



# My Clients & Profits! 5.0



## Demo Guide



## **Clients & Profits Sales: (800) 272-4488**

This Administrator's Guide documents the My Clients & Profits! 5.0 web server

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## How to use this demo guide

This demo guide explains how to run the trial version of My Clients & Profits!, an add-on web server that lets creatives, account executives, and out-of-office staff members access the shop's Clients & Profits database. This guide provides complete, step-by-step instructions for installing, setting up, and running the My Clients & Profits! demo software. (A separate User Guide explains how web users log onto and use the My Clients & Profits!)

You'll find many helpful screen shots throughout the administrator's guide that illustrate My Clients & Profits!'s management features and web capabilities. For more information about the My Clients & Profits! web server, visit the My C&P! web site:

**[www.clientsandprofits.com/my](http://www.clientsandprofits.com/my)**

There you'll find up-to-date technical information about how the My Clients & Profits! web server works, as well as tips, shortcuts, and troubleshooting ideas.

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# Introducing My Clients & Profits!

My Clients & Profits! 5 is an add-on web server for your Clients & Profits 5.x database that allows creatives, account executives, and out-of-office staff members to track jobs, traffic, time, expenses, and more from anywhere using any kind of internet-enabled computer.

The My C&P! web server serves customizable web pages using real-time data from your Clients & Profits database. Users can add proposals, open jobs, edit traffic and schedules, review company and personal calendars, update status reports, enter hours on time cards, and track costs using only a web browser—and more.

My Clients & Profits! acts as a gateway between the shop's Clients & Profits database and any number of users either inside or outside the office. A user opens their web browser then logs onto the My C&P! server by entering a specified web address (such as "http://my.clientsandprofits.com"), their user ID, and their password. My C&P! verifies the user's ID and password, then displays a personalized home page. This home page contains links to the various client, job, and costing functions available to them, as well as links to company and industry news, a company calendar, and an optional online company handbook.

My Clients & Profits! maintains its own list of web users, so only authorized people can use it. Hundreds of users can be supported, depending on your server hardware. Once connected to the My Clients & Profits! web server, staff members and freelancers can perform many creative, production, and account service (but not, for security reasons, accounting) activities.

My Clients & Profits! also lets authorized clients and vendors access their information in your database. Clients can see their account information, job tickets, client job status report, and invoices. Vendors can see their own purchase orders. Each individual who works at a client or vendor must have his or her own My C&P! web ID and password, which prevents them from seeing the work of other clients and vendors. This keeps important data private.

My Clients & Profits! is available 24/7 (except during nightly backups). It runs unattended on a stand-alone computer that is connected to your Clients & Profits file server. There is no preset limit on the number of concurrent My C&P! users, so many web users can add jobs, time, and expenses simultaneously.

The My Clients & Profits! web server keeps track of every request, or hit, in a log. This makes it easy for a web server

administrator to track the server's usage, including who's using it at which times. The web server administrator can remotely monitor and manage the My Clients & Profits! web server from home, a hotel room, an airport—anywhere there's an internet connection. My Clients & Profits! even sends instant e-mail error notifications to the webmaster.

All of the My Clients & Profits! web pages are customizable. A page's design can be tailored to match your company's visual identity and style. This can make your My C&P! system look and feel just like your web site for anyone who uses it.

■ The trial demo is a full-featured version of My Clients & Profits! 5.0 with a few limitations: The demo expires in 30 days after starting, there's a limit to five web users, and the log is limited to 1000 entries.



**No password, no access** The My C&P! home page requires a valid, active user ID and password before allowing someone to access the shop's database.

## The My Clients & Profits! home page

Each My C&P! web user has their own personalized home page, whether they are a staff member, freelancer, client, or vendor.

Each web user can access selected client, job, traffic, and job costing functions based on their My C&P! access privileges. These user-defined privileges work together with the user's standard Clients & Profits access privileges. Some users will see more or fewer links, depending on what they are authorized to use. The graphics used for each link are GIFs that can be replaced with your own custom graphics.

The company calendar page is linked to the Calendar window in Clients & Profits, listing company events, meetings, and important dates.

Staff members can easily access web sites that the company deems valuable by clicking on these links.

E-mail can be instantly sent to the My C&P! webmaster by clicking on this link.

The screenshot shows a web browser window titled "My Clients & Profits! Home". The address bar shows "http://my.clientsandprofits.com/home". The page content includes:

- Navigation:** File, Edit, View, Go, Favorites, Tools, Window, Help.
- Header:** "My Clients & Profits!" logo.
- Welcome Message:** "My Clients & Profits! for Gayle Greene. Welcome! This welcome message is customizable, so each staff member who uses My Clients & Profits! can be greeted with his or her own special message."
- Central Grid:** A grid of 12 icons with labels: Clients, Daily Job Status, Time Card, Job Tickets, Traffic, Add Expenses, Open New Job, Weekly Task Planner, Purchase Orders, Work to do, Client Job Status.
- Company Calendar:** "Sun's baby shower this Friday" with a list of events (e.g., 6/2 - Sign up now for COMEX shuttle, 6/8 - Sun's baby shower).
- Company News:** "Three new clients this month" with news items (e.g., 6/10 - \$3M Multicom is latest account win).
- Industry News:** "check out merger details for ABC Industries (our new client)" with news items (e.g., 6/10 - ADWEEK.com report: up, up, and away).
- Links:** A list of external links including "What's New in Clients & Profits!", "HOW Design Conference in Atlanta", "Sales Home Stories", "Advertise - advertisein.paradise", and "Adroll.com - the media marketplace".
- Company Handbook:** A list of internal links like "General Information", "Your Benefits", "Your Personnel File", "Employment Classifications", "Employment Policies", "Standards of Conduct", "Compensation", "Performance Review", "Work Schedules", "Holidays", "Vacations", "Leave of Absence", "Insurance", "Retirement", "Safety", "Job Postings", "Miscellaneous".
- Company Forms:** A list of links for "Expense Report", "Payroll Change", "Equipment Loan", "Work Schedule Request", "Insurance Request", "Suspension App", "Vacation Request", "Benefit Change", "NCO Update", "HC Status Change".
- Footer:** "The My Clients & Profits! webmaster is Mark Robillard", "© 2000 Clients & Profits, Inc. All Rights Reserved", and "Content and sample links are fictitious and used for example only. This page is part of the My Clients & Profits! web server".

A special "welcome" message greets each My C&P! user on their home page. This greeting is edited in the user's Access & Privileges window by the web server administrator.

Clicking on a web page's **help** link opens the My C&P! online user guide.

The lookup lists in the My C&P! web server look like the ones in Clients & Profits. They give web users the same access to client, job, vendor, and other quick-reference lists, as Clients & Profits users.

The Company News section promotes company propaganda, including new hire announcements, account wins, acquisitions, and other newsworthy stories.

Staff members can stay informed of industry news, gossip, and events using these customizable links.

My C&P! can serve pages from a private, online company handbook. Your existing handbook can be copied into web pages (or use PDF files) that are easily linked to the staff member home pages.

# Quick Start

The My Clients & Profits! web server trial demo installs like the regular Clients & Profits software, so the process is probably familiar: Insert the My Clients & Profits! demo CD-ROM into a PC or Mac (or download the demo installer), start the Installer application, then follow the prompts. Within minutes, your new My Clients & Profits! software will be installed. The My Clients & Profits! web server can be started once its preferences and web users have been set up.

The My Clients & Profits! web server requires a dedicated Power Mac, iMac, or eMac running Mac OS 9.1 or greater (including Mac OS X v10.2 or later) or Pentium-based PC running Windows 2000/XP with 128mb of RAM, 25mb of hard disk space, a full-time TCP/IP connection to the internet, and a full-time LAN connection to your Clients & Profits file server. This computer must have a **fixed** IP address that can be accessed outside of the office. Also, this computer should be dedicated to running My C&P!, so shouldn't be used for other web, mail, or file servers for best performance.

■ For up-to-date system recommendations for My Clients & Profits!, please see [www.clientsandprofits.com/sales/server\\_recs.html](http://www.clientsandprofits.com/sales/server_recs.html)

My Clients & Profits! should only be installed on the server that will run it. The My Clients & Profits! is fully self-contained. There is nothing to install on the user workstations or on the Clients & Profits file server itself.

My Clients & Profits! is browser-independent, meaning anyone using any kind of web browser can access the Clients & Profits database from any kind of computer.

■ My Clients & Profits! 5 only works with Clients & Profits Classic 5.x, Clients & Profits Pro 5.x, and Job Tracker 5.x or later databases (including the My C&P! demo data.DF1 database, which is included).

The Clients & Profits web site features detailed technical information, including up-to-date hardware recommendations:

[www.clientsandprofits.com/my](http://www.clientsandprofits.com/my)

**For technical help, please call (800) 272-4488**

## To install the My C&P! web server demo

Before installing My Clients & Profits!, be sure that the computer does not contain any prior versions of Clients & Profits. Different versions of C&P can conflict with the My Clients & Profits! web server and cause system problems.

**1** Insert the My Clients & Profits! CD-ROM into your computer (or download the demo installer from the C&P web site).

**2** On a Mac, double-click on the Installer. On a Windows-based PC the installer application starts up automatically, choosing the right C&P Player to use on your version of Windows.

The Installer will prompt you to choose a destination for the new My C&P folder. On a Mac, the hard disk is selected. On a Windows PC, the top level of your C: drive is chosen automatically. Any volume can be chosen.

**3** Follow the prompts to finish the installation.

A My C&P! folder will be copied to your hard disk. Inside it you'll find a special web-enabled version of the C&P Player, the My Clients & Profits! 5.0 application, an HTML folder that contains the My C&P! web pages, and other program files.

**4** Restart the computer.

## To open the My C&P! web server demo

**1** On a Mac, double-click on the My C&P! application. On a Windows-based PC, choose Start > Programs > My Clients & Profits!

The first time My Clients & Profits! is started, you will be prompted to serialize the C&P Player.

**2** Enter your name, company, and current Clients & Profits serial number, then click OK.

There is no separate serial number for My Clients & Profits!—you'll use the same one you're using now. Once the C&P Player is serialized, it will prompt you to find and open a Clients & Profits database.

**3** Find and open a Clients & Profits database.

**4** Enter your Clients & Profits user ID and password when prompted.

You must be a Clients & Profits manager-level user to initially set up the My Clients & Profits! web server. Once My C&P! is running, access to it is controlled by a separate web user list (see "To Add My C&P! web users" on page 7). You'll then see the My C&P! Web Server Status window. Before the web server can be started, the server's preferences (including a webmaster's name and e-mail address) and users must be entered.

Your Clients & Profits Player serial number:

C	8	R	S			M													
---	---	---	---	--	--	---	--	--	--	--	--	--	--	--	--	--	--	--	--

## To set my My C&P! preferences

- 1 Choose Setup > Preferences.
  - 2 Enter or select any of the settings that seem appropriate to your web server (see page 17 for a description of each preference).
    - Be sure to enter the My C&P! webmaster's name, their e-mail address, and address of your mail server first. This enables the server's automatic e-mail notifications, which keep the web administrator constantly informed of server problems.
- None of these settings are required to actually use the My Clients & Profits! web server.
- 3 Click Save.
- For details about setting My C&P! preferences, see page 16-17.

## To add My C&P! web users

- 1 Choose Setup > Users, Access & Passwords.
- 2 Choose Edit > Auto-Create Web Users

The Auto-Create Web Users window opens, listing all of your current Clients & Profits users.

- 3 Click OK.

Web user accounts are automatically created for everyone who currently uses Clients & Profits now, using the same password for the web server. Later, web access privileges and passwords can be changed for each user. Once web user accounts are created, the My Clients & Profits! web server can be started.

- For details about setting up web user accounts for My C&P!, see page 18.

## To start the My C&P! web server

- 1 Choose My Clients & Profits! > Start Web Server

Once started, My Clients & Profits! begins listening for requests from web users. Every request, or hit, from a web user makes a log entry into the Web Server Status window, so it's easy to monitor who's using the web server.

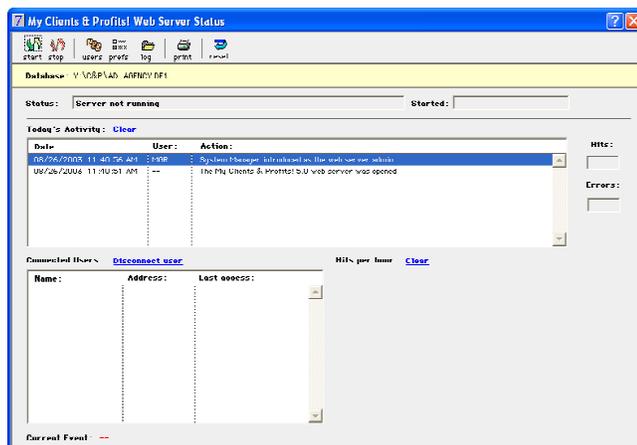
## To access the My C&P! web server from a web browser

- 1 Open a web browser, such as Internet Explorer or Netscape Navigator.
- 2 Enter the My C&P! web server's IP address or name, then press Enter.

The My C&P! web server can be identified by its IP address or by a URL depending on how your domain name is configured with your ISP or internal DNS server. An IP address would be entered like "http://192.168.100.10" while a URL could be entered as "http://my.agency.com". The URL can be any name of your choosing.

- 3 Enter your web ID and password, then click Go.

If you're successfully connected you'll see the My Clients & Profits! home page. Your home page lists the functions that you have access privileges to use, such as clients or jobs. Clicking on a link opens a My Clients & Profits! web page.



**Starting the web server** Buttons to start and stop the My Clients & Profits! web server are found in the window's toolbar.

# How My Clients & Profits! Works

The My Clients & Profits! web server acts as a gateway between your shop's Clients & Profits database and any number of Internet Explorer or Netscape Navigator users—whether in the office (your “intranet”), working at home, in a client's conference room, or in a hotel room somewhere on the road.

My Clients & Profits! installs and runs just like the regular Clients & Profits software. It uses the same C&P Player, so using it will be familiar to anyone who's used Clients & Profits. My C&P! features an industry-standard HTTP server for publishing custom web pages that include real-time data from the Clients & Profits database. Users access My Clients & Profits! by entering the web server's address, or URL. The URL can be the computer's actual IP address (e.g., 192.168.100.55) or a custom domain name (e.g., “my.clientsandprofits.com”). In fact, the web address of the My C&P! can be any variation of the shop's domain name. The web server is started by opening the My C&P! application, opening your shop's C&P database from the file server, then choosing the Start Web Server menu command. Once the My C&P! web server has been started, it begins listening for incoming HTTP requests from web users.

Any web browser can access the My C&P! web server as long as the user has the right access privileges. Only authorized users can access the My Clients & Profits! web server, which share access privileges with the user list in Clients & Profits.

