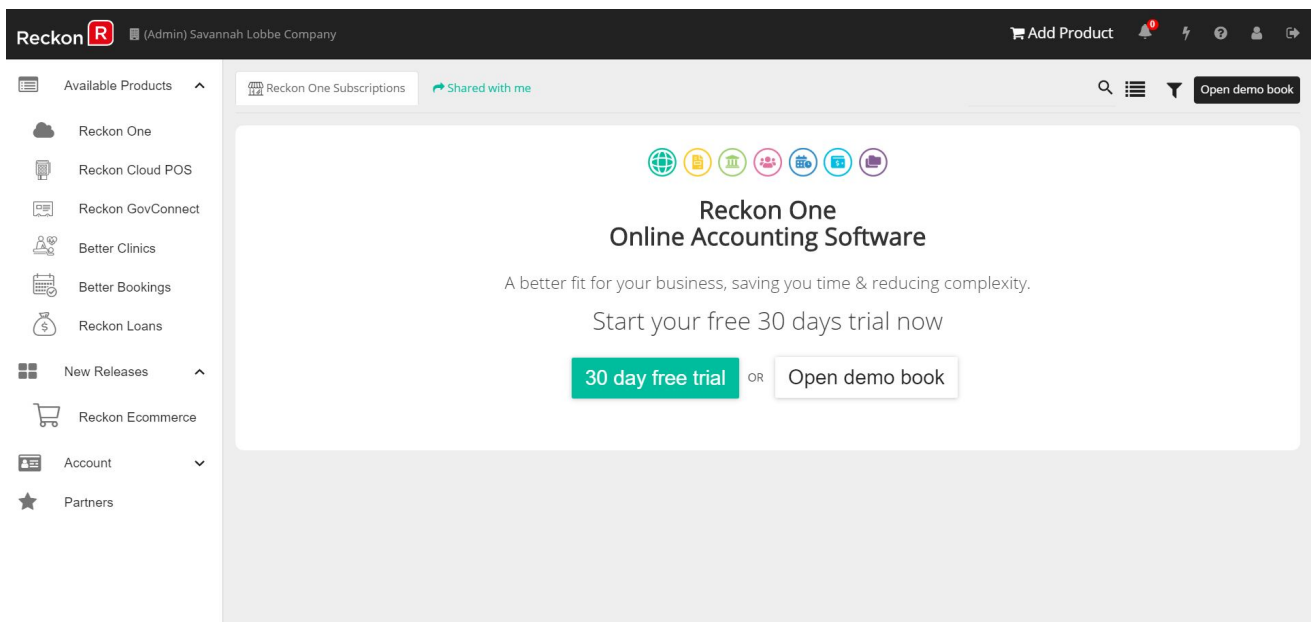
Please login to finalise the account creation.

