Time To Get Serious. Time For Clients & Profits X 10.2

Don't despair over challenging times. Help is here.

Today's headline in Ad Age wasn't pretty. "Consuming confidence tanks in February. Recession could lead to business failures, irrational risks." Not exactly encouraging.

In good times, keeping up with the work is all that matters. But in bad times, what matters most is making the work pay. And there's no better way to manage that work than with Clients & Profits.

That's because in good times or bad, only Clients & Profits gives you the tools to track what really matters: clients, projects, deadlines, people, time, and money. When the bottom line matters most, we're what the shops that survive depend on.

We've been through tough times. And after 23 years, we're still here. Still independent, still debt-free. And still committed to the ad industry. And we're here to help, as always.

That's Clients & Profits. We're Serious Business.

GREAT REASONS WHY YOU'LL WANT CLIENTS & PROFITS X 10.2

By Mindy Williams

You've asked, we've listened! And the result is Clients & Profits X 10.2. It's all-new for 2009 and ready to work.

Clients & Profits X's second major upgrade features so many things you've asked for plus a few things we thought of ourselves.

Best of all, the upgrade is FREE to support subscribers, so there's no reason not to check it out today.

We've always believed in listening closely to our users, and this upgrade proves it once again. Clients & Profits X 10.2 features over 100 improvements based on suggestions from users like you.

These improvements make 10.2 better than ever. But it's the new features that give it the WOW factor:

> "The sooner you put C&P X 10.2 to work, the sooner you'll see the benefits of smarter production and accounting management. In times like these, who can afford to be inefficient, disorganized, or unproductive?"
>
> -- Mindy Williams

iPhone Time Card Now it's easy to track your time anywhere, anytime right from your iPhone. The new iPhone time card makes it easy: just choose your job and task from real-time scrolling lists (there's nothing to memorize), enter your hours, then type a description — that's it. The hours your enter are instantly saved into your shop's database back at the office.

Credit Card Statements An intelligent new credit card manager makes tracking purchases made on the shop's VISA, MasterCard, or American Express quick, easy, and simple. Vendor invoices can now be paid by credit card when they are added into Clients & Profits then cleared off automatically when the monthly statements are entered. The statements and their purchases are self-reconciled automatically, saving time.

Online Payments Since vendors can now be paid directly from your bank's web site, getting those payments into Clients & Profits is now a snap. Online payments are recorded like traditional checks, when they are written or from the bank statement.

Web-based Creative Dashboard The old (and, we admit, somewhat boring) web-based time card is now a complete "creative dashboard" showing staff members their important jobs (i.e., the job hot sheet), scheduled tasks that are due that day, and the company's in/out board. It puts more important info about your day-to-day work right in your line of sight.

Who's Connected? This new window lets system managers monitor who's currently using C&P in real-time. They can send users email alerts easily as well as remotely log off selected users. Finally — no more running around!

Clients & Profits X 10.2 is **made for Mac OS X Leopard**, so it has an authentic Mac look-and-feel that's so much more usable than a web application.

Upgrading is really easy, too. You'll find everything you need to know, including screen shots and tutorials, here: *www.cnp-x.com/upgrade/*

We're not stopping there either. We are more committed than ever to make C&P X impossible to live without. Your feedback helps us more than ever. All of us at the C&P Helpdesk are willing and able to help you get the most from Clients & Profits X. Please let us know how we can help.

Mindy Williams is a senior member of the Clients & Profits Helpdesk and teaches the New User Training Class. Reach her at mindy@clientsandprofits.com

DON'T MISS THESE GREAT C&P X 10.1 FEATURES

If you're still using Clients & Profits X 10.0, it's time to upgrade. You're missing out on something good:

■ **Approval Manager** Simplify, standardize and automate your entire approval process for jobs, artwork, estimates, schedules, media, vendor invoices, and billings. *See pages 4-5.*

■ **Vendor Printing RFQs** It's been modernized for today's print projects. Automated request-for-quotes can be emailed to three vendors then awarded via email, creating a purchase order with one click.