## How the web administrator manages My Clients & Profits!

Only existing C&P system managers can configure the My Clients & Profits! web server, including adding web users. Anyone can be added as a web user, including clients, vendors, freelancers, and contractors—all with specific access privileges to what they can and can't see and do. Any web user can be a web server **administrator** and make changes to the My C&P! server's preferences, monitor the server's status, and print web server reports. One web administrator (typically the Clients & Profits system manager) can be designated as the **webmaster**. The webmaster is the key contact for anything My C&P!-related. The webmaster's name and e-mail address appears on error pages (so that users can contact him or her about problems) and gets notified automatically via e-mail about web errors.

## How staffers, freelancers, clients, and vendors will use My Clients & Profits!

From a user's point-of-view, using My Clients & Profits! is even simpler. A user opens Netscape or Explorer then logs onto the My C&P! web server using a special URL (e.g., <http://my.clientsandprofits.com>). An introduce yourself page prompts them to enter their user ID and password. My Clients & Profits! instantly verifies the ID and password, then displays a personalized home page. This home page contains links to the various client, job, and costing features available to them, as well as links to company and industry news, a company calendar, and an optional online company handbook.

Staff members and freelancers have full access (within the limits of their access privileges, that is) to clients, jobs, time cards, expenses, and purchase orders. Clients see their own account information, jobs, and Client Job Status Report. Vendors see only their own purchase, insertion, and broadcast orders. Web administrators have the same access as staff members, but have links to monitor and manage the My Clients & Profits! web server remotely.

My Clients & Profits! will let any number of web-based users access the shop's database concurrently. To the database, the My Clients & Profits! web server looks like any other user on the network.

■ My C&P! takes up one of the database's user slots (for example, a 10-user version of Clients & Profits that also uses My C&P! will have 9 slots available for non web-based users).

## Padlocks, error checking

Unlike regular Clients & Profits users, web users don't have a full-time connection to the shop's database. This means they won't get padlocks that indicate record-locking, and losing the network connection can't damage the database. Instead, each request is a separate transaction that's received by the My C&P! web server, processed, then returned to the web page in the form of a web page. Because there is no full-time connection to the Clients & Profits database, there is no interactive error-checking when a user tabs from field to field. Error checking only occurs when the transaction is saved; if an error occurs (such as an invalid job number), the My C&P! displays an error page to the user explaining what was done wrong.

## Performance factors

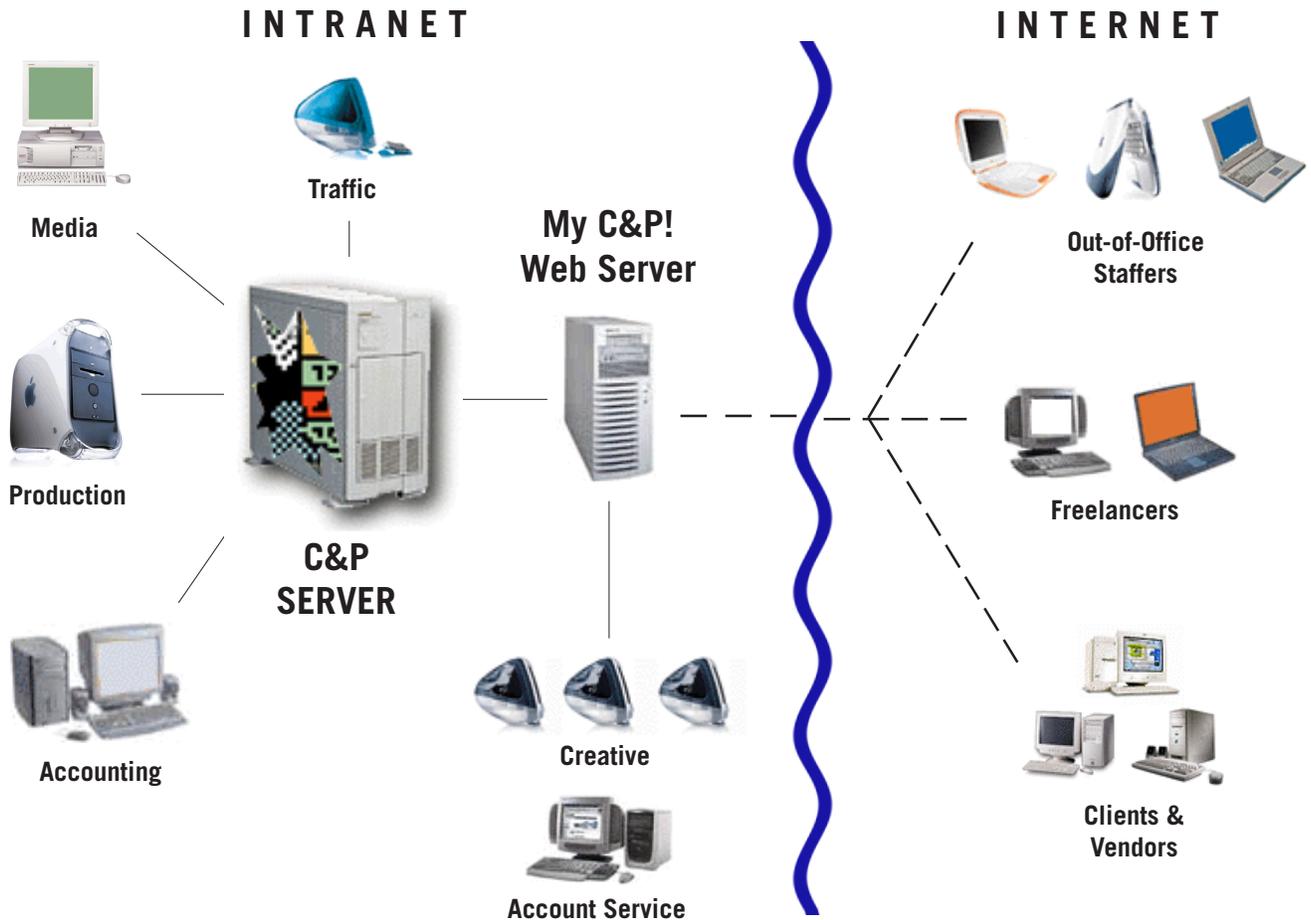
The performance of the My Clients & Profits! web server depends on three factors:

- (1) the speed of the internet connection,
- (2) the speed of the server running the My C&P! web server, and
- (3) the amount of traffic on the LAN and the Clients & Profits file server.

Stress in any of these areas will be noticeable to web users when they request a web page or wait for data to be submitted (although data-entry will be unaffected). Transactions from My Clients & Profits! have no greater or lesser priority over regular Clients & Profits users—everything is handled first-come, first-serve.

## The My C&P! Flow Chart

The My Clients & Profits! web server acts as a gateway between your shop's Clients & Profits 5.x database and any number of web-based users—whether in the office, working at home, at a client location or on the road.



**HOW IT WORKS:** A user opens their web browser then logs onto the server using the special web address, a personalized ID, and password. My C&P! verifies the user's access privileges then displays a custom home page. This page features links to the various client, job, and costing functions plus custom links to company and industry news, a company calendar, and an optional company handbook.

# My Clients & Profits! Features

## General

- My Clients & Profits! can be accessed inside or outside the office using any internet connection.
- My Client & Profits! is a stand-alone application that runs on a dedicated Power Mac or Windows-based PC; no additional software is needed.
- My Clients & Profits! is compatible with Internet Explorer, Safari, Navigator, and all other web browsers (works best with IE).
- My C&P! serves real-time data-driven web pages, user-created HTML pages, and Acrobat PDF files.
- Access to My C&P! is available only to authorized individuals with their own web account.
- Each web user has his or her own My C&P!-specific access privileges.
- The standard staff home page has customizable, user-defined links to functions they're allowed to use.
- Web accounts can be created for individual clients contacts, giving them access to only their own jobs, traffic, and invoices.
- Web accounts can be created for freelancers, allowing them to enter time and see work schedules.
- Vendors can be given web accounts to access their purchase orders.
- My C&P! web pages can be redesigned to fit the shop's corporate identity and visual style.
- My C&P! web pages can be customized in FrontPage, Dreamweaver, BBEdit, and any other web design and site management application.
- Graphics, text, and links can be added to or removed from any web page.
- Additional data fields can be added using special OMFLD database tags.
- Customizable help pages offer online assistance for using clients, jobs, time, expenses, POs, and traffic.
- A web-based version of the Clients & Profits In/Out board lets staff members track when they arrive and leave the office.
- Staffers can use My C&P! to mark themselves unavailable for the day, morning or afternoon.
- **My C&P! web pages have help links to a detailed online user guide.**

## User-defined home pages

- Separate home pages are provided for staff members and freelancers, webmasters, clients, and vendors.
- Custom company news pages can be created in FrontPage, GoLive, Dreamweaver, or any other HTML editor then served by the My Clients & Profits! web server. Staff members can keep up to date on new account wins, new hires, company milestones, and more from the shop's own private web site.
- Individual users can have completely custom home pages.
- Important dates of upcoming meetings, events, trade shows, parties and more are available to anyone in the company from their web browser. Any number of calendar pages can be created in any web page editor and served by My Clients & Profits!
- Custom industry news links keep the company's employees current on the big events in their industry, and all from a single home page.
- Important or useful links to outside web pages can be included on the

- My C&P! home page. Standard links include the leading industry publications (e.g., Adweek, Advertising Age, HOW, Print, Communication Arts), the Clients & Profits web site, and (just for fun) the American Advertising Museum's web site. These home page links are completely customizable.
- Staff members can read all about employment benefits, policies, standards, and holidays from the online company handbook. The My C&P! home page can be customized to display links to any number of company-created employee handbook pages. Access to the company handbook, as with the rest of My C&P!, is restricted to authorized users only. (Content not included.)
- Employees can download expense reports, payroll change requests, insurance, and other forms (either HTML pages or PDF files) any time they're needed. (Content not included.)
- Home page GIFs are easily interchangeable with your own graphics.
- Links to clients, jobs, daily job status, time card, etc. are available to users based on their access privileges.
- Lookup web pages show complete lists of clients, jobs, staff members, vendors, status codes, the task table, groups, purchase/insertion/broadcast orders, job type/spec sheets, and client projects.
- **Real-time access to company and personal calendars.**
- **Web users can add calendar entries to the personal and company calendar.**

## Clients

- The client web page features name, address, contact, and account information.
- The client page includes links to client contacts, billing info, budgets, the client diary, projects, stats, jobs, and invoices.
- New client diary entries can be added from My C&P!
- The Client Jobs page lists a client's open and closed jobs, including estimate, hours, billed, and unbilled totals.
- The Client Invoices page lists client's billing history, including unpaid invoices.
- New client projects can be added from My Clients & Profits!
- The Lookup Clients page lists all clients; clicking on a client number opens the Clients web page directly.
- **A client's contacts can be viewed and edited.**
- **Proposals can be viewed, added, edited, and printed.**

## Job Tickets

- The job ticket web page looks like the Job Ticket window in Clients & Profits, displaying the job's number, name, contacts, and tasks.
- Users can find jobs by number or use the "Lookup Jobs" web page.
- The job ticket web page features links to the job's specifications, work order, creative brief, estimate, schedule, job snapshot, diary, and change orders.
- Web users can open new jobs using job type/spec sheets.
- New tasks can be added to existing job tickets.
- Web users can edit a job's specs, work order, and creative brief.

- The start and due dates for a job’s scheduling tasks can be entered, reviewed, and updated from the Job Schedule web page.
- New jobs can be opened for any client, based on the user’s access privileges. If a new job is given a job type/spec sheet, My Clients & Profits! will copy the template’s tasks to the new job automatically.
- Estimates can viewed, edited, and approved/unapproved for any job.
- Printer-friendly estimate previews can be printed for any job.
- Change orders can be viewed, added, and deleted.
- A job’s production status, billing status, status notes, next steps, traffic assignments, and milestones can be updated from the Traffic web page.
- Web users can view the task’s billings, POs, and job costs.
- The Job Snapshot web page shows authorized users a job’s estimate remaining, hours worked to date, billings, and profit so far.
- Jobs can be found by client, job name, project, etc.

### Production and Traffic

- The shop’s Daily Job Status report can be viewed by production status or billing, just like the regular report printed from Clients & Profits. Users with the appropriate access privileges can update a job’s status codes and status notes any time.
- The web-based Weekly Traffic report looks like the report printed from Clients & Profits.
- Creatives and production staff can review the week’s deadlines from job schedules in their Weekly Task Planner web page any time.
- The web-based Work To Do page lets creative and production staff keep track of unfinished job tasks for any range of start dates or due dates.
- The Daily Job Status and Weekly Traffic reports can now show jobs by billing status.
- Both clients and staff members can use the web-based Client Job Status report to track a client’s open jobs.
- **The Job Timeline can be viewed for one job at a time.**
- **Opened jobs can be tracked using the Production Planner.**

### Job Costing

- Production, creative, and account service staffers can find and review purchase orders, broadcast orders, and print insertion orders.
- Production managers can approve new purchase orders online. *Not available for Clients & Profits Classic users.*
- Staff members can enter their hours worked on a daily Time Card web page.
- Lookup lists on time cards are interactive; clicking on a job or task copies it to the time card automatically.
- Clients & Profits’ budget alerts can now be triggered in My C&P! in POs, time, and expenses.
- Purchase orders can now be added from My Clients & Profits!
- Time cards have a stopwatch timer to automatically track hours worked.
- Time cards have a “show my tasks” link that lists the user’s unfinished jobs and tasks.
- Users with the right access privileges can approve/unapprove POs.

- Time from previous days can be reviewed and changed as needed, based on the user’s access privileges.
- Production and creative staff working on location can enter time each day, keep productivity and job cost reports up-to-the-minute accurate and timely.
- Staff members can enter daily expense reports for travel, parking, in-house supplies, and more without manual expense forms.
- Expenses for internal charge items such as CD duplication, output, slides, and more without rekeying. *Not available to C&P Classic users.*

### Administration and security

- A Web Server Status window constantly monitors the web server’s current activity and its connected users (by IP address), producing a hits-per-hour graph. This window makes it easy for webmasters to check the server’s performance at a glance.
- My Clients & Profits! will automatically close then reopen the database at selected times to accommodate the nightly backups.
- The My C&P! web server can be configured as a service under Windows 2000/XP.
- The web server port 80 can be user-defined in Preferences.
- Cookies are used to automatically log in users throughout the day.
- The My Clients & Profits! can be set to automatically start listening for hits every time the application is opened.
- My Clients & Profits! supports multiple webmasters.
- Webmasters can monitor and manage the My C&P! server remotely from home or on the road from any internet connection.
- A My C&P! webmaster can be notified automatically via e-mail on failed attempted log-ins and invalid passwords.
- New user accounts can be created remotely from a web browser.
- The server’s activity log can be printed remotely from a web browser.
- Temporary “guest” access is not allowed to prevent access to My C&P! from anonymous web users.
- Web accounts can be automatically created for current Clients & Profits users, eliminating rekeying.
- Users cannot create their own web accounts, and cannot choose their own passwords (which are required); both are performed by the webmaster.
- User-based web-only access privileges enhance the standard privileges built into Clients & Profits.
- Web accounts can be temporarily suspended for security reasons.
- A web account is automatically suspended after 3 bad login attempts.
- A detailed activity log keeps track of every kind of hit to the My C&P! web server, including each hit’s date, time, user ID, IP address, and event/action.
- The web log can be automatically archived to a text file every Monday.
- Server reports can be printed to analyze the performance and utilization of My Clients & Profits! based on log entries.
- Your company’s logo can appear at the top of each web page by simply replacing the *my\_logo.gif* graphic with your own 175x58 pixel graphic.

