

**Settings**

## Chapter 9

### SETTINGS, OPTIONS, & PREFERENCES

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## Introduction

Clients & Profits X is highly customizable, so it can be tailored to how you work. It's easy, since all settings, options, and preferences can be changed without programming. You're never locked into these decisions, either. Since they can be changed anytime—and as many times as you need. This chapter explains, in depth, how to set up Clients & Profits X. In this chapter you'll learn how to:

- add users to your database
- set up user passwords and access privileges
- add staff members, cost rates, and billing rates
- add, edit, and delete vendors
- use the Information Center
- create a custom Task Table
- set up status codes
- set up groups
- set up job spec sheets with job templates
- register your Clients & Profits X software and activate your database
- set your system's preferences

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 [www.cnp-x.com/support](http://www.cnp-x.com/support). The web site is continually updated, so it's more timely and helpful than a printed user guide.

# Users, Access & Passwords

Clients & Profits X features a sophisticated user-based password system to keep your database secure. The system tracks who's using the database based on user initials. Access privileges to different parts of the system can be made available—or disabled—for individual users. This ability lets you limit what users can see, change, and print. There is virtually no limit to the quantity of users in your user list. Anyone who will ever use Clients & Profits X, even just once, must first be added as a user. Every user is identified by his or her initials (or some other code; it's your choice) and a password. Every user has his or her own password, which is unique. When a user starts Clients & Profits X, they will be prompted to enter their initials and password; if the password is wrong (they get three tries), they can't open the C&P database.

■ Manager-level users can add, edit, and delete regular users, plus they can change the system's default settings (e.g., Preferences, Report Options).

The Users file is different from the Staff file. Users are people who can access Clients & Profits X, while Staff members are the shop's employees. They are usually identical, since most employees typically use C&P. Everyone who works for the company should be added as a staff member, while only those people who will use Clients & Profits X should be added as "users." Staff members and Clients & Profits users may have the same initials. Changing the user's name or initials doesn't update the staff information, and vice versa; if you change information in one window, you should change the other as well.

Once the new user is saved, you can give the user his or her access privileges.

## Access Privileges

Access privileges are the foundation of your database's security system. By carefully and thoughtfully assigning access privileges, you can provide users access to the things they need to see—and keep them from seeing and working on things they shouldn't.

Every user has his or her unique set of access privileges. This ability lets you tailor the system to a user's special needs for information. For example, you can selectively give a user access to adding, editing, and deleting job tickets—but prevent them from seeing costs.

You can provide access to specific menu commands, as needed. When a user doesn't have access to a menu command, it appears dimmed and can't be chosen. This prevents a user from working in some place they shouldn't. For example, you can give a user access to Media, to add, change, and print media plans, but not Accounts Payable or the Checkbook.

Access privileges are very flexible, so they can be changed at any time. The changes you make take effect the next time the user enters their initials in the Introduce Yourself window.

■ Any manager can change a user's access privileges, including their password.

Over 40 user-based access privileges give system managers a greater ability to pick-and-choose just what a user can see and do. These new access privileges are not automatically enabled when you first install Clients & Profits X. Instead, they need to be set individually for each user. To accommodate these expanded access privileges, they are organized into five functional windows: General, Menus, Jobs, Costs, and

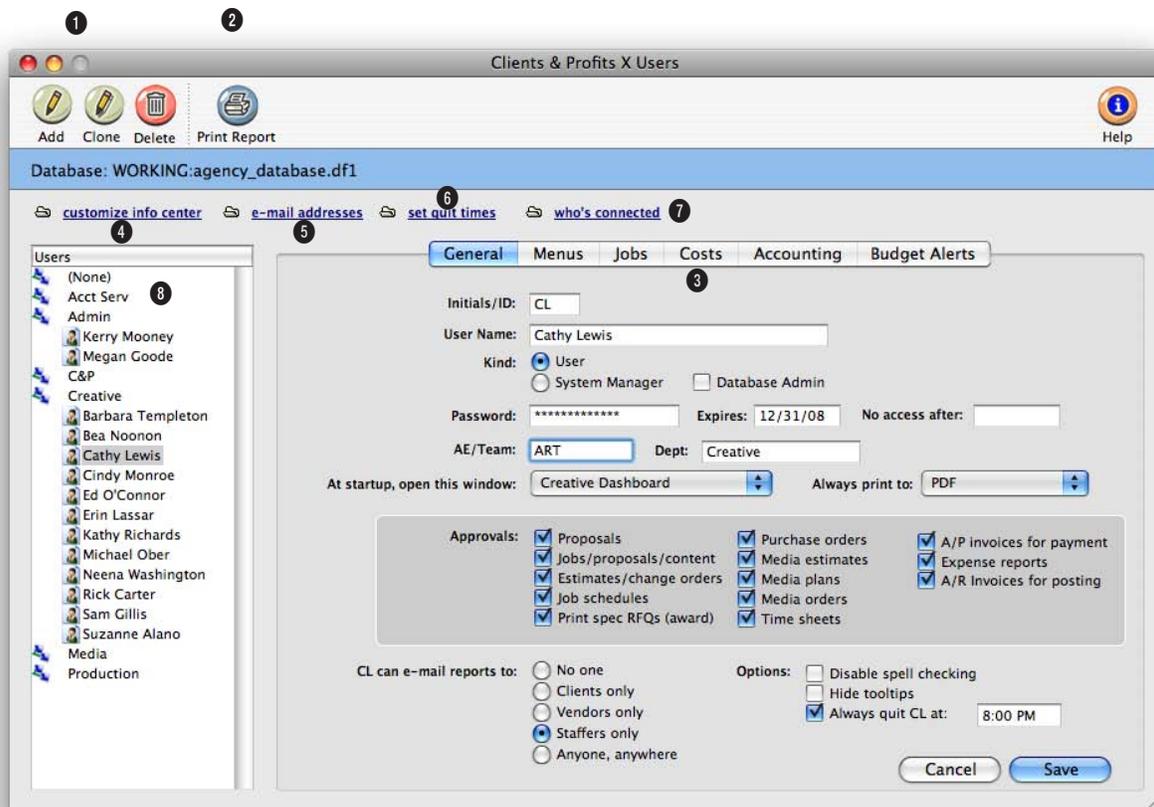


Accounting.

## User Access Privileges

Category	Access privileges that can be customized
General	A user's access settings are setup in the General Privileges window. The access settings include selecting what type of user the user is, adding a password with an expiration date, a special no access after date, an optional quit time, assigning an AE/Team, an option to disable the spell checker, assigning a department, and selecting to always print to the printer or screen.
Menus	The Menus Privileges window determines what areas of Clients & Profits that a user can access. A user can have access to all, none, or some of the menu options available. This allows system managers to give users who specialize in one part of the job process (e.g., an accounts payable clerk) access to only the menus they need to use and see.
Jobs	The Job Privileges window allows a system manager to customize how a user views and works with job tasks, job tickets, and traffic. There are many options to choose from to get the perfect settings to fit each user's needs. For example, a user can have access to just view job tickets for a limited production status code range or to only update job schedules in the job ticket window.
Costs	The Costs Privileges window allows a system manager to customize how a user views and works with time, purchase/insertion/broadcast orders, costs, cost transfers, and checks. There are many options to choose from to get the perfect settings to fit each user's needs.
Accounting	How a user can work with Accounts Receivable and the General Ledger are determined in the Accounting Privileges window. A system manager can choose what G/L tools a user can see and use, what kind of g/l accounts the user can add/edit/delete, if a user can post everyone's entries or only their own, and whether or not they can change the sales tax settings on estimates and invoices.

