

How to Create Cost Codes

Cost Codes are used to set up standard descriptions and charges for your costs. Once you have set up your standard cost codes, you will be able to use them as templates whenever you create New Costs.

Note Costs are indirect expenses incurred against a matter, e.g. photocopies and facsimile costs. Cost codes are not used for Direct Costs (direct expenses occurred against a matter, e.g. Visa Application Charge)

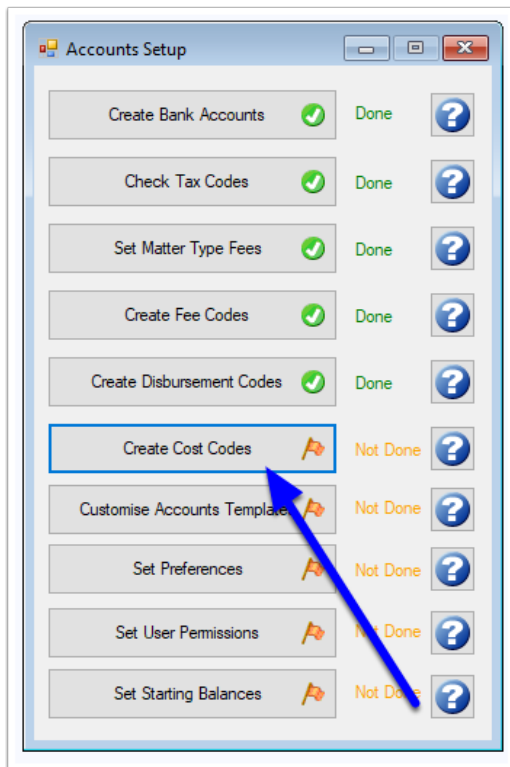
1. Open the Cost Codes window

To create a new Cost Code you can either use the Accounts Setup Tool or launch from the main menu.

1.1. From the Accounts Setup Tool

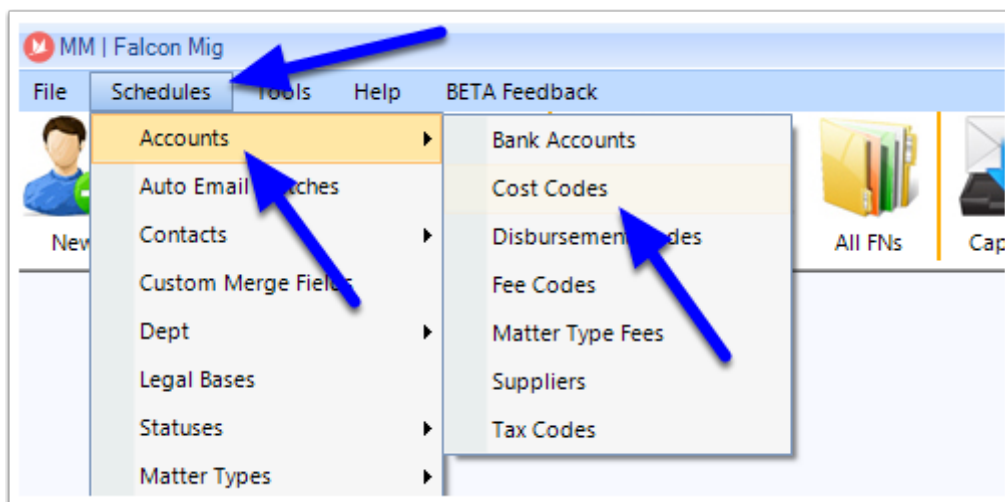
If you haven't yet completed the Accounts Setup tool, you can create your Cost Codes from the Accounts Setup tool. To access this click the Accounts button in the main toolbar and then select 'Accounts Setup'. For instructions on how to use the Accounts Setup tool please see: [How to use the Accounts Setup Guide](#).

When the Accounts Setup tool opens, click 'Create Cost Codes'.