# Installing My Clients & Profits! on Windows

The My Clients & Profits! software installs like the regular Clients & Profits software—simply insert the CD then follow the prompts. My Clients & Profits! uses a special web-enabled version of the C&P Player. The My Clients & Profits! web server won't run with standard versions of the C&P Player. There is no client-side software to install and nothing to set in the web browser. Once installed, anyone using Internet Explorer (any version), Netscape Navigator, or any other browser can start using My Clients & Profits! immediately.

## Preparing the server for My Clients & Profits!

My Clients & Profits! requires a Pentium 4 PC (1.6 ghz or faster) running Windows 98/NT/2000/XP with 128mb of RAM, 15mb of free disk space, an internet connection with a fixed IP address, and an Ethernet connection to file server that contains the Clients & Profits database. Windows XP Home is ideal for small web servers that support up to 10 concurrent users. Sites with higher volumes should use Windows 2000 or Windows XP Professional. Also, my Clients & Profits! can run as a "service" on Windows 2000/XP (see page 36).

- My Clients & Profits! is a self-contained HTTP server, so no extra software is required. It does not need "server" or "enterprise" versions of Windows 2000 or Windows XP to operate. My C&P! needs only "workstation" versions of Windows.

- The PC should be dedicated to running My Clients & Profits! and **not** shared with other web, mail, or file servers.

- To prevent performance problems, **do not** run My Clients & Profits! on the same server that also stores the Clients & Profits database.

The web server PC should have a permanent network connection to the Clients & Profits file server. The shop's C&P database will be opened automatically whenever the My Clients & Profits application is started. If the C&P database is not available, My Clients & Profits! won't run.

The web server PC must have a **fixed IP address** that is accessible both inside and outside the office. The server PC should be accessible with a URL (e.g., my.yourdomainname.com). Users will use My C&P! by entering this URL. Contact your ISP to establish a URL for the My C&P! web server.

## To install the My Clients & Profits! software

- Before installing My Clients & Profits!, be sure that the computer does not contain any prior versions of Clients & Profits. Different versions of C&P can conflict with the My C&P! web server and cause system problems.

1 Insert the My Clients & Profits! CD-ROM into your computer.

The Windows installer will start up automatically.

2 Click on the Install Software option when prompted.

The Installer will prompt you to choose a destination for the new My C&P folder. The top level of your C: drive is chosen automatically, but any drive can be chosen.

3 Follow the prompts to finish the installation.

A My Clients & Profits! folder will be copied to your hard disk. Inside it you'll find a special web-enabled version of the C&P Player, the My Clients & Profits! application (named My Clients & Profits! 5.0.lbr), an HTML folder that contains the My C&P! web pages, and other program files.

4 Restart the computer.

Once the software is installed, My Clients & Profits! needs to be configured.

## To start the My Clients & Profits! web server application

1 Choose Start > Programs > My Clients & Profits!

My C&P! is not a plug-in application, so can't be run together with Clients & Profits; it must be run as a stand-alone application. The first time My Clients & Profits! is started, you will be prompted to serialize the C&P Player.

2 Enter your name, company, and current Clients & Profits serial number (the same one you use for Clients & Profits), then click OK.

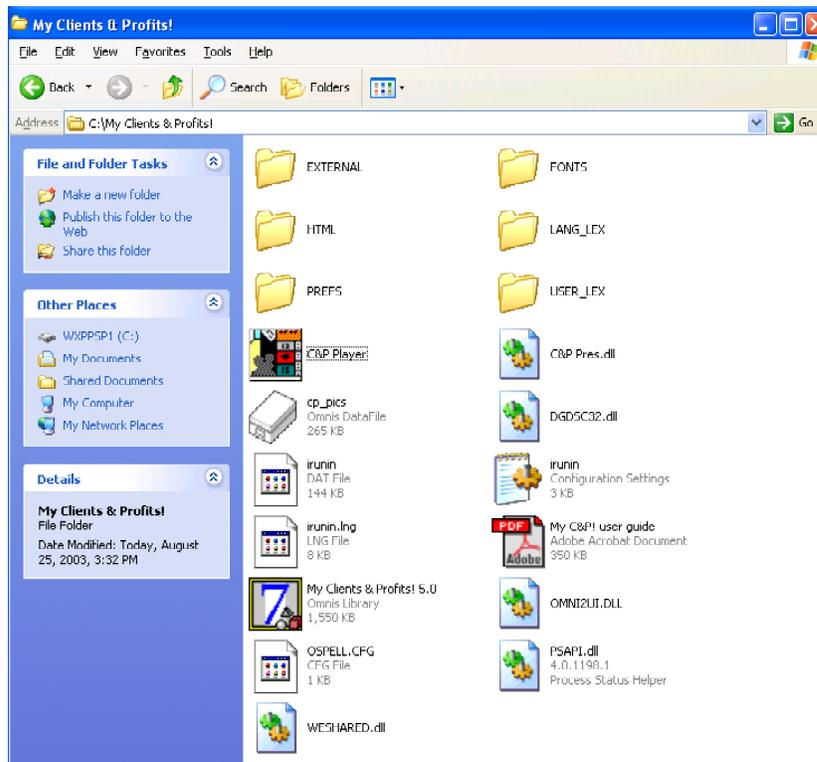
3 Find and open your Clients & Profits database from the file server.

4 Enter your Clients & Profits user ID and password when prompted.

You must be a regular Clients & Profits user to start the My Clients & Profits! web server. Once the web server is opened, access to it by other users is controlled by a separate web user list (see page 18). You'll then see the My C&P! Web Server Status window. Before the web server can be started, the server's preferences and users must be entered.

- My Clients & Profits! can only access and serve one database at a time. If your shop uses multiple databases that need to be web-accessible, you'll need separate web servers with unique fixed IP addresses for each database.

## Inside the My Clients & Profits! for Windows folder



**EXTERNAL** The External folder contains software extensions used by the Clients & Profits application.

**FONTS** The Fonts folder contains backup copies of the cross-platform fonts used by My Clients & Profits! These fonts are automatically copied to the Windows system folder when My Clients & Profits! is installed.

**HTML** The HTML folder contains the web pages and graphics served by My Clients & Profits!

**LANG\_LEX** The Lang\_lex folder contains the files used by the Clients & Profits spell checker. The spell checker is only used in the My C&P! application; it doesn't spell check web pages.

**PREFS** The Prefs folder stores a text file containing the web server's MIME types, which tell My C&P! how to serve different types of web files.

**USER\_LEX** The User\_lex folder contains a custom spelling dictionary.

**C&P Player** The C&P Player is the "engine" that runs the My Clients & Profits! application. This version is web-enabled, which allows the C&P database to be shared via HTTP.

**cp\_pics** The cp\_pics.DF1 file contains the graphics used in the My C&P! application's window toolbar buttons.

**irunin.dat, irunin, irunin.lng** These files are used by the installer application.

**My C&P! 5 user guide** This Acrobat file is a two-page introduction to the My Clients & Profits web server designed for users.

**My Clients & Profits! 5.0** This is the My Clients & Profits! web server application. It is opened and run by the C&P Player to provide web access to your Clients &

Profits database.

**DGDSC32.dll, PSAPI.dll, Omni2ui.dll** These are system files used by the C&P Player.

**Ospell.cfg** This is a system file used by the built-in spell checker.

**WESHARE.dll** The WESHARE file is a system file used in part to web-enable the C&P Player.

**MYSERV** These files are used by Windows 2000/XP to automatically open My Clients & Profits as a service (see page 37).

# Installing My Clients & Profits! on a Macintosh

The My Clients & Profits! software installs like the regular Clients & Profits software—simply insert the CD then follow the prompts. My Clients & Profits! uses a special web-enabled version of the C&P Player. The My Clients & Profits! web server won't run with standard versions of the C&P Player.

The My Clients & Profits! web server is self-contained; there is no client-side software to install and nothing to set in the web browser. Once installed, anyone using Netscape Navigator or Internet Explorer can start using My Clients & Profits! immediately.

## Preparing the Mac server for My Clients & Profits!

My Clients & Profits! requires a Power Mac, iMac, or eMac (600mhz or faster) running Mac OS 8.6 or later (including Mac OS 9.x and Mac OS X v10.2 or later), 128 mb of RAM or greater, 15mb of free disk space, an internet connection with a fixed IP address, and an Ethernet connection to the file server that contains the Clients & Profits database.

- My Clients & Profits! runs on Mac OS X as a “classic” application.
- My Clients & Profits! is a self-contained HTTP server, so no extra software is required. It does not need AppleShare, Personal Web Sharing, or other system software to operate.
- The Mac should be dedicated to running My Clients & Profits! and **not** shared with other web, mail, or file servers.
- To prevent performance problems, **do not** run My Clients & Profits! on the same server that also stores the Clients & Profits database.

The web server Mac should have a permanent network connection to the Clients & Profits file server. The shop's C&P database will be opened automatically whenever the My Clients & Profits application is started. If the C&P database is not available, My Clients & Profits! won't run.

The web server PC must have a fixed IP address that is accessible both inside and outside the office. The server PC should be accessible with a URL (e.g., my.yourdomainname.com). Users will use My C&P! by entering this URL. Contact your ISP to establish a URL for the My C&P! web server.

## To install the My Clients & Profits! software

■ Before installing My Clients & Profits!, be sure that the computer does not contain any prior versions of Clients & Profits. Different versions of C&P can conflict with the My C&P! web server and cause system problems.

- 1 Insert the My Clients & Profits! CD-ROM into your computer.
- 2 Double-click on the My C&P! installer.

The Installer will prompt you to choose a destination for the new My C&P folder. The top level of your hard drive is chosen automatically, but any volume can be chosen.

- 3 Follow the prompts to finish the installation.

A My Clients & Profits! folder will be copied to your hard disk. Inside it you'll find a special web-enabled version of the C&P Player, the My Clients & Profits! application (named My Clients & Profits! 5.0), an HTML folder that contains the My C&P! web pages, and other program files.

- 4 Restart the computer.

Once the software is installed, My Clients & Profits! needs to be configured.

## To start the My Clients & Profits! web server application

- 1 Double-click on the My Clients & Profits! web server application.

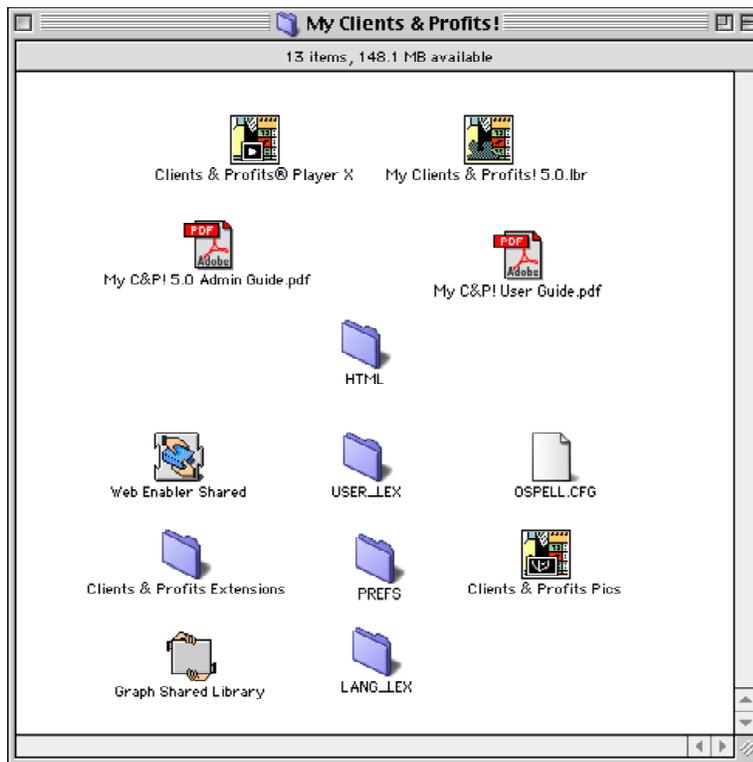
Opening the My Clients & Profits! application automatically launches the C&P Player. My C&P! is not a plug-in application, so can't be run together with Clients & Profits; it must be run as a stand-alone application. The first time My Clients & Profits! is started, you will be prompted to serialize the C&P Player.

- 2 Enter your name, company, and current Clients & Profits serial number (the same one you use for Clients & Profits), then click OK.
- 3 Find and open your Clients & Profits database from the file server.
- 4 Enter your Clients & Profits user ID and password when prompted.

You must be a regular Clients & Profits user to start the My Clients & Profits! web server. Once the web server is opened, access to it by other users is controlled by a separate web user list (see page 18). You'll then see the My C&P! Web Server Status window. Before the web server can be started, the server's preferences and users must be entered.

■ My Clients & Profits! can only access and serve one database at a time. If your shop uses multiple databases that need to be web-accessible, you'll need separate web servers with unique fixed IP addresses for each database.

## Inside the My Clients & Profits! for Macintosh folder



**Clients & Profits Player X** The C&P Player is the "engine" that runs the My Clients & Profits! application. This version is web-enabled, which allows the C&P database to be shared via HTTP. This version of the Clients & Profits Player runs on Mac OS 9 and in the "classic" mode on Mac OS 10.2 or later.

**My Clients & Profits! 5.0** This is the My Clients & Profits! web server application. It is opened and run by the C&P Player to provide web access to your Clients & Profits database.

**My C&P! 5.0 Admin Guide** This Adobe Acrobat file contains late-breaking information about installing, starting, and running the My Clients & Profits! web server.

**My C&P! 5 user guide** This Acrobat file is a two-page introduction to the My Clients & Profits web server designed for users.