■ **Recurring Billings** Job billings for routine monthly charges like web hosting and account management fees can be scheduled for up to a year in advance. These billings are then saved automatically into A/R as unposted invoices.

■ **Creative Dashboard** Inspired by our popular web-based studio manager, C&P ASAP, the creative dashboard combines a staffer's daily time card, the day's deadlines, and the job hot sheet that's always open when you need it.

■ **Sales Commissions** The slow, tedious, and error-prone process of tracking and calculating AE and BizDev commissions is now quick and easy. Commission rates are flexible and are based on job tasks or a flat percentage. Tasks can be chosen to be commissionable or not.

■ **Job Schedule Revision Tracking** Like estimate revisions, prior revisions to a job schedule can be saved and recalled later as needed.

■ **Expense Report Payables** If a staff member is added as a vendor, their expense reports can be added automatically as an A/P invoice and paid on the next check run — saving hours of bookkeeping time.

WHY ACCOUNTANTS WILL LOVE 10.2

Dear Mark:

"What are the benefits of upgrading to 10.2 for the accounting side of Clients & Profits?"

— BJ, New York

To me, without a doubt: it's MySQL.

If you use any edition of Clients & Profits X, you can migrate your existing database to MySQL and see a significant performance gain everywhere — especially when printing reports. You won't believe the difference.

The new work flow for managing credit card statements is an amazing innovation. It'll save hours of time tracking down and reconciling your VISA, MasterCard, and AMEX charges.

The online payment manager is long overdue, I know, but it's worth the wait. It makes keeping track of payments made from your online banking account so simple now. It's easier and faster than writing a check.

C&P X 10.1 streamlined the reimbursement process for employee expense reports. You no longer have to cut a check to an employee before the reimbursement. Just enter that expense report and you're a few clicks away from the A/P invoice that'll automatically pay the employee back on the next check run. It's foolproof.

Many users don't realize the Approval Manager will prevent the printing of A/R invoices or paying an A/P invoice until after they have been approved. If you're all about the process, then you'll love it.

Also, take a look at the recurring billing and sales commission features. Recurring billing works just like recurring payables, so you'll figure it out easily.

The tedious process calculating sales commissions for your AEs is now totally automatic, too. And you can now include business development execs in your commission plan. It's all customizable and very easy to set up. If you've ever spent hours at month-end figuring commission checks, you'll love this new feature.

Mark Robillard is the founder of Clients & Profits and the company's Creative Director. Ask your business management questions at www.clientsandprofits.com/support/ask_mark

HOW TO UPGRADE TO CLIENTS & PROFITS X 10.2

Installing the Clients & Profits X 10.2 upgrade is easy if you're already using C&P X, less so if you're still using an older version of Clients & Profits:

■ **If you're using C&P X 10.0** The upgrade is available only as a download from www.cnp-x.com/upgrade. The installer copies a new Clients & Profits X application, which needs to replace any previous version. A one-time database registration is needed, as well as activating each workstation (which serializes the application). A quick conversion is required the first time a database is opened.

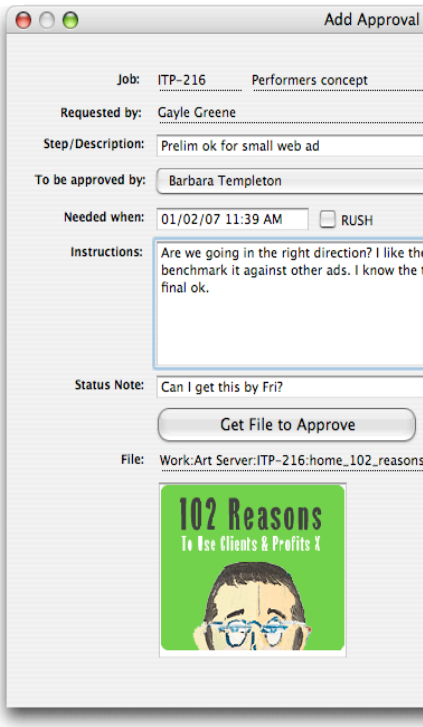
■ **If you're using C&P Classic/Pro/Job Tracker 5.x** If you are using C&P 5.0.8 (see www.clientsandprofits.com/whats_new), the upgrade will convert 5.x databases automatically; if not, follow the instructions in the Installation Guide. An extensive conversion is required the first time a 5.x database is opened, which can take several hours. There are major differences between 5.x and 10.2, so be prepared for a learning curve.