Logging In

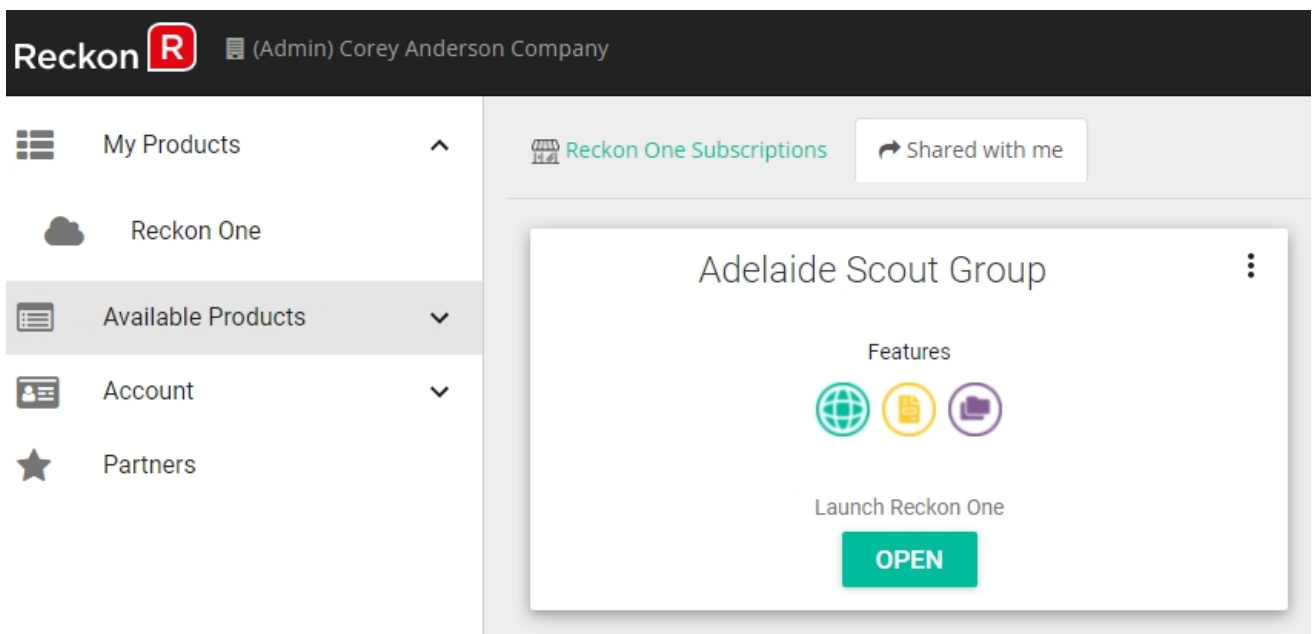
Next time you visit <https://portal.reckon.com>, enter your **Username/ Email Address** and **Password** and Click **Sign in with Reckon**, or click **Sign in with Google** or **Sign in with Office 365**.



The next screen is the Reckon One portal screen which has links to the products available as well as being able to manage your practice.

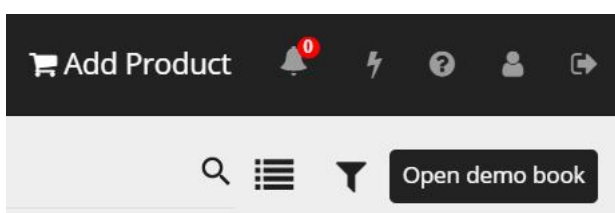


The book created for you will be under the Shared with me Tab



Using the Demo Book

Your Reckon One access comes with a demonstration book containing pre-filled sample data learn how to navigate or to test out a process before actioning it in a live book.



CORE

Administration menu

The **Administration** drop down menu is for the Chart of Accounts and all the Settings in Reckon One.

The **Settings** displayed will be dependent on the modules that are active within the book.

When all modules are selected, the view will resemble:

Settings			
General			
Book settings Edit your book settings.	Report settings Edit your report settings.	Manage invoice templates Manage your Invoice templates for communications with clients.	Email settings Edit default email content and other email settings.
Classifications Manage your classifications.	Contacts details types Manage addresses, contact numbers and electronic addresses labels.	Roles Create and manage roles for different levels of access.	Users Create and manage users for this book.
Day to day			
Money in Edit settings for all money in functions.	Money out Edit settings for all money out functions.	Time Edit timesheets and transfer billable options.	Employee expenses Edit settings for expense claims.
Statements Edit settings for statements.			
Payroll settings			
General Edit your general payroll settings.	Leave Edit and create your leave items.	Pay items Edit and create your pay items.	Pay schedules Manage your pay schedules.
YTD set up Add opening values for pay slips, leave balances and payment summaries.	SuperStream services Select your preferred SuperStream service.		
Tax settings			
General Edit your general tax settings.	BAS details Edit your BAS details settings.	Tax codes and groups Manage your tax codes and groups.	
Integrations			
Payment services Edit settings for 3rd party payment services.	Add-on marketplace Integrate Reckon One with other Reckon products such as Reckon Cloud POS, Better Clinics and many other 3rd party apps.	Zapier A workflow automation tool that connects 1000+ apps to Reckon One.	