# Clients & Profits Users window



**System Managers use the Clients & Profits Users window to quickly and easily manage the staffers, freelancers, and temps who need access to the database.**

1 Users can be easily added, cloned, edited, and deleted using these toolbar buttons. To add a new Clients & Profits X user, click on the **add** button. Cloning makes an exact duplicate of a user's access privileges with a new user code and name. To clone a user, click on the **clone** button. Users can be edited at any time by a system manager. To edit a user's settings and access privileges, click on the **edit** button. To delete a user, click on the

**delete** button. A user can be deleted at any time and it is permanent. However, a user can be re-added if necessary.

2 Click the **print report** button to print a hard-copy user list.

3 Enter a user ID (either their initials or a code) here to **find** a user account.

4 To change a user's information center, click on the **customize info center** link.

5 A listing of every user with their respective e-mail addresses and departments can be viewed, edited, and printed by clicking on the **e-mail addresses** link.

6 To enter the automatic quit times for every user, click on the **set quit times** link. This option forces Clients & Profits X to quit automatically at a certain time. By quitting automatically, the nightly backup won't be stopped if a user forgets to quit Clients & Profits X.

**Deleting a user doesn't erase the work he or she has done. You'll still see his or her initials on invoices, jobs, time sheets, etc. Also, the user's Staff Member record is not deleted; instead, the Staff record is marked as inactive.**

7 View who's online, who's not, and what screen in C&P they visited last in the Who's Connected window.

**Accounting** manages access to billing, posting, WIP, and the General Ledger.

8 Clicking on a department name shows all of the C&P X users who belong in the department.

With optional **budget alerts**, each user can have different warnings setup to appear when a user is near or over budget while adding purchase orders, job costs, or time entries. To add, edit, or remove a user's budget alerts, click on the budget alerts tab.

9 Click on one of the tabs to edit a user's different access privileges and the option budget alerts. The changes you make are saved automatically.

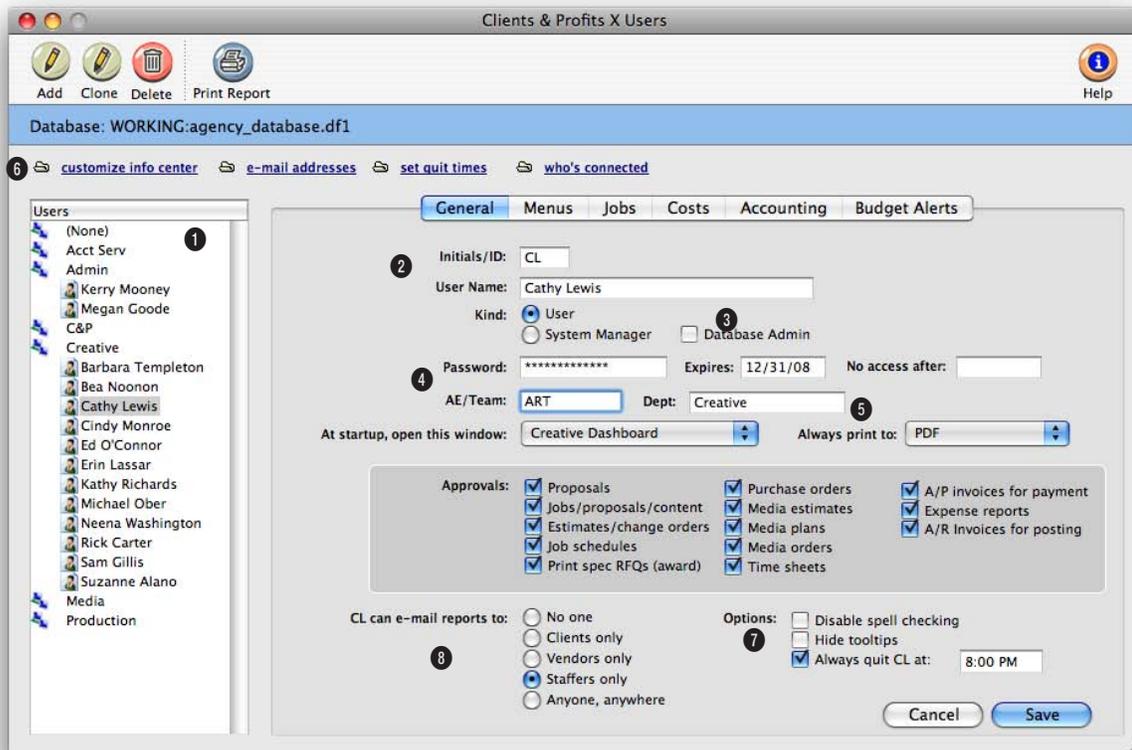
**General** privileges contain essential account information, such as password.

**Menus** controls which Clients & Profits X features are available to the user.

**Jobs** manages just what a user can and can't do with jobs, estimates, schedules, traffic, etc.

**Costs** sets limits on how a user can track time, add job costs, and approve time cards and expense reports.

# General Access Privileges



**Passwords are an integral part of Clients & Profits X security system. Make sure each user has a password and periodically change them to help keep the database secure.**

1 Click on a user name then the General tab to edit the user's general access privileges.

2 A user can be set as a regular Clients & Profits X user or as a system manager. Users can use most typical add, edit, delete, and print operations, while managers can access special functions, such as setting access privileges. A staff member can be changed from user to manager, and vice versa, as needed. A Quick Check is performed on the database

whenever a manager-level user introduces himself or herself.

3 The user's password controls their access to Clients & Profits X. A user can't open the database without entering a correct password. Passwords are defined by system managers, not by users. Users can't change their own passwords. Passwords are especially important in larger shops, where dozens of staffers will use Clients & Profits X. The security system provides two important

features: it keeps confidential data private, by restricting access; and, it keeps people from accidentally adding, changing, or deleting information they're not supposed to change.

A password can be set to **expire** by entering an expiration date. If a user's password has expired, he or she can't open the database until a system manager resets the expiration date.

4 Entering a date in the no

**A system manager can add, edit, and delete regular users. They can also change the system's default settings, such as Preferences, Access Privileges, and Custom Reports. Managers also have special access to management-type functions, like unposting and doing database repairs. There can be more than one manager-level user.**

access after field allows a user (like a temp or a freelancer) to use Clients & Profits X for a limited time.