■ **If you're using C&P SQL 1.0** Clients & Profits X 10.2 will convert any SQL Server database, but now requires SQL Server 2005 (Oracle is no longer supported).

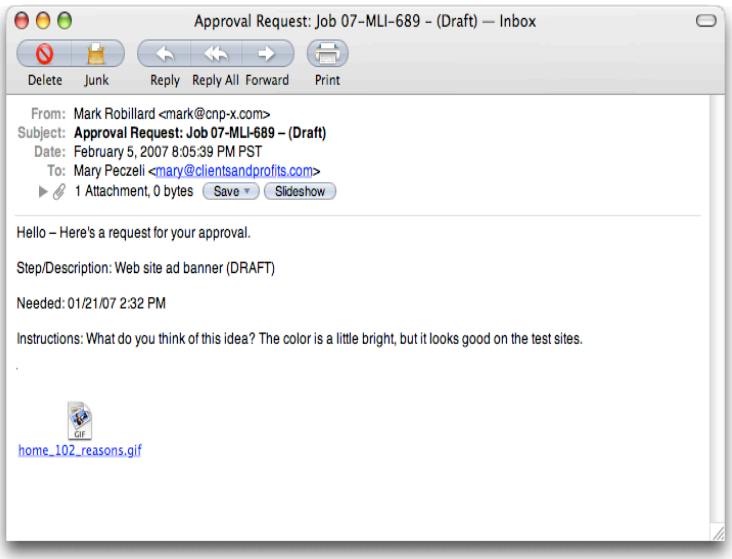
■ **If you're using C&P ez/4/PLUS** To upgrade from these 1990s-era versions, call (800) 272-4488. We can convert your database to C&P X 10.2 in less than 48 hours.

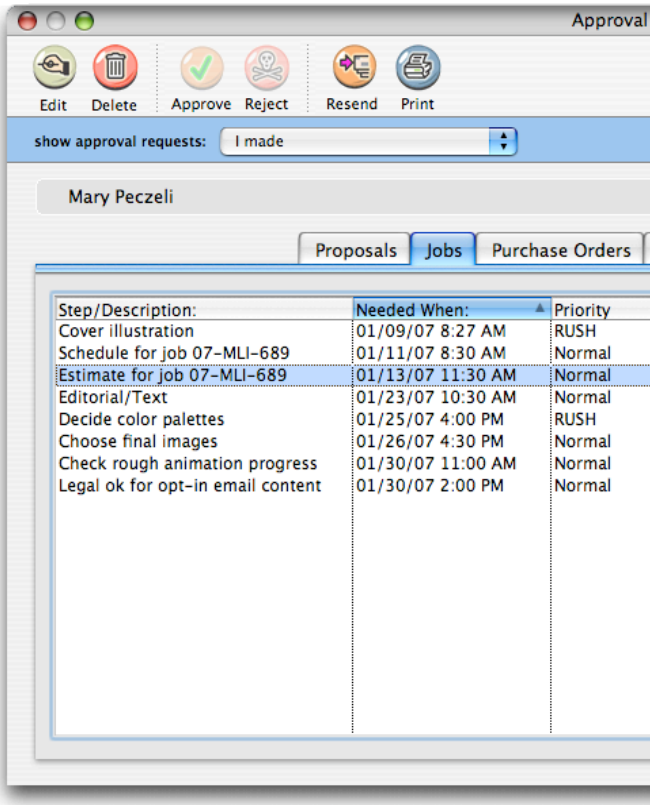
■ **If you're using My Clients & Profits!** The new My Clients & Profits! X (www.cnp-x.com/my) is a free upgrade and packed with new features. Try the free online demo today: my.clientsandprofits.com

