

# Installing the Clients & Profits X 10.5 Upgrade

Clients & Profits X 10.5 is a major upgrade that features dozens of new features and hundreds of enhancements. It replaces your existing Clients & Profits 10.x applications throughout your shop. These instructions explain how to install the new upgrade.

**If you're already using Clients & Profits X 10.4 then the upgrade was installed automatically and there's nothing to do—it's ready to go now.**

Clients & Profits X 10.5 is installed separately on every computer that uses it. The installation steps are straightforward: (1) run the Clients & Profits X installer, (2) start Clients & Profits X, (3) open your database and perform the one-time conversion, then (4) register your database and activate your software.

Installers for both Mac OS X and Windows are available from the Clients & Profits X web site: [www.cnp-x.com/downloads](http://www.cnp-x.com/downloads)

The first time Clients & Profits X opens your database, it will prompt you to convert your database. This process normally takes a few minutes, but can take up to a couple hours for very large databases. The database should only be converted if no one else is currently using Clients & Profits. If you use multiple databases, each one needs to be converted separately. Once your database is converted, it should be registered. Registering your database is required for software activation. A backup should be made before a conversion is attempted. The built-in database must be converted locally (not over a network).

Everyone who uses Clients & Profits in your shop needs to upgrade to Clients & Profits X at the same time. While you can open your Clients & Profits X database with earlier versions of the software, mixing old and new versions on the same database can cause data problems and is not recommended.

For step-by-step instructions on how to use Clients & Profits X 10.5, click on any window's help button to access the online user guide (internet access is required).

For help, please call the Clients & Profits Helpdesk at (800) 521-2166 from 7 AM to 5 PM Pacific time. Or e-mail [helpdesk@clientsandprofits.com](mailto:helpdesk@clientsandprofits.com)

## System requirements

All versions of Clients & Profits X a connection to your file server and an internet connection (required for the online user guide, automatic update and the database registration/software activation). The program's system requirements and performance vary by platform:

**Macintosh:** The Mac version of Clients & Profits X runs on any modern desktop or laptop from Apple with Mac OS X 10.5 or later. On Mac OS X, Clients & Profits X runs as a native application.

**Windows:** Clients & Profits X for Windows runs on any PC with Windows XP, Vista, Windows 7 or Windows 8.

The Clients & Profits X ([www.cnp-x.com](http://www.cnp-x.com)) web site features detailed technical information, including up-to-date hardware recommendations (you email address and company password may be required for some pages)

## Moving from My C&P! to Jobr

**If you're not using My C&P! X then skip these steps.**

1. Install Clients & Profits X on the machine previously used by My C&P! X. It's recommended to create a separate user account for the Jobr/Web Access Server.

2. Click on Setup and then choose Web Access.

3. Verify the preferences under the Preferences tab.

4. Enter new passwords for all users under the Web Users Tab.

5. Choose the Current Activity tab then click the Start button to start the web server.

The IP address of the host machine will display in the Status. Use this address displayed to login to the Jobr Mobile web app.

Ready to move your job tracking and accounting to the cloud? Give us 30 minutes and we'll show you the all-new Clients & Profits Cloud, the most advanced agency management system we've ever made — and one you already know how to use. See what we've freshly reinvented: <http://www.clientsandprofits.com/whats-new/>

## To install the Clients & Profits X upgrade for Mac OS X

Before installing the upgrade, be sure to quit Clients & Profits if it is running.

- 1 Find your current Clients & Profits folder on your hard disk and move any custom reports, databases, and other files you want to save out of the folder. Then drag the Clients & Profits folder to the trash.
- 2 Double-click on the installation file downloaded from the website.
- 3 Follow the installer's prompts to copy the new Clients & Profits application to the Application folder.
- 4 Open the Clients & Profits X application. Choose your edition. At the Introduce Yourself prompt, click on the Open Database button to find your database, then enter your initials and password.
- 5 After logging in you will be prompted to activate you application. If your registration information is correct click "Activate Workstation". The application will restart.



Clients & Profits X

Database shortcuts Click the Open Database button to find and open your C&P database. The database will be converted automatically then added to the pop-up menu for easy access.

## To install the Clients & Profits X upgrade for Windows

Before installing the upgrade, be sure to quit Clients & Profits if it is running.

- 1 Find your current Clients & Profits folder on your hard disk and move any custom reports, databases, and other files you want to save out of the folder. Then drag the Clients & Profits folder to the trash.
- 2 Double-click on the installation file downloaded from the website.
- 3 Follow the installer's prompts.
- 4 Move any files you saved into the new Clients & Profits X folder.
- 5 Now start the Clients & Profits X application. At the Introduce Yourself prompt, click on the Open Database button to find your database, then enter your initials and password.
- 6 After logging in you will be prompted to activate you application. If your registration information is correct click "Activate Workstation". The application will restart.

## Software Registration and Activation

All new database require a one time registration.

- 1 Choose Setup > Software Registration then click the Register button.
- 2 Enter your company Helpdesk ID, Client Number, Company Name and Address and well as any other prompted information. Click the Register button.
- 3 Click the Activate Workstation

Clients & Profits respects your privacy. No other information about your organization or your database is transmitted or stored.

## Using old plug-ins, custom reports

If you are have custom reports or plug-ins from version earlier than Clients & Profits X 10.2 these may need to be re-written for Clients & Profits X 10.5.