**HTML** The HTML folder contains the web pages and graphics served by My Clients & Profits!

**Web Enabled Shared** This file adds the TCP/IP, HTTP, FTP, and SMTP functions to the Clients & Profits Player.

**USER\_LEX** The User\_lex folder contains a user's custom spelling dictionary.

**LANG\_LEX** The Lang\_lex folder contains the files used by the Clients & Profits spell checker. The spell checker is only used in the My C&P! application; it doesn't spell check web pages.

**Clients & Profits Extensions** The Extensions folder contains software extensions used by the Clients & Profits Player.

**PREFS** The Prefs folder stores a text file containing the web server's MIME types,

which tell My Clients & Profits! how to serve different types of web files.

**Graph Shared Library** The Graph Shared Library file is used by the Clients & Profits Player to draw the web usage graph on the Server Status window.

**Clients & Profits Pics** The cp\_pics.DF1 file contains the graphics used in the My Clients & Profits! application's window toolbar buttons.

# Setting My C&P! Preferences

Key functions of the My Clients & Profits! web server are controlled by the system's preferences, which are user-defined. My C&P! web server administrators can change these settings and options to improve the server's accountability and security. One or more My C&P! users who are defined as web administrators can change the server's preferences as needed, anytime.

■ The server's preferences can't be changed from My C&P! while the web server is running. If the server is running, you'll need to stop it temporarily while you make your changes. However, most preferences can be changed remotely using a web browser without stopping the server if the *allow remote administration* setting is enabled.

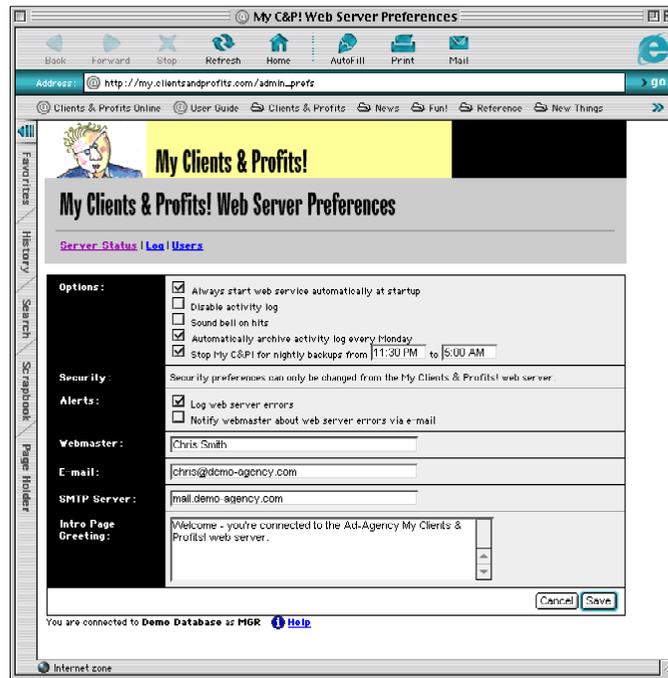
## Remotely managing the My C&P! web server

The server's preferences can be changed from the My Clients & Profits! application or remotely from any web browser. To remotely change preferences, the *allow remote administration* option must be checked. This setting allows webmasters to check and update the server's preferences from home, a trade show, a client's site—anywhere there's an internet connection.

■ There is an inherent security risk to allowing the My C&P! server's preferences to be changed remotely. While the server's preferences can only be changed by a web administrator (whose user ID and password are assumed to be private), there's no guarantee that someone couldn't steal the administrator's account information and access the server's settings. For this reason the server can't be started or stopped remotely; instead, starting and stopping My Clients & Profits! can only be done from the application itself.

For better security, remote administration via the internet can be limited to one specific, preset IP address. The *restrict remote administration* option prevents any computer except the one with the preset IP address from monitoring and managing the My C&P! server remotely. This setting

ensures that only the designated web administrator's computer can remotely manage My Clients & Profits! However, this setting only works for a computer with a fixed IP address, such as a home computer connected using a DSL or cable modem. Laptops and computers using a dial-up modem connection have dynamic IP addresses that change with each new connection, so they won't have the same address every time. They can't be used for remote administration if the *restrict remote administration* setting is enabled.



■ For security reasons, the web server can't be started or stopped remotely.

## To change the My Clients & Profits! web server preferences

1 Choose My Clients & Profits! > Preferences link from the Web Server Status window.

The Preferences window opens, displaying the My Clients & Profits! web server's current settings and options.

2 Make any changes, then click Save.

Any changes you make take affect instantly once the web server is started.

## To change the My C&P! web server preferences from a web browser

- 1 Open your web browser and connect to My Clients & Profits!
- 2 Enter your user ID and password, then click Go.
- 3 Click the Preferences link in the Web Admin section of your home page.

The web server preferences home page opens, displaying the server's current settings and options.

4 Make any changes, then click Save.

**Changing My C&P! preferences anywhere** If the *allow remote administration* is enabled, web administrators can change the My Clients & Profits! web server preferences from any browser.

## The My C&P! Preferences window

**My Clients & Profits! Preferences**

**My C&P! web server preferences:**

**Options:**

- Always start web service automatically at startup
- Sound bell on hits
- Disable activity log
- Automatically archive activity log every Monday
- Automatically stop My C&P! for nightly backups

Stop at: 11:00 PM Restart at: 1:00 AM

**Security:**

- Notify webmaster of failed logins via e-mail
- Disable web accounts after 3 bad passwords
- Notify webmaster after 3 bad password attempts via e-mail
- Allow remote administration

Restrict remote administration to IP address: 192.168.100.247

**Alerts:**

- Log web server errors
- Notify webmaster about web server errors via e-mail

Use my\_script.js from: http://www.clientsandprofits.com

Port number: 80

Webmaster: Chris Smith E-mail: chris@demo-agency.com

SMTP server: mail.demo-agency.com

Intro greeting: Welcome to My Clients & Profits!

Table font/size: <font face="Geneva,Verdana" size="-2" >

Cancel Save

1 The **always start** option tells My C&P! to check for hits as soon as it's started. (If unchecked, My C&P! won't serve pages until the web administrator clicks the "start" button.) The **sound bell on hits** option makes My C&P! beep after every hit. The **disable activity log** option stops My C&P! from tracking how people use the server, which improves performance by reducing the system's overhead caused by logging. The **automatically archive activity log every Monday** purges the web log weekly (see page 25).

2 Use the **automatically stop** option to accommodate the nightly backup. My C&P! will stop, close the database, then reopen the database and restart the web server at user-defined times.

3 The **notify webmasters of failed logins** option e-mails the webmaster every time someone tries to access My C&P! with an unknown user ID or password. The **disable web accounts** option will suspend any user who enters an invalid password three times. The **bad password** option sends an

e-mail notification when a valid user ID tries to enter an unknown or incorrect password.

4 The **allow remote administration** option lets web administrators monitor the server's status, add web user accounts, and check the server's log from any web browser. If the *allow remote administration* option is checked, a web administrator can be restricted to accessing the server from a specific computer at a fixed **IP address**. To allow a web admin to access My C&P! anywhere, leave it blank.

5 The **web log server errors** tracks TCP/IP errors on the activity log. The **notify webmaster about server errors** option automatically e-mails the webmaster about server error. These two settings are only needed to troubleshoot server problems.

6 My C&P! uses a javascript based file to store scripts for displaying data on web pages. The *my\_script.js* file is normally

accessed from the C&P web site, but can be served from your own site. For more information, see page 33.

7 The **port number** on which My C&P! listens for hits can be changed from 80, which is the default for web servers, to any port number.

8 Enter the name and e-mail address of the My C&P! **webmaster** here. Web users can send questions, problems, and comments to this webmaster easily from links included on selected web pages. While there can be many My C&P! web administrators, there is only one designated webmaster. The **SMTP server** is either the name or IP address of your mail server. If you don't want to get automatic e-mail, leave it blank.

9 This standard **greeting** appears on the introduce page whenever someone tries to access My Clients & Profits!

10 The **table font/size** setting is HTML code that formats cells on CGI-generated tables, such as a list of job tasks.

# Setting up My C&P! Users

Only authorized My Clients & Profits! web users can access the shop's database. Any staff member, freelancer, client, or vendor can be set up as a My C&P! user—all they need is a valid web account, ID, and password.

All current Clients & Profits users can also be web users, allowing them to work with clients, jobs, time, and more from either their Clients & Profits application or the My C&P! web server. Select clients can have their own My C&P! web account, letting them see their own jobs, costs, and job status (but not for other clients, of course). Vendors can be allowed to see their purchase orders. Also, freelancers can access their jobs, tasks, and deadlines. All accounts can be given expiration dates to keep users from accessing My C&P! after a certain date. There is no guest access to My C&P!

Web users cannot create their own accounts online; instead, accounts can only be created by a My C&P! web administrator. Web accounts can be added from the My C&P! server application or remotely from a web browser if the *remote administration* preference is enabled (see pages 16-17).

## To view a list of My C&P! users

1 Choose Setup > Users, Access & Passwords or click the **users** button from the Server Status window.

The Users window opens, displaying the web accounts for existing My C&P! users. Since web accounts are not created automatically when My C&P! is first installed, the list will be empty.

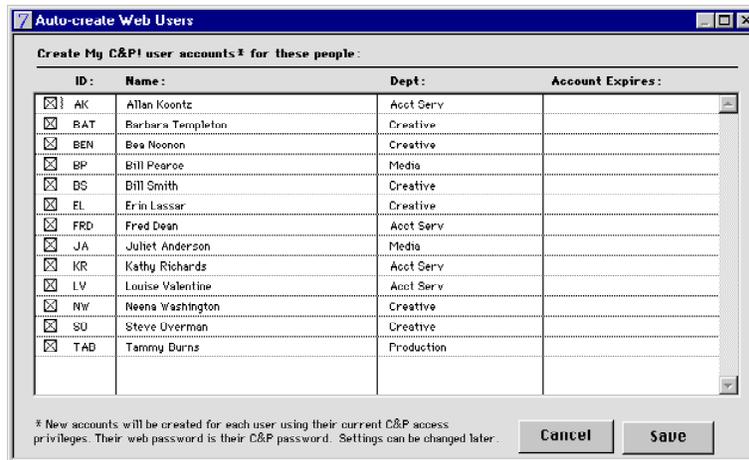
## To automatically create web accounts for current C&P users

1 Choose Edit > Auto-create Web Users or click the **auto-create** button.

The Auto-create Web Users window lists the shop's current Clients & Profits staff members who aren't already My C&P! users. Some or all staffers can be given access by clicking on individual user names.

2 Click on the checkbox to create a My C&P! web account for any user, then click Save.

A new My C&P! web account will be created automatically for each Clients & Profits selected user. The user's Clients & Profits information is copied to My C&P! automatically, so there's no rekeying of their ID, name, and access privileges—except for their web password.



**Create web accounts automatically** The Auto-create window is a shortcut for creating My C&P! web accounts for one or more existing Clients & Profits users. The window lists all current C&P users who don't have access to My Clients & Profits! Clicking the checkbox automatically creates a web account for the selected users.

Passwords are required to access the web server. For better security, users can't choose their own passwords; they can only be changed by the web administrator. All new user accounts are given the temporary password of **temp**. New My C&P! users will enter their initials and the password "temp" until a web administrator assigns a permanent web password to each new user. To automatically create a random password, click the Create Password button.

## To add a new web user

1 Choose Edit > Add New Web User or click the **add** button.

2 Enter the web user's account information and access privileges (see page 20).

3 Click Save.

## To edit a web user's access privileges

1 From the Users window, double-click on a web user.

2 Make your changes then click Save.

## To delete a web user's account

1 From the Users window, click once on a web user.

2 Choose Edit > Delete Web User or click the **delete** button.

## The My Clients & Profits! Users window

1

2

3

4

5

6

7

ID:	Name:	Kind:	Last Access:
AK	Allan Koontz	Staffer	08/15/2003 12:06:22 PM
BAT	Barbara Templeton	Staffer	03/22/2002 9:03:04 AM
BEN	Dea Noonon	Staffer	00/01/2003 3:13:00 PM
BP	Bill Pearce	Staffer	--
BS	Bill Smith	Staffer	--
CL	Cathy Lewis	Client	03/13/2002 10:08:43 AM
CM	Charles Meeker	Staffer	--
DED	Debbie Downs	Staffer	--
ELL	Erin Lassar	Staffer	08/15/2003 12:05:09 PM
FRD	Fred Dean	Freelancer	04/25/2002 10:01:18 AM
GG	Gayle Greene	Freelancer	04/23/2002 3:35:00 PM
JA	Juliet Anderson	Staffer	08/01/2000 8:38:35 AM
KM	Kerry Mooney	Staffer	12/23/2000 1:51:37 AM
KR	Kevin Richards	Staffer	05/30/2000 10:34:50 AM
LY	Louise Valentine	Staffer	--
MCR	Mary Meyers	Staffer	09/08/2000 8:29:09 AM
MG	Megan Goode	Staffer	09/27/2000 12:33:02 PM
MGR	System Manager	Staffer	08/19/2003 3:07:54 PM
ML	Mark Lopez	Staffer	--
MD	Michael Ober	Staffer	12/15/2000 2:58:08 PM
NP	Noah Pezzeli	Vendor	03/26/2002 4:42:31 PM
NW	Neena Washington	Staffer	07/11/2000 1:51:31 PM
RB	Rhonda B.	Staffer	--

1 Web user accounts can be added, edited, deleted, and printed by clicking these toolbar buttons. Clicking a button is identical to choosing an Edit menu command.

2 The **auto-create** button is a shortcut that creates My C&P! web user accounts for one or more existing Clients & Profits users. Clicking this button opens the Auto-Create window, which lists everyone who already uses Clients & Profits. If selected, the account information for each user will be copied to a new My C&P! web user account automatically, including access privileges. Each new user account is given the temporary web password of "temp".

3 To jump to a web user's access privileges window, enter the user's initials then click the **Find** button.

4 My Clients & Profits! allows different kinds of users to access the shop's C&P database, including staff members, freelancers, clients, and vendors. Each web user is identified as a staffer, freelancer, client, or vendor. Since each individual web user has his or her own account, the My C&P! user list can become very long. The **show** menu filters the user list to display only one kind of user at a time, making it easier to track who can use My Clients & Profits! Choose "all" to display all web users.

5 The **user ID** and **name** identify each My C&P! web user. Each web user needs a unique ID, such as initials, before he or she can access My Clients & Profits! Existing Clients & Profits users are identified by the same initials they use in the C&P database.

6 Click the **access privileges** button to edit a web user's access privileges. These privileges determine just what someone can see and do with My Clients & Profits!

7 The user list displays all or some of the My Clients & Profits! web users. It can contain names of staff members, freelancers, clients, or vendors. Double-click on a user to edit his or her access privileges.