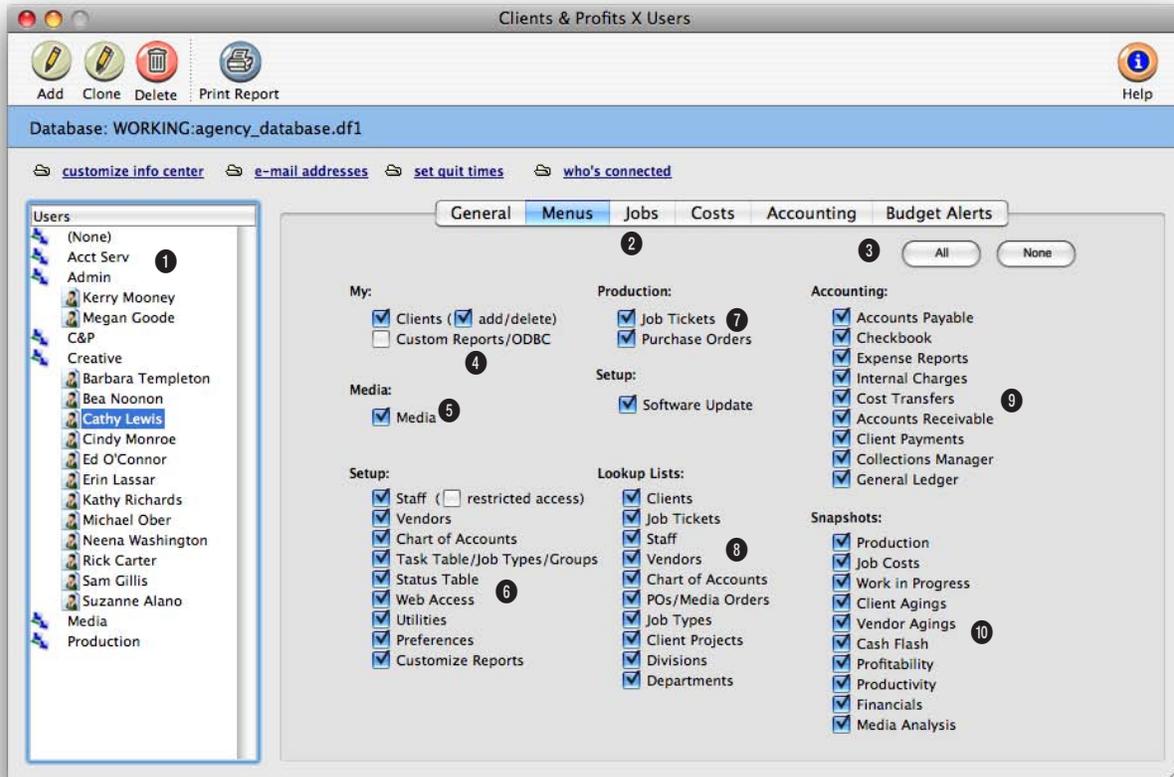
5 User accounts can be sorted by **AE/Team** on reports to manage large groups of users more easily. Each user can belong to a **department** by entering a department code here.

6 A user's **information center** can be customized to fit their individual needs. To customize a user's information center, use the customize info center link in the Clients & Profits Users window.

7 Check the **disable spell checking** option for a user who doesn't want the spell checking window to open when the Save button is selected. Check the **always quit** option to force Clients & Profits to shut itself down at a certain time at night. Use this option to prevent a user from keeping Clients & Profits X open at the same time as the scheduled backup. The **Software Update** option allows a user to download and install new versions of Clients & Profits X. For security and control reasons, you may want to limit software updates to system managers only by unchecking this option. If unchecked, a system manager will have to download new updates on each user workstation.

8 The e-mail reports option allows a user to send an electronic version of any Clients & Profits X reports or form (e.g., estimate or invoice) via e-mail.

# Menu Access Privileges



User access to menu options can be easily tailored to fit their needs. What menu access a user has is at the discretion of the system manager.

1 Access privileges are set for one user at a time. The user ID/name identifies the user whose access privileges are being changed.

2 Click on one of these buttons to edit a different set of access privileges for the user.

3 Click the all button to give the selected user access to all menus. Or, click the none button to prevent the user from using everything in Clients & Profits except time cards and

lookup lists (this setting is ideal for creatives and freelancers who don't do estimates or schedules).

4 Access can be given to Clients and Custom Reports in the My menu options section. Giving users access to Clients lets them see everything about your clients, including account balances and activity. Checking the add/delete option lets users add and delete client accounts; uncheck this option to give a user a view-only access to clients.

Giving clients access to Custom Reports/ODBC gives complete access to the hundreds of fields found in the program. NOTE: Checking the custom reports/ODBC settings gives complete access to the C&P database, including financials and passwords, via custom reports and ODBC.

5 Users who have access to media can add, edit, and print media plans, estimates, and more.

**Keep in mind that even though a user may have restricted access, if they have access to custom reports they will be able to access everything in the database by creating a new report using any of the fields and records available in Clients & Profits.**

6 Access to the **Setup** menu should be carefully considered, since these tables are used throughout Clients & Profits. That's because giving someone access to the Task Table means they can add, change, and delete tasks without any restrictions. Giving a user access to Staff means he or she can see a staff member's billing and cost rates; if these rates are confidential, access to Staff should be especially limited. The **restricted access** option allows a user to only see his or her own staff record, but no other staff members.

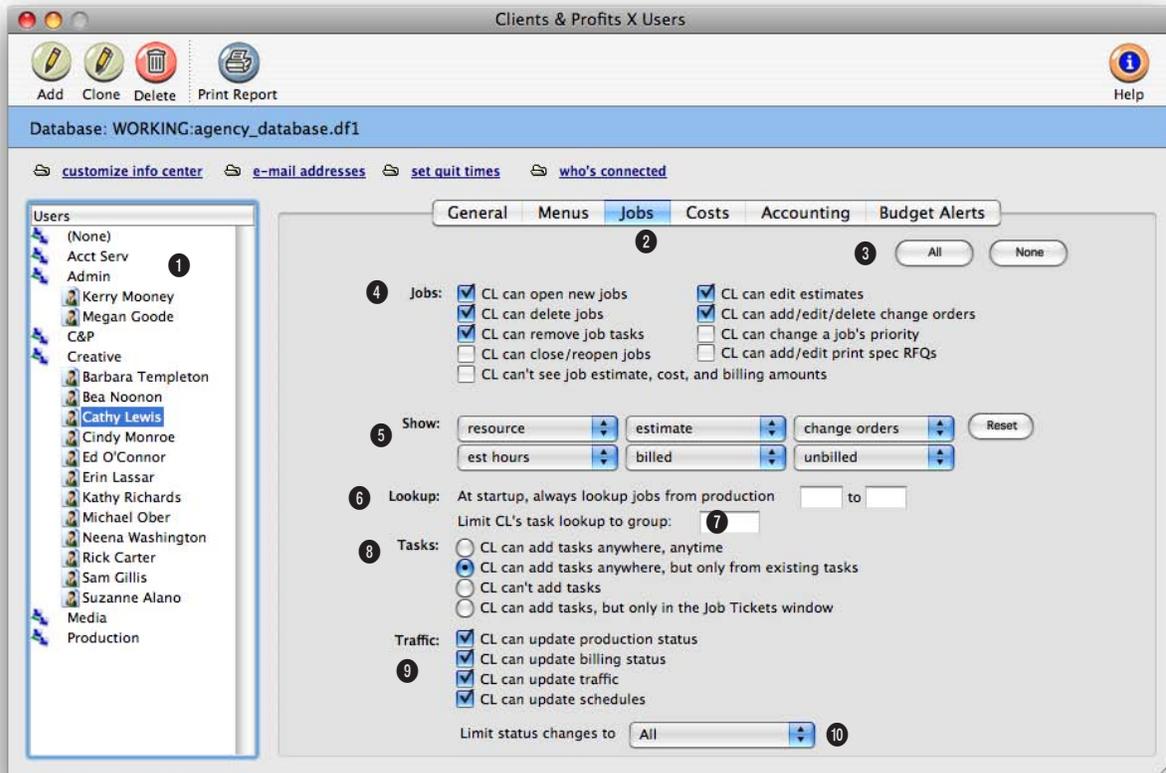
7 Access can be given to Job Tickets and Purchase Orders in the **Production menu** options section. Giving users access to Job Tickets is more customizable, since specific access privileges to jobs can be defined in the Job Privileges window. Giving users access to Purchase Orders can also be customized in the Costs Privileges window.