THE APPROV



2 THE APPROVAL REQUEST IS SENT TO THE CLIENT IN THE FORM OF AN EMAIL WITH ATTACHED ART FILES.

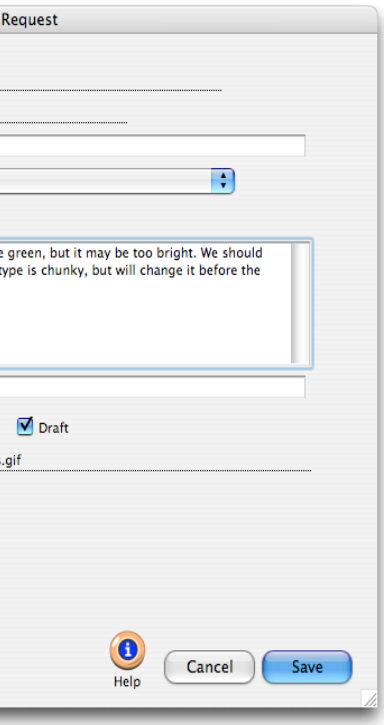




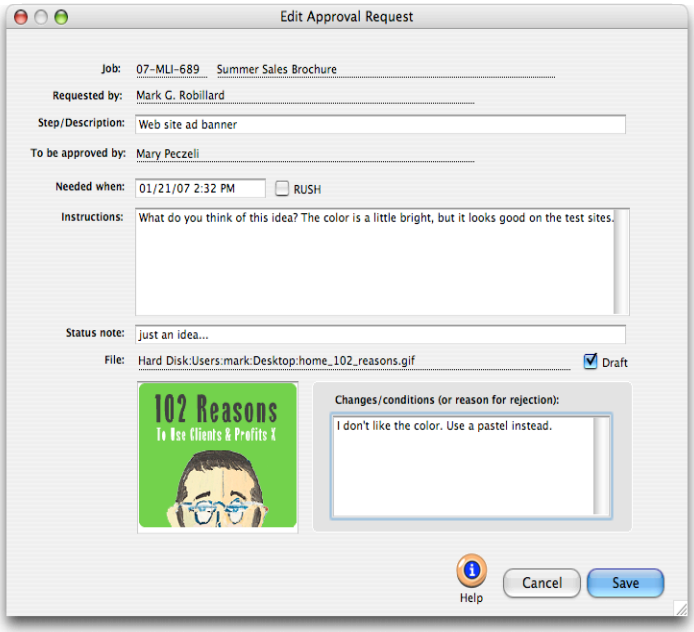
3 THE CLIENT REPLIES TO THE EMAIL, AND A STAFFER UPDATES JOB STATUS VIA THE APPROVAL MANAGER. OR, CLIENTS CAN APPROVE JOB REQUESTS DIRECTLY FROM ANY WEB BROWSER*.

