



Clients & Profits[®] X



Installation Guide



This Installation Guide documents Clients & Profits X 10.4

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This Installation Guide explains how to install Clients & Profits X 10.4, a state-of-the-art job tracking, costing, billing, and accounting system for advertising agencies, design firms, and corporate graphic/marketing communications departments. It provides complete step-by-step instructions on installing the software, starting the program, and setting up your new database.

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■ If you're upgrading from Clients & Profits 4.x or earlier, please call the C&P Helpdesk at (800) 521-2166 for special upgrade instructions.

■ The Clients & Profits X web site has news, tips, tech notes, FAQs, and more:

www.cnp-x.com/support

For help using any part of Clients & Profits X, click the  button from any window to open the online user guide. This web-based user guide features step-by-step instructions, explanations, tips, demonstrations, and links to FAQs, tech notes, and tutorials from the Clients & Profits X web site. It's continually updated, so it's more timely and helpful than a printed user guide.

Introduction

Clients & Profits X is a tenth-generation job tracking, costing, billing, and accounting system for advertising agencies. The system is multi-user and cross-platform, allowing any number of Mac OS X and Windows XP/Vista users to work together on the same database of clients, jobs, etc.

There are four **editions** of Clients & Profits X:

Clients & Profits Classic X is an ultra-low maintenance, entry-level agency management system for ad agencies and design firms that need basic job tracking, media buying, job costing and billing, and financial accounting. Designed for agencies with 5-15 employees.

Clients & Profits Pro X is a professional-grade agency management system that features comprehensive media planning, buying and WIP accruals, a more powerful financial accounting system, and custom reporting. Includes support for MySQL 5 and Microsoft SQL Server 2008 Express. Designed for agencies with 15-75 employees.

Job Tracker X is a job tracking, costing, and chargeback system tailored for corporate design, graphics, and marcom departments. Cost and billing data can be easily integrated with corporate accounting systems via ODBC. Includes support for MySQL 5 and Microsoft SQL Server 2008 (including the free Express version).

Clients & Profits X : Enterprise Edition is an enterprise-class application based on Microsoft SQL Server 2008. C&P X : Enterprise Edition is a highly scalable, customizable agency management system for mid-size agencies with 25-250 employees in multiple locations.

All versions of Clients & Profits X share a common user interface, work flow, and database architecture. In this guide, all versions are referred to as, simply, Clients & Profits X.

The Clients & Profits X installer is available via download only. A single installer will install any of the four editions. The edition you'll use is enabled when during the web-based software registration (see page 12).

Clients & Profits X should be installed separately on every Mac or PC that will run it (i.e., don't run the software from the file server).

About the Database

Clients & Profits X features a built-in relational database that is extremely easy to set up and needs virtually no maintenance, but is not client/server.

SQL-based client/server databases offer better performance, reliability, and accessibility that make them a better choice for larger shops. However, SQL databases are complex and require experienced database administrators to manage them.

■ C&P Classic X now fully supports MySQL, but does not support Microsoft SQL.

MySQL 5: C&P X supports both the free community version and commercial "enterprise" version.

Microsoft SQL Server 2008 Express: C&P X supports this free version of SQL Server 2008. Each Mac user needs a \$30 ODBC driver from www.actualtechnologies.com.

Microsoft SQL Server 2008: Both Job Tracker X and Enterprise Edition support this industry-standard, high-performance database server.

■ No SQL database is included with Clients & Profits X. If you use SQL, you are responsible for choosing, installing, and configuring the database. The C&P Helpdesk does not offer technical support for hardware, system software, or SQL databases.

System Requirements

All versions of Clients & Profits X run well on a wide range of computer models. Because it's a relational database, performance is highly affected by the speed of your file server and your network.

File Server: Clients & Profits X requires its own dedicated file server. If your shop is 100% Mac, use Mac OS X Server 10.5 (or higher). To use SQL Server 2008 or SQL Server 2008 Express, you need a Windows server. Linux servers are not supported.

Workstations: Any Mac running Mac OS X 10.5 (or later) or any PC running Windows Vista/7. C&P X 10.4 is a universal binary application so it runs natively on an Intel Mac.

■ For detailed recommendations, see: www.cnp-x.com/sales/system_recs.html

■ For up-to-date technical news, visit: www.cnp-x.com/support/sys_mgr_news.html

Sending e-mail: C&P X can send e-mail notifications to staff members automatically. To enable e-mail, C&P X needs to connect to a valid SMTP mail server.

Need installation help? Call the C&P Helpdesk at **(800) 521-2166**

Web Accessibility

Clients & Profits X features a free built-in **web-based time card** that allows a virtually unlimited number of staff members to track their time from a web browser, whether they're inside the office or on the road.

The web-based time card requires a dedicated Mac or PC with a static IP address. If users need to access their time card from home, an airport, or a client's office then the server needs an outside IP address.

For users who need to add proposals, open new jobs, edit estimates, enter expense reports, and more outside the office, you'll want My Clients & Profits! X (sold separately).

My Clients & Profits! X is an add-on web server that offers staff members, vendors, clients, and freelancers access to the work they do from any web browser.

My C&P! X is a self-contained web server and requires a dedicated Mac or PC with a static IP address. It features user-based logins and access privileges separate from Clients & Profits X. The web server offers web-based remote administration, full activity logging, and account and password expirations. The My C&P! X server takes one of your concurrent user licenses, but allows a virtually unlimited number of remote users. For information, visit www.cnp-x.com/my

■ To see My Clients & Profits! X in action, try the live demo:

<http://my.clientsandprofits.com>

Learning C&P X

Clear, concise learning materials are available to help you and your staff become C&P X pros quickly:

Demo Guide This guide walks you through the Clients & Profits X basics, including opening jobs, tracking time, and printing invoices.

Feature Guide This guide offers an illustrated overview of the best parts of C&P X. It offers screen shots and captions for commonly-used features, but not step-by-step instructions. For new buyers, one printed Feature Guide is included for each user licensed.

User Guide The web-page user guide includes step-by-step instructions for every C&P X function. The user guide can be accessed by any web browser by clicking on any window's Help button. Most pages feature links to tutorials, sample reports, and other learning resources.

Database Guide Designed for database managers, this guide describes how the built-in Clients & Profits X database works in technical detail. It includes tips for preventing corruption and suggestions for troubleshooting problems. Not needed for SQL installation.

www.cnp-x.com/support The online helpdesk has an extensive knowledge base of tutorials, FAQs, tech notes, training videos, and more available to support subscribers. You can also post bug reports and wish list requests and sign up for the C&P User Guide here. Your e-mail address is your login ID and everyone in the office uses the same company-wide password.

Software Registration and the Trial Demo

Clients & Profits X runs as a free trial demo for 60 days—or until your software is registered. The trial demo has very few restrictions—there are no limitations to the number of clients, jobs, costs, and billings you can add, as well as the number of reports you can print.

■ The trial demo allows up to 10 users to share a database at the same time.

■ Your company name will not appear on reports, estimates or invoices in the trial demo.

You can license Clients & Profits X any time during the 60-day trial period. The software registration process will validate your installation and remove the demo limitations. There is nothing to reinstall. Once your trial period has ended, your demo database can't be used unless you buy Clients & Profits X. Your demo database can be opened at any time thereafter; no data is lost.

Clients & Profits X uses an internet-based registration system to validate each software installation. The software registration process does two things:

Registration only runs once for each database you use. Only C&P X system managers with admin access can register, while anyone can activate. Clients & Profits X must be licensed before a database can be registered.

Activation (see page 12) serializes a user's C&P X application (which controls how many users can share the database) and sets which edition (i.e., C&P Classic, C&P Pro, Job Tracker, or Enterprise Edition) will be used.

How to Upgrade

Clients & Profits X 10.4 is 100% compatible with databases created by previous versions of Clients & Profits. A automatic conversion process is required to make it work with the new features found in the C&P X 10.4 upgrade.

■ Before upgrading a database, be sure to **BACK IT UP**. If the upgrade process stops for any reason, the database will be unusable. For better performance, do not convert your database over the network. Also, no one can use the database during the upgrade conversion.

■ Everyone must upgrade to C&P X 10.4 at the same time.

Upgrading from C&P X 10.0.x (or later) A quick data reorganization is needed. When you open a C&P X 10.0.x or 10.4.x database for the first time, C&P X 10.4 will prompt you to convert it.

Upgrading from C&P 5.x Before upgrading, be sure the database name ends in .df1 (e.g., DATA2006.df1). If you're not using the C&P 5.0.8, download the Prep C&P X Database utility then follow its instructions. The database conversion can take between 10 minutes to several hours depending on its size. This is a one-time process that must be performed on each database you use. No data is lost. Once converted, the database can be opened and used by any C&P X user. Custom reports and plug-in applications will have to be recreated for Clients & Profits X.

