



Clients & Profits News Fall 2006

It's time to take a fresh look at how you work



Summer's over ... time to get back to work!

For most shops, Fall is the start of a busy season that lasts until, well, next summer. You want to be ready, right? So start preparing now for the rush by rethinking how you work, and how Clients & Profits can help.

Even if you're a Clients & Profits expert, it's easy to get complacent about its features and benefits. The software has changed dramatically over the last few years (and will soon change again), so why not take a little C&P refresher? This issue will show you how.

If you're a creative, spend some time with the business side—you'll appreciate why time cards, purchase orders, and expense reports are so important. And if you're a suit, try to see things from the creative side.

With Clients & Profits, feel confident that you have the right tools to make the most of your clients and profits.

After all, it's software for the business of being creative.

UPGRADE NEWS



MY CLIENTS & PROFITS! X BRINGS NEW LIFE TO WEB USERS

By Mary Peczeli

Does this sound familiar? The copywriter's in New Jersey. The creative director's working from home. The production manager's in New York. The account executive's in San Francisco. The art director's in Bermuda. How do you keep everybody working together? Now everybody can be on the same page no matter where they are.

A home page, that is, with My Clients & Profits! X.

We redesigned the entire My Clients & Profits! X web server from scratch—the first redesign since its introduction in 2000. We replaced the web server engine so pages load up to 100% faster. And we took the lessons we learned in web page usability from Cli-

ents & Profits ASAP, our hot new web-based studio manager, and completely revamped the user interface (if you're using the old version, you won't believe your eyes!)

Now, everything you can do in My Clients & Profits! X is accessed from logical drop-down menus. The new server works much more like Clients & Profits X, so it's much easier to learn and use. The web pages show more detail and have more editing options, so there are fewer limitations compared to My C&P! 5.0. Taken together, it's unlike any other job tracking web server you've ever seen.

The upgrade features a new "creative dashboard" home page that displays the user's daily time card, the day's deadlines, their job hot sheet, and the company in/out board.

The My C&P! X upgrade features a new "creative dashboard" home page borrowed from our hot web-based studio manager, Clients & Profits ASAP, which displays the user's time card, job hot sheet, deadlines, and the company's in/out board.

New features include: the ability to add, edit, approve, print, and kill proposals; adding and editing change orders; printing selected Snapshot production and work in progress reports, as well as job reports like the Job Summary; pre-billing job estimates; review billings and approving A/P for printing; approving time sheets and expense reports; approving vendor A/P invoices for payment (all upcoming new features in Clients & Profits X 10.1), and much more.

My Clients & Profits! is designed especially for Mac OS X and Windows XP and fully supports MySQL and SQL Server 2005. The server supports the latest versions of Safari, Internet Explorer, and Firefox—no special plug-ins are required. The price is unchanged at \$2,495. Best of all, we're offering My C&P! X as a free upgrade for current users. You can try My Clients & Profits! X now using the live demo at my.clientsandprofits.com. The web server upgrade will be available in January. For more information, please visit www.cnp-x.com/my.

Mary Peczeli is the Clients & Profits sales manager and has been a staff member since 1996. She can be reached at (800) 272-4488 or at mary@cnp-x.com

MOVING UP TO MY CLIENTS & PROFITS! X

If you're happy with My Clients & Profits! 5, then there's no rush to upgrade—the C&P Helpdesk will be supporting it for a long time. But if you're anxious to upgrade, keep these in mind:

■ **You'll need Clients & Profits X 10.1** Both upgrades share some of the same new features, so they need to work together. You'll need to upgrade both Clients & Profits X and My Clients & Profits! at the same time.

■ **You probably won't need a new server** While My Clients & Profits! X is almost twice as fast as My C&P! 5, it does not require more powerful hardware. The software will run faster on newer servers, of course, but you should evaluate My C&P! X on your existing system before deciding on upgraded hardware.

■ **It's a universal binary** The My C&P! X upgrade runs natively on the new Intel Mac hardware, as well as on previous generations of PowerPC hardware running Mac OS X 10.3 or later. (My C&P! X also runs on Windows, of course).

■ **Your old customized web pages won't be useable** My Clients & Profits! X has an entirely new site structure and web page design, so any previously customized web pages won't work. You can still customize the new web pages like before, including serving the page graphics from your own web server. Keep in mind, however, that new My C&P! X updates will replace the entire folder—be sure to make backups before installing future updates.

■ **Be sure to double-check user passwords and web access privileges** There are several web access privileges in My C&P! X, so make sure your users have the access they need before rolling out the new upgrade.