## My C&P! Access Privileges

1 Each web user must have a unique **ID**. The ID will be used for the user to log onto My Clients & Profits! if the web user is also a Clients & Profits user, then the web ID is identical to their C&P ID (which is usually their initials). The ID field is limited to 10 characters, so a long value like an e-mail address can't be used as an ID.

2 Each My C&P! user is identified by **kind**—*staffer, freelancer, client, or vendor*. This setting determines which pages are available to users. Clients have their own

custom home page, and are limited to seeing only their jobs. Vendors can only see their POs. Freelancers have limited access to jobs and traffic.

3 Any account with the **web server administrator** option enabled can start, stop, monitor, and manage the My C&P! web server. The web server administrator also typically Clients & Profits system managers. There can be multiple web administrators.

4 The web user's **password** is assigned by the web administrator. For better security, users can't choose their own passwords — or change them later. A user password is required. Click the **Create Password** link to automatically assign a random password. The password will be automatically encrypted when the user's access privileges are saved. The user's password can be set to **expire**, preventing access to the My Clients & Profits! server after a specified date (which is a useful option for temporary staff).

## My C&P! Access Privileges

**5** The **no web access after** option prevents a web user from accessing My C&P! after a selected date. Use this for temporary employees or contractors who should only use My C&P! for a limited time.

**6** The web administrator can use the **account suspended** option to temporarily prevent a web user from using My C&P! A user's web account is automatically suspended after 3 bad login attempts if the *disable web accounts after failed logins* setting in Preferences is checked (see page 17).

**7** The **welcome message** is an optional greeting that appears on each user's home page.

**8** The **allow web access to** settings determine which pages a web user can see and use. These settings only allow a user to see a page; what they can or can't do with it is based on their access privileges in Clients & Profits (e.g., adding job tasks, a PO limit, seeing costs, etc.).

Selecting the **clients** option allows a web user to see the client's account information as well as client contacts, billing information. The **job tickets** access privileges determine which production, estimating, and traffic functions are available to a My Clients & Profits! web user. If a My C&P! user is a staff member, then his or her access privileges to jobs is

copied here. Web users who are clients have no automatic access to jobs; instead, the web administrator needs to specifically decide which functions the user can see by checking on the various options.

**9** Click the **All** button to make all of the options available to the web user.

**10** Web users can be restricted to seeing one particular client and its jobs or vendor and its POs using the **restricted to** option. When a client or vendor number (or code) is entered here, the web user won't be able to see any other client's and vendor's data. This option is required for web users who are clients or vendors. It can be a useful option for web users who belong to exclusive account teams. Client and vendor numbers are available for quick reference using the Lookup menu.

**11** Each user can have a completely **custom home page** (see page 37). When a custom home page is specified in a user's web account, My C&P! displays it instead of the standard home page whenever that user logs in. The custom home page needs to be created first, then selected by clicking on the **Get Page** button.

# Running the My C&P! Web Server

Once the My Clients & Profits! server software is installed, web service can be started immediately. (There is no client-side software to install and nothing to set in the web browser. Anyone using a web browser can access My Clients & Profits! immediately.)

There are two steps to starting the My Clients & Profits! web server: (1) launch the My C&P! application then (2) start the web server.

The My C&P! server application won't start listening for requests, or hits, from web users until web service has been started. This gives the web administrator a chance to update the user list, review the activity log, and update preferences before web users start accessing the server.

■ Opening the My Clients & Profits! application doesn't automatically start the web server unless the *always start web service at startup* option is enabled in Preferences. When this option is enabled, My C&P! will start listening for hits as soon as the server application opens (for more information on setting preferences, see page 16).

■ The My Clients & Profits! web server can be set to automatically close the database at a specified time each evening to accommodate the nightly backup. The web server will stop listening for hits, but doesn't actually shut down. Instead, My C&P! waits until a specified time then reopens the database and restarts the server. Clicking the *automatically stop My C&P! for nightly backups* preference sets the close and reopen time to 11 pm and 5 am. The close time can't be set before 5:00 pm or after 12:00am. The reopen time can't be set after 12:00 am or before 10:00 am.

## To start the web service

1 Choose My Clients & Profits > Start Web Server or click the **start** button.

Starting the web service resets the Web Server Status window: the Today's Activity list, the Connected User list, and the Hits Per Hour graph. As soon as web users start logging onto My Clients & Profits! you'll see the hits reflected on this window.

The Web Server Status window usually remains open while My Clients & Profits! is running, making it easy for web administrators to monitor the server's usage and performance at a glance.

## To stop the web service

1 Choose My Clients & Profits > Stop Web Server or click the **stop** button.

Stopping the web service stops My Clients & Profits! from listening for hits from web users.

■ If a web user tries to access My Clients & Profits! when it isn't running, they'll get a "a connection failure has occurred" error from their web browser. It may take up to one minute for the browser to realize the server's not running and show the error message.

## Making changes to the My Clients & Profits! web server

The My Clients & Profits! web server doesn't have to be stopped to make changes to users, preferences, or the activity log. All of these functions can be accessed without interrupting web service.

## To monitor the web server's status

If the My C&P! Web Server Status window isn't opened, choose My Clients & Profits! > Web Server Status. The Server Status window displays the server's recent activity and connected users.

■ The My C&P! web server can also be monitored remotely from a web browser if the *allow remote administration* preference is enabled. This setting allows a web administrator to view the server status, activity log, user list, and preferences web pages from any internet connection.

## To reset the My Clients & Profits! web server

Resetting the My C&P! server clears the Today's Activities list, Connected Users list, and Hits-Per-Hour graph. It does not stop the web server or affect whatever work a connected user is doing. Starting the web server automatically resets the server's stats. My C&P! only needs to be manually reset each morning so that the Server Status stats are cleared for the new day's work—and only if My C&P! wasn't stopped the night before.

## Looking up clients, vendors, staff members, etc.

For easy reference, lookup lists for clients, jobs, vendors, staff members, and more can be opened by the web administrator from the My Clients & Profits! application using the Lookup menu.

## To quit My Clients & Profits!

1 Choose File > Quit.



The main menu All of the key functions of My C&P! are available from the main menu.

## The My C&P! Web Server Status window

1 2 3 4 5 6

My Clients & Profits! Web Server Status

start stop users prefs log print reset

Database: Y:\C&P\AD\_AGENCY.DF1 7

8 Status: Running Started: 04/18/04 9:07 AM

Today's Activity: Clear

Date:	User:	Action:	Hits:
04/18/2004 4:27:33 AM	JA	Add job diary entry for SED-122	1894
04/18/2004 4:27:31 AM	MGR	View client RET	
04/18/2004 4:27:28 AM	KR	Add time for 4/27/04	
04/18/2004 4:27:26 AM	KR	Edit traffic for ITP-128	
04/18/2004 4:27:20 AM	FRD	Add job diary entry for SED-122	
04/18/2004 4:27:17 AM	FRD	Edit job specs for ITP-222	24
04/18/2004 4:27:16 AM	MG	View client diary for SED	

9

Connected Users: Disconnect user 10

Name:	Address:	Last access:
Kathy Richards	192.128.100.44	04/18/2004 3:59:19 AM
Fred Dean	192.128.100.41	04/18/2004 4:17:03 AM
Megan Goode	192.128.100.88	04/18/2004 4:07:49 AM
Barbara Templeton	203.122.91.100	04/18/2004 3:48:11 AM
Juliet Anderson	192.128.100.12	04/18/2004 4:27:33 AM
Louise Valentine	192.128.100.08	04/18/2004 4:13:29 AM
Kerry Mooney	192.128.100.36	04/18/2004 3:16:30 AM
Sam Gillis	206.200.38.44	04/18/2004 3:46:22 AM

11 Hits per hour: Clear

12 Current Event: Listing jobs for Jobs lookup list for KR

1 The **start** and **stop** buttons control the My Clients & Profits! web server. Clicking the Start button tells My C&P! to begin listening for requests, or hits. Clicking the Stop button stops the server, but leaves the My C&P! application running.

2 Clicking the **users** button opens the My C&P! users window, where web user accounts can be added, edited, and deleted.

3 Click the **prefs** button to change the My Clients & Profits! web server's preferences.

4 Clicking the **log** button opens the My Clients & Profits! activity log.

5 Click the **print** button to print web server performance and utilization reports.

6 Clicking the **reset** button clears the data on the Web Server Status window,

including the day's activities, currently connected users, and hits-per-hour graph. Use the Reset function to start a new set of daily statistics.

7 The **database** name shows the name and location (i.e., file server) of the Clients & Profits database which is being served by My Clients & Profits!

8 The web server's current **status** tells you what the My Clients & Profits! system is doing right now. The typical status is "Running" while it waits for requests from web users.

9 The **today's activity** list displays the day's most recent hits to the web server. Hits, or requests from users, are listed chronologically, newest ones first. Each hit shows its date and time, the web user who made the request, and what action occurred. This list can get very long.

Clicking the Clear button erases the list without actually deleting the log entries.

10 The **connected users** list shows the names of recent web users. The list displays the most-recent My C&P! users first. Users are identified by IP address. A specific user can be disconnected from My C&P! by clicking the **disconnect user** button, which allows a different user to connect to web server with the same IP address.

11 The **hits per hour graph** visually shows how busy the web server has been today. The graph charts hits per hour from 6 AM to 8 PM (hits after those hours aren't graphed). The graph's scale will change based on the volume of hits to the web server.

12 The **current event** panel shows the process currently being performed by the web server.

# The My C&P! Activity Log

The activity log keeps track of every request, or hit, to the My Clients & Profits! web server. Each hit creates a web log entry, which contains the date and time of the hit, the user's ID, and what actually happened (i.e., the event).

The activity log can store thousands of hits. Log entries are created instantly after every hit to the web server. The activity log can be searched to find entries for a particular day, which can then be printed. The web log can be automatically archived every Monday based on a setting in Preferences to keep the log size manageable.

Webmasters can view the log any time from the My Clients & Profits! server application to monitor the server's work load. The log can also be monitored from a web browser if the *allow remote administration* option is enabled in Preferences (see pages 16-17).

## To view the My C&P! activity log

1 Choose My Clients & Profits! > Activity Log or click the **log** button from the Server Status window.

The Activity Log window opens, listing all of the web server's log entries in chronological order. The entries on the log can be sorted by date, user, and event description by clicking on a column heading. The sort direction (i.e., ascending or descending) can be changed by clicking on the up and down buttons.

## To find a selected day's log entries

1 Enter a date into the **find date:** field then choose File > Find Log Entries or click the **find** button.

The log entries for the selected date will be highlighted in the Activity Log window. To print a list of these log entries, click the **print** button.

## To print the activity log

The Activity Log Report is a hard-copy version of the activity log window. The printed report shows all log entries or some entries, depending on

which ones are selected. Log entries will be sorted on the printed report in the same way they are sorted on the window.

To print the entire activity log, choose Edit > Deselect Log Entries. To print a selection of log entries, use your mouse to highlight the entries you wish to print.

1 Choose File > Print Activity Log or click the **print** button.

## To clear the activity log

Selected entries can be removed from the activity log. While the activity log can hold over 100,000 entries, the number of entries that are displayed in the Activity Log window is

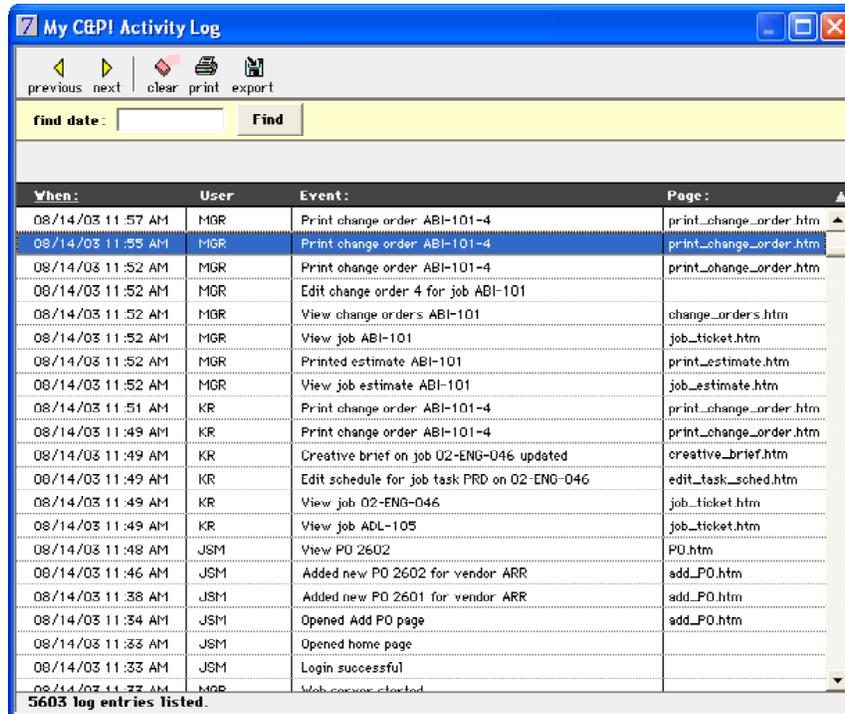
based on your computer's available memory. Log entries should be regularly deleted when they are no longer relevant or likely to be used.

To clear a selection of log entries, use your mouse to highlight a set of entries. To clear the entire list, choose Edit > Deselect Log Entries.

1 Choose Edit > Clear Log Entries or click the **clear** button.

## To export log entries

Selected entries can be exported from the activity log into a tab-delimited text file. This text file can then be opened by Microsoft Excel, FileMaker Pro, Access, and any other spreadsheet or database for analysis. Exporting



**Sorting the activity log** Log entries for every hit to the My Clients & Profits! server is recorded in the Activity Log. Log entries can be sorted by date, user, or by what happened by clicking *when*, *user*, or *event* column headings.

is an ideal method for storing old sets of log entries when they are no longer needed in the activity log.

■ Exporting doesn't clear log entries. If you don't want to keep exported entries in the activity log, click the Clear button to delete the selected log entries.

To export a selection of log entries, use your mouse to highlight a set of entries. To export the entire list, choose Edit > Export Log Entries.

1 Choose Edit > Export Log Entries or click the **export** button.

**To remotely monitor the activity log**

The My Clients & Profits! web server activity log can be monitored remotely from any internet connection using a web browser. This ability lets My C&P! web administrators monitor the server's usage and performance when they're outside the office—from home, an airport, a trade show, or a client's office.

The *allow remote administration* option in the My C&P! web server's preferences must be checked before the log can be accessed from a browser. The view activity log function appears as a link on the web administrator's home page.

■ Only web administrators can remotely monitor and manage the My Clients & Profits! server from a web browser.