■ Once the database is converted for 10.4, it is not advised to connect to it with older versions of Clients & Profits.

Upgrading from older versions of Clients & Profits Call the Helpdesk for specific instructions for your version of Clients & Profits.

Installing Clients & Profits X on Mac OS X

Clients & Profits X is installed separately on every Mac OS X workstation that needs it. The installation steps are straightforward: simply download the software, run the Clients & Profits X installer, then follow the prompts.

The Clients & Profits X 10.4 installers are available from the Clients & Profits X web site (www.cnp-x.com/downloads). They are not available on disc.

- Clients & Profits X does not need to be installed on the file server. The software always runs from user workstations.

- Clients & Profits X does not modify your system software.

You can use Clients & Profits X on any Macintosh computer (including Intel Macs) running Mac OS X 10.5 (or later).

Clients & Profits X is a native application for Mac OS X 10.5 Leopard (or higher) and a universal binary for the Intel-based Mac.

To remove the Clients & Profits X 10.4 software, simply drag the application to the Trash.

To install the Clients & Profits X software

- 1 Download the Clients & Profits X 10.4 installer for Mac OS X from www.cnp-x.com.

- 2 Double-click on **ClientsProfitsX 10.4.dmg** file to mount the installer.

The Installer window will open, prompting you to drag the Clients & Profits X application to your hard disk.

- 3 Drag the C&P X 10.4 application into your Applications folder.

Clients & Profits X 10.4 is now ready to use.

If you want C&P X to appear in your Dock, open your Applications folder then drag the C&P X application onto your dock.

To install updates

Clients & Profits X has a built-in web-based software updater that makes it easy to keep up-to-date.

- 1 Start C&P X, open your database, then log in.

- 2 Choose Setup > Software Updates.

- System managers can restrict access to software updates for individual user in Users, Access & Passwords > Menus.

If you have access to software updates, Clients & Profits X will check for new versions each time you start the application. If a new update is available, you'll need prompted to install it.

For help using any part of Clients & Profits X, click the help button from any window to open the online user guide. This web-based user guide features step-by-step instructions, explanations, tips, demonstrations, and links to FAQs, tech notes, and tutorials from www.cnp-x.com/support. The web site is continually updated, so it's more timely and helpful than a printed user guide.

Installing Clients & Profits X on Windows

Clients & Profits X is installed separately on every Windows workstation that needs it. The installation steps are straightforward: Run the Clients & Profits X installer then start Clients & Profits X.

The Clients & Profits X 10.4 installers are available from the Clients & Profits X web site (www.cnp-x.com) and are not available on CD.

■ Clients & Profits X does not need to be installed on the file server. Normally, the software always runs from a user's PC.

Clients & Profits X does not install any Windows system files, except for four special cross-platform fonts (see below). It doesn't modify your Windows configuration. Also, Clients & Profits X takes advantage of extra RAM by printing larger reports faster.

You can use Clients & Profits X on any late-model PC (or better) running Windows XP or Vista.

The Installer copies a special program that can uninstall Clients & Profits X. The uninstaller program removes the Clients & Profits X application and all of its files.

■ The Uninstaller won't delete the C&P folder if it contains your database, a custom report, or any other user files. This is a safety feature to prevent the database from being accidentally deleted. If you've changed the contents of the C&P folder, you'll have to trash it manually.

To install the Clients & Profits X software

1 Download the Clients & Profits X 10.4 installer for Windows from www.cnp-x.com.

2 Double-click on the **ClientsProfitsX 10.4.exe** file.

The Installer will prompt you to choose a destination for the new C&P X folder. The Program Files folder on your C: drive is chosen automatically, but any volume can be chosen.

3 Follow the prompts to finish the installation.

■ Any saved custom reports, plugins, or other files can now be moved into the new C&P folder.

To install updates

Clients & Profits X has a built-in web-based software updater that makes it easy to keep up-to-date.

1 Start C&P X, open your database, then log in.

2 Choose Setup > Software Updates.

■ System managers can restrict access to software updates for individual user in Users, Access & Passwords > Menus.

If you have access to software updates, Clients & Profits X will check for new versions each time you start the application. If a new update is available, you'll need prompted to install it.

Sharing Clients & Profits X

Clients & Profits X is a true multi-user relational database. This means it is designed to share the same database among dozens of active users. Because Clients & Profits X is a cross-platform application, users with either Macs or Windows-based PCs can share the same database simultaneously.

Multi-user Clients & Profits X works with a variety of industry-standard file servers. Windows Server 2003 and Mac OS X Server 10.4.4 (or later) provides cross-platform access to both Macintosh and Windows users. (As an option, Job Tracker and Clients & Profits Pro can use MySQL for improved performance and reliability; see below.)

Like earlier versions, Clients & Profits X isn't installed or run from the file server. Instead, it is installed only on user workstations. Only the database is stored on a shared folder on the server. Anyone who uses Clients & Profits X starts it from their own computer, then opens the shared database from the server. All of the work is entered and processed (including printing reports) from the user's computer. The file server only saves the data.

The shared database created by Clients & Profits X should be stored on the file server, where it can be accessed by anyone who needs it.

■ For best performance and security, a file server dedicated to the Clients & Profits database is required.

■ For up-to-date system recommendations, please visit our web site: www.clientsandprofits.com/what-is

To accommodate PC users, your database needs to have a DOS file extension. So if your database is now named MarCom2008 DATA, it must be changed to MRCM_08.DF1 or something like it. The Macintosh and Windows versions of Clients & Profits X recognize files ending with .DF1 as the database.

There is nothing to set up, initialize, or configure to share Clients & Profits X. The software needs to be installed on any computer that needs it, while the database is kept in the shared folder on the file server. Clients & Profits X uses a last-entered, last-saved method for updating records; if several users are editing the same record, the last person who enters data is the one whose changes are saved.

Concurrent user limits

Clients & Profits X is licensed based on concurrent number of users for all platforms. This means only a certain number of Mac and Windows users can access the same database at the same time. C&P Classic X supports up to 15 concurrent users. C&P Pro X and Job Tracker X support up to 100 users.

For example: If you bought a 10-user version, any ten Mac and/or Windows users can share your database. These ten users could be anywhere in the

company, from account service to accounting. If an eleventh user tries to open Clients & Profits X, however, he or she will get a warning message—something like “too many people are using Client & Profits.” That person can't share the database because there are no open “slots” to use. When someone quits Clients & Profits X, a slot becomes available. So as some people quit the program, others can use it.

You can easily increase the number of users who can open the database by purchasing a license for additional users by calling Clients & Profits Sales at **(800) 272-4488**.

■ If you have enabled the built-in web-based time card, you will need to dedicate one full-time user to the web timecard server. See your Feature Guide for more information.

Performance issues

Since Clients & Profits X is a multi-user database, it is very different from typical programs such as Word, Quark, and Photoshop. These programs aren't multi-user, so the work you do is saved into your computer's memory—or onto your hard disk. These programs are single-user. No one can work on them while you've got them open.

The work you do in Clients & Profits is saved automatically to the file server when you press Return/Enter (that's why there's no Save command). This lets other people see, change, and print the information you've entered immediately. Since everyone's working on the same clients, jobs, costs, and billings this system keeps everyone up-to-date.

Because Clients & Profits X is disk-based, its performance is affected by the speed of your file server and network, and less affected by your own computer. When the server is busy, you'll slow down. As you add additional users to your database, you'll see somewhat slower overall performance. The slower speed will be more apparent during peak periods, such as Friday afternoon when everyone typically enters their weekly time sheets. The only way to improve the system's performance is to use faster hardware.

■ The Clients & Profits X Database Guide, which provides a comprehensive guide to managing the database, is available from the C&P web site: www.cnp-x.com/support/database_guide

Security issues

The network server software (e.g., Windows 2003 Server or Mac OS X Server) controls the access users have to the database itself. Once a user can open the database, he or she must enter a valid set of initials and password to actually work with clients, jobs, costs, and billings.

Clients & Profits X and the network server provide a high level of security for your valuable information. However, the designated system manager must

actively manage the server, the database, and its users to prevent security lapses and damaged data.

It's important that everyone who can use Clients & Profits X have a unique, private password. This password should be changed frequently (such as every month or quarter), and especially when an employee leaves.

■ A reliable backup system is absolutely critical to prevent time-consuming loss of data. Any kind of backup system (e.g., external drive, DVD-R, tape) will work if it is used nightly. Also, make sure you have the database regularly stored on different types of media (such as an external hard drive).

Setting up the file server

Regardless of which file server you choose, setting up the Clients & Profits X database is the same.

■ If you're using MySQL or SQL Server, skip these steps.

1 Create a folder (or directory) on a server volume for Clients & Profits X users only.

This folder/directory should only contain the Clients & Profits X database and other shared files, such as custom reports. Don't copy the C&P Player or program here; they should only be installed on the workstations themselves. Otherwise, someone may run the program from the server and cause performance and data reliability problems.