8 Users can be restricted to seeing only certain lookup lists by checking and unchecking the various **Lookup menu** settings. For example, if the Staff lookup option is unchecked, the user can't open the staff lookup list and see the shop's staff members. These settings only affect whether users can see lookup lists; they do not prevent users from seeing this information on other windows and reports, or from adding records with it.

9 Giving users access to menu commands in the **Accounting** menu lets them add, edit, delete, and print records. A user can be assigned any combination of accounting access privileges, depending on the kind of work they do. For example, an accounting clerk might have access to purchase orders and accounts payable, but not to the checkbook. This would allow the clerk to enter POs and reconcile them with vendor invoices, but not write checks.

10 Users who can access **Snapshots** menu commands can print production, financial (e.g., income statement, balance sheet), profitability, productivity, and media analysis (e.g., post-buy, client spending, etc.) reports. Access to Snapshots doesn't override any access privileges to clients, jobs, or the accounting—they only let users print reports.

# Job Access Privileges



**Every user can see only the parts of the job ticket that pertains to the type of work they do by choosing different options in the Job Privileges window.**

1 Access privileges are set for one user at a time. The user ID/name identifies the user whose access privileges are being changed.

2 Click on one of these buttons to edit a different set of access privileges for the user.

3 Click the **all** button to give the selected user access to all job privileges. Or, click the **none** button to limit a user's access to jobs to only essential functions (this setting is ideal

for creatives, account execs, and others who shouldn't touch job information).

4 These settings control just what a user can do with jobs and estimates.

5 Use the **show** settings to customize the job ticket window to fit the individual user's needs. The default settings for the job ticket window columns are resource, estimate, change orders, estimate hours, billed, and unbilled. Any combina-

tion can be chosen and it can be changed at any time by a system manager.

6 The **always lookup jobs** option automatically loads the user's Jobs lookup list at startup. If set, Clients & Profits only lists jobs that have a production status within the range entered here. You could use these fields to list only your open jobs in the database.

7 The **limit task lookup group** option restricts the user to see-

**Each user can have their job ticket window customized to show just the information they need to see. An AE may want to see costs, labor, billed, and unbilled while a production manager may want to see estimated hours and actual hours.**

ing only tasks that belong to a specific group.

**8** The **tasks** settings control how and when a user can add new tasks to job tickets. The **anywhere, anytime** option is the most flexible, giving the user complete access to tasks. It's the best option for the production managers.

The **only from existing tasks** option prevents brand-new tasks from being added to the Task Table. The user can add new tasks anywhere from C&P as long as the task is already part of the Task Table. This option prevents the same tasks from being added with slightly different task codes (i.e., where a "miscellaneous" task is added as MISC, MIS, MIS1, etc.).

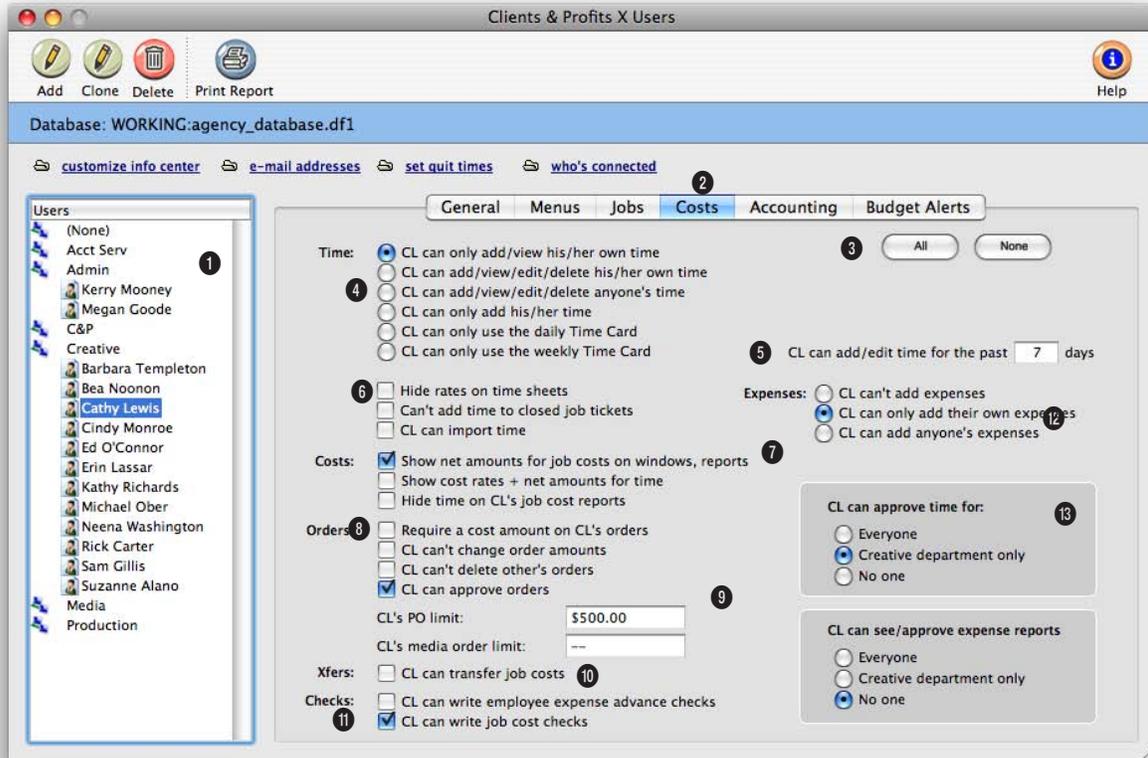
The **can't add tasks** option restricts this user from adding any task at all; he or she can only work with existing job tasks.

The **only in the Job Tickets** window option prevents a user from adding new job tasks from the time card or other windows. It prevents unauthorized (or maybe just unwanted) tasks from suddenly appearing on job tickets. Give this option to users who often misjudge what kinds of tasks they are working on.

**9** The **traffic** settings allow a user to change a Job's production status, billing status, traffic, or job schedules.

**10** The **limit status changes** option restricts users to choosing only a range of status codes, based on the status category, on jobs. For example, it keeps users who aren't allowed to close jobs from entering a "closed" status, based on the status category.

# Job Costing Access Privileges



**Customize how a user can enter time in the Job Costing Privileges window. For example, users who should only see their time should be restricted to time cards only.**

1 Access privileges are set for one user at a time. The user ID/name identifies the user whose access privileges are being changed.

2 Click on one of these tabs to edit a different set of access privileges for the user.

3 Click the all button to give users the most access to job costing, or click none to give them no access.

4 The time settings control

how and when a user can add, view, or edit their time. The **add/view his/her own time** option restricts users to entering only their own hours. It's best used when a user shouldn't see other people's time. The **add/view/delete his/her own time** adds the ability to delete a user's own hours. The **add/view/delete anyone's time** option is best given to managers who need to proof and fix time sheets. It's also ideal for accounting staffers who need to enter other people's hours from

paper-based time sheets. The **only add his/her time** option lets users add their own hours, but not see, edit, delete, or print their time sheets. The **only use the Time Card** option restricts users to entering hours from their Time Card only.