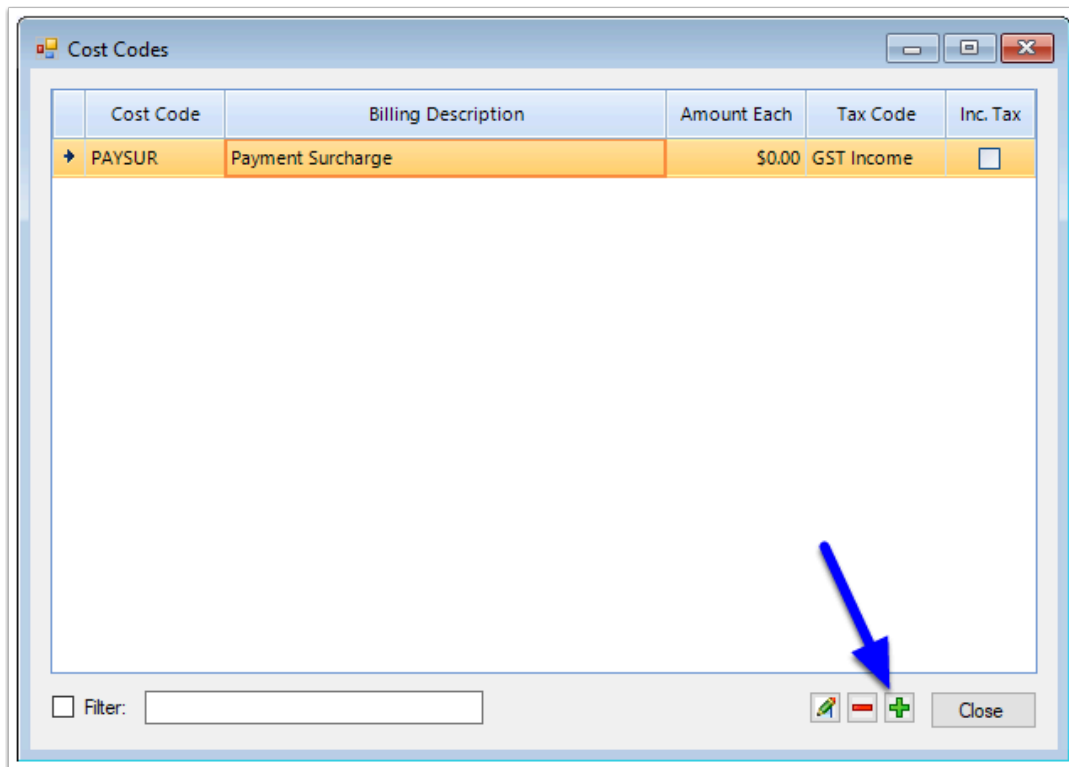
1.2. From the Main Menu

To create a new Cost Code at any time, click **Schedules** on the main toolbar and then click **Accounts**, then **Cost Codes**.



2. Click the add button

Once the Cost Codes window opens, click the + button.



3. Enter Cost Code

The New Cost Code window will now appear. First enter the Cost Code that you wish to identify this Cost by. Your Cost Codes can be a mixture of letters and number but it is recommended that they not be longer than 6 characters.

Cost Code:

Default Billing Status:

Billing Description:

Amount Each: ☐ Amount Includes Tax

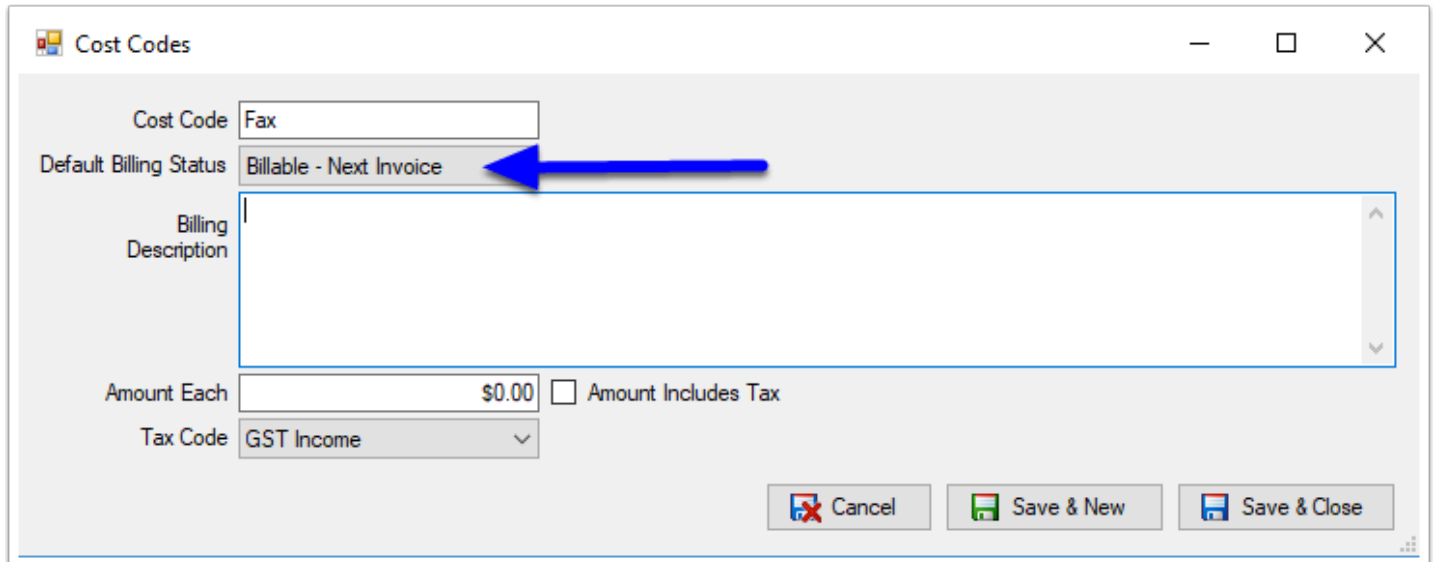
Tax Code:

4. Enter the Default Billing Status

The Default Billing Status will appear when a **Cost** charge is raised against a Matter. This can be

- **Billable Next Invoice**
- **Billable Later Invoice**
- **Not Billable**

This will determine if the charge will appear on the next invoice to be raised, or held for future Invoices. The Billing Status can be also manually changed as the cost is entered against a Matter.