2 Name this folder (or directory) something obvious to your users.

People need to intuitively know where the database is stored, so name it something like "C&P Data" or "Accounting Database."

3 Use the server's administrative tools to establish read/write access privileges for this folder. Only people who will use Clients & Profits X should be able to see it.

4 Move your database into the shared C&P folder.

Once the database is moved to the file server, anyone with the right access privileges can start using Clients & Profits X.

Database integrity

The Clients & Profits X database is designed to be reliable over many years of use. Unlike other programs you use, the database file is used every day, all day, by many people. It can become very large over the years, which makes it vulnerable to hardware problems like disk fragmentation.

■ The Clients & Profits X database segment has a maximum size of 256

megabytes. To store more than 256 MBs of data, you'll need to use MySQL, Microsoft SQL Server 2008 Express, or Microsoft SQL Server 2008.

Because you'll use the same large file every day, there's a greater probability that you'll have problems with Clients & Profits X than with other programs. So it's important that the system manager have a procedure for tracking problems with the database—no matter how small.

Each time a computer crashes while using the database, there's a chance that it can become damaged. Over time, these incidents can corrupt the database, making it behave inconsistently. Most damage can be easily fixed using the built-in Data Utilities (which includes the daily Quick Check).

The system manager should be aware of day-to-day changes in the database's performance. Keep a log of events like seemingly random freezes, error messages, and inconsistencies in how the program works. These will be clues to diagnosing the problem—and finding a solution before any data is lost. When combined with a dependable backup system, you'll prevent the expensive downtime when Clients & Profits X is unavailable.

Starting Clients & Profits X

Whether you're using Macs or Windows, Clients & Profits X starts like any other application.

To start Clients & Profits X

- 1 Double-click on the Clients & Profits X application.

If you're using the software for the first time, it runs as a trial demo and you will be prompted to choose an edition to use.

- 2 At the C&P X Trial Demo window, click on either C&P Classic, C&P Pro, Job Tracker, or the Enterprise Edition.

While running the trial demo you can do virtually everything. A small tutorial database is included to get started, but you can create a new database for your own clients, jobs, costs, and billings. Once you have licensed Clients & Profits X and registered your database (see page 12), activating your workstation will set the edition automatically and enable multi-user access to your database.

You'll then be prompted to choose a database then log in. The Introduce Yourself window (see above) lists the databases you've recently used, as well as lets you connect to SQL databases.

- 3 Click the Open Database button, then select the c&px-tutorial.df1 database, then click Open.
- 4 Click the Open Database button, select the c&px-tutorial database, then click Open.
- 5 Enter your initials as DEMO and your password as demo then click Connect.

You are now connected to the tutorial database on your hard disk. Other databases can be opened, including those on your file server, by repeating steps 2-3. Only one database can be opened at a time.

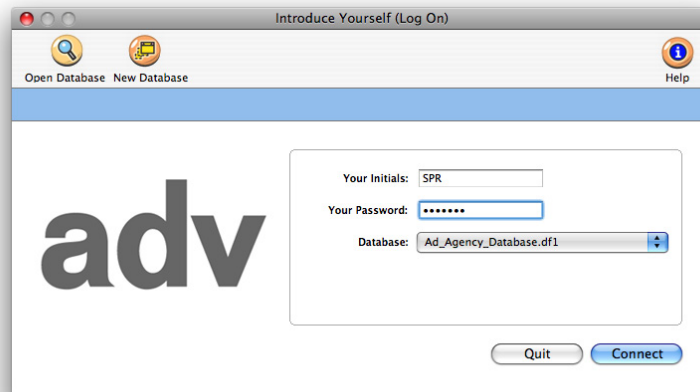
To start a new database

Before starting to enter your own work, you'll need create your own database.

- If you're using SQL, new databases need to be created first by your DBA using the server's admin tools (see page 18-24). These steps do not apply.

- 1 From the Introduce Yourself window, click on the New Database button.
- 2 Name the database then choose its destination on the server.

You can name your database anything you want, but make sure it's clear to your users that it is the production/accounting data—and not some easy-to-trash file. For example: Marcom 2008 DATA.



If you're using Clients & Profits X on Windows, or are sharing the database between Macs and PCs, your database needs a file name extension (e.g., MRCM08.DF1). The .DF1 is very important, since it identifies this file to Clients & Profits X as the database.

- 3 Click Save.
- 4 Enter the initials MGR then click Connect.

Every new database has a system manager account MGR with no password. You should delete this temporary MGR account after you've added yourself and all of your co-workers as Clients & Profits X users.

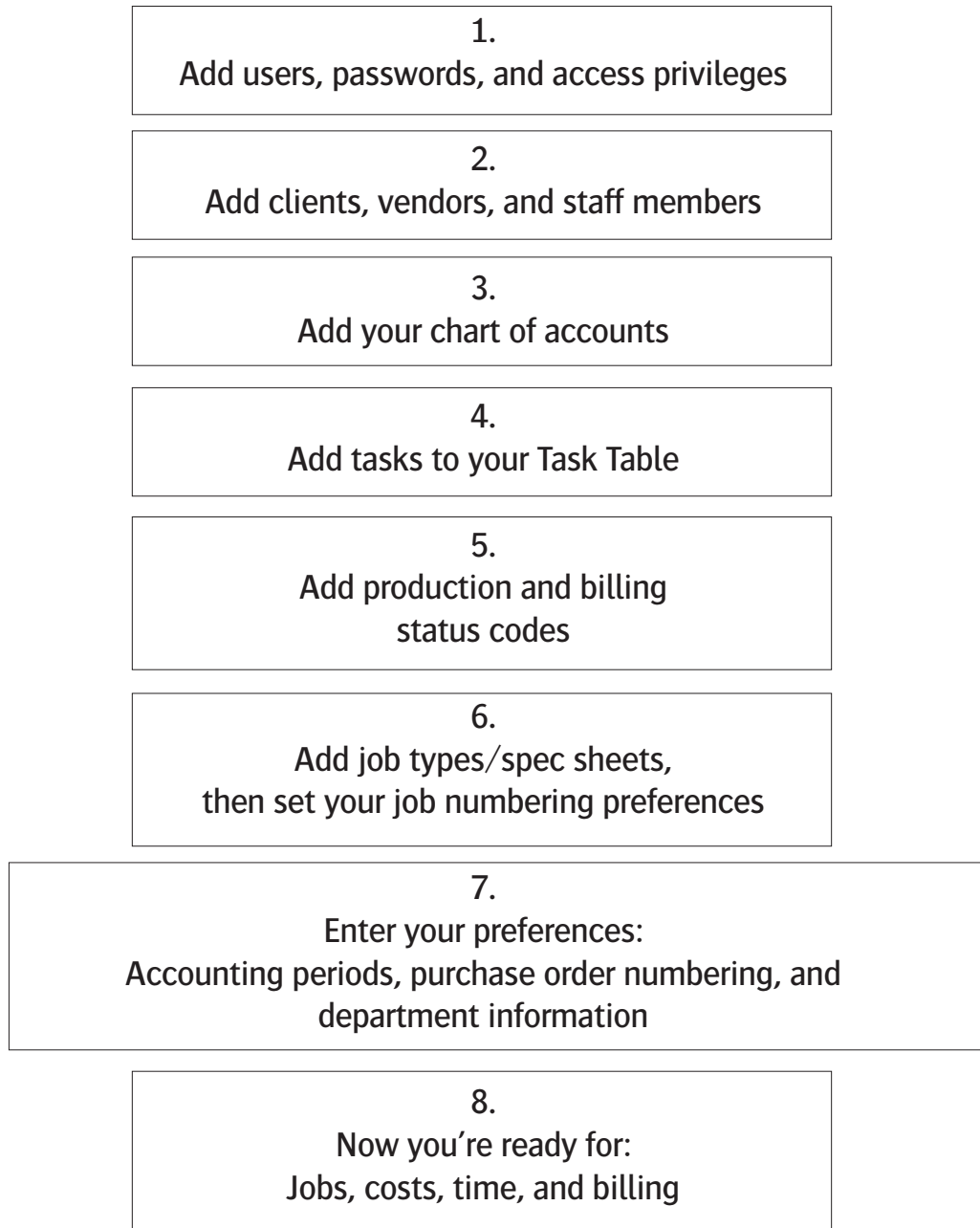
Every new database gets a standard collection of status codes, G/L accounts, groups, tasks, etc. but is otherwise empty. You can edit and delete any of the standard settings in a new database, as well as add your own information.

While most shops need only one database, Clients & Profits X can support several different databases. This means the accounting department can use the same Clients & Profits X program to handle several different companies or divisions, such as output houses and graphic design shops. Each database is independent of the others, and they can't be consolidated.