DON'T TAKE ANYTHING FOR GRANTED

Dear Judy:

"I was running a verify/recover on my G/L account balances and the server crashed. I learned my auto backup had not taken place for a few days. What are my options now?"

— Scot, Boston

In 25 years keeping books, I've had my share of panic moments when I thought some work was lost. Here are a few tips I've learned along the way:

DON'T PANIC Chances are the server crash didn't damage the database during the first part of the verify/recover. That's because the first step, zeroing account balances, is not very complex. If you start the verify/recover again, it'll restore the balances (which is the point of the utility, after all). But, you need to check your database for damage. That's because nothing verify/recover can do can fix a corrupted database.

RUN THE QUICK CHECK First, make sure no one is using Clients & Profits, then drag the database onto your hard disk. This is the one you'll want to check. If there's a problem, you can repair it faster on your computer than over the network, and also avoids any network-related problems. (Be sure to

lock the database on the server so no one uses it in the meantime.) Once fixed, move the database back to the server.

RUN VERIFY/RECOVER AFTER HOURS

Since this process is very methodical, it can be time-consuming. Running it during the day can disrupt other users, so it's best to run it after work but before the nightly backup. When you arrive the next day, your balances will be freshly verified.

One more thing (actually, two):

TEST YOUR NIGHTLY BACKUPS The time to discover your nightly backups haven't been working isn't when you need them. So, restore some files from a random backup tape once or twice a month. It's the only way to know that there isn't a problem.

BURN YOUR OWN BACKUP CD It's not a bad idea to copy your C&P database (and other critical finance files) to a CD for extra piece of mind. Do it at the end of the month, then keep them locked in a fire-proof media safe (search amazon.com for "media safe") somewhere off-site, such as the boss' home.

Judy Salkind-McConnaughay is an 11-year veteran of the Clients & Profits Helpdesk and is a practicing bookkeeper. Ask your business management questions at www.clientsandprofits.com/support/askjudy



THINGS TO DO THIS QUARTER

EVEN IF YOU ARE A SUPER Clients & Profits power user, there's likely something you're not doing. And for everyone else, there's always ways to make Clients & Profits work better. So consider this online "refresher" course:

■ **Take the tutorial** The tutorial videos cover the essential functions of Clients & Profits (e.g., traffic, tracking time, etc.). They offer a big-picture view of the system's best features and benefits and are the fastest way to learn the software: www.cnp-x.com/learn/tutorial

■ **Watch the class videos** These QuickTime videos were specially produced for the web based on our regular new-user training classes. The videos are organized by topic (e.g., estimates, adding checks, etc.) and walk you through each process step-by-step. They're short, to the point, and free to current support subscribers. Creative types can watch how the other half spends their day adding payables, writing checks, and billing clients while the business types can learn how to open jobs, print estimates, and set up schedules: www.cnp-x.com/support/newusertrainingclasses.html

■ **Explore the Report-o-Matic** It's an interactive database of the most commonly printed Clients & Profits reports. Sample reports can be selected by category (e.g., production, accounting) and who they're typically used by. It's a great way to find C&P versions of reports you're currently creating with spreadsheets: www.cnp-x.com/reports

1994



IT'S ALL ABOUT DEADLINES

From the start, Clients & Profits has always been about deadlines.

Back in 1994, most agency management systems treated scheduling and traffic as an afterthought to the accounting system. Back then, the accountants and office managers controlled the computers that ran the shops. And as much as media and account service thought of themselves as the center of the advertising world, it was the controllers who had the information and the power.

From these bleak old days of job binders, wall-sized white boards, and master calendars—and missed deadlines—sprung a new way to manage deadlines that integrated traffic with finance into a single system. Now, both the creative side and the business side of the agency could share information in real-time using the same program.

It certainly helped that Clients & Profits, for the first time, was now available for Windows.

Clients & Profits Pro 1.0 was a breakthrough. It was the first agency management system to combine production and accounting into a single software program. And for years it was the only software ran on Macintosh and Windows.

2006

The screenshot shows a window titled "Weekly Traffic Report" with a search bar containing "Interactive (11 jobs)" and "jobs with production status 1 - 999". Below the search bar is a table with the following columns: Job, AC, AD, AD, CW, PM, PA, Est, Comp, Comp, C/D, Devo, Pgm, F/A, QA, Beta, AD ok, CM, Install, Status, Note. The table contains several rows of job data, including job numbers like ABI-118, ABI-2292, and ADL-182, along with various dates and status notes.