Roles

Roles can be created to specify different types and areas of access for users. There is no limit on the number of roles that can be created and users can have more than one role applied to them. Roles are hierarchal, meaning that the role with the higher-level permissions will override other lower roles / permissions.

From the **Administration** drop down menu, click **Settings**. Then in the **General** settings area, click **Roles**.

When a book is created, you are automatically designated as an Administrator role.

From the Roles overview, the Users column shows how many users are applied to each role. Roles can be duplicated so you can tweak the access instead of creating a new Role. The Roles can also be copied to other books.

Chart of Accounts

From the **Administration** drop down menu, click **Chart of accounts**.

The Chart of Accounts overview shows the separate tabs for each account type – income, expenses, etc.

New Accounts

Accounts can be created as header or sub accounts down to three levels.

An account can also be created to be used as just a header account to add sub accounts underneath.

Reorganising your Accounts

The order of the accounts can be reorganised to better suit business processing.

To reorganise the accounts permanently, not just filter them which reverts back to the original display after refreshing the screen, you need to use **Reorganise your ** accounts**.

To reposition the account order, click on an **account** and drag it with your mouse up or down the list to where you want it to be positioned.

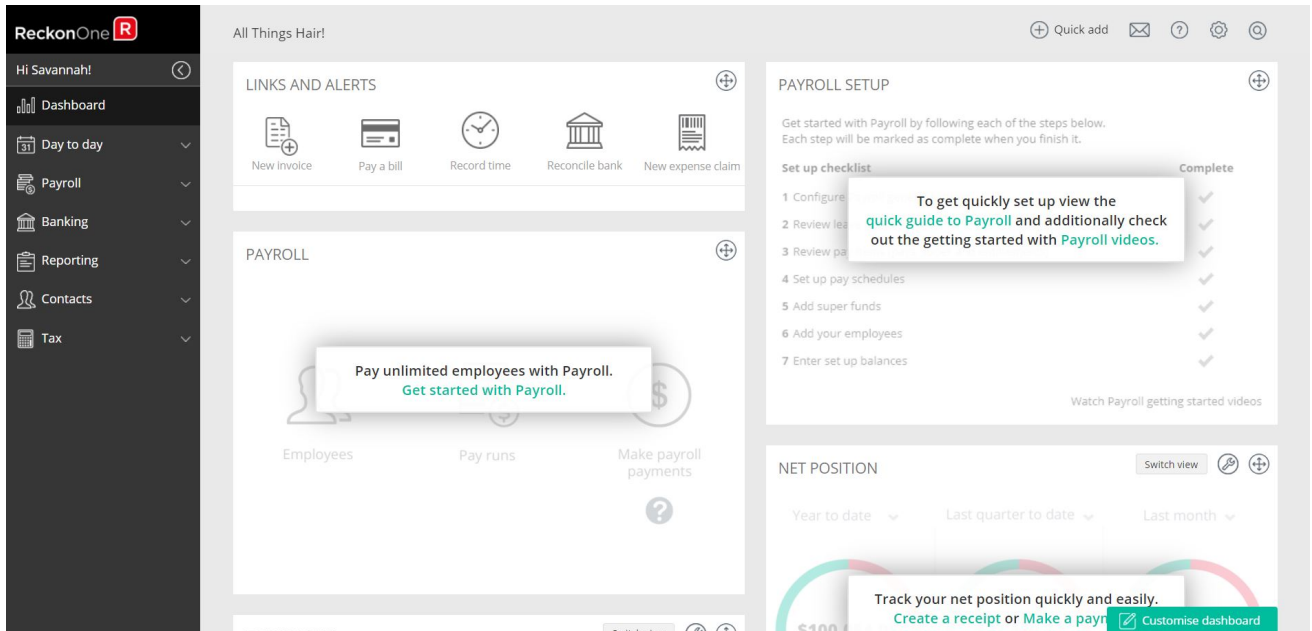
Import Chart of Accounts

The Import Chart of Accounts option can be used to bring in your own tailored Chart of Accounts.

Dashboard

The Dashboard gives you a snap shot of the business via customisable widgets.

The widgets displayed will be dependent on the modules active in the book and are specific to each user's profile.