- Any number of new databases can be created from Clients & Profits X as long as they are used by the same staff in the same location. If you need different databases for separate businesses or divisions, those groups need their own licensed edition of Clients & Profits X.

- 5 The new database now needs to be completed. The New Database Flow Chart (see right) describes what to do next.

New Database Flow Chart



Software Registration

Clients & Profits X uses an internet-based registration system to validate each software installation. The registration process makes your trial demo software fully functional.

Registration is a one-time process that's required for each database after you purchase Clients & Profits X. After being successfully registered, each workstation in the organization needs to be activated. The activation process automatically initializes the C&P X serial number, which controls multi-user access to your database. Activation also determines the Clients & Profits X edition (e.g., C&P Classic, C&P Pro, Job Tracker, or Enterprise Edition) that you'll be using.

You can use Clients & Profits X for multiple databases as long as they are used by the same people in the same location (as described in our license agreement). Each database needs to be registered and activated from the Software Registration window. Here are some things to know about software registration:

- Your organization name will not appear on printed reports, estimates, and invoices until you've purchased Clients & Profits X and licensed the database.

- You can license Clients & Profits X any time during the free 60-day trial period.

- The software registration process will validate your installation and remove the demo limitations. There is nothing to reinstall.

- Once your trial period has ended, your demo database can't be used unless you buy Clients & Profits X. Your demo database can be opened at any time thereafter; no data is lost.

Clients & Profits respects your privacy. No other information about your organization or your database is transmitted or stored. Your encrypted database information is used for software registration purposes only.

To register your database

1 Choose Setup > Software Registration

The Software Registration window opens.

2 Click the Register button.

The Register Database window (see right) prompts you for the database's setup information, including its system manager.

The organization name and address identify this database. The name appears at the top of every report. The C&P Helpdesk ID identifies your Clients & Profits X software installation. The C&P Client # is your customer number in our CRM system. Both are printed on your sales invoice or are available by calling the Clients & Profits Helpdesk at (800) 521-2166.

3 Press Return (or click Register) to send your registration information to the C&P Helpdesk.

Your registration information—and nothing else—is encrypted then e-mailed to the C&P Helpdesk for validation. Once your registration details have been validated, you'll be notified by e-mail to activate your workstation.

To activate your workstation

1 Choose Setup > Software Registration

2 Click the Activate Workstation button.

Register Database

Register this Clients & Profits X database:

WORKING:agency_database.df1

C&P Helpdesk ID: 9372

C&P Client #: 894

Organization: The Ad Agency

Address: 3874 Kidman Ave, Suite 340
Chicago, IL 38974

System Manager: Nicole Sayer

E-mail: nicole@theadagency.com

SMTP Server: mail.adagency.com

Mail Server Authentication (optional)

User Name: nicole

Password: nicknick812

Sign up for the free C&P User Group

Help Cancel Register

Your database's organization name and address will be updated using the information you sent from the Registration window. Activation also serializes your Clients & Profits X software, which enables the database to be shared between many users. (To add additional users later, you only need to call C&P Sales at (800) 272-4488 then activate the workstations again.) Your remaining users can now activate their workstations and start using Clients & Profits X.

Need registration help? Call C&P Sales at (800) 272-4488

Software Updates

Clients & Profits X is self-updating, automatically installing new feature enhancements, bug fixes, and patches as they are made available—with a single mouse click.

Unlike previous versions of Clients & Profits which required update installers or software patches, Clients & Profits X uses a web-based update server to download feature enhancements, bug fixes, and patches directly into each copy of Clients & Profits X.

Software updates are available to all Clients & Profits X registered users with current support subscriptions and to trial demo users.

Only users with access to Software Update can update their own copy of Clients & Profits X. For better security, access to Software Update is turned off by default in the Users, Access & Passwords window. Access to software update can be assigned on a per-user basis, giving the system managers better control over how Clients & Profits X is updated.

System managers will be notified via e-mail whenever a software update is released. Update announcements are also posted to the What's New @ Clients & Profits web page (www.cnp-x.com/whats_new). Clients & Profits X users with access privileges to Software Update will be notified of new updates whenever they start the software.

Updates are not available as stand-alone installers or on CD. An internet connection is required to download software updates.

To update Clients & Profits X

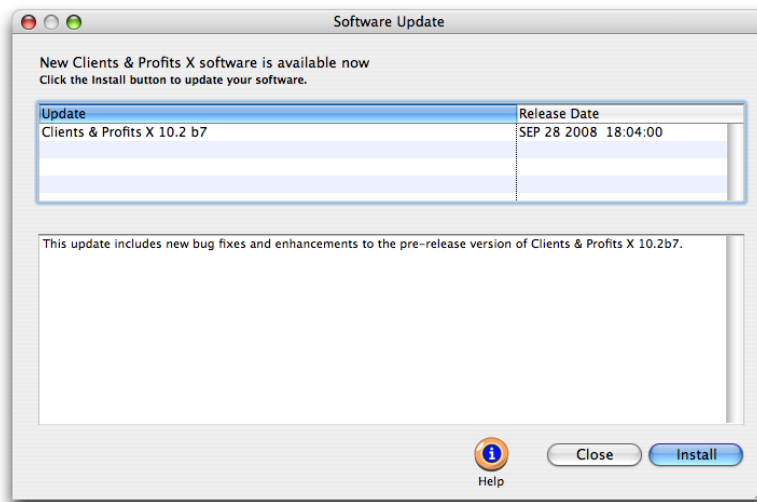
1 Choose Setup > Software Update.

The Software Update window opens and starts checking for new updates. If your copy of Clients & Profits X is up-to-date, you'll be alerted that your software is current. But if a new update is available, Clients & Profits X will display the update's version name, release date, and release notes in the window.

2 Click on the Install button to install the update now. Most software updates will take only a few minutes to download, depending on the number of

enhancements or fixes included. You'll need to repeat these steps on each workstation that uses Clients & Profits X.

■ Since Clients & Profits X is a multi-user application, it's important that everyone always use the same version of the software. Since some system managers prefer to test a new update with a backup copy of the agency's database first, Clients & Profits X doesn't automatically check for software updates for users who don't have access privileges to software update. This also helps ensure that everyone in the shop is using the same version.



To print an update's release notes

1 Click on the Print button.

More information about software updates can be viewed from www.cnp-x.com/downloads/release_notes.html

Configuring MySQL 5 for Clients & Profits X

While most of the database administration of the Clients & Profits X database will be performed within the application itself, the MySQL 5 server needs to be initially configured for Clients & Profits X. This section features step-by-step instructions for doing a generic configuration of a Clients & Profits X database for MySQL on an Xserve. These instructions assume that MySQL 5 is already installed and operating.

These instructions explain how to setup the MySQL server for the C&P X tutorial database, which is just one of several databases you might use. Each database you'll use, such as the sample training database and your shop's actual database, are configured separately following these same steps. To configure the sample database, starter database, or another database, substitute its name and details wherever the word "tutorial" appears in these instructions.

In this section, you'll do these steps:

- 1) Create a C&P X tutorial database using the MySQL Administrator
- 2) Start Clients & Profits X then import the tutorial data

Estimated time: 30 minutes

■ These instructions will setup a minimum configuration of MySQL for Clients & Profits X. There are many settings that can and should be customized for your specific work environment (such as backing up data). The C&P Helpdesk does not provide support for tuning MySQL databases. You will need the services of an experienced MySQL DBA to optimize your system.

■ If you are a non-technical Clients & Profits system manager, you should get assistance from an experienced MySQL DBA to configure the server.

To configure your Xserve for Clients & Profits X

To configure your Xserve for Clients & Profits X and MySQL, you'll first need to install the C&P X application onto the server. It will be used to initially set up your Clients & Profits X database, then used only to maintain the database. You'll first need to install MySQL 5 and the MySQL Administrator software (<http://dev.mysql.com/downloads/administrator>).

Before using Clients & Profits X, you'll need to configure MySQL Pro for each database. There are two sample databases you'll need to configure: (1) the tutorial database, which is used for new user training or evaluating the Clients

DATABASE INFORMATION

Database name: _____
Server IP Address:

& Profits X and (2) the sample database that you'll use for testing reports. The databases can be found at: www.cnp-x.com/downloads

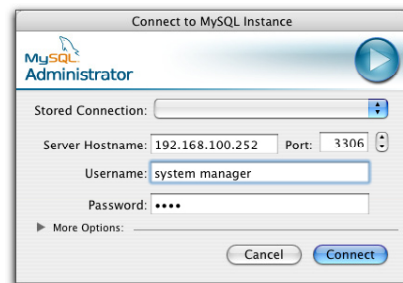
To use these databases with Clients & Profits X, they need to be imported into the MySQL database. The import process is mostly automatic, but MySQL needs to be first configured to handle each database. Once imported, users can start working with these databases.