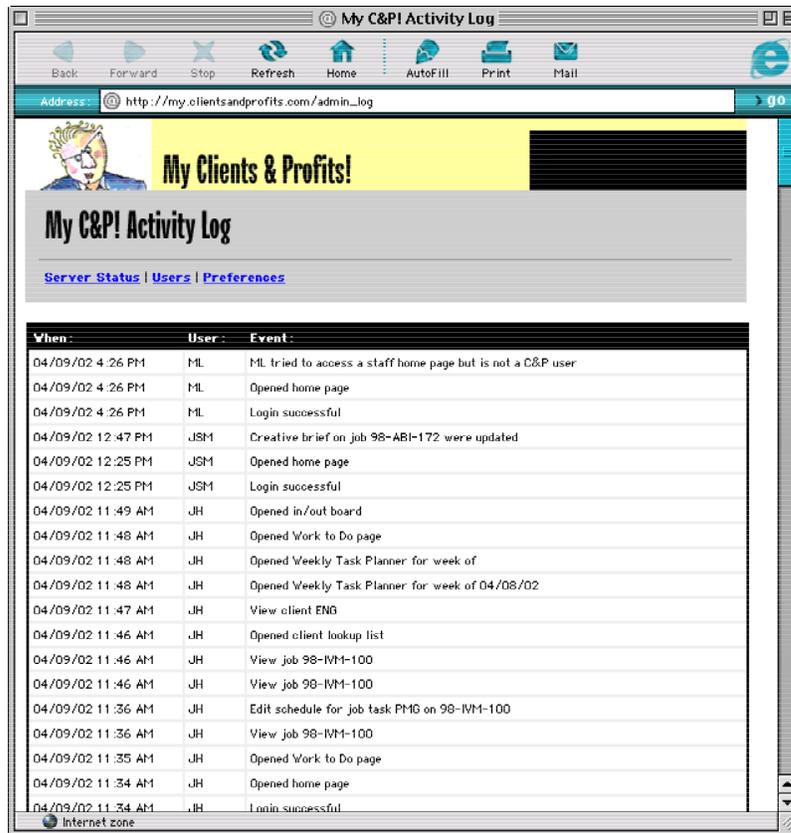
**To automatically archive the web log every Monday**

The *automatically archive activity log every Monday* option tells My Clients & Profits! to export the week's web log every Monday morning, then start a

brand-new log for the week. This setting keeps your web log's size manageable (a busy shop with lots of web users could have a 10,000+ entry web log within months). The exported logs are automatically dated and stored in the same folder as your My C&P! web server.

These tab-delimited text files can be opened in Excel, FileMaker, Access, or any text editor. To keep all of the web log entries together in your database, leave this preference unchecked.

- 1 Choose Setup > Preferences.
- 2 Check the automatically archive activity log every Monday option.
- 3 Click Save.



**A web-based activity log** The My Clients & Profits! server activity log can be monitored from any internet connection using any web browser if the *allow remote administration* preference is enabled. This option lets web administrators track the server's usage

# Printing My C&P! Server Reports

Server reports are your best source of up-to-date statistics on the My Clients & Profits! web server's usage. These reports analyze the My C&P! activity log to determine the most-active users, most-popular web pages, and more. Web server reports can be printed for any range of dates, letting web administrators compare the server's performance and utilization for any period of time.

**General** reports are lists of users and other basic information about the My Clients & Profits! server. These reports provide hard-copy printouts of staff members, freelancers, clients, and vendors and what they can do with My Clients & Profits!

**Performance** reports look at the big picture—raw numbers of hits by days of the week, time of day, and week vs. week. These reports help web administrators track the busiest times for My Clients & Profits!, which helps them better manage the system. The "hits" report series can be printed for one day, one week, or any time period. This flexibility allows web administrators to see more or less data on reports.

**Utilization** reports highlight the most and least active users, as well as the most- and least-used web pages. These reports help web administrators determine which parts of My Clients & Profits! are useful and productive to staff members, freelancers, clients, and vendors.

■ Each of the server reports has its own unique purpose. You may not need everyone to help web administrators manage the server. Instead of printing every report, experiment with each report (and its various options) to see which one gives web administrators the best information they need to stay on top of the server's performance.

## To print server reports

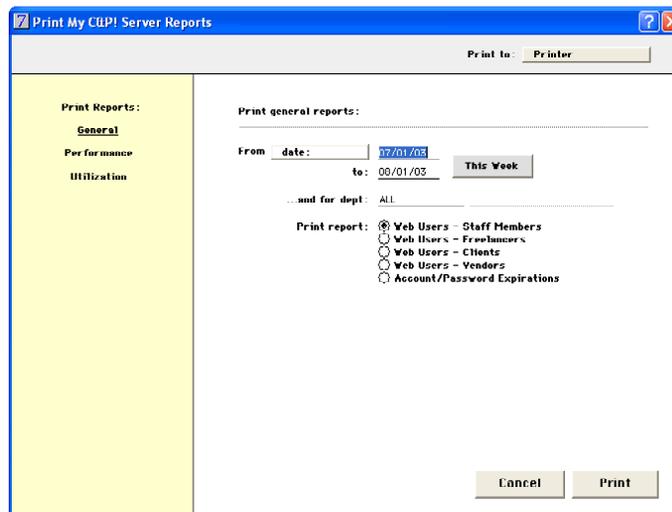
Most of the web server reports are based on entries in the activity log, which are selected for a range of dates. Entering a range of dates will search the log and analyze the entries for that time period.

1 Choose File > Print Server Reports, or click the **print** from the Web Server Status window.

2 Select the kind of report you wish to print (e.g., General, Performance, or Utilization).

3 Make your report selections.

4 Click Print.



Server reports that show a broad time period, such as a month or quarter, will take longer to print than reports based on a day or week, since there are more log entries to analyze.

## Tips for printing My C&P! server reports

■ Use the **Peak Usage** report to keep track of the My Clients & Profits! web server's busiest times. Web administrators can use this analysis to better plan maintenance and other downtime, and well as determine whether the server hardware is adequately handling the work load.

■ Since web users can't choose or change their own passwords, it's up to the web administrator to maintain them. The **Account/Password Expiration** report lists accounts and passwords that are emiently expiring within the next 30 days and need attention. If the web administration doesn't update these expiration dates, the web users will suddenly lose access to My Clients & Profits! This report should be printed monthly.

**Who's using what?** My Clients & Profits! reports analyze how the server is being used for a day, week, month, quarter, or any period of time based on entries saved in the server's activity log.

## My Clients & Profits! Server Reports

General	
<b>Web Users - Staff Members</b>	The Web Users report lists staff members by user ID. This report shows each user's last access date and other account information.
<b>Web Users - Freelancers</b>	This version of the Web Users report shows only users marked as "freelancers" in the Users list. Freelancer users can have the same access privileges as staff members.
<b>Web Users - Clients</b>	This version of the Web Users report only shows individuals who work for the shop's clients, displaying each user's account information. Users are grouped by client number.
<b>Web Users - Vendors</b>	This version of the Web Users report displays web users who work for the shop's vendors.
<b>Account/Password Expirations</b>	The Account/Password Expiration report lists expiring web accounts. The report has two parts: one for expiring accounts and another for expiring passwords. Since users can't change passwords themselves, web administrators can use this report to update old passwords.
Performance	
<b>Hits by Day</b>	The Hits by Day report analyzes users requests, or hits, for each day of a selected week. This report calculates the total hits per day to help web administrators track the server's volume.
<b>Hits by Time</b>	The Hits by Time report analyzes how web users used My Clients & Profits! throughout the day. The report totals up hits by hour for any range of dates.
<b>Hits by Week</b>	The Hits by Week report compares hits to the My Clients & Profits! web server week-by-week for any selected period of time. The report helps analyze My C&P! usage over a longer time frame.
<b>Peak Usage</b>	The Peak Usage report calculates the web server's busiest times based on the number of hits per hour for a range of dates.
<b>Errors</b>	The Errors report analyzes the web server's activity log for error log entries. Web administrators can use this report to monitor the number, frequency, and type of errors occurring in My C&P!
Utilization	
<b>Most-Active Users</b>	The Most-Activity report displays the users with the most connections to the My C&P! server.
<b>Least-Active Users</b>	The Least-Activity report displays web users who have the fewest connections to the server.
<b>Most-Popular Pages</b>	The Most-Popular report analyzes the activity log for the most frequently used web pages.
<b>Least-Popular Pages</b>	The Least-Popular report displays pages with the least number of hits from web users.
<b>User Connections</b>	The User Connections report lists connections to the My C&P! web server by IP address.

# Remotely Managing My C&P!

Parts of the My Clients & Profits! web server can be monitored and managed remotely from any internet connection using a web browser. This ability lets My C&P! web administrators monitor the server's usage and performance when they're outside the office—from home, an airport, a trade show, or a client's office.

The remote administration functions include server status monitoring, viewing the activity log, setting the My C&P! web server's preferences, adding new web users, and updating web user access privileges. These functions appear as links on the web administrator's home page. Remote administration has no affect on regular My C&P! users, and is completely optional.

■ Only web administrators can remotely monitor and manage the My Clients & Profits! server from a web browser. Any web user who is a staff member (i.e., not a client, freelancer, or vendor) can become a web administrator by checking the *web server administrator* option in the user's access privileges window.

Remote administration is not a standard option, so must be enabled in the My C&P! preferences. Once enabled, any My C&P! user with web administrator privileges can connect to the server, monitor it, and make changes.

## Restricting remote administration

My Clients & Profits! features a special high-security option to prevent unauthorized people from remotely monitoring and changing the web server. The *restrict remote administration to IP address* option appears when the *allow remote administration* option is checked. This security option restricts My Clients & Profits! from being remotely administered by only one specific computer based on its IP address. If an IP address is entered here, only the computer that has this address will be allowed to monitor and manage My Clients & Profits! My C&P! can still be accessed from any other addresses, but the remote administration links will not appear on your home page. This setting effectively restricts My C&P! from being monitored and managed from an

unknown computer—and more than one web administrator, since it allows for only one IP address. It should be used at sites where security is more of a concern than easy accessibility by web administrators.

■ This option will only work for computers with fixed IP addresses, such as the ones on your LAN. It won't work for web administrators who use a laptop and a dial-up modem connection to My C&P!, since its IP address changes with each new connection.

Name	Address	Last access
System Manager	192.168.100.75	9 MAY 02 15:50:20
New User	192.168.100.105	9 MAY 02 15:49:03
Bea Noonon	168.97.133.243	9 MAY 02 15:41:44
Allan Koontz	168.97.133.243	9 MAY 02 15:38:47
Gayle Greene	168.97.133.243	9 MAY 02 15:37:43

Date	User	Action
9 MAY 02 15:50:20	MGR	Opened My C&P! server status page
9 MAY 02 15:49:03	JH	View job 98-ABI-176
9 MAY 02 15:48:31	JH	View print specs for 98-ABI-176
9 MAY 02 15:48:28	JH	Added new job 98-ABI-176
9 MAY 02 15:40:49	BEA	Opened Weekly Traffic report
9 MAY 02 15:40:45	DCM	Opened Weekly Traffic report

**Monitoring the server's status** The My Clients & Profits! server status web page shows who is using My C&P! as well as the day's hits.

your user ID and password.

Your customized home page appears, which now includes links for remote server administration: server status, users, activity log, and preferences.

2 Click on any admin link to monitor or manage the server.

## To monitor the server's status

1 From the home page, click on the Server Status link.

The **server status** link opens the My C&P! Web Server Status page (see above). This page is the web-page equivalent of the My C&P! Server Status window. It shows the currently opened database, the server's current status, and the date and time the server was started. The page also lists the

## To enable remote administration

1 Choose Setup > Preferences.

2 Click on the *allow remote administration* option to select it.

3 If the *restrict* option is to be used, enter the web administrator's IP address; otherwise, leave it blank to allow any web administrator to remotely control My C&P! from any computer.

4 Click Save.

Once the *allow remote administration* option is selected, a web administrator can monitor the server from a browser immediately.

## To remotely monitor the server's status

1 Open your web browser then log onto My Clients & Profits! with



# Customizing My Clients & Profits!

The web pages that your My Clients & Profits! users see are customizable. All of the pages can be redesigned to reflect your shop's style and image. Changing a page's design doesn't affect its function; it still works the same way as the standard My C&P! web page. But the look-and-feel of your web pages can complement your corporate identity so well that users will think they're accessing the company's web site.

All My Clients & Profits! web pages share the same general design, which is intentionally simple. They have a common banner graphic, header, and footer, all of which can be customized. Only the body of each page varies, which is composed on-the-fly with content from your Clients & Profits database. The My C&P! web pages are designed for easy modification, so they are free of frames and other complicated design elements.

## Standard web pages vs. database-driven web pages

My Clients & Profits! will serve both standard HTML web pages and dynamic, database-driven web pages that use data from the Clients & Profits database. Any page that's located in the HTML folder can be accessed by web users. New pages can be linked to any page by editing the home page's HTML source code. New data-driven web pages can't be added because no My C&P! CGI can be created by end-users to process them (however, new CGIs will be provided in software updates to My C&P!). However, you can add any number of new HTML pages to your My C&P! web server.

## About OMFLDs

Most of the My C&P! web pages are database-driven, meaning they show real-time data from the Clients & Profits database. Fields from the database are displayed on a web page using special formatting tags called "OMFLDs" (pronounced "Om-Fields").

OMFLDs contain field names from the Clients & Profits application. OMFLDs appear on web pages as HTML tags—for example, the *job number* field is entered as `<OMFLD>J_NUM</OMFLD>`. Whenever a page is requested by a web user, the My C&P! server loads the page's HTML code then searches for any OMFLDs contained within it. The OMFLDs tell the My C&P! server just

what data the user is looking for, which is then retrieved from the database on the file server. My C&P! replaces the page's OMFLDs with the real-time data, then sends the newly-composed page back to the user's web browser. The entire process takes only seconds.

Some web pages, such as *job\_ticket.htm*, have easily recognizable OMFLDs. When a My C&P! page is opened in an editor, the data field names for job tickets are obvious: J\_NUM, J\_NAME, J\_START\_DATE, etc.



[Clients](#)



[Daily Job Status Report](#)



[Purchase Orders](#)



[Time Card](#)



[Job Tickets](#)



[Weekly Traffic Report](#)



[Add Purchase Order](#)



[Availability](#)



[Add New Job](#)



[Weekly Task Planner](#)



[Expense Reports](#)



[In/Out Card](#)



[Work to Do](#)



[Add Internal Charges](#)



[Client Job Status Report](#)

**Home page GIFs** The clip art used on the My C&P! home page can be replaced with your own graphics. Simply replace the standard GIF with your own graphic, keeping the same file name. When the home page is opened, your graphics will be displayed.