You can click on the **Move** icon (top right of each widget) and drag the widgets around the screen.

Click **Widget settings** (the **spanner** icon) to customise the graphs and periods displayed.

Click on the graph or diagram and the relating report will be launched right from the dashboard.

You can select the widgets displayed by clicking on **Customise dashboard** bottom right of screen.

Contacts

The vertical navigation menu options displayed will be dependent on the modules active in the book (below are the contacts when only the Core module is active).

A contact in Reckon One is a Customer or Supplier; a contact can also be both a customer and supplier within the profile.

Customers

From the vertical navigation menu, expand **Contacts** menu and select **Customers**.

To create a new customer contact click **Add**.

Enter the customer information including name, address, phone number and email. After clicking **Save** Customer tab will then become active. This allows you to set Payment terms unique to the customer and a credit limit if desired.

Suppliers

From the vertical navigation menu, expand **Contacts** menu and select **Suppliers**.

To create a new supplier contact click **Add**.

Enter the supplier information including name, address, phone number, email. You can also enter the suppliers ABN and verify the GST status

Clicking Save then activates the Bank Details tab so you can enter the Bank Details for the supplier.

Day to Day Menu

Selling / Receive Customer Payments

From the vertical navigation menu, expand **Day to Day** and in the **Money In** section select **Receive payment**.

To create a new receive money transaction click **Add** then complete the date of the receipt, customer, payment method, amount and whether it is being applied to an invoice or straight to an account.

An **Amount** can be entered by deselecting Use **transaction total** or the amount will be calculated from the transaction total below.

Click on **Save & close** to return to the Receive money overview.

Buying / Make Supplier Payments

From the vertical navigation menu, expand **Day to Day** menu and in the **Money Out** section select **Make payment**.

To create a new payment click **Add** then complete the date of the payment, supplier, payment method, amount and whether it is being applied to a bill or straight to an account.

Journals

If you need to enter prior period information or move things around, Reckon One has the ability to create journals.

From the vertical navigation menu, expand **Day to day** and in the **Business** section select **Journals**.

To create a journal click **Add**, then the journal date, amounts, summary and description then the complete the journal as required.

Budgets

Reckon One has a very simple and easy to use Budgets.

Budgets allow a business owner to set their goals for the business and then keep track of this budget by comparing against actual results.

From the vertical navigation menu, expand **Reporting** and select **Budgets**.

Click **Add** to create a new budget and complete the required fields.

Then complete the income and expenses tabs as required.

Changing Values

You also have the option to Change Values to easily updated the accounts and months in the budget.

You have a number of options available to change the amounts either by months or by accounts. The options are:

- Set all to the same value
- Increase by percentage
- Decrease by percentage
- Smooth
- Average

BANKDATA

Reckon One has the ability to automatically import your bank transactions into the software saving you time in manual data entry.

The Bank Data Module provides a link between Reckon One and your chosen financial institution(s). Each day all the financial data that has been collected in your chosen bank account(s) is sent directly to your Reckon One book to help reconcile your transactions.

Reckon One uses a combination of Direct Feeds from the Banks, the Yodlee data aggregation service and manual upload.

Banking Menu

From the vertical navigation menu, expand **Banking** menu and select **Bank accounts**.

This will take you to the Bank accounts overview where you will see all the bank account and credit card accounts for the book.

The Bank accounts overview can be filtered Open, Closed or All accounts to be displayed by clicking on the relevant tab.

Two bank accounts are created when you start the book. One is called My Bank Account and can be renamed and used for your main bank account including adding bank feeds. The second one is called Petty cash. The Petty cash account should not be used for adding your everyday business transactions. Bank data feeds cannot be linked to this account.

You can add a new account by clicking **Add**, then completing the mandatory and required fields.

Direct Feeds and Yodlee

Please see the Bank Data help page at help.reckon.com for detailed instructions on how to set up the Direct feeds and Yodlee.

