



CLIENTS & PROFITS[®] X

Feature Guide

Fourth Edition

This feature guide documents Clients & Profits® X

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How to use this feature guide

This Feature Guide illustrates the best features in Clients & Profits X for tracking your clients, jobs, costs, billings, and finances. Together with the web-based Learning Clients & Profits X tutorial (www.cnp-x.com/tutorial), the guide highlights the software's most important abilities, and walks you through the basics of each window and its functions. After browsing through this guide, you'll have a good sense of what you can do with Clients & Profits.

■ The first two chapters, Introducing Clients & Profits X and Getting Started, provide a quick overview of the Clients & Profits X software.


■ Chapter 3, Job Tickets, illustrates job tickets, estimating, scheduling, and traffic. To see how to track time, add purchase orders, manage vendor payables, and write checks, see Chapter 4, Job Costing. Chapter 5, Media, describes Clients & Profits X's media planning, ordering, and tracking capabilities. Clients, Billing, and Accounts Receivable, Chapter 6, guides you through billing client, as well as tracking unpaid invoices, making client payments, and printing statements.

■ To learn how Clients & Profits X manages accounting see Chapter 7, General Ledger. Chapter 8, Snapshots, explains how to print essential reports showing jobs, traffic, costs, work in progress, vendor and client account balances, productivity, and profitability, as well as financial statements.

■ Chapter 9, Settings, Options and Preferences, shows system managers how to set up users, assign access privileges, set up vendors, and customize how Clients & Profits X behaves.

NEED HELP? Call Clients & Profits X Helpdesk at (800) 521-2166 from 7:00 AM - 5:00 PM Pacific Time. Or, send your questions to helpdesk@clientsandprofits.com.

For up-to-date answers to your agency management questions, check out the Clients & Profits X web site: www.cnp-x.com/support

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

Contents

Chapter 1: Introducing Clients & Profits

- 1-2 Introducing Clients & Profits X
- 1-4 Starting Clients & Profits X
- 1-6 Using The Information Center
- 1-7 Using Lookup Lists
- 1-8 Clients & Profits X Menus
- 1-10 Clients & Profits X 5.0 Basics
- 1-12 The Job Ticket Flowchart

Chapter 2: Getting Started

- 2-4 Getting Started Quickly with Clients & Profits X
- 2-5 Adding Jobs
- 2-6 Printing Daily Traffic reports
- 2-7 Adding Job Costs
- 2-8 Adding Billings
- 2-9 Printing Reports
- 2-10 What to Do First...
 - 2-10 Add Users
 - 2-11 Add the Chart of Accounts
 - 2-11 Enter Your Sales Tax Rates
 - 2-12 Add Clients
 - 2-12 Add Vendors
 - 2-13 Add Staff Members
 - 2-13 Add Tasks
 - 2-14 Add Status Codes
 - 2-14 Add Spec Sheets
 - 2-15 Set Your Job Preferences
 - 2-15 Set Your Accounting Preferences
- 2-16 What To Do Next...
 - 2-16 Add Open Jobs
 - 2-17 Add Open Purchase Orders
 - 2-17 Add Unpaid Payables
 - 2-18 Add Unpaid Receivables
 - 2-18 Add G/L Beginning Balances
 - 2-19 Add Unbilled Work in Progress
 - 2-19 Checking Your Work
- 2-20 Getting Started Tips

Chapter 3: Job Tickets

- 3-4 Proposals
- 3-6 Job Tickets
- 3-8 Job Ticket Window
- 3-10 Add New Job Window
- 3-12 Job Tasks
- 3-14 Adding Job Tasks
 - 3-16 Creative Briefs
 - 3-17 Printing Specifications

3-18	Estimating
3-20	Printing Estimates
3-22	Printing Specifications
3-24	Traffic
3-26	Job Traffic
3-28	Job Scheduling
3-30	Timeline
3-32	Change Orders
3-34	Production Planner
3-36	Weekly Traffic Report
3-38	Daily Job Status Report
3-40	Work To Do
3-42	Asset Manager
3-44	View>Point
3-44	Job Snapshot
3-46	Printing Job Reports
Chapter 4: Job Costing	
4-4	Purchase Orders
4-8	Adding Purchase Orders
4-10	Printing Purchase Orders
4-12	Printing Purchase Order Reports
4-14	Accounts Payable
4-16	The Accounts Payable Window
4-18	Job Cost Invoices
4-20	Overhead Invoices
4-22	Media Accrual Invoices
4-24	Add Credit Card Statement
4-26	Importing Credit Card Statements
4-28	Printing Accounts Payable Reports
4-30	Time Cards
4-32	Time Sheets
4-34	Time Sheet Window
4-36	Adding Time Sheets
4-38	Import Time
4-40	Time Reports
4-42	Checkbook
4-44	The Checkbook Window
4-46	Vendor Checks
4-48	Autopay Payables
4-50	Job Cost Checks
4-52	Add Online Payment
4-54	Overhead Expense Checks
4-56	Employee Advance Checks
4-58	Printing Checks
4-60	Checkbook Reports
4-62	Bank Reconciliation
4-64	Expense Reports
4-66	The My Daily Expense Reports Window
4-68	Internal Charges