| Job | AC | AD | AD | CW | PM | PA | Est | Comp | Comp | C/D | Devo | Pgm | F/A | QA | Beta | AD ok | CM | Install | Status | Note |
|----------|-----|----|-----|-----|----|-----|--------|-------|-------|-------|-------|-------|-------|-------|-------|--------|----|---------|--------|-------------------------------|
| ABI-118 | AK | BW | NW | IL | ML | TAB | 11/0 | 11/7 | 11/9 | 11/10 | ok CD | ok AD | 11/15 | 11/18 | ASAP | | | | | Need to re-do draft sketch |
| ABI-2292 | AK | BW | NW | IL | ML | TAB | 8-30 a | 9-14 | 9-18 | 9-23 | ok CD | ok AD | 10/1 | ASAP | rba | 11/30? | | | | Design rejected --- redo |
| ABI-2301 | AK | BW | NW | IL | ML | TAB | 8-10 | 8-10 | 8-11 | 8-12 | ok CD | ok AD | 8-18 | 8-22 | 8/24 | 8/30 | | | | See AE for new PMS colors |
| ADL-182 | FRD | BW | SAC | IL | GG | TDC | 10-9 | 10-10 | 10-10 | 10-20 | | | | | | | | | | Double-check orig art for fit |
| ADL-2316 | FRD | BW | SAC | IL | GG | TDC | n/a | Steve | Amy | Mary | | | 8-17 | 8-25 | Thurs | 8-27 | | | | Code still needs work |
| ATT-111 | AK | BW | NW | BAT | IS | | | Steve | ADA | ok CD | | | 11-30 | 12-2 | | | | | | QA passed; ready for beta |
| ATT-114 | AK | BW | NW | BAT | IS | | 10-10 | 10-15 | 10-28 | 10-28 | ok CD | ok AD | 11-6 | 11-14 | Tues | 11-28 | | | | Waiting for scans from client |
| ATT-238 | AK | BW | NW | BAT | IS | | | | | | | | | | | | | | | |
| FFK-128 | FRD | BW | SAC | IL | ML | TDC | | | | | | | | | | | | | | |
| FFK-128 | FRD | BW | SAC | IL | ML | TDC | | | | | | | | | | | | | | |
| MAS-101 | LV | BW | SO | IL | GG | TAB | | | | | | | | | | | | | | |
| MAS-101 | LV | BW | SO | IL | GG | TAB | | | | | | | | | | | | | | |
| REE-111 | AK | BW | SO | BAT | GG | TAB | | | | | | | | | | | | | | |

697 job tickets found for client ALL.
11 Interactive job(s) listed

TRAFFIC THAT WORKS WHEREVER YOU ARE

Traffic has never been an easy skill to master.

At first, traffic managers try to juggle everything in their heads, then in job binders and giant white boards. But these don't scale, so a traffic system that handles 20 jobs collapses when it tries to handle 200.

That's when Clients & Profits saves the day.

Now, dates and times don't need to be memorized. Job status, deadlines, and specifications are available any time with a click of the mouse—whether you're in the office or on the road.

And the changes anyone makes are instantly available for everyone to see. This means fewer forgotten deadlines and less embarrassing miscommunication.

Automated traffic is one of many Clients & Profits innovations, including Snapshot reports (1990), job cloning (1992), built-in change orders (1996), online estimate approvals (1999), one-click creative briefs and proposals (2001), web-based schedules and traffic (2000), asset manager and production planner (2003), and more to come.

BEST OF DAILY Q&As



Q. How many users can access the My C&P! X web server at the same time?

The only limit is technical, which is based on the performance of the hardware that's running My Clients & Profits! X, the available bandwidth of your internet connection, the speed of your Clients & Profits X file server, and the amount of traffic on the network.

Q. Will My Clients & Profits! X work with any version of Clients & Profits?

No. The new My Clients & Profits! X web server requires the upcoming Clients & Profits X 10.1 upgrade, which will be released together in January 2007. Both upgrades share common features so need to work together.

Q. Can clients still access jobs with the My Clients & Profits! X?

Yes, as long as they are authorized web users. Each person at a client needs to be added as a My C&P! X

user then given the appropriate access privileges (for example, not to add time cards). Since employees of clients and vendors are not regular Clients & Profits users, they should have extremely limited access to the web server.

Q. Does My Clients & Profits! X work with all web browsers?

It has been tested with the latest versions of Safari, Firefox, and Internet Explorer. My C&P! X has been optimized to look and work best on Safari.

Q. How do I set up a domain name, like my.agency.com, for our My Clients & Profits! X web server?

Contact your internet service provider and request a new domain name that points to the IP address of your My C&P! web server. We recommend adding the prefix "my" to your shop's domain name to identify the web server. For example, an agency with

the domain name of "www.advertising.com" would name its My C&P! X web server as "my.advertising.com" Adding a prefix to your domain name is free, unlike setting up a brand-new domain name. A new, unique name can also be registered with any domain name registry for about \$9/year (godaddy.com). Either way, the name you choose for the My C&P! web server will be entered by web users as the URL to access the Clients & Profits X database from a browser.