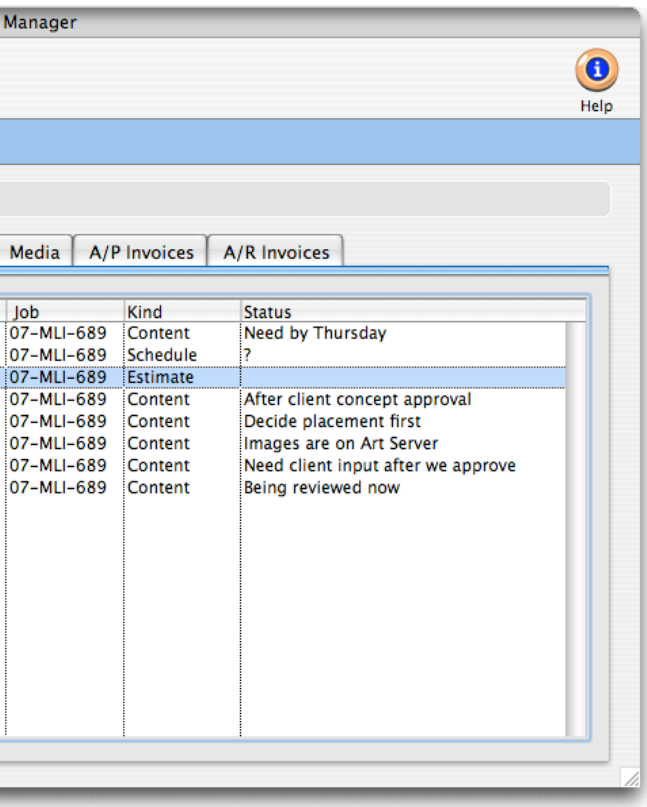
(*IF YOU USE THE MY CLIENTS & PROFITS! X ADD-ON WEB SERVER.)

VAL PROCESS



1 STAFF MEMBER INITIATES AN APPROVAL REQUEST IN CLIENTS & PROFITS, SELECTING THE PERSON WHO WILL APPROVE THE REQUEST AND ATTACHING ANY NECESSARY FILES.





4 IF YOU CHANGE THE APPROVAL REQUEST, IT CAN BE EASILY RESENT TO THE PERSON WHO WILL APPROVE IT. THEY'LL RECEIVE AN EMAIL CONTAINING THE NEW DETAILS INSTANTLY.

BEST PRACTICES FOR THESE CHALLENGING TIMES

By Mary Peczeli

Even the best of times are a challenge. In good times, it's just keeping up with the work. But in times like these, it's a matter of survival.

Forget Your Competition Instead, get your own house in order.

Pennies Matter, Dollars Matter More Insist on time cards every day — no excuses, no exceptions. Time is money now more than ever. Remember, a staff member with unbillable time is an expense, not an asset. And don't even consider unbilled time. Count every billable hour and get it billed on time.

Don't Drop The Ball Traffic people love their own systems, but enough's enough. Don't let them juggle calendars, spreadsheets, or homemade apps for something as critical as meeting client deadlines. If they're not using C&P X for traffic, they're working twice as hard. And now's not the time to pay for that.

> "The agency business today is unforgiving. I've talked about this a hundred times, and it's never been as true as it is today. The shops that obsess over best practices won't only survive, they'll thrive as their competitors fail."
>
> -- Mary Peczeli

Prove Your Worth Use the Client Job Status report to remind your clients how professional, organized, and efficient you are. Always send estimates (and get them signed). Insist on creative briefs (and get them approved). Impress them with automatic client emails that keep them in the loop.

Act Like a Client Make sure you're getting the best deal from your vendors. They're hungry too. So use the Vendor RFQs to get three quotes for everything you print. No orders without approval. And pay no invoices without a purchase order.

Everyone, Same Page Make sure everyone has their priorities straight: clients, jobs, deadlines. That's all that matters now. Always use the auto email alerts for breaking news about job dates, status changes, budget warnings, and approvals.

Measure Up Use Snapshot reports to see the big picture. Winners have it all: profitability, productivity, cash flow.

Bill Early, Bill Often Get a jump on cash by billing something — anything — when a client approves a job. (Offer a token discount if you have to.) Then bill as the job progresses, even before all the costs come in. You can always send a final billing with lots of detail if the client asks for it.

Get Paid Use the Collection Manager EVERY DAY to stay ahead of your unpaid invoices. Let it nag your slow-paying clients for you.