4-70 Job Cost Transfer

Chapter 5: Media

5-4 Overview
5-7 The Media Menu
5-8 Media Work Flow
5-10 Media Calendar
5-12 Media Briefs (Campaigns)
5-14 Media Estimates
5-16 Broadcast Media Plans
5-18 Print Media Plans
5-20 Insertion/Broadcast Orders
5-22 Adding Broadcast Orders
5-24 Adding Insertion Orders
5-26 Adding Interactive Orders
5-28 Adding Outdoor Orders
5-30 Media Traffic
5-32 Stations
5-34 Publications
5-36 Make Goods
5-37 Media Billing Goals
5-38 Media Reports
5-40 Media Link

Chapter 6: Clients, Billing, and Accounts Receivable

6-4 Clients
6-8 Client Features
6-6 The Clients Window
6-8 The Add Client Account Window
6-9 Client/Staff Privileges
6-10 Client Contacts
6-12 Client Billing Information
6-14 Client Projects
6-15 Client Diary/Call Log
6-16 Meeting>Manager
6-18 Client Retainers
6-20 Client Budgets
6-21 Client Statistics
6-22 Client Alerts
6-23 Client E-mail
6-24 Sales>Maker
6-28 Billing/Accounts Receivable
6-29 A/R Features
6-31 Billing Types
6-32 The Billing/Accounts Receivable Window
6-34 Job Billing
6-36 Estimate Billing
6-38 Progress/Final Billing

6-40	WIP Billing
6-42	Multi-Job Billing
6-44	Media Billing
6-46	Retainer Billing
6-48	Advance Billing
6-50	Miscellaneous Billing
6-52	Finance Charge Billing
6-54	Automatic Job Billing
6-56	The Billing Worksheet
6-58	Applying Advances
6-59	Applying Retainers
6-60	Printing Invoices
6-62	Printing A/R Reports
6-64	Client Payments
6-66	The Client Payments Window
6-68	The Add Client Payment Window
6-70	Distribute Payments
6-71	Split Client Payments
6-72	Bank Deposits
6-74	Printing Client Payment Reports
6-76	Collection Manager

Chapter 7: General Ledger

7-4	General Ledger
7-5	G/L Features
7-8	The General Ledger window
7-12	Profit Centers
7-14	Departments
7-15	Sub-Classes
7-16	Chart of Accounts
7-18	The Chart of Accounts Window
7-20	The Add New Account Window
7-22	The Budget Worksheet Window
7-24	The Add Journal Entries Window
7-26	Printing G/L Reports
7-28	G/L Tools
7-30	Importing Payroll
7-32	Transfer Account Balances
7-33	Add Adjusting JE
7-34	G/L Reconciliation
7-35	Out of Balance Checker
7-36	Auditor
7-38	Overhead Allocation Worksheet
7-40	Close Year

Chapter 8: Snapshots

8-4	Snapshot Reports
8-5	The Snapshots Menu

8-6	Production Reports
8-8	Work in Progress Reports
8-10	Job Costs Reports
8-12	Vendor Account Aging
8-14	Client Account Aging
8-16	Cash Flash
8-18	Profitability Reports
8-22	Productivity Reports
8-24	Financials
8-28	Media Analysis Reports

Chapter 9: Settings, Options, and Preferences

9-4	Users, Passwords, and Access Privileges
9-6	The C&P Users window
9-8	General Privileges
9-10	Menu Privileges
9-12	Jobs Privileges
9-14	Job Costs Privileges
9-16	Accounting Privileges
9-18	User Budget Alerts
9-20	Who's Connected
9-22	Departments
9-24	Staff
9-26	The Staff window
9-28	Staff Availability
9-30	Vendors
9-32	The Vendor window
9-34	Vendor Account Info window
9-36	The Information Center
9-38	Status Table
9-40	Task Table
9-42	Job Types/Spec Sheets
9-44	Order Templates
9-46	Registration
9-48	Preferences
9-50	C&P E-mail
9-51	Spell Checker
9-52	Web Access
9-54	Daily Time Card for iPhone and Web

Appendices

Appendix A: Glossary

Appendix B: Using Plug-in Applications

Glossary

Index

A technical supplement, *The Clients & Profits X Database Guide*, is included at the end of this chapter. It is a step-by-step troubleshooting and maintenance guide to the C&P database. Its contents include:

4	Database Troubleshooting Flow Chart
5	Troubleshooting Worksheet
6	How to Troubleshoot Database Problems
7	Database Myths
8	How to Repair Damaged Databases
10	How to Export/Import Damaged Databases
12	Database Troubleshooting FAQs
14	15 Tips for Preventing Data Damage
15	Common Causes of Damaged Data
16	Inside the Clients & Profits X Database
18	Database Size
20	Windows Tips