■ While most shops only have one database, an unlimited number of databases can be maintained by Clients & Profits X. In some cases, companies with different businesses (such as an autonomous PR company) would create a separate database for each unit. Each database has a unique name and set of authorized users. All of the company's databases would be stored in MySQL and opened as needed. However, Clients & Profits X can only open one database at a time on a workstation.

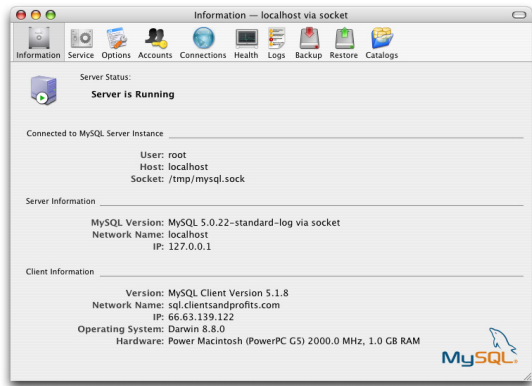
To create a C&P X tutorial database using the MySQL Administrator

The MySQL Administrator application lets you add new databases, monitor the server's performance, as well as make and restore backups. You'll use it to set up every database you need for Clients & Profits X.

- 1 Open the MySQL Administrator application.
- 2 At the login prompt, enter your Xserve's IP address and your administrator name and password then click Connect.



The Information window opens, displaying the MySQL server's current status. This window shows you whether or not the server is running ("server status") and the version of MySQL you're currently running.



3 Click on the Catalogs (i.e., databases) button to list the databases currently set up in MySQL.

4 Click the “+” button to add a new database (i.e., “schema”).

5 Name the “schema” (i.e., your database) as `tutorial` when prompted.

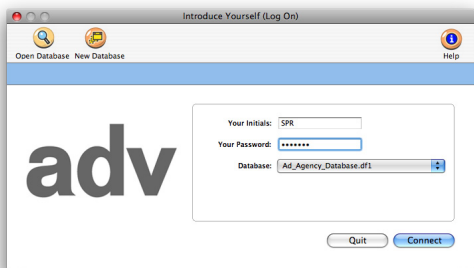
The name of the database is very important. Each Clients & Profits X user will need to type in the Xserve’s IP address and the this name when they first connect to a database. Shorter names are easier to remember.

6 Quit the MySQL Administrator.

An empty tutorial database has now been created in MySQL, but can’t be used until data is imported from Clients & Profits X.

7 Start the Clients & Profits X application.

8 At the Introduce Yourself prompt, enter your user ID as `ROOT` then press Tab.



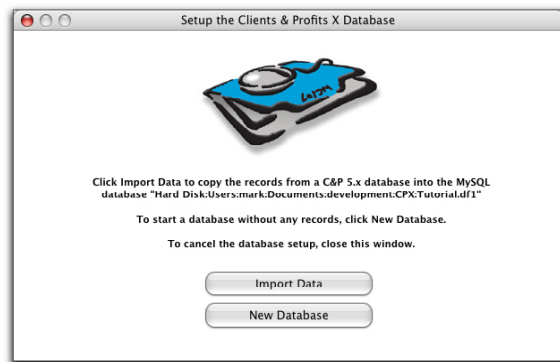
9 Enter your MySQL administrator password, if changed, or leave it blank and press Tab.

10 Click on the Database drop-down menu and choose “MySQL”.

11 Enter the Xserve’s IP address, then a forward slash, then the database’s name then click Connect.

Clients & Profits X will then connect to the MySQL server via TCP/IP. When the connection is successful and the selected database is opened, C&P X will know that the database is empty and prompt you to import data from an existing C&P 5.x or 10.x database or use starter data.

12 When prompted, click on the Import Data button then locate and open your Tutorial.df1 database on the Xserve’s hard drive (it should be in your C&P X folder).



■ If you’d clicked the New Database button, a starter set of tasks, status codes, G/L accounts, groups, and more would have been automatically imported into your new MySQL database.

On an Xserve, the import process takes about one hour per 100 megabytes. While the data is being imported, no one should use the MySQL Administrator or Clients & Profits X. Once the data is completely imported, a report will print summarizing the new database. Once the report prints, the database is ready to use.

No more Database Utilities Your clients, jobs, costs, etc. are now stored in MySQL, not in the built-in Clients & Profits database -- the familiar .DF1 file. Since the data is now completely managed by MySQL, you won’t use the C&P Database Utilities for importing, exporting, Quick Check, backing up, reindexing, etc. All data handling is now a function of MySQL.

Configuring SQL Server 2008 for Clients & Profits SQL X

While most of the database administration of Clients & Profits X will be performed within the application itself, the SQL Server 2008 (or SQL Server 2008 Express) needs to be initially configured for Clients & Profits X. This section features step-by-step instructions for doing a generic configuration SQL Server 2008 for Clients & Profits X on a Windows 2003 server. The configuration process has many steps, and each set of steps is distinctly numbered. These instructions assume that your SQL Server 2008 server is already installed and operating.

These instructions explain how to setup the SQL Server 2008 file server for the C&P tutorial database, which is just one of several databases you might use. Each database you'll use, such as the sample training database and your shop's actual database, are configured separately following these same steps. To configure the sample database, starter database, or another database, substitute its name and details wherever the word "tutorial" appears in these instructions.

In this section, you'll do these steps:

- 1) Create a C&P tutorial database using the SQL Server Enterprise Manager
- 2) Setup the data source for the ODBC driver
- 3) Start Clients & Profits X then import the tutorial data

Estimated time: 2 hours

■ These instructions will setup a minium configuration of SQL Server 2008 for Clients & Profits X. There are many settings that can and should be customized for your specific work environment (such as backing up data). The C&P Helpdesk does not provide support for tuning SQL Server databases. You will need the services of an experienced SQL Server DBA to optimize SQL Server 2008 for Clients & Profits.

■ If you are a nontechnical Clients & Profits system manager, you may want assistance from an experienced SQL Server DBA to configure the server.

1) To create a C&P X tutorial database using the SQL Server 2008 Management Studio

You'll need to know the name of the machine that's running SQL Server and database information to configure the Clients & Profits X workstations. For convenience, enter the server's name here (see step 1-9):

DATABASE INFORMATION

Database name: _____

Server Name: _____

1-1 Choose Start > Programs > Microsoft SQL Server 2008 > Microsoft SQL Server Management Studio.

The Connect to Server window opens, prompting you for your SQL Server database name, login name and password.

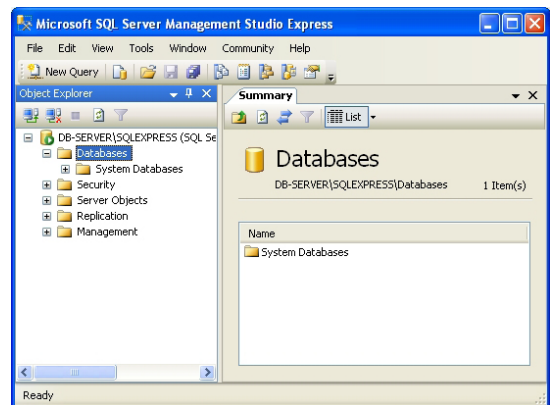
1-2 Choose a server name from the Server Name combo box, or enter your SQL server's IP address.

1-3 Click on the Authentication combo box and choose SQL Server Authentication.

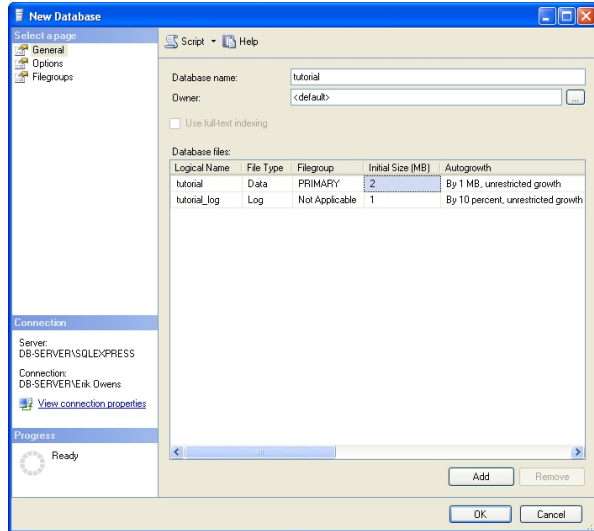
1-4 Enter the server's system administrator login name (for example, "sa") and password then click Connect.



1-5 Expand Databases by clicking on the (+).



1-6 Right-click on the Databases folder and choose New Database.