Stay Plugged In C&P X is always on, so rely on it. You have up-to-the-minute stats on your shop at your fingertips. Head bad news off at the pass with change orders, budget alerts, and job status emails.

Eyes Forward Bad times don't last. These best practices give better odds that you'll be one of the survivors — and the one rescuing your dead competitors' clients.

Mary Peczeli is the Clients & Profits' VP-Sales and has been a staff member since 1996. She can be reached at (800) 272-4488 or at mary@clientsandprofits.com

INTRODUCING C&P X: ENTERPRISE EDITION

Clients & Profits SQL has been reintroduced as **Clients & Profits X: Enterprise Edition** and given more power and special features that make it ideal for multi-location advertising agencies and in-house marcom departments.

SQL Server 2005 C&P X: Enterprise Edition is based exclusively on Microsoft SQL Server 2005 for unsurpassed scalability, reliability, and interoperability.

Mac OS X Universal Binary C&P X: Enterprise Edition is the only SQL-based agency management system designed for Mac OS X. It is an evolution of a system that's been a real Mac application since 1986.

Cross-Platform C&P X: Enterprise Edition fully supports Windows users. This means both your Mac OS X and Windows users can collaborate on the same database of clients, jobs, costs, and billings at the same time.

Hybrid Desktop/Web Application When used together with the SQL Server-based My Clients & Profits! X web server, users can access their own clients, jobs, time cards, schedules and more in real-time whether they are working in the office, at home, or on the road.

Exclusive Features Clients & Profits X: Enterprise Edition offers enhanced security and other special features not found in other editions of Clients & Profits X.

With Clients & Profits X: Enterprise Edition, users can upgrade to SQL Server-based performance without losing any of their work — and without learning anything new.

WORK THE WEB WITH MY CLIENTS & PROFITS! X 10.2

By Chris Lawrence

My Clients & Profits! X 10.2 is a brand-new version of the widely-used add-on web server for Clients & Profits X — and a free upgrade, too. There's a lot to like:

Dramatically faster performance The new upgrade runs 2-5X faster than My C&P! 5. The server engine has been completely reengineered around Web 2.0 technologies (e.g., slimmer HTML/CSS2 and enhanced Javascript) for improved cross-platform compatibility. And the Mac OS X version uses gzip encoding to greatly reduce network traffic.

C&P X-like user interface The My C&P! X web pages were redesigned to look and feel just like the Clients & Profits X desktop application. This means there's virtually no learning curve for web users who know the desktop software.

Creative dashboard home page A C&P ASAP-inspired "creative dashboard" home page that displays the user's daily time card, the day's deadlines, their job hot sheet, and the company's in/out board. So they're in the loop even when off-site.

Online approvals Use the web to approve A/P invoices, time sheets, and expense reports as well as vendor invoices for payment and client approvals for job content when used with the C&P X approval manager. *(See pages 4-5 for an illustrated example of how this works.)*

Online proposals, change orders Add, edit, approve, print and kill proposals as well as add and edit change orders anywhere you have internet access.

Pre-billing estimates Pre-bill job estimates and review unposted client billings from your iPhone (how cool is that?).

Snapshot reports Print selected Snapshot production, work in progress, and job reports like the Job Summary.

Improved compatibility My Clients & Profits X 10.2 is designed especially for Mac OS X 10.5 (Leopard) and Windows Vista and fully supports MySQL 5, Microsoft SQL Server and the latest versions of Safari, Firefox, and Internet Explorer without plug-ins of any kind.

These performance improvements require no additional server hardware, so My C&P! X 10.2 has the same server requirements as before. While we recommend using a dedicated server for My C&P! X, it doesn't have to be a brand-new server.

Upgrading is easy: it is a simple reinstall. If your users are running Clients & Profits X 10.2, then no data conversion is needed.

Chris Lawrence (chris@clientsandprofits.com) is Clients & Profits' CIO. He edits the System Manager News page and finds the best deals on hardware and software for the Deals page.