5 The **past days** option prevents a user from adding or editing time too far back or forward in time. For example, if you enter 5 days, Clients & Profits won't let the user enter a time more than a week old—or beyond next week.

**Users who can approve purchase orders will have their signature automatically added to printed purchase orders approved by the user. A user's signature can be scanned into the program and saved in their Staff file.**

6 The **hide rates on time sheets** setting keeps a user from seeing cost and billing rates on time sheets. If this option isn't checked, the user can also change rates on time sheets. The **import time** setting lets users import time sheet text files.

7 The **show cost amounts** options lets users see the actual cost of vendor invoices and time sheets. If cost amounts should stay confidential, be sure to uncheck this setting.

8 The **POs** settings determine how users can add, edit, and approve purchase, insertion, and broadcast orders.

9 Limits can be set for each user for purchase order amounts and insertion/broadcast order amounts. Entering a limit amount prevents a user from saving orders that are for more than they are authorized to order.

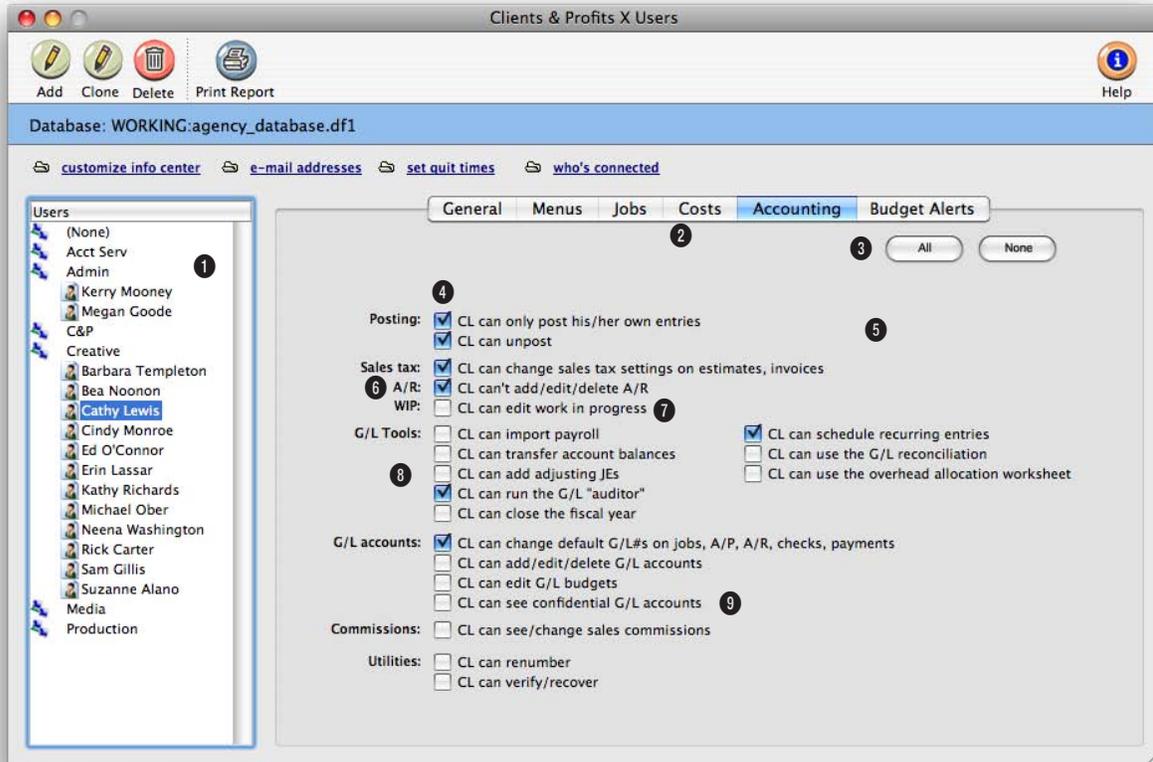
10 The **transfer** option lets users move costs between jobs using the Job Cost Transfer utility.

11 The **checks** settings lets users add employee advance checks (which is usually a very restricted privilege) and write direct disbursement checks to vendors for costs without invoices.

12 Users can be setup to **approve** time. If a user can approve time, they can approve time for everyone or for only users in their department.

13 Users can be setup to **approve** expense reports. If a user can approve expense reports, they can approve them for everyone or for expense reports added for users in their department only.

# Accounting Access Privileges



**To prevent users from accidentally posting other people’s work that isn’t ready for posting, restrict users to only posting his/her own entries.**

- 1 Access privileges are set for one user at a time. The user ID/name identifies the user whose access privileges are being changed.
- 2 Click on one of these buttons to edit a different set of access privileges for the user.
- 3 Click the all button to give users the greatest access to the C&P accounting system, or click none to give them no access.
- 4 The only post his/her own

entries option prevents a user from posting someone else's work. It's especially useful when several people add the same thing, such as media payables and production payables. For example, it lets media people post their own invoices without accidentally posting production payables. The **unpost** option allows users to unpost an invoice, check, client payment, or G/L entry.

5 The **change sales tax** option keeps a user from changing a

task's sales tax settings on job tickets and A/R invoices. If a user can't change sales tax, then the tax setting from the Task Table is always used—a user can't override it unless he or she can change sales tax. If a particular user is often changing a task's sales tax incorrectly, this option should be unchecked.

6 The **can't add/edit/delete A/R** option prevents someone from adding, changing, and deleting client invoices. It doesn't

**To keep your sales tax reports accurate, restrict access to editing sales tax. Deselecting the “can change sales tax settings on estimates and invoices” option for your users will prevent unauthorized users from entering incorrect sales tax rates.**

prevent a user from seeing client invoices (that's controlled by menu access privileges). It's most useful for users who need to see whether an invoice has been paid (such as an acct. exec.), but otherwise doesn't need access to A/R.

**7** The **edit work in progress** setting lets a user change a cost's billing status (e.g., “unbilled” to “unbillable”). A user shouldn't have access to editing WIP unless he or she completely understands how the cost status affects billing—and has the authority and responsibility for managing unbilled job costs. Don't give this option to users who shouldn't see how much something costs.

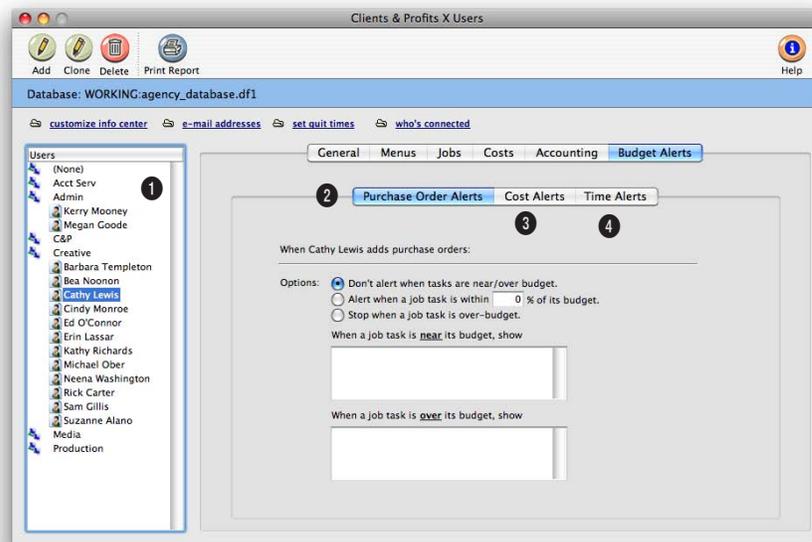
**8** Anyone with access to the General Ledger window (via the

General Ledger menu access privilege) can add, edit, delete, and post journal entries. But access to G/L tools can be restricted individually with these settings.