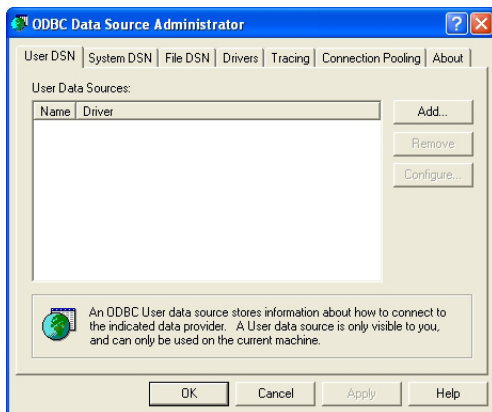


1-7 Name the new database tutorial then click OK.

You'll see the new tutorial database listed inside the Databases folder.

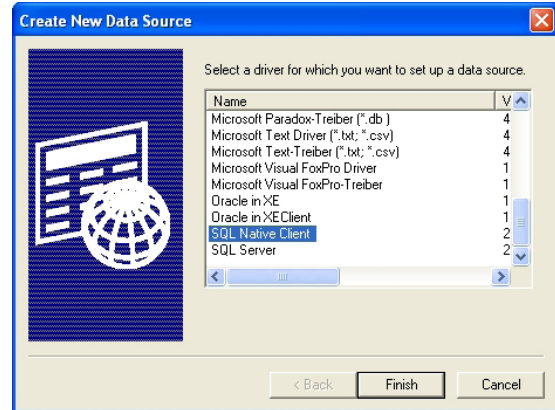
2) To create a data source name on SQL Server 2008

2-1 Choose Start > Programs > Administrative Tools > Data Sources (ODBC)



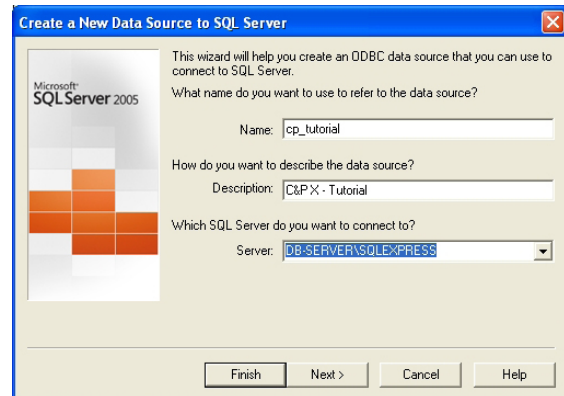
The ODBC Data Source Administrator window opens, which where you'll add the data source for the tutorial database.

2-2 Click Add.



2-3 Select SQL Native Client from the driver list and then click Finish.

The Create a New Data Source window opens, prompting you to enter the name of the tutorial database and its server name.



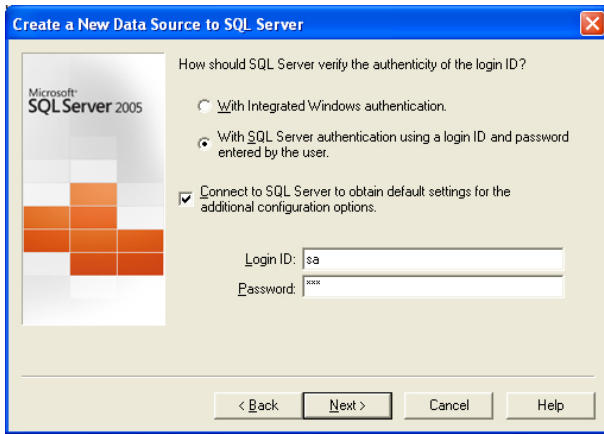
2-4 Enter the name as tutorial, the description as Clients & Profits X, then choose the server name from the combo box (or enter the server's IP address).

The next window will prompt you to choose a method of authentication.

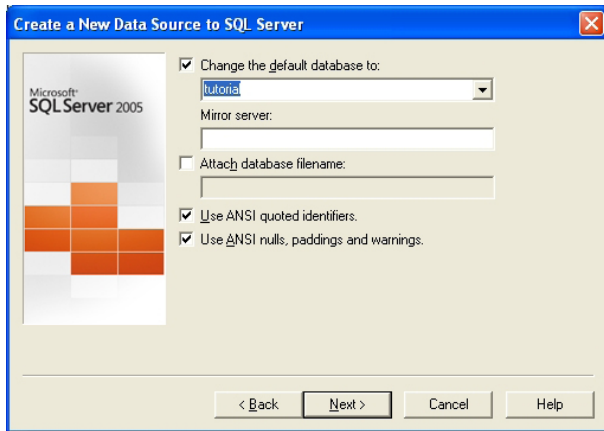
2-5 Click on the "with SQL Server authentication" radio button, enter the server administrator login name ("sa") and password, then click Next.

The DSN Configuration window will now prompt you to change the default database.

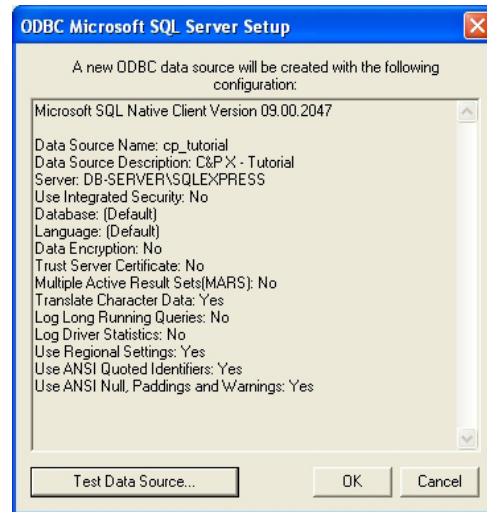
Configuring the SQL Server 2008 Database Server (con't)



2-6 Click on the “change default database” checkbox then select tutorial from the combo box then click Next.

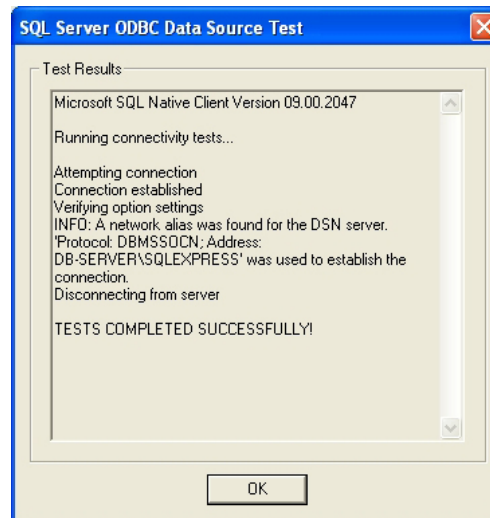


2-7 Click Finish at the next DSN Configuration window to keep the standard settings.



You'll then be prompted to test the SQL Server data source for the tutorial database.

2-8 Click Test Data Source then click OK to confirm the database was connected successfully, click click OK again to complete the data source setup.



The tutorial database has now been successfully created on the SQL Server 2008 Server and is now ready for client, job, and accounting data. The final step is to import the sample tutorial data into your new database.

3) To import the tutorial data

The first time a C&P X user connects to a SQL Server database, Clients & Profits X will prompt you to initialize it. This process sets up SQL Server 2008 for the Clients & Profits X tutorial database, copying over its tables then importing the clients, jobs, costs, and other sample records into SQL Server tables. Once the tutorial database is imported, users can start C&P X and access the tutorial database.

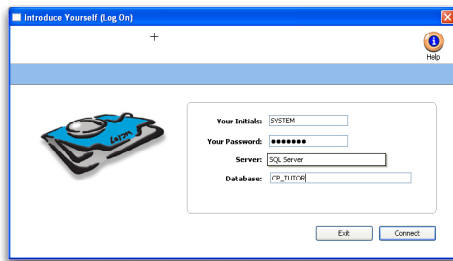
■ Importing data into a new SQL Server 2008 database can only be performed from a Windows-based PC running C&P X.

These steps will be repeated for every C&P X database you want to use with SQL Server 2008, such as the sample training database, and existing Clients & Profits databases you're currently using.

3-1 Choose Start > Programs > Clients & Profits X then select the Clients & Profits X application.

Because you haven't yet registered the software, you'll be prompted to choose an edition (e.g., C&P Pro, Job Tracker, or C&P Enterprise Edition). Once you register your software, this step will be skipped.

3-2 Select SQL Server 2008 from the Database drop-down menu,



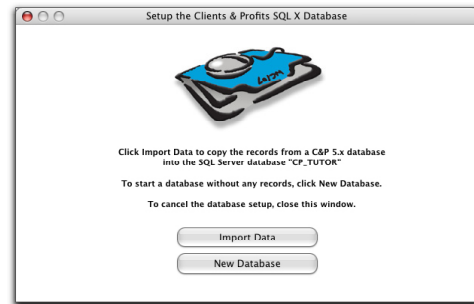
3-3 Enter the login initials as SA ("system administrator") and the server administrator's password.

■ You'll only enter your initials as SA (the "system administrator") the first time a C&P database is initialized. Once the data is imported, users will access the database by entering their own initials and passwords.