Manual Upload

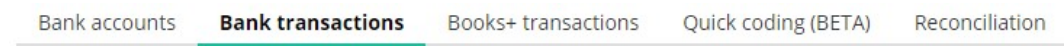
Reckon One allows importing electronic bank statements into Reckon One by using the manual upload process.

Log in to your financial institution and export the electronic bank statement or bank transactions as a QIF file or CSV file format and save it on the local computer and then upload it into Reckon One.

From the Bank Accounts overview, click on **Actions** then **Upload transactions**. Select the file that you have downloaded from Internet Banking and click **Import the file**.

Allocate transactions

After you have imported the bank transactions, Reckon One will display on the **Bank transactions** tab of the selected bank account showing the recently imported transactions.

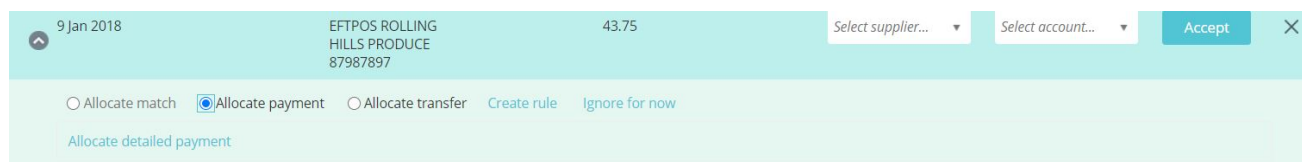


You will also notice the following action steps as shown below.



Allocate payment

The **Allocate payment** function allows the chosen **expense** transaction (**Money out**) to be allocated against a specific **Contact/Supplier** and **Account**.



After selecting a **Contact** and **Account**, Click **Accept** and the transaction will then be moved to the **Reckon One Transactions** tab.

Allocate detailed payment

The **Allocate detailed payment** function allows the chosen **expense** transaction (**Money out**) to be allocated against a specific bill for that Contact/Supplier.

Click **Allocate detailed Payment**

Allocate payment

Cancel Save

Date * 9/01/2018

Bank account * Everyday

Payable type Accounts Payable

Contact * Select contact...

Payment method

Reference

Details EFTPOS ROLLING HILLS PRODUCE 87987897

Use transaction total

Amount * \$43.75

Allocation notes DEBIT

Allocate New

ALLOCATE THIS MONEY TO AN EXISTING TRANSACTION

Date	ID	Type	Total amount	Balance owing	How much to allocate
15 Nov 2019	00008	Journal entry payables	2,538.62	2,538.62	\$2,538.62

Allocate receipt

The same process applies if the bank transaction is a **Money in**, in which case, an **Allocate receipt** function appears.

Allocate detailed receipt

Allocate a detailed receipt is the same process as Allocate detailed receipt.

Allocate transfer

The **Allocate transfer** function allows the bank transaction to be transferred from one bank account to another bank account.

8 Jan 2018 POS897797 EFTPOS SETTLEMENT 765.00 Select account... Accept X

Allocate match Allocate receipt Allocate transfer [Create rule](#) [Ignore for now](#)

[Allocate detailed transfer](#)

Matched Transactions

If you manually enter a transaction via Receive Money or Make Payment, it will appear as a suggested match on the New tab in Banking. These transactions just need to be reconciled.

1 Oct 2018 EFTPOS SETTLEMENT
6798134 135.00 Cash Sales Lawns & Gardens Accept ×

Allocate match Allocate receipt Allocate transfer [Create rule](#) [Ignore for now](#)

! Suggested match: 1 Oct 2018 | Receipt | Cash Sales | 135.00

Create Transaction rules

As you process numerous bank transactions in your day to day book keeping, you will inevitably find that some bank transactions are recurring.

Examples could be monthly account keeping fees, rent payments or fuel expense purchased on a regular basis.

When you find a transaction that you would like to have automatically, click Create Rule.

5 Jan 2018 PMT ROLLING HILLS
PRODUCE 586567 1,158.00 ×

Allocate match Allocate payment Allocate transfer [Create rule](#) [Ignore for now](#)

Give the rule a name. This is normally who the rule applies to.