**9** Access to G/L accounts can be limited with these settings. Unchecking the **default G/L#s** option prevents a user from changing the default account number on invoices, checks, billings, and client payments. This option ensures that the preset account settings aren't changed by unauthorized users. Unchecking the **add/edit/delete G/L accounts** option prevents a user from changing the Chart of Accounts. This option prevents people from making up their own G/L accounts. The **edit G/L budgets** option prevents a user from using the Budget Worksheet.

# User Budget Alerts

Budget alerts warn users when they are working near or over a Job's budget. These warnings appear whenever users add job costs, time, or purchase orders. The warning itself can be customized for each user, so different users can get different kinds of messages. Managers have complete control over how and when budget warnings appear. Different alerts are used for purchase orders, time, and job costs for flexibility and can be set to appear at any percentage of the budget remaining (e.g., when the costs are within 10% of the task's budget). The alert is based on the amount of the job cost that the user is adding. There are no master alerts that affect everyone (except, that is,



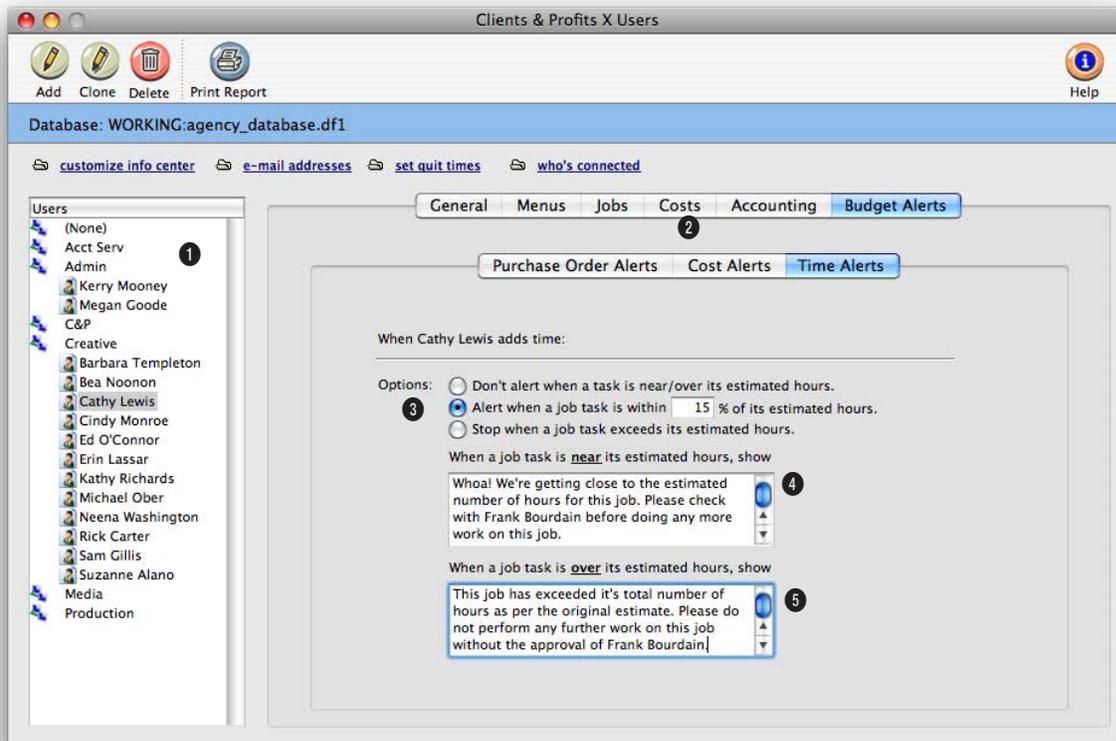
**Why use budget alerts? They remind a user just how much has been spent on a job task up to that moment, which helps to prevent overruns.**

1 Every user has his or her own unique budget alerts, based on their user initials. You can use any combination of the three different budget alerts (i.e., purchase orders, costs, and time), including all three at the same time. Alerts for different users must be changed one at a time.

2 Click the **purchase order** alerts tab to edit the user's budget warnings for purchase orders and insertion orders.

3 Click the **cost alerts** tab to change the user's budget alerts when adding job costs, including A/P invoices and expenses.

4 Click the **time alerts** tab to set the user's time card/time sheet budget alerts. These settings will be used whenever the user adds time.



**The alert dialog box shows the jobs’s budget, estimated hours, and the amount of the budget remaining—as well as the special message entered by a manager.**

1 Budget alerts are set for one user at a time. The user ID/name identifies the user whose budget alerts are being changed.

2 Click on one of these buttons to edit a different budget alert for the user.

3 There are three alert options. The **don't alert** option, which is the default setting, ignores the task's budget when costs are added. The **alert when** option warns the user when he or she

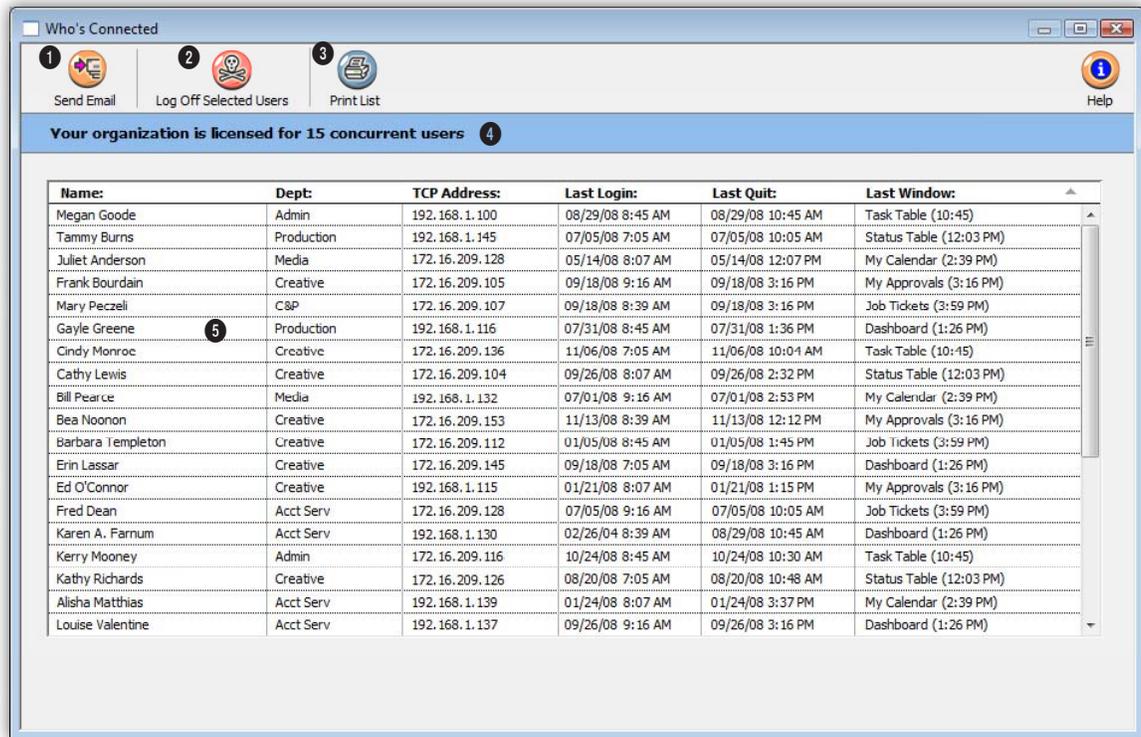
adds a cost that's near the job task's budget. Since the budget percentage is customizable, different users can have different thresholds that trigger an alert. For example, one user might be warned when 10% of the budget is reached, while others might need more advance notice—maybe when the job task reaches 25% of budget. The **stop when** option displays a special over-budget alert message and only appears when the job task's budget has been exceeded. Setting budget