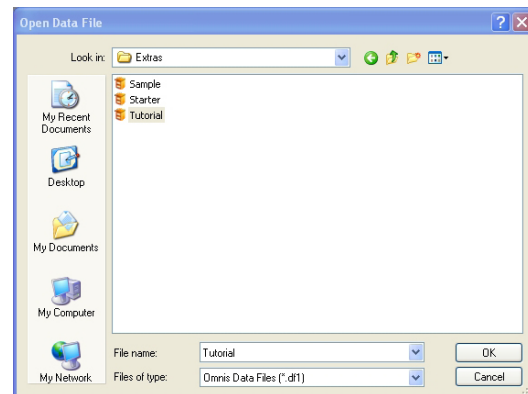
3-4 Enter the database's name, which is the DSN name from the ODBC Data Sources setup window, then click Connect.

Clients & Profits X will now start an ODBC session with SQL Server, connecting to the tutorial database you just set up. The first time a new database is opened, you'll be prompted to initialize the database.

3-5 From the Initialize window, click the Import Data button.



3-6 Find the **tutorial.dft** database in the Clients & Profits X folder then click OK.



Clients & Profits X will now import all of the tutorial data into SQL Server. When the import is complete, a log will print that can be used to look for conversion errors. This database is now ready to use.

Configuring Mac OS X Users for SQL Server 2008

Clients & Profits X is installed separately on every Mac computer running Mac OS X 10.4 (or higher) that needs it. The installation steps generally the same as other Mac applications:

- 1) Install the Clients & Profits X software on a workstation
- 2) Install the Actual Technologies ODBC client driver (not included)
- 3) Configure the Actual ODBC to connect to your C&P X database
- 4) Start C&P X then log onto to your database
- 5) Activate your C&P X software

Estimated time: 20 minutes

■ Mac OS X can't connect to SQL Server 2008, unlike MySQL, without the Actual ODBC driver for SQL Server, which must be purchased separately for each Mac workstation. Step-by-step installation instructions are included here, but the C&P Helpdesk offer only limited supports for the Actual ODBC driver. To purchase or get technical support, please visit www.actualtechnologies.com.

If you are not the SQL Server database administrator ("DBA"), there are several SQL Server settings that you'll need to know (see the chart below) before installing Clients & Profits X. These settings are based on how SQL Server 2008 was configured for your C&P X databases.

Clients & Profits X does not install any system files and doesn't modify your Mac OS X configuration.

■ Clients & Profits X should be installed on every user workstation who will use it. For better performance, always run the C&P X application from a local workstation, not from the file server.

SQL Server 2008 / C&P X DATABASE INFO

C&P TUTORIAL database info (Tutorial.DF1)

Database name: _____

Server Name: _____

C&P SAMPLE database info (CP_Sample.DF1)

Database name: _____

Server Name: _____

Your shop's Clients & Profits X database info:

Database name: _____

Server Name: _____

To install the Clients & Profits X software

- 1 Download the C&P X installer from www.cnp-x.com/downloads.
- 2 Double-click on the C&P X installer.
- 3 Follow the prompts for both Clients & Profits X and the Actual ODBC driver.

The Clients & Profits X software and the demo version of the Actual ODBC drivers should be installed in less than a minute.

To register the Actual ODBC driver

A demo version of the Actual ODBC driver is installed automatically when you install Clients & Profits X. The demo has a limit of three records per transaction until it is registered. Before using Clients & Profits X for real work, you'll need to register the ODBC driver.

- 1 Buy the Actual ODBC driver from: <https://www.actualtechnologies.com/buynow.php>
- 2 Write down the license key, which you'll need for step 4 (see page 25).

To configure the Actual ODBC driver for C&P X

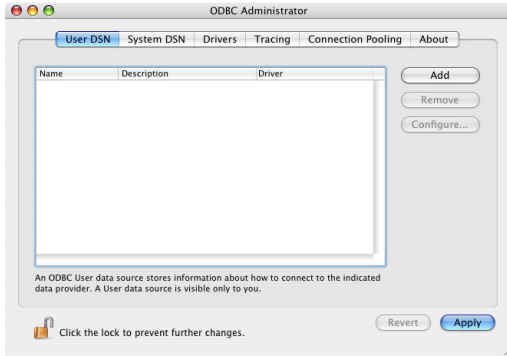
Both SQL Server 2008 and Clients & Profits X allow users to access many different databases. For example, a tutorial database works with the Clients & Profits X tutorial to help new users learn the system.

Your shop will generally have one database for its clients, jobs, and accounting. If the company has different businesses, then each business may have its own database. When Clients & Profits X is started, it prompts you to connect to one of your databases. Each database is called a service and has to be configured on each workstation by the Actual ODBC driver.

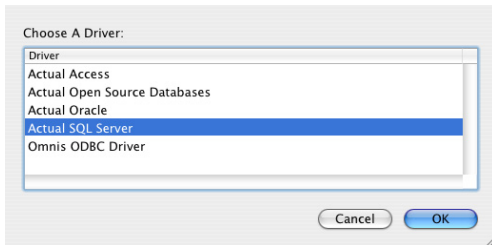
- 1 Choose Go > Utilities > then double-click on the ODBC Administrator application.

The Actual Technology's ODBC Administrator program opens, displaying the Administrator window. This windows lists the SQL databases to which you can connect. The list is empty if you haven't yet configured any SQL databases.

2 Click on the User DSN tab then click the Add button.

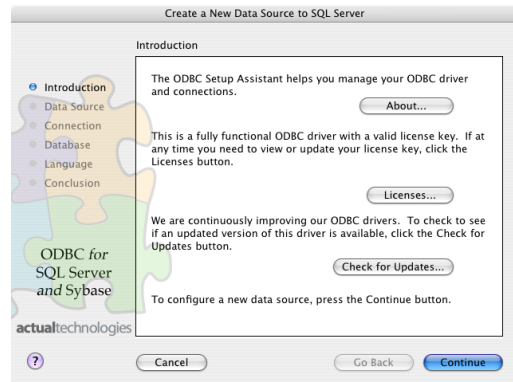


You'll be prompted to choose an ODBC driver from the list:



3 Click once on the Actual SQL Server driver to select it, then click Finish.

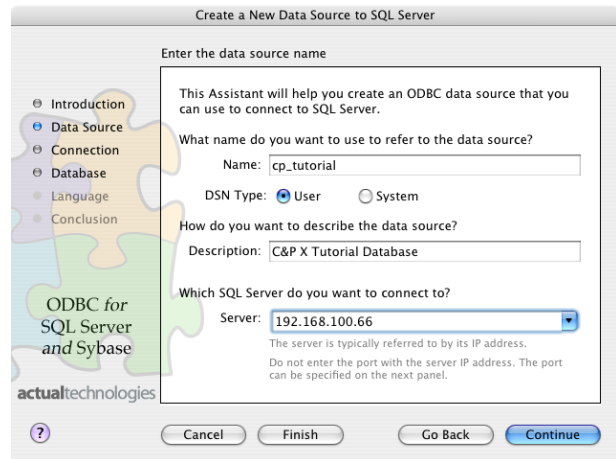
4 Click on the Licenses button then enter your license key (i.e., serial number) then click OK.



5 Click Continue to create a new data source to SQL Server. You'll then be prompted to enter the new data source's name, description, and server location.

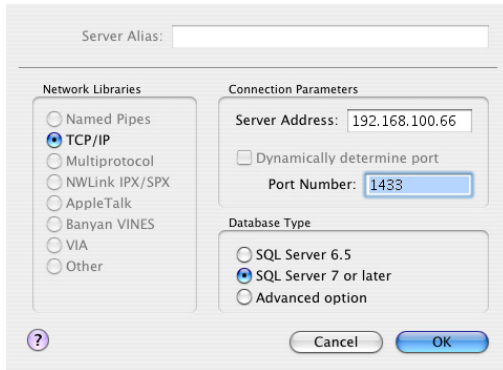
6 Enter the database name as CP_TUTOR and a short description of the database (e.g., "C&P tutorial"), then enter the database server's IP address and click Next.

The database name refers to a single specific database that's inside SQL Server 2008. If your shop uses several Clients & Profits databases, each one will have its own unique name. A database's name will never change.