The drop down boxes give you a number of choices on how Reckon One looks for information to find a match. The Description field needs to be generic but also specific so remove words like Direct Debit, BPay, Dates.

Add matching rule

Cancel
Save

Rule name *

Applies to Money in Money out

DEFINE THE RULE

Description has

Reference has

Transaction day is

Type has

Amount is

THE RULE WILL

Do the following

Contact *

Description is set to *

AND ALLOCATE THE BANK TRANSACTION TO*:

Project	Account	Tax code	Amount	Percentage
	Catering	GST		100.00%

The rule can also be set to automatically allocate the transaction to multiple accounts either by amount, percentage or both.

The Transaction will update to say it has been matched to a rule and needs to be Reconciled.

^ 3 Jan 2018

DIRECT DEBIT WALKER
BAKERIES 0032960214

500.00

Walker Bakeries

Cost of Goods Sold

Accept ×

Allocate match
 Allocate payment
 Allocate transfer
 [Create rule](#)
[Ignore for now](#)

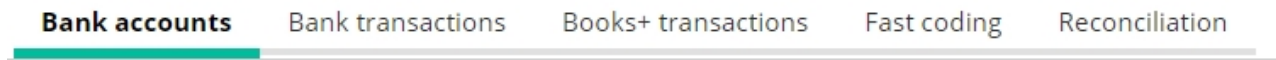
i
Matched rule: Walker Bakeries | Create a payment | Walker Bakeries | DIRECT DEBIT WALKER BAKERIES | 500.00

You can override the match by selecting Allocate payment (or receipt) to manually allocate to a different account.

Reconciliation of your banking transactions

You can confirm your Reckon One transactions by “accepting” (reconciling/matching) them with your electronic bank records (or even paper bank statements).

Click on the **Reconciliation** tab. Make sure that you have the correct account selected.



Input the **Expected closing balance** (usually shown on an actual paper bank statement or your internet banking balance as of the closing date of that month).

Reconcile your bank account

Start reconciliation

Before you reconcile an account, you should make sure the information you have in Reckon One is as accurate as possible. Please enter the bank account statement closing balance and the closing date. To learn more about the reconciliation, click [here](#).

[Undo last reconciliation](#) | [View bank reconciliation report](#) | [View history](#)

Account	Everyday
Last reconciled to: Never	
Opening balance	\$0.00
Statement closing balance *	\$3,000.00
Statement closing date *	14/06/2018
Reference	

Click **Start Reconciliation** to reconcile the transactions, which appear on your source document if you haven't already reconciled them from the Transactions from bank tab.

If you need to change a transaction, just click on details and you can alter it. It will need to be reconciled again.

If the **Balance difference** is **0.00** and you have ensured your Reckon One account transactions are correct and no transactions are missing, you can then click the **Finish reconciliation** button.

Reckon One will then ask if you wish to lock the period and view the Bank Statement Report.

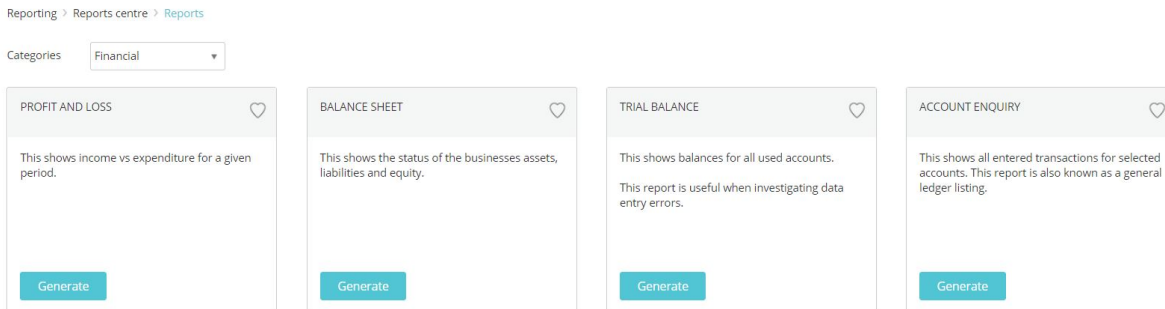
Unlocking a reconciled bank account

To unlock a reconciled bank account so you can make adjustments, you need to click on the spanner on the right hand side of the bank account. Then delete the date in the Transactions locked off date

REPORTS

Reckon One has a growing list of reports for the business owner to keep track of how their business is going on a daily basis. Common reports found here are Profit and Loss report, Balance Sheet, Account Enquiry (General Ledger), Aged Debtor and Aged Creditors.