Q. What do I have to do to be able to administer My C&P! from my browser?

In order to set up users' web access to enable browser-based My C&P! X administration, you will need to make sure that they are set up as Clients & Profits X manager-level users and their web users' ID (i.e., usually their initials) matches their C&P X user ID.

Q. Will My Clients & Profits! X run on the new Intel-based Macs?

Yes. The upgrade is a universal binary, so both run natively on new Mac Pros, iMacs, and the Mac Mini.



JOHN DUFFY'S TIPS FOR EXPLORING C&P

Having supported Clients & Profits for many years, I can say I've seen it all. But one thing I've never seen is someone using it too much. Many people start out ambitious, then become something of a comfortable minimalist. Sound familiar? Well, it's a big C&P world out there. Strap on your walkin' shoes, and let's take a stroll.

■ **Are you a time tracker who longs to be among the job trackers?** Let's face it, you didn't buy Clients & Profits just to track time. Somewhere along the way you just put off learning to use the other great features (e.g. the rest of the program). Just taking 15 minutes a day to look beyond the time card can launch you into new arena of traffic, scheduling, and—*EEK!*—accounting.

■ **Are you a job tracker who's never stepped into Accounting-land?** So, you've worked along and gotten yourself using the job tracking and scheduling to the utmost. You're feeling good about moving those projects along, but there is this nagging feeling that you're missing something. No? Well, you can avoid a lot of double-entry by poking around the Accounting menu. You can review a job's costs, check its outstanding POs, see if the client's been billed and much more—without having to chase down the bookkeeper.

With Clients & Profits' excellent job tracking, traffic, and scheduling it just makes sense to use them together with accounting. Taking a little ride up the learning curve could save you in needless double-entry time over the next few months alone. So step out and take a look around. Click a Help button. Explore cnp-x.com. Run some reports just for fun. You might be surprised at what insights you find.

John Duffy (compulicious@gmail.com) has been a C&P staffer/trainer/consultant since 1997.

A FINE TIME TO CONSIDER NEW TECHNOLOGY

By Chris Lawrence

Last Spring, we focused on cleaning up and getting organized. Now that your shop is a mean lean IT-machine, it's time to consider some new technologies.

■ **Plan for new upgrades** The upcoming Clients & Profits X 10.1 upgrade (planned for 1Q 2007) supports the MySQL 5.0 Community Edition (previously, they had to purchase the Pro Certified Server) and Microsoft SQL Server 2005 Express Edition. Both are free, fast, easy to install, and well-supported. SQL databases, however, definitely require some extra know-how, but they reward you with better performance, data reliability, and powerful management tools. Also, the C&P Helpdesk doesn't offer SQL tech support. You will need an experienced DBA to configure and maintain your system.

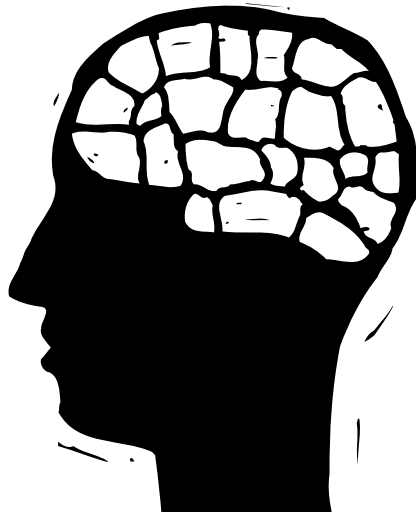
■ **Plan for new hardware** Hardware manufacturers are giving IT managers plenty to look forward to (other than exploding laptop batteries). Steve Jobs announced several new products at the recent Apple Worldwide Developers Conference in San Francisco. They've completed their transition over to Intel chips by offering the Mac Pro (replaces and looks almost identical to the Power Mac G5). The standard configuration includes two dual-core Intel Xeon processors at 2.66GHz

each. That's a lot of speed—far more than C&P needs, to be honest. Most users will do great with an iMac or Mac Mini, but for the video editor or Photoshop wizard who needs a new rig anyway, they'll be able to enter their timecard at light-speed.

The Xserve also got the Intel treatment with dual 2.0GHz dual-core Xeon processors. Much like the Mac Pro, it's far more powerful than necessary for only hosting a C&P database, but for a shop in need of a new file server with plenty of power to handle a variety of server tasks, the new Xserve is a good choice (look for it in October).