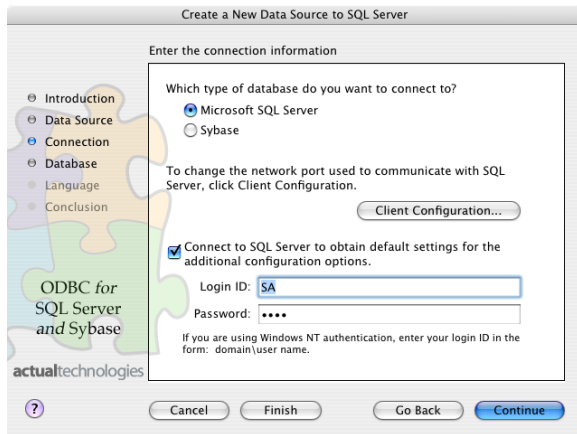
Configuring Mac OS X Users for SQL Server (con't)

If the connection fails, make sure the server's address and port numbers are set properly:



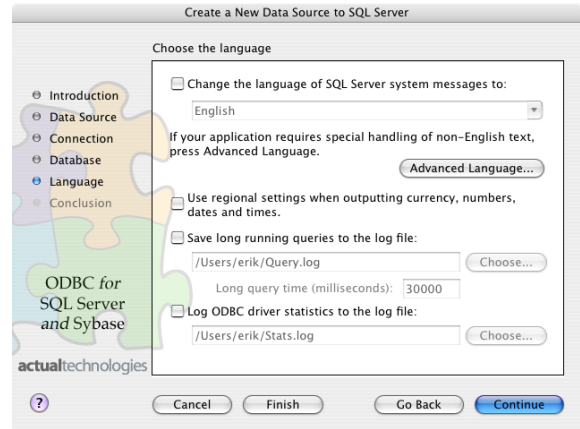
7 Unlike configuring the ODBC connection for a Window client, in order to use NT authentication the client login ID and password need to be set in this window.

Click on the checkbox labeled "Connect to SQL Server to obtain default setting" then click Continue.

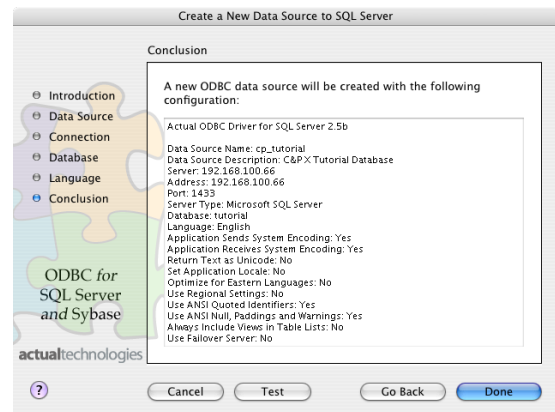


8 Change the default database to tutorial then click Continue.

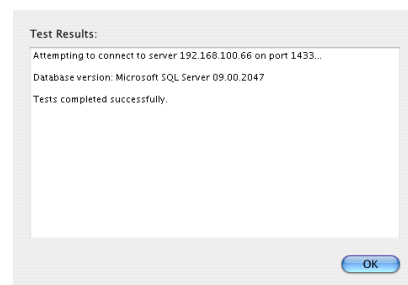
9 Accept the default settings, then click Continue.



10 Click Test to check that your settings are correct.

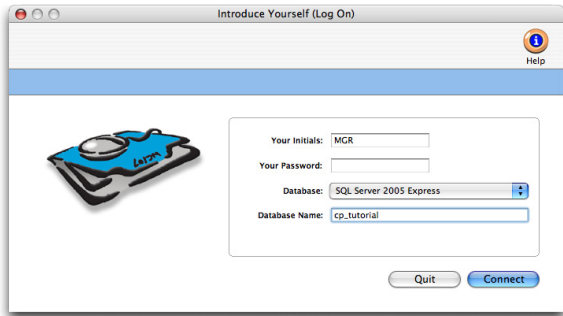


If your connection was successful, you'll see this:



11 Click OK to complete the configuration and introduce yourself (i.e., log in) to Clients & Profits X.

12 Enter your C&P X user ID and password (or MGR if you don't have one) and the server name then click Connect.



You are now connected to your Clients & Profits X database.

To connect to other Clients & Profits X databases

You'll need use the same steps shown previously, except you'll enter the other database's name, and the Server IP address or name (which will probably be the same), and select the new database as default.

Only one database can be opened at one time from a workstation, but it's easy to switch from one to another. Every time Clients & Profits SQL is started, you'll be prompted to connect to a database by entering the service name (e.g., CP_ACCT). To later switch to a different database, choose File > Introduce Yourself (Log On) then enter a database's service name.

Configuring Windows Users for SQL Server 2008

Clients & Profits X is installed separately on every Windows-based PC that needs it. The installation steps generally the same as other applications:

- 1) Install the Clients & Profits X software on a workstation
- 2) Setup a data source for the Server 2008 ODBC driver to the C&P database
- 3) Start C&P X then connect to your SQL Server 2008 database
- 4) Activate your C&P X software

Estimated time: 20 minutes

If you are not the SQL Server database administrator (“DBA”), there are several SQL Server settings that you’ll need to know (see the chart below) before installing Clients & Profits X. These settings are based on how SQL Server 2008 was configured for your C&P X databases.

Clients & Profits X does not install any system DLL files and doesn’t modify your Windows registry or configuration.

■ Clients & Profits X should be installed on every user workstation who will use it. For better performance, always run the C&P X application from a local workstation, not from the file server.

To install the Clients & Profits X software

- 1 Download the C&P X installer from <http://www.cnp-x.com/downloads>.
- 2 Double-click on the installer to install the software.
- 3 When prompted, click Next to continue the setup.

SQL Server 2008 / C&P X DATABASE INFO

C&P TUTORIAL database info (Tutorial.DF1)

Database name: _____

Server Name: _____

Your shop's Clients & Profits X database info:

Database name: _____

Server Name: _____

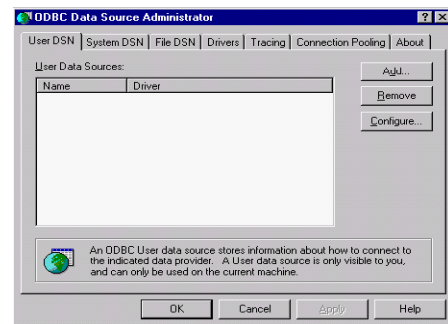
To setup a datasource for the SQL Server 2008 ODBC driver

Both SQL Server 2008 and Clients & Profits X allow users to access many different databases. For example, a tutorial database works with the Clients & Profits X tutorial to help new users learn the system. Your shop will generally have one database for its clients, jobs, and accounting. If the company has different businesses, then each business may have its own database. When Clients & Profits X is started, it prompts you to connect to one of the databases. Each database is called a service and has to be configured on each workstation.

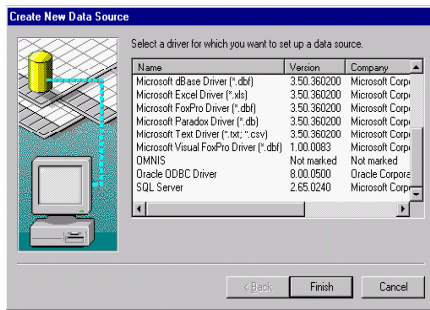
- 1 Choose Start > Control Panel > Performance and Maintenance > Administrative Tools > Data Sources (ODBC).

If you don’t have the ODBC data sources icon, it usually installs with programs that use ODBC access, like Crystal reports, Microsoft Access, or Microsoft Excel.

- 2 From the User DSN, click add.

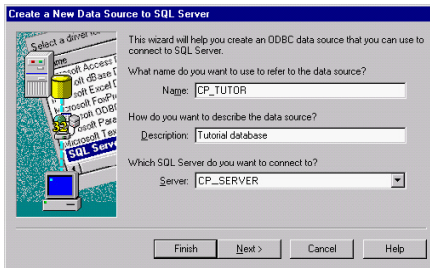


- 3 Select the SQL Server, then click Finish.



■ Note: The instructions for setting up the ODBC driver are for version 3.x or above. If your driver is version 2.x or below the setup is different.

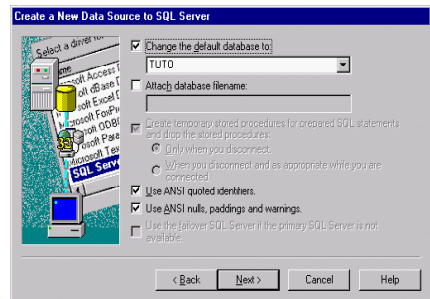
4 Enter the database Name as `tutorial` and a database description. If you are using Windows 2000 you must type in the server name). Click Next.



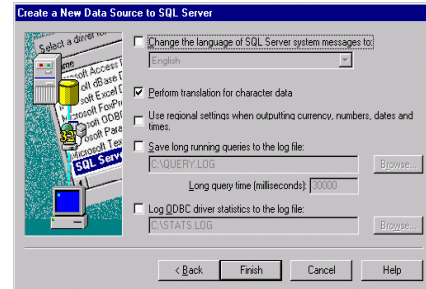
The “name” refers to a single specific database that’s inside SQL Server 2008. Each Clients & Profits X database will have its own unique name. A database’s name will never change.

5 Accept the default settings, then click Next.

6 Change the default database to `tutorial`, click Next.



7 Accept the default settings, then click Next.



8 Click Test Data Source to check your settings.

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