alerts to appear at 99% causes a warning to appear nearly every time a cost is added.

4 Each user can have his or her own special near-budget warning. A more gentle, helpful message should be entered here.

5 This warning message only appears when the job task is over budget. A more aggressive, instructive message should be entered here.

# Who's Connected



**View who's online, who's not, and where they were last working in Clients & Profits using the Who's Connected window. You can even log off connected users with one click.**

1 Selecting a user, then clicking the **Send Email** button will bring up a prompt to send a quick email to that user.

2 You can log any connected user off of Clients & Profits anytime by simply selecting the user from the list, then clicking the **Log off selected users** button. The user will receive an alert on their computer that they will be logged out of C&P in 5 minutes. Logging out users is particularly useful when a user leaves for the day

and forgets to quit Clients & Profits, which may adversely affect other users from logging into the program if you have reached your maximum number of concurrent connections.

3 Click the **Print List** button to print a complete list of Clients & Profits Users, when they were last connected, for how long, and what area of Clients & Profits they were last using.

4 The number of users you are presently licensed to use

Clients & Profits concurrently is listed here. Once you have reached the maximum number of connections, users attempting to log into the software will be denied access.

5 All active and inactive users who have connected to your Clients & Profits database are listed here. Select any user from the list to perform a function, such as Sending an email or logging them out of C&P.

C&P  
Who's Connected

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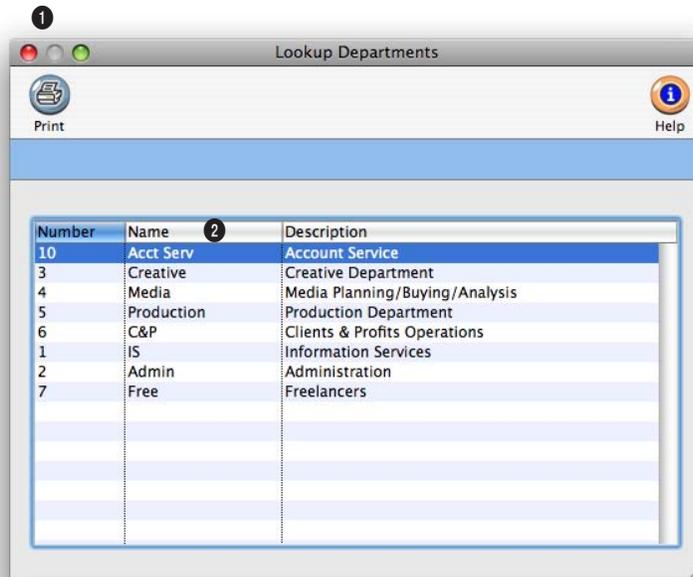
Name:	Dept:	TCP Address:	Last Login:	Last Quit:	Last Window:
Allan Koontz	Acct Serv	192.168.1.127	01/18/08 10:04 AM	01/18/08 4:27 PM	Software Update (4:27 PM)
Alisha Matthias	Acct Serv	192.168.1.139	01/24/08 8:39 AM	01/24/08 3:37 PM	Status Table (3:37 PM)
Barbara Templeton	Creative	192.168.1.156	01/05/08 9:54 AM	01/05/08 1:45 PM	My Calendar (1:45 PM)
Bea Noonon	Creative	192.168.1.109	09/23/08 9:57 AM	09/23/08 5:22 PM	Users (9:55 AM)
Bill Pearce	Media	192.168.1.100	07/01/08 8:56 AM	07/01/08 2:53 PM	Media Calendar (2:53 PM)
Cathy Lewis	Creative	192.168.1.105	09/26/08 10:05 AM	09/26/08 2:32 PM	General Ledger (2:55 PM)
Cindy Monroe	Creative	192.168.1.104	11/06/08 11:41 AM	11/06/08 10:04 PM	Weekly Task Planner (2:56 PM)
Erin Lassar	Creative	192.168.1.116			
Ed O'Connor	Creative	192.168.1.115	01/21/08 1:15 AM	01/21/08 1:15 PM	My Calendar (2:39 PM)
Fred Dean	Acct Serv	192.168.1.106			Production Planner (2:56 PM)
Juliet Anderson	Media	192.168.1.154	05/14/08 10:04 AM	05/14/08 12:07 PM	My Calendar (2:39 PM)
Karen A. Farnum	Acct Serv	192.168.1.157	02/26/08 8:39 AM		
Kerry Mooney	Admin	192.168.1.107	10/24/08 9:54 AM	10/24/08 10:30 AM	Client Payments (2:56 PM)
Kathy Richards	Creative	192.168.1.108	08/20/08 9:57 AM	08/20/08 5:22 PM	My Calendar (2:58 PM)
Lori Thomas	Acct Serv	192.168.1.129	01/23/08 8:56 AM	01/23/08 11:41 AM	Task Table (10:45)
Louise Valentine	Acct Serv	192.168.1.122	09/26/08 10:05 AM	09/26/08 8:39 AM	Users (2:58 PM)
Megan Goode	Admin	192.168.1.153	08/29/08 11:41 AM	08/29/08 10:45 PM	Task Table (10:45)
Frank Bourdain		192.168.100.75	09/30/08 10:35 AM		Users (10:35 AM)
Michael Ober	Creative	192.168.1.111	10/15/08 10:04 AM	10/15/08 1:56 PM	Software Update (10:24 AM)
Mary Peczeli	C&P	192.168.1.132	09/22/08 8:39 AM	09/22/08 5:22 PM	Users (5:20 PM)
Mindy S. Williams	Acct Serv	192.168.1.121	01/29/08 9:54 AM	01/29/08 9:54 PM	
Neena Washington	Creative	192.168.1.110	09/26/08 9:57 AM	09/26/08 8:39 PM	General Ledger (2:55 PM)
Rick Carter	Creative	192.168.1.129	08/10/08 8:56 AM	08/10/08 12:53 PM	Weekly Task Planner (2:56 PM)
Ruth Theodore-Schreiner	Acct Serv	192.168.1.131	04/17/08 10:05 AM	04/17/08 11:16 AM	Snapshots: Productivity (2:56 PM)
Sam Gillis	Creative	192.168.1.192	07/05/08 11:41 AM	07/05/08 4:59 PM	My Calendar (2:39 PM)
Stephanie Sammis	Production	192.168.1.166	09/26/08 8:39 AM	09/26/08 8:39 PM	Production Planner (2:56 PM)
Suzanne Alano	Creative	192.168.1.185	07/26/08 8:56 AM	07/26/08 8:56 PM	Task Table (10:45)
Tammy Burns	Production	192.168.1.189	07/05/08 10:05 AM	07/05/08 10:05 PM	Status Table (12:03 PM)
Teri Olsen-Geary	Production	192.168.1.160	07/05/08 8:56 AM	07/05/08 5:15 PM	Media Calendar (2:53 PM)
Teri Olsen-Geary	Production	192.168.1.100	07/31/08 10:05 AM	07/31/08 8:39 PM	Web Access (8:39 AM)
Teri Olsen-Geary	Production	192.168.1.109			

31 Users listed

The Who's Connected report contains a complete list of Clients & Profits users, when they last logged in, logged out, which window of the program they last used, as well as their IP address.