From the vertical navigation menu, expand **Reporting** and select **Reports Centre**. The reports are grouped into different categories based on the type of reports.



The reports can be customised to show different information particularly comparison period to show last years or budget figures.

Profit and loss
Smashed Avo Cafe Pty Ltd
For the year ending 30 June 2018 vs budget (2018),
accrual basis

ACCOUNT	AMOUNT	COMPARISON AMOUNT	VARIANCE (\$)	VARIANCE (%)
INCOME				
Cafe	\$10,000.00	\$18,000.00	-\$8,000.00 ▼	-44.4 % ▼
Catering	\$695.45	\$4,000.00	-\$3,304.55 ▼	-82.6 % ▼
TOTAL INCOME	\$10,695.45	\$22,000.00	-\$11,304.55 ▼	-51.4 % ▼
COST OF GOODS SOLD				
Purchases	\$4,039.77	\$12,000.00	-\$7,960.23 ▼	-66.3 % ▼
TOTAL COGS	\$4,039.77	\$12,000.00	-\$7,960.23 ▼	-66.3 % ▼
GROSS PROFIT	\$6,655.68	\$10,000.00	-\$3,344.32 ▼	-33.4 % ▼
EXPENSES				
Equipment Hire/Lease	\$300.00	\$300.00	\$0.00	0.0 %
Payroll Expenses	-	-	-	0.0 %
Superannuation	-	\$300.00	-\$300.00 ▼	-100.0 % ▼
Wages & Salaries	-	\$3,000.00	-\$3,000.00 ▼	-100.0 % ▼
Total Payroll Expenses	\$0.00	\$3,300.00	-\$3,300.00 ▼	-100.0 % ▼
Repairs & Maintenance	\$245.45	\$500.00	-\$254.55 ▼	-50.9 % ▼
Telephone	-	\$150.00	-\$150.00 ▼	-100.0 % ▼
TOTAL EXPENSES	\$545.45	\$4,250.00	-\$3,704.55 ▼	-87.2 % ▼
NET POSITION				
Income	\$10,695.45	\$22,000.00	-\$11,304.55 ▼	-51.4 % ▼
Cost of goods sold	\$4,039.77	\$12,000.00	-\$7,960.23 ▼	-66.3 % ▼
Gross profit	\$6,655.68	\$10,000.00	-\$3,344.32 ▼	-33.4 % ▼
Expenses	\$545.45	\$4,250.00	-\$3,704.55 ▼	-87.2 % ▼
Other income	\$0.00	\$0.00	\$0.00	0.0 %
Other expenses	\$0.00	\$0.00	\$0.00	0.0 %
NET POSITION	\$6,110.23	\$5,750.00	\$360.23 ▲	6.3 % ▲

INVOICES

The Invoice module allows the business owner to raise invoices. Reckon One allows the user to customise the invoice by turning on and off what will be shown on the invoice, add their logo, customise the email template, add additional payment terms and payment details for customers to pay.

Day to day > Money In > Invoices

Tax Invoice INV0005 UNPAID Cancel Save & new Receive payment

[Change template](#) [Print](#) [Send via email](#)

Customer *

Invoice date *

Payment terms

Due date

Reference code

Amounts *

Invoice discount

Classification

Project	Item	Item price	Account	Description	Qty	Discount	Tax code	Tax	Amount
<input type="text" value="Select project..."/>	<input type="text" value="Select item..."/>		<input type="text" value="Select account..."/>						

Add new row

NOTE:

PAYMENT DETAILS:

Smashed Avo Cafe Pty Ltd
BSB: 091 000
Account 123 456
Please use the invoice number as the reference.
Thank you!