■ If you've ever created custom reports in Clients & Profits using the built-in report writer, these field names should be familiar; if not, you'll find definitions for each data file and field name in the Clients & Profits Data Dictionary: [www.clientsandprofits.com/support/data\\_dictionary/data\\_dict.html](http://www.clientsandprofits.com/support/data_dictionary/data_dict.html).

In addition, there are several special-purpose OMFLDs that aren't in the Data Dictionary, such as CONTENT, DATE, LINKS, GREETING, LOOKUP, etc. These tags are used to compose lists of data, such as a job's tasks, as well as forms.

## Adding, removing fields from web pages

Other data fields can be added to web pages by simply entering the OMFLDs in a web page editor. For example, to add the job's "date closed" field to the *job\_ticket.htm* page, add the text `<OMFLD>J_DATE_CLOSED</OMFLD>` to the page's HTML code.

■ Field names must be spelled accurately or else the data from the C&P database won't display on the page.

Fields can be removed from a web page by deleting the OMFLD tags completely from the HTML source code.

## Customizing Web Pages

The My Clients & Profits! system contains over 100 web pages, all of which can be tailored to your shop's identity and style. (For a flow chart illustrating how the web pages are related, see page 40.) The key pages include:

**Introduce Yourself** *Introduce.htm* is the first page users see when they access My Clients & Profits! Its only purpose is to log a user onto the My C&P! server. It functions as the gatekeeper, and is the only way to enter the My Clients & Profits! web server.

**Home** The home page is the primary interface for all of My Clients & Profits! It contains links for all of the functions available to a particular user, based on a user's access privileges. There are four separate home page HTML files, one for each type of My C&P! user: *home.htm* for staff members; *home\_admin.htm* for web administrators; *home\_client.htm* for the shop's clients; and *home\_vendor.htm* for the shop's suppliers. These pages are virtually identical, except that functions which aren't applicable to a kind of user are removed (e.g., clients can't enter time, staff members can't add web users, etc.). The same home page is used for both staff members and freelancers. The web administrator's home page is identical to the staffer's home page, except that it has links to remotely monitor and manage the web server. The client and vendor home page do not have links to the company calendar, handbook, forms and have fewer lookup links. All clients share the same *home\_client.htm* web page, and all vendors share the same *home\_vendor.htm* web page. While the four home pages look alike, they can be substantially redesigned for each kind of user.

■ Individual users can have their own custom home pages, which are used instead of the standard home pages. Custom home pages can be designed for special needs, such as users who use palm PCs to access My Clients & Profits! For more information see page 37.

The home page can take several seconds to load because of the graphics. When a web user clicks on a home page link, the new page always opens in a new window. This way the home page never closes, so it never has to reload its graphics. This also helps keep users from becoming lost.

■ When adding new links to the home page, always open the page in a NEW window so that home page never closes. This saves users time by not repeatedly reloading the home page).

The home page has 10 sections: a banner, a welcome, links to functions (e.g., opening jobs, entering time, etc.), lookups, the company calendar, company news, industry news, general information, an optional company handbook, and optional company forms as well as a help link and an e-mail link to the My C&P! webmaster. All of these links, except for functions, can be expanded or removed as needed. (The function links can't be changed because they are composed on-the-fly by the My C&P! server based on the user's access privileges). The home page sections include:

**Banner:** The home page banner identifies the page to users. It has two parts: the left side is an animation, while the right side is static. This banner is not linked to any other web page.

**Welcome:** The welcome section contains an OMFLD for the user's greeting, which is entered by the web administrator in each user account. Since the greeting is user-based, it allows the home page to be more personalized for each user. Graphics and text that are common among all users can be added into this section.

**Functions:** The function links (e.g., clients, job tickets, time card, etc.) for the OMFLDs LINKS1, LINKS2, and LINKS3 are composed on-demand by the My C&P! server based on the user's access privileges. Each of the home page's functions has its own graphic. The names of these GIFs are hard-

Selected My Clients & Profits! Graphics		
Name	Used on Pages	Description
banner.gif	all pages	This 468x60 gif is used at the top of almost every page; not linked
my_logo.gif	all pages	This 175x58 gif is used for your company logo at the top of every page
intro_logo.gif	introduce.htm	Introduce Yourself page graphic
calendar.gif	home.htm	Used with Company Calendar links; not linked
home_banner_left.gif	home.htm	Animated left section of home page banner; not linked
home_banner_right.gif	home.htm	The right section of the home page banner
home_button_add_job.gif	home.htm	Link to Add Job Ticket page
home_button_add_POs.gif	home.htm	Link to Add Purchase Order page
home_button_charges.gif	home.htm	Link to Add Internal Charges page (C&P Pro users only)
home_button_clients.gif	home.htm	Link to Clients page
home_button_client_status.gif	home.htm	Link to Client Job Status page
home_button_exp.gif	home.htm	Link to Add Expenses page
home_button_in_out.gif	home.htm	Link to the In/Out Board page
home_button_traffic.gif	home.htm	Link to Weekly Traffic Report page
home_button_work.gif	home.htm	Link to Work To Do page
link.gif	home.htm	Used with Links section on home pages; not linked
pencil.gif	home.htm	Used with Company News links on home pages; not linked
thumbs_up.gif	home.htm	Used with Industry News links on home pages; not linked

For a complete list of My C&P! graphics, please see [www.clientsandprofits.com/my/my\\_graphics.html](http://www.clientsandprofits.com/my/my_graphics.html)

# Customizing My C&P! (con't)

coded into the My C&P! server and can't be changed. However, the graphic itself can be replaced by your own graphic—as long as it has the same file name. (See page 31 for a list of graphic file names and how they are used.)

**Lookups:** These links open lookup pages that feature lists of clients, jobs, vendors, staff members, tasks, status codes, and more.

**Links:** These links are for general information that the company (or the web administrator) feels would be useful to My Clients & Profits! users.

**Company handbook:** The online company handbook is optional, but can be an effective way to keep staff members up-to-date on company policies and procedures. No standard handbook is included with My C&P!, so you'll have to convert your existing employee handbook to HTML pages first. Once converted into separate web pages, move your pages into the My C&P! HTML folder then link them to the handbook section of the home page. These pages are more confidential than a regular web server, since only My C&P! users can see them.

**Company forms:** Online versions of the company's forms can be provided to staff members using My Clients & Profits! No standard forms are included with My C&P!, so you'll need to create your own HTML pages or PDF files. These forms aren't CGI-enabled, so My C&P! won't process them with data from the Clients & Profits database. They are included here only as an easy way for employees to print copies for their own use.

■ Both the company handbook and company forms sections should be removed if they are not going to be used.

**Clients** The *clients.htm* page resembles the Clients window in Clients & Profits, including the links to billing info, contacts, etc. The client account fields are displayed in a table. Any fields from the client data file can easily be added to the table by simply typing an OMFLD with a field name. The client contact, billing info, stats, budget, diary, and projects pages can be customized in the same way. The client jobs and invoices pages are less customizable, since their content is composed on-demand by My Clients & Profits! via CGI.

**Job Tickets** The *job\_ticket.htm* page looks identical to the Job Ticket window in Clients & Profits. The page shows the job number, client, job name, and other details as well as the job's tasks. Job tasks are listed via CGI using the "content" OMFLD, so can't be modified. The links for Add Tasks, View Billings, View POs, and View Costs are also displayed via CGI based on the user's access privileges, and can't be changed.

**Proposals, Daily Job Status, Traffic, Weekly Task Planner, Production Planner, Work To Do, Client Job Status** These production and traffic web pages are composed using CGI-based forms, so the body of these pages generally can't be modified. However, new graphics and other elements can still be easily added.

**Purchase Orders** The *purchase\_order.htm* page resembles Purchase Orders window in Clients & Profits. The page displays the shop's purchase, broadcast, and insertion orders. The order's line items are displayed in a list using the "content" OMFLD, which can't be changed. The page has "next" and "previous" links to view a different order, as well as a form for finding a specific order by number. The page has links to the order's description, specs, vendor info, and options. A different web page will display depending on whether the order is a purchase order, broadcast order, or insertion order.

**Time Card** The *time\_card.htm* page resembles the pop-up Daily Time Card window in Clients & Profits. The page lists the day's time entries (in the OMFLD named "CONTENT") with "next" and "previous" links to view a different day's time. Users can add a time entry using a form at the bottom of the page. The form has entry fields for job number, task, hours, notes, and an overtime checkbox. HTML does not support all-cap fields, so the job number and task code can be entered in lowercase letters. (My C&P! will convert lower-case letters to capitals automatically when the time entry is saved.) The form action `/save_new_time` calls the My C&P! CGI that saves a time card; this action shouldn't be changed. Additional fields can be added to the form, which My C&P! will process when the time entry is saved. The time entries cost and billing rates are calculated by My C&P! when the time entry is saved.

**Add Expenses, Add Internal Charges** The *expenses.htm* page resembles Add Expense Report window in Clients & Profits. The page features a form that prompts a user to enter the individual expenses. The list at the bottom of the page displays the user's expense entries for each day. The *add\_internal\_charge.htm* web page lets users track costs for internal charge items, like CD duplication and film output. This feature is only available to Clients & Profits Pro and Job Tracker users, since Clients & Profits Classic doesn't track internal charges. (The Add Internal Charges link only appears if the Clients & Profits database contains internal charge item records.)

**Lookups** The *lookup* pages are identical to the Lookup List windows in Clients & Profits, except that they don't allow new records to be added. The design of the lookup pages is slightly different from other My C&P! web pages since they have the unique purpose as reference lists. The content of the lookup lists are built via CGI and can't be modified.

**Online help** Each My Clients & Profits! web page has a link for online help at the bottom. Depending on which page is being used, clicking on the help link opens one of six different help pages: *help\_clients.htm*, *help\_exp.htm*, *help\_jobs.htm*, *help\_POs.htm*, *help\_time.htm*, and *help\_traffic.htm* in addition to a generic *help.htm* page. The *help.htm* contains general information about how to use My Clients & Profits! web pages, while the other help pages offer specific instructions and guidance for each special function. The text on these pages is very general and should be customized with your own instructions for using My Clients & Profits!

## Adding your own web pages and PDFs to My Clients & Profits!

In addition to its own web pages, My Clients & Profits! can serve your own custom web pages and Adobe Acrobat PDF files. Any page or PDF file stored inside the My C&P! HTML folder can be accessed using a link on any web page. (For an example of how to link a web page to My C&P!, see the “company handbook” source code on the *home.htm* page.) My Clients & Profits! web pages can end in either *.htm* or *.html*.

## Custom home pages for specific My Clients & Profits users

Each user can have a completely custom home page. First, create a home page by duplicating *home.htm*, *home\_admin.htm*, *home\_client.htm*, or *home\_vendor.htm* then redesign it. Be sure to give each custom home page a unique name, since it will be entered into a user’s web account (see page 20). When a custom home page is specified in a user’s web account, My C&P! displays it instead of the standard home page whenever that user logs in.

## Tips for customizing My Clients & Profits! web pages

Customizing your HTML pages for My Clients & Profits! is relatively easy, depending on your skills as a web page designer. You can use advanced web design software like Microsoft FrontPage, Macromedia Dreamweaver, Adobe GoLive or very basic editors such as Netscape Composer, which is a component of Communicator. Text editors, such as WordPad, can also be used to make quick changes to web pages.

- Do not change the `<OMFLD>CONTENT</OMFLD>` tags except to adjust their position to accommodate a new design.
- Changing the *banner.gif* graphic will affect all pages, since they all use the same banner. Custom banners can be added to any page by moving the graphic into the Images folder then modifying the page’s HTML code to display the new banner.
- Before redesigning any My Clients & Profits! page, make a backup copy of the page first. If your changes somehow break the page, you’ll need to restore an original copy of the page and start over.
- Before adding new graphics to your web pages, remember to place your web graphics in the Images folder, which is inside the HTML folder.
- All web pages need to have the following copyright statement in the HTML source code: `<!--This page is part of the My Clients & Profits! web server © 2003 Clients & Profits, Inc. All Rights Reserved-->`
- All web pages need to have the following copyright text at the bottom of each page: `This page is part of the My Clients & Profits! web server © 2003 Clients & Profits, Inc. All Rights Reserved`

## Customizing the “my\_script.js” JavaScript file

The *my\_script.js* file is a JavaScript document that contains style information that determines how data is formatted on web pages. It is also used to format data correctly on forms (e.g., converting lower case letters to all-caps, checking for invalid dates, etc.). Each My C&P! web page looks for the *my\_script.js* file when it is opened.

To make enhancements quicker and easier, the *my\_script.js* file is served from the Clients & Profits web site. However, you can serve the *my\_script.js* file from your own server if you host your own web site (using an outside ISP won’t work). Use this option if (1) you want to customize the JavaScript file or (2) if web pages load faster from your own server. To server your own JavaScript file, move the *my\_script.js* file from My C&P!’s HTML folder onto your web server then enter your web server’s URL into Preferences (see page 17).

# Appendix A: Security Issues

My Clients & Profits! was designed to offer reasonable security to the shop's Clients & Profits database, while making it available to the widest number of users. It is a custom, proprietary HTTP server, so can't be accessed anonymously like other web servers.

The My Clients & Profits! server itself contains no company data. All of the data it uses is stored in the Clients & Profits database on your file server. If My C&P! can't access your file server for any reason, then it can't serve data to web users.

The My C&P! web pages themselves contain no company data, either. Pages contain tags (called OMFLDs; see page 30) that are used by the My C&P! CGI to access records from the shop's Clients & Profits database. A web page only shows actual data when it is processed by the My Clients & Profits!'s CGI, which can only happen if someone logs on with a valid user ID and password. If someone copies an HTML page from My C&P!, they will only see the page's OMFLDs. This effectively prevents spiders and bots from indexing My Clients & Profits!

The server does not support SSL, so cannot establish secure encrypted connections between users and the web server. For this reason, My Clients & Profits! offers only limited access to your accounting data. There is no access whatsoever to anything financial, such as checks, client payments, or the general ledger.

My Clients & Profits! contains many built-in security features which, when used together with responsible management practices, help ensure that confidential company data stays private.

My Clients & Profits!'s security features include:

**Starting My Clients & Profits!** Only Clients & Profits system managers can configure the C&P database for My Clients & Profits!, set up web users, then start the web server.

**Individual user accounts** While My Clients & Profits! can be accessed from any internet connection, it is not a publicly available server. It is only accessible to staff members, freelancers, clients, and vendors who are authorized My C&P! web users. Each individual person has their own web account, including people who work for the shop's clients and vendors. Users can't create their own accounts; instead, they must be set up by the My C&P! web server administrator. User accounts can be set to expire at a selected date.