■ **Keep an eye on Leopard** Mac OS X 10.5, aka Leopard, is planned for release in 2007. It promises a built-in system backup utility, with typical Apple style, called Time Machine. A new feature, Spaces, will allow you to have multiple workspaces going at once. Gone will be the days of a dozen applications open at once and stacked on top of each other; you'll be able to spread them out across several virtual workspaces. This could be a real benefit for C&P users. The new OS is also optimized for the new Intel-based Macs, so should run much faster.

Chris Lawrence is Clients & Profits' CIO. Chris can be reached at the C&P Helpdesk or by e-mail at chris@clientsandprofits.com.



THE ROAD AHEAD

The lessons learned from creating Clients & Profits ASAP, a web-based studio manager, in 2004 helped its designer, Mark Robillard, make the My Clients & Profits! X upgrade better.

Lesson #1 - Don't Reinvent The Wheel "My original idea for ASAP was to completely rethink the C&P model of agency management. I spent six months trying to make it deliberately different, but in the end it didn't work better. After months of research, I couldn't design a workflow that tracked jobs, costs, and billings with fewer steps and less complexity. So I had to reorient my thinking back to the Clients & Profits, not because it was familiar, but because it was proven to work." That same thinking applied to the My C&P! X upgrade. "Rather than throw out the design, I kept what had proven to work and focused on improving the areas that didn't."

Lesson #2 - Don't Overcomplicate The urge to add more and more features — *feature creep* — is almost overpowering for software developers. "The ego that wants to show off your skills sometimes beats up your common sense, so features get added that don't add much value." At its worst, feature creep causes decent programs to collapse under its own dead weight, alienating loyal users who just want the new version to work better than the old one.

Lesson #3 - Be User-Focused "There just wasn't any point to making My C&P! X different just to be different," Robillard says. "It had to work better for the creatives who need to quickly check on jobs, costs, and billings when they're out of the office." The newly redesigned My C&P! X home page now loads in seconds and acts like a creative dashboard, showing the job hot sheet and today's deadlines. "The page has menus that work just like C&P X, so the user doesn't have to adjust the way they work when they're on the road."



What's New...

By Mark Robillard

UPDATE NEWS C&P X 10.0.7 was updated in September and is available via Software Update or via download at www.cnp-x.com/support/cpx_update.html. The next release will be C&P X 10.1 in January 2007.

CLIENTS & PROFITS AT MACWORLD Two major upgrades—Clients & Profits X 10.1 and My Clients & Profits! X—will be announced at the MacWorld Expo in San Francisco January 8-12.

CANADIAN CHEQUES Beginning in January, all Canadian businesses must use standard-

ized cheques for all payments. The existing cheques are incompatible and will need to be replaced. A patch for C&P 5.x is available now at www.clientsandprofits.com/support/patches.html. A patch for C&P X will be available via Software Updates by the end of October.

C&P X UPGRADE OFFER EXTENDED Our special introductory prices on Clients & Profits X upgrades has been extended until the end of December. While we'll continue to offer telephone support for Clients & Profits 5.0 or earlier versions, there will be no more software updates. Be sure to try-before-you-buy with the free Clients & Profits X demo: www.cnp-x.com/demo

STAFF NEWS We're looking for a new inside sales person with advertising agency or media sales experience: www.cnp-x.com/jobs. Anniversaries: Chris Lawrence (4 years); Karen Farnum (8 years); Brenda Lohr (6 years); Shawn McBride (4 years); Mindy

Williams (13 years).

VINTAGE C&P ARTWORK TEES Some of Peter Horjus's (www.peterhorjus.com) best illustrations are being offered on t-shirts for our 20th anniversary. 100% of the profits from these sales will be donated to the Contemporary Arts Center New Orleans (www.cacno.org), of which Clients & Profits is a corporate sponsor. Look for new designs here: www.cafepress.com/clients_profits

CLIENTS & PROFITS:20 There are more inside stories about early years of Clients & Profits: clientsandprofits20.blogspot.com

MILESTONE In August 1988, Clients & Profits 3.0 was introduced at MacWorld Expo in Boston. It was our first trade show on the East Coast, and I still remember it being 100° at 11 pm.

Mark Robillard (mark@clientsandprofits.com) is Clients & Profits' founder and creative director.

CLIENTS & PROFITS is an award-winning job tracking and accounting software made just for creative businesses. Since 1986, more advertising agencies have chosen Clients & Profits over any other agency management software for Mac and Windows. Nearly 3,000 ad agencies, graphic design firms, and corporate marketing departments use Clients & Profits to track jobs, costs, and billings every day.

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