Subtotal	\$	0.00
Discount	\$	0.00
Total (excluding tax)	\$	0.00
Tax	\$	0.00
Total	\$	0.00

The invoice can be emailed to the customer straight from Reckon One including multiple email address and a BCC option. There is an email history button to check the sent status of an email.

Items

An Item is a product or a service that the business buys, sells or resells in the course of business.

Items can be created as normal or sub items for grouping and reporting purposes.

Customer Adjustment Notes

Reckon One allows a user to raise a customer adjustment notes for adjustments to an invoice.

BILLS

The ability to for the business owner to keep track bills owing to suppliers is part of the Invoice modules. Reckon One allows the user the customise the bill template by turning on and off what will be shown on the bill in Reckon One and add their logo.

Day to day > Money out > Bills

Bill BIL0006 **OVERDUE**

Cancel Save & close Make payment

Print Send via email Delete View history Make a copy

Supplier * Rolling Hills Produce

Bill date * 01/01/2020

Due date 09/01/2020

Reference code

Edit supplier details

Amounts * Gross (Tax Inclusive)

Bill discount e.g. 12.50% or \$12.50

Classification Select classification...

Project	Item	Item price	Account	Description	Qty	Discount	Tax code	Tax	Amount	
			Purchases	Purchases			NCG	\$105.27	\$1,158.00	
								Subtotal	\$	1,158.00
								Discount	\$	0.00
								Total (excluding tax)	\$	1,052.73
								Tax	\$	105.27
								Total	\$	1,158.00

Add new row

NOTE:

Note to supplier

ATTACHMENTS:

DRAG & DROP DOCUMENTS HERE OR BROWSE

ABA Files

Reckon One allows a business owner to create an ABA file for bills that they have marked as paid to upload into internet banking for easy payment.

Supplier Adjustment Notes

Reckon One allows a user to raise a supplier adjustment notes for adjustments to a bill.



Document Storage

Once a Bill has been saved, Reckon One allows a user to attach 3 files at a maximum of 10MB per file to a bill. You can Drag & Drop or Browse to attach your file. File extensions that can be saved are: docx, doc, xlsx, xls, tiff, PDF, jpg, jpeg, png and gif.

RECURRING TRANSACTIONS

Reckon One has the ability to automatically create recurring Invoices, Receipts and Payments. Click Recurring Transactions from the Day to Day menu. Select the type of transaction to create that recurring transaction. Complete the Recurring schedule and the normal transaction details.

Recurring schedule

	Start date *
	<input type="text" value="23/01/2020"/> 
	End
	<input type="text" value="Never"/> ▼
Name *	
<input type="text"/>	
	Next transaction date
	23 January 2020
Frequency *	
<input type="text" value="1"/>	<input type="text" value="Month(s)"/> ▼
	<input type="checkbox"/> Email invoice automatically 

PROJECTS

Using the Projects module, a business can manage revenue and costs, review progress and forecast final results at a project level. You have the option of adding sub projects and these sub projects can be billed separately or with the main project.

A project can have criteria based on a start date and end date. Items can be weighted by customers, suppliers or a combination of these. Projects offer another dimension to business reporting. Unlimited number of Projects are available in Reckon One.

The level of the Projects module purchased determines what project features are enabled in Reckon One.

Day to day > Business > Projects

Add project **ACTIVE** Cancel Save & new

Project name *

Project name *

Subproject **SUBPROJECT**
This is a subproject of

Start date

End date

Description

Customers Suppliers Items

Assigning customers to a project allows the costs of the project to be shared between them.
You do not have to assign customers to a project.

Customer	Weighting
<input type="text"/>	<input type="text"/>

Once a project has been created you can quickly see the estimated project position from within the project screen as well as short cuts to add an invoice or bill.

A project column will be added to the invoice, bills and banking screens so you can assign a project to a transaction.

Project	Item	Item price	Account	Description	Qty	Discount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The profit and loss report can be customised to show a selected project.