**User passwords** Each web account has its own password. Passwords are not defined by the user; instead, they must be assigned by the My C&P! web administrator ("webmaster"). User passwords can be set to expire at certain dates to help keep passwords from being circulated. Passwords are stored in the Clients & Profits database as encrypted data.

**Access Privileges** The functions that a web user can see and do are based on their My Clients & Profits! access privileges. Each web user can be given access to clients, jobs, time cards, expenses, etc. by the My C&P! web administrator. Clients and vendors have limited access to the database, while staff members and freelancers can add jobs, edit estimate, etc. based on their access privileges to Clients & Profits.

**No guest access** There is no temporary "guest" access to the My Clients & Profits! web server. Unlike other web sites, anonymous users can't create their own My C&P! account and get temporary, limited access to the system. Instead, user accounts can only be created and managed by a My C&P! web administrator.

**Cookies control user access** Cookies must be enabled on the users' browsers to access the My C&P! web server. When a user successfully logs onto My C&P!, a cookie is automatically set in their browser that lasts for 24 hours. The user can then repeatedly access My C&P! web pages during that period without reentering their ID and password. The cookie's expiration date can be changed (for example, to a week instead of one day) by changing the Javascript in the *introduce.htm* page.

**No bookmarks** Web users can only access My Clients & Profits! from the "introduce yourself" page. This ensures that My C&P! knows exactly who has accessed every web page. If a user bookmarks any My C&P! page (other than the Introduce Yourself page) the server will open the introduce page instead.

**Restrictions to client, vendor accounts** A web user can be restricted to seeing only one client's account information, jobs and costs as part of their access privileges. The same restriction can be made to web users who are vendors; they are limited to only seeing their POs. This option can be used with staff members and freelancers, as well as clients. Vendors can't access client information in any way, and clients can't see vendor data.

**Failed login notification** A *notify webmaster of failed logins via e-mail* preference (see page 17) automatically sends an alert via e-mail to the My C&P! webmaster whenever someone tries to access the web server with an invalid user ID or password. An entry is also made in the server's web log.

**Bad password notification** My Clients & Profits! will notify the webmaster via e-mail whenever a web user tries to log onto the server with a bad password.

**3 bad passwords suspend web accounts** The optional *disable web accounts after 3 bad passwords* preference will automatically suspend a web account if the user enters a bad password three times in a row. The user will see an error page explaining why their account has been suspended, and the My C&P! webmaster will be notified via e-mail. The account can be reactivated from the My C&P! user access window (see page 20) or remotely from the user access web page.

**All hits are logged** The activity log tracks all hits to the My Clients & Profits! web server. For faster performance, logging can be stop by enabling the *disable activity log* preference—but then you'll have no idea of who's using My Clients & Profits! and what they're doing.

**Users are tracked by IP address** The My C&P! Server Status window shows the IP address of every current and recent web user, helping webmasters track down who's using the server. If a user who's connected to My C&P! logs in from a different computer, the new IP address replaces the original one.

**Only web administrators can remotely monitor My C&P!** Unless the *web server administrator* option is enabled for a web user, he or she won't be able to remotely monitor or manage the My C&P! web server.

**Remote administration is an option** If the *allow remote administration* preference is unchecked, the home page links for server status, users, activity log, and preferences are not available. This prevents anyone outside the office from monitoring the My Clients & Profits! server.

**Remote administration can be limited to a preset IP address** The *restrict remote administration* preference allows a web administrator to remotely monitor and manage the My Clients & Profits! server from a single specified IP address. If anyone else tries to remotely administer the server from a different computer they will be rejected.

### Security Tips for My Clients & Profits!

- Don't let users share the same web account.
- Use long passwords of random characters and number instead of recognizable names, words or phrases.
- Use the automatic e-mail notification for errors and bad logins.
- Change web user passwords frequently.
- Check the web log for excessive or suspicious use by particular users

# Appendix B: Setting up My C&P! as a Windows 2000/XP Service

If you are using a Windows 2000/XP server, you can set My Clients & Profits! to automatically start up by installing it as a *service*. This is the only way to automatically launch My C&P! when the server starts up. Otherwise, a web administrator will have to manually launch My Clients & Profits! every time the Windows server is restarted.

Setting up My C&P! as a service has three steps: (1) installing the My C&P! software, (2) installing the service, and (3) configure Windows 2000/XP to auto log on at startup.

■ For the Windows 2000/XP service to work correctly, the My Clients & Profits directory has to be named **MyClientsProfits**. If you move or rename this directory, Windows won't be able to find the My C&P! application.

Before you can configure My Clients & Profits! as a Windows 2000/XP service, the My C&P! software must already be installed (see page 12).

The My Clients & Profits! installer copies the *MyClientsProfits* directory onto the top level of the server's C: drive by default. You can move the MyClientsProfits directory anywhere you want before the service is installed. The service is linked to the location of the MyClientsProfits directory. Once the service is installed, if you move the directory then My Clients & Profits! won't automatically start.

### To install the My Clients & Profits! service

1 In Windows 2000 or Windows XP, choose Start > Programs > Accessories > Command Prompt.

2 Type `cd myclientsprofits` then press Return.

3 Type `myserv -install` then press Return.

The Command Prompt responds with a message "My Clients & Profits service installed."

4 Click the Command Prompt's close box.

Next, you'll need to configure the new MyClientsProfits service using Windows's administrative tools.

5 Choose Start > Settings > Control Panels then double-click on the Administrative Tools control panel.

6 Double-click on the Services administrative tool.

The Services administrative tool lists all of the services installed on your Windows 2000/XP server.

7 Double-click on the My Clients & Profits service.

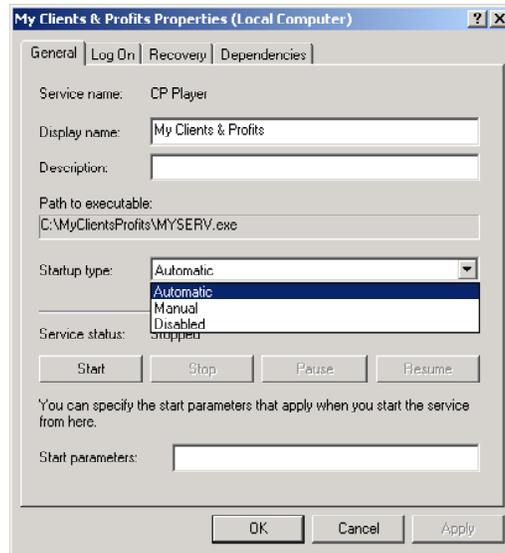
The My Clients & Profits service Properties window opens, displaying the settings for the service.

8 Click on the Startup Type pop-up menu, choose Automatic, then click OK.

9 Close the Services window, then close the Administrative Tools window.

■ The first time you run My C&P! choose Setup > Preferences and make sure the *always start web service automatically at startup* option is checked. This tells My C&P! to start listening for hits at startup.

■ If you move the MyClientsProfits directory after installing the service, you'll need to remove the service and reinstall it.



**Auto startup** Windows will automatically start My C&P! once you've set the service's Startup Type to "automatic".

### To configure Windows 2000/XP to automatically log on

When Windows 2000/XP starts up, it prompts the user for an ID and password. In order for the server to start up unattended, it must be configured to automatically log on. This involves a security risk, someone could access the server without having to enter an ID and password. But this is the only way to automatically start My Clients & Profits! after the server's been powered on.

Configuring Windows 2000/XP to automatically log on involves editing the Windows registry. You'll find step-by-step instructions here: <http://support.microsoft.com/default.aspx?scid=kb;EN-US;q310584>. Once these steps have been completed, restart the computer and My Clients & Profits! will start automatically.

# Appendix C: Custom Home Pages

Individual users can be given their own custom home page. Custom home pages should be based on the standard home pages, but can be completely redesigned (for example, completely stripped of graphics to accommodate palm PCs or other wireless internet devices). This lets custom home pages be highly creative and expressive (there's no real limit to its look and feel). The same custom home page can be shared by several different users (for example, a custom home page for the traffic department).

There are two steps to implementing custom home pages: (1) creating the page then (2) defining the custom home for a user.

### To create a custom home page for an individual user

- 1 From the Windows or Macintosh desktop, find and open the HTML folder inside the My Clients & Profits! folder.
- 2 Click on a standard home page then duplicate it.
- 3 Give the new home page a unique name (e.g., *home\_chris.htm*)
- 4 Using an HTML editor (such as Dreamweaver or FrontPage), modify the user's home page as needed.
- 5 Save the new home page into the My C&P! HTML folder.

This custom home page is now ready to define to a web user.

### To define a user's custom home page

Before the user can use his or her custom home page, the page's name needs to be defined in the user's web account in My Clients & Profits! This can't be done while the server is running, and the user's custom home page can't be defined remotely.

■ If the My C&P! web server is running, temporarily disable it by clicking the Stop Server button (or by choosing Control-S in Windows or Command-S on a Mac).

- 1 Choose Setup > Users, Access & Passwords.
- 2 From the My Clients & Profits! Users window, double-click on a user name then click on the General button.
- 3 From the General Privileges window, enter the custom home page's name or click the Get Page link then locate the user's home page in the HTML folder.
- 4 Click Save then close the User Access windows.
- 5 Restart the web server by clicking the Start Server button (or by choosing Control-S in Windows or Command-S on a Mac).

The user's custom home page will be available instantly once web service has been started.

Selected My Clients & Profits! Home Page Links	
Link	Access to
/clients	View client accounts
/job_tickets	Job tickets, estimates, schedules, creative briefs
/add_job	Open new job tickets
/find_job_status	Daily Job Status report
/find_weekly_traffic	Weekly Traffic report
/task_planner	Daily Task Planner
/find_work_to_do	Work to Do
/find_client_status	Client Job Status report
/login	Opens the Introduce page
/proposal	View, add, edit, and print client proposals
/prod_plan	View the shop's production planner
/PO	View purchase, insertion, broadcast orders
/add_PO	Add new purchase orders
/expenses	Add employee expense reports
/internal_charges	Add internal charges
/time_card	View, add, edit time on daily time cards
/availability	View, add staff availability calendar entries
/in_out_board	Track who's in and out of the office
/lookup_clients	Lookup list of active clients
/lookup_jobs	Lookup list of open jobs
/lookup_staff	Lookup list of staff members
/lookup_status_codes	Lookup list of production/billing status codes
/lookup_task_table	Lookup list of task table
/lookup_groups	Lookup list of task groups
/lookup_POs	Lookup list of open purchase, insertion, broadcast orders
/lookup_job_types	Lookup list of job type/spec sheets
/lookup_projects	Lookup list of client projects
/admin_status	Current web server status
/admin_log	View the day's web server activity
/admin_users	Remotely edit a My C&P! web users' access privileges
/admin_prefs	Remotely edit the web server's preferences

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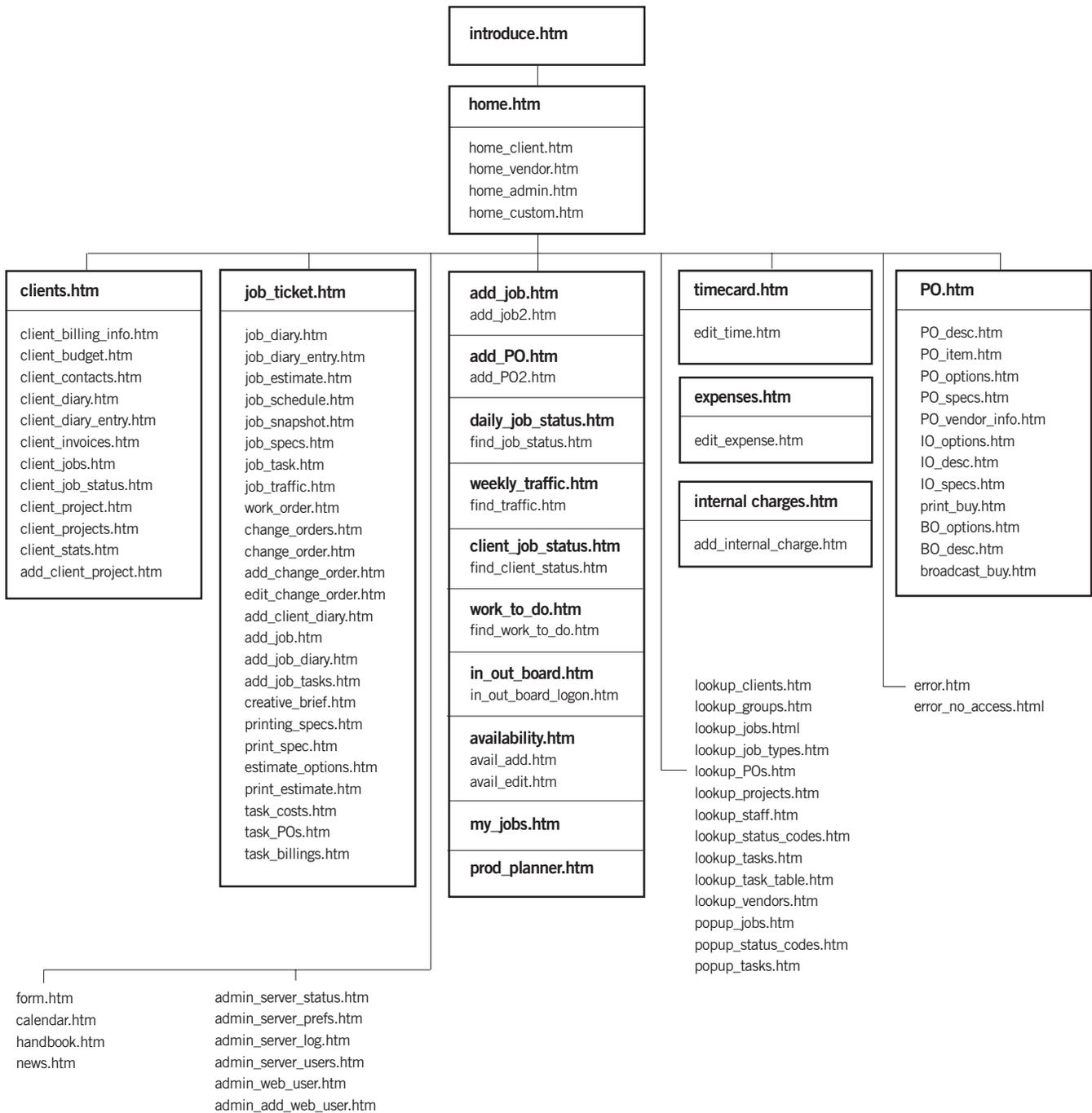
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# My Clients & Profits! 5.0 Web Pages Flow Chart



For a description of each My C&P! web page, see [www.clientsandprofits.com/my/my\\_web\\_pages.html](http://www.clientsandprofits.com/my/my_web_pages.html)