5 GOOD REASONS TO MOVE TO MYSQL

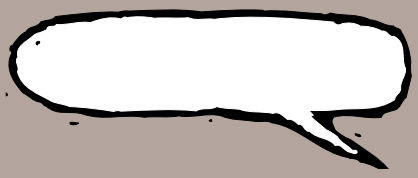
#1 Your database is growing As your database grows, the demands on it increase as more jobs, more tasks, more costs, and more billings are added. Things move slower if the server hardware hasn't been upgraded to handle the volume, especially when a database grows beyond one segment. Because MySQL is a dedicated database server, it is scaled for high volumes of work by dozens of users without straining.

#2 Your database is slowing down or, even worse, crashing The built-in Clients & Profits database was designed for simplicity and low maintenance . That's why you don't need an expensive server or an experienced database expert to run it. But the downside is that it's vulnerable to network interruptions and hardware problems. Since MySQL actively manages the database, it is fault tolerant and self-correcting. This means a large database is more reliable.

#3 You're concerned about reliability MySQL is an industry-standard open source database, so it is widely used and well documented. There are many tools to monitor the database and optimize its performance that aren't possible with the built-in C&P database.

#4 Moving to MySQL is not painful Once your MySQL server is configured, converting your database is easy. C&P X will automatically convert your database into MySQL tables. Then, when each user opens C&P X, they'll connect to MySQL using its IP address and database name—that's all. Everything runs the same as before, except the performance is much faster.

#5 It's free—and it runs on Mac OS X Server MySQL is open source, so there are no license fees. And its available for Mac OS X, so you don't need a Windows box to run it—a big advantage if you have an all-Mac shop.



UPGRADE FAQS

Q. Is Clients & Profits X 10.2 really a free upgrade? Yes! We're so excited about C&P X 10.2's new features that we didn't want cost to keep people from upgrading now. That's why we're offering this upgrade free to support subscribers. This free upgrade is our way of saying thanks for our support subscribers' commitment to Clients & Profits.

Q. What happens if we don't upgrade this year? You'll still be able to upgrade, but it will cost extra to wait until 2010 to upgrade.

Q. We never upgraded to C&P X. Can we still upgrade? Yes, but not for free. For a limited time we are still offering generous discounts to Clients & Profits 5.x users.

Q. We let our support subscription lapse. Can we still upgrade? Yes, but after you renew your annual subscription.

Q. Is the upgrade process difficult? No. Here's what to do: (1) download the 10.2 installer from the C&P X web site, (2) trash your C&P X 10.x folder, (3) run the installer and follow the prompts, (4) start C&P X 10.2 then open your current database. The first time you open your database, it will prompt for a one-time conversion. Then repeat steps 2-3 for each workstation. That's it.

Q. Do we have to upgrade everyone at once? Yes, everyone must be using the same version of Clients & Profits X.

Q. What happens to our custom reports or our custom plug-in applications when we upgrade? Custom reports from C&P X 10.0.x can be converted by opening them in C&P X 10.2. Custom plug-ins aren't compatible and will have to be reprogrammed in Omnis Studio 4.3.

Q. Is there a data conversion? Yes, but it is minor and very fast.

Q. Is there a lot to learn for this upgrade? No. Everything still works the same way. The new features, such as the online approvals, will take some time to learn if you decide to use them. Most new features have a video tutorial on the C&P web site.

Q. Will there be any more updates to C&P X 10.0 or 10.1? No. Those versions have served us well, but have been retired to the Clients & Profits Archives.

Q. Can we try Clients & Profits X 10.2 before we upgrade? Of course! You can download the upgrade and try it with your own sample database (don't use your live database, because you can't go back) for 60 days.

Need answers about upgrading? Send your questions to helpdesk@clientsandprofits.com today.

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. IT'S SOFTWARE FOR THE BUSINESS OF BEING CREATIVE®

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