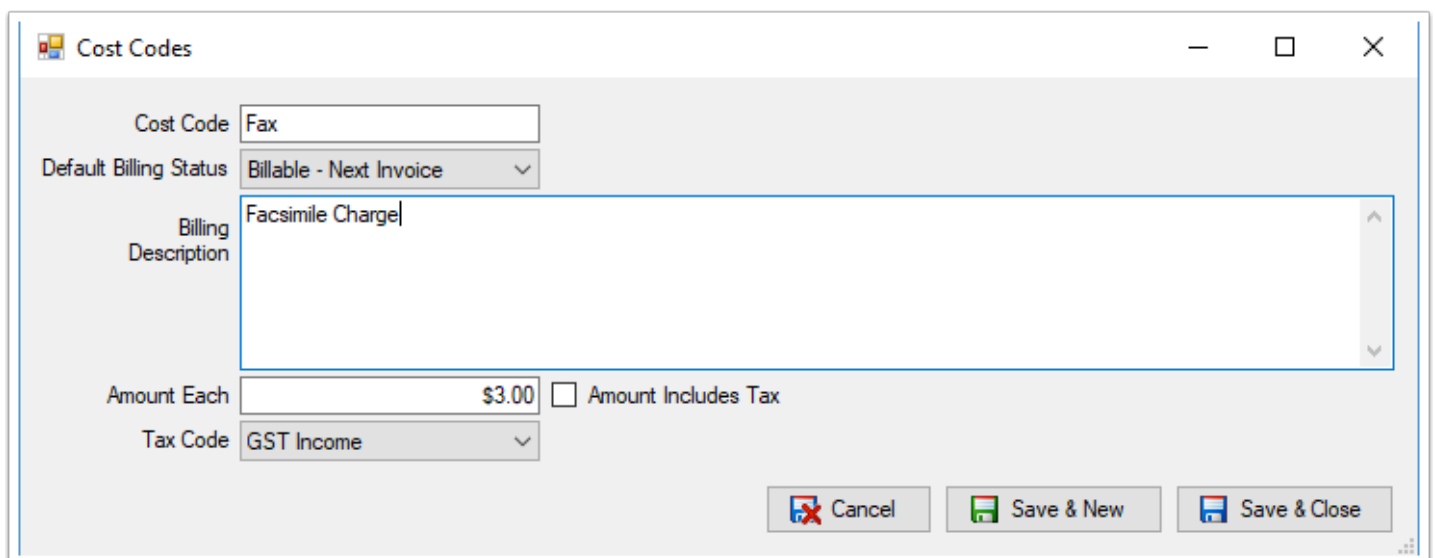


The screenshot shows the 'Cost Codes' window with the following fields and values:

- Cost Code:** Fax
- Default Billing Status:** Billable - Next Invoice (indicated by a blue arrow)
- Billing Description:** (Empty text area)
- Amount Each:** \$0.00
- Amount Includes Tax:** ☐
- Tax Code:** GST Income
- Buttons:** Cancel, Save & New, Save & Close

5. Enter the Description and Details

Next enter the full billing **description**, the **amount** of the Cost, the **Tax Code** and whether the **amount includes** tax.

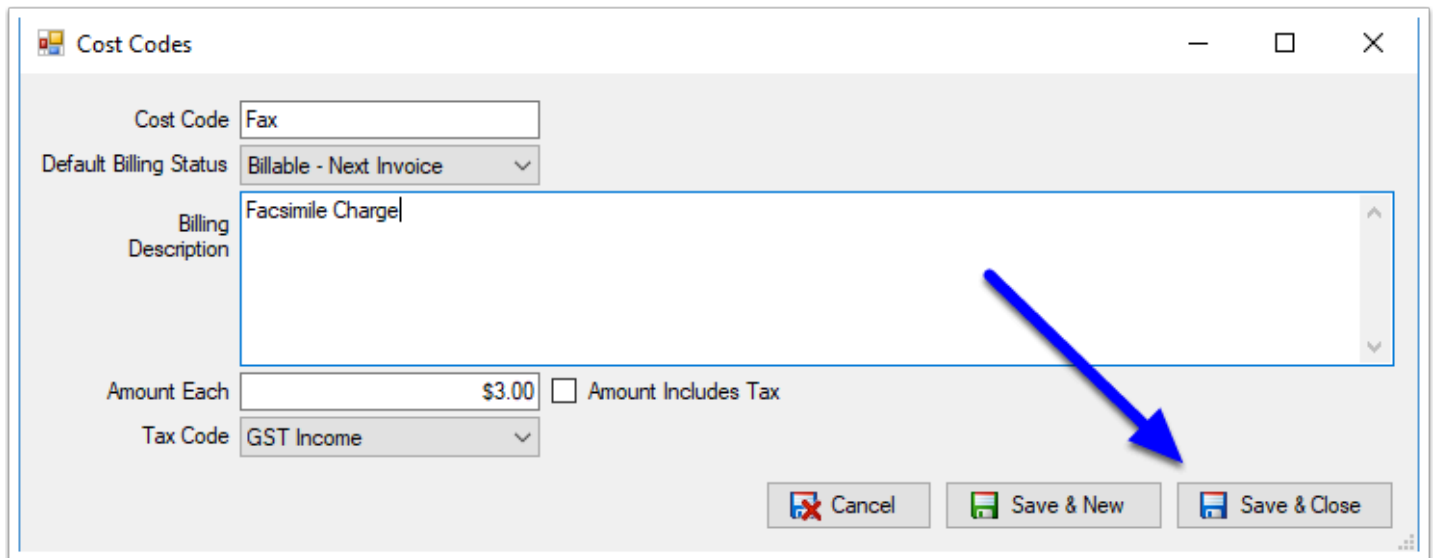


The screenshot shows the 'Cost Codes' window with the following fields and values:

- Cost Code:** Fax
- Default Billing Status:** Billable - Next Invoice
- Billing Description:** Facsimile Charge
- Amount Each:** \$3.00
- Amount Includes Tax:** ☐
- Tax Code:** GST Income
- Buttons:** Cancel, Save & New, Save & Close

6. Click 'Save & Close'

To finish setting up the Cost Code, click **Save & Close**.



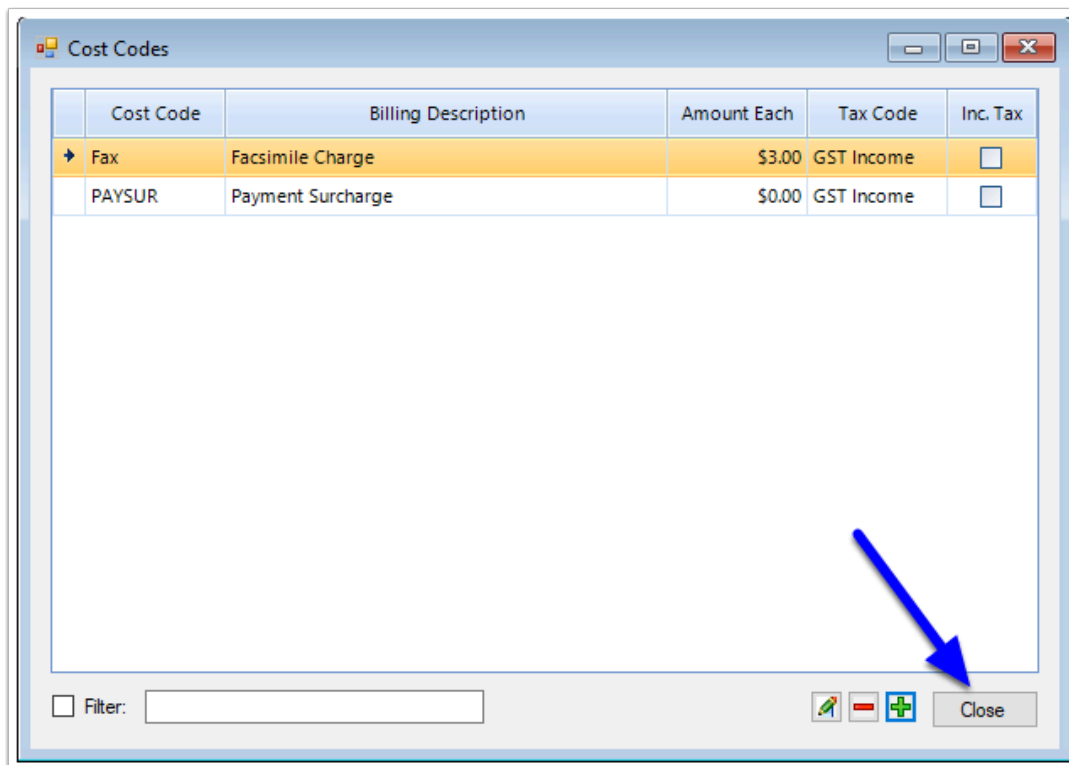
The screenshot shows the 'Cost Codes' form with the following fields:

- Cost Code: Fax
- Default Billing Status: Billable - Next Invoice
- Billing Description: Facsimile Charge
- Amount Each: \$3.00
- Tax Code: GST Income
- Amount Includes Tax: ☐

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save & Close'. A blue arrow points to the 'Save & Close' button.

7. Close

The Cost Code will now appear in the Cost Codes list. Once you have finished entering all of your relevant Cost Codes, click **Close** to finish.



The screenshot shows the 'Cost Codes' list with the following data:

Cost Code	Billing Description	Amount Each	Tax Code	Inc. Tax
Fax	Facsimile Charge	\$3.00	GST Income	<input type="checkbox"/>
PAYSUR	Payment Surcharge	\$0.00	GST Income	<input type="checkbox"/>

At the bottom right, there is a 'Close' button. A blue arrow points to the 'Close' button.