# Departments

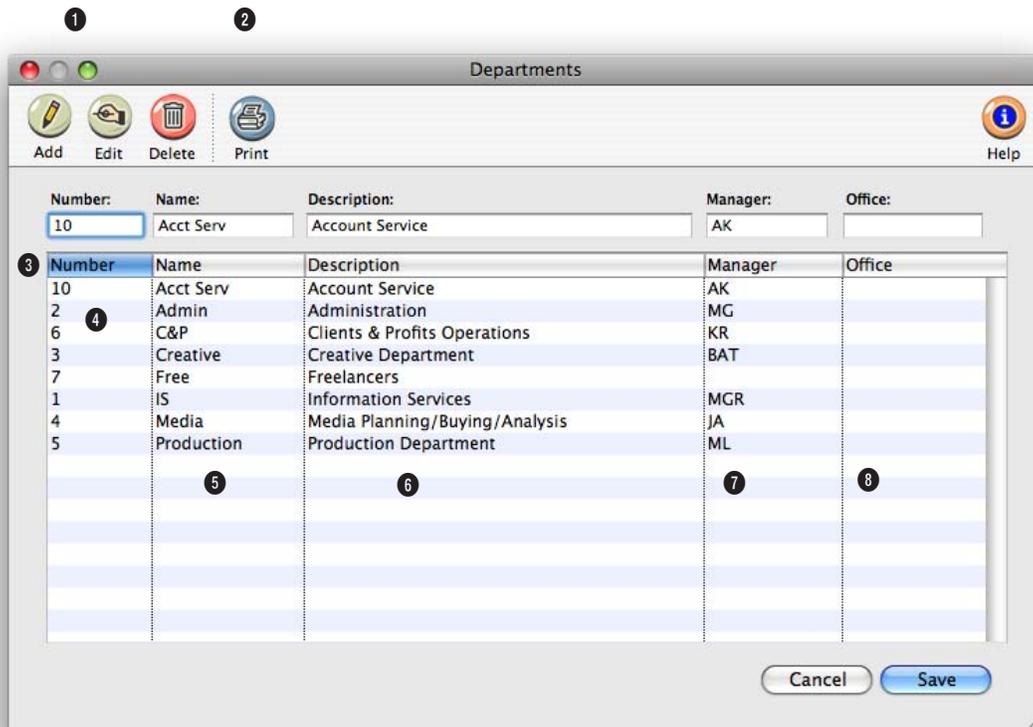
In larger companies staff members are usually organized into departments, such as account service, production/traffic, media, accounting, and administration. Clients & Profits X allows users to be grouped together into departments in the same way. Departments are indirectly used throughout Clients & Profits X. Every user can belong to one department, which is entered in the user's General access privileges window. A department table can be created with codes and names that describe each department. Each department is identified with a number (from 1 - 99), a short name, and a long description of the department's function (which is optional).



**Departments can be viewed anywhere in Clients & Profits by choosing Lookup > Departments.**

1 Click the print button to print the department list.

2 Departments are listed by department number. Click on any column heading to change the sort order.window.



**By arranging users into departments, it's easier to track, compare, and manage the performance of a shop's different departments.**

1 Departments can be easily added, edited, and deleted using these toolbar buttons.

2 To print a hard-copy printout of the Department List, click on the **print** button.

3 Departments are listed by number, but can be sorted by clicking on a column heading. Double-clicking on a department edits it.

4 Each department gets a **number** between 1 and 99.

5 The **name** briefly identifies the department.

6 The **description** is an optional explanation or note describing the department's purpose or function.

7 Each department can have a **manager**. This person's name will appear on most department-oriented reports. When the TimeCop is enabled, the department manager will be notified by e-mail whenever a department member doesn't

finish their time card.

8 An optional **office** number can be given to each department. If you're using Clients & Profits across multiple offices, this number helps identify the department within each location. If you don't have multiple offices, the department number can be left empty.

# Staff

The Staff file contains the company's employees. Staff records are used by time cards and time sheets. Anyone whose time is tracked is added as a staff member. The staff window contains information about each staff member, including name, address, department, billing rates, and a personal photograph. You can add hundreds of names to the staff file. Staff reports can be printed anytime to make employee and department lists.

Each staff member can have his or her own set of standard and special billing rates. Every user has his or her own standard cost and billing rates, which are copied automatically to their time sheets. In addition, special billing rates can be made for any combination of staff member, client, and task. Also, a special overtime billing rate can be entered for charging rush charges. These rates are applied to time sheets and time cards automatically. Users may or may not see these rates, depending on their access privileges.

There's no special method for calculating a cost rate—it's completely customizable. You can choose to use an average cost per hour, which equalizes your time accounting. Or you can make the cost rate equal to the staffer's actual hourly salary or wage, plus benefits. Don't include overhead (or an overhead factor) in your cost rates, since they keep the job reports from showing an accurate gross profit (labor costs are typically treated as overhead, based on your payroll expense entries).

Staff members can be limited to seeing jobs for only certain clients by setting the client's staff access privileges. If a staff member doesn't have access to the client's jobs, they can't see its job tasks.

■ Staff members can be quickly found anywhere in Clients & Profits X using the Staff lookup list: To open the lookup list, choose **Lookup > Staff**.

## How Clients & Profits manages cost and billing rates

The billing rate and the cost rate are not inherently related; in both cases you can enter any rate you want for any staff member. The cost rate, however, is important since it's used for job costing. The cost rate calculates the dollar cost of your staff time on job summaries. The cost rate doesn't affect billings—only the Job's labor cost.

Here's how they work: Someone's cost and billing rates are copied to the time sheet when time is added. The cost rate is based on the staffer's salary, so it is generally unchanged. The billing rate, however, can change for many reasons: you've negotiated a rate with a client, etc. If the staff member has

special billing rates, they will replace the standard billing rate. If the job task itself has a preferred billing rate, it is used instead. Or, the billing rate can be changed while the time sheet is being added (if the user has access to rates and costs).

## Staff members and time tracking

Time keeping has always been a contentious issue within ad agencies and design studios. Clients & Profits doesn't try to solve the political or cultural problems with time keeping; instead, it simply tries to make it easier, faster, and more accurate.

The argument for time keeping is substantial: Clients are demanding more accountability (they want to know where and why you're spending your time) and today's lower profit margins don't support unproductive work. So the only way to know if everyone is working productively is to somehow track where they spend their time.

By tracking time for each staff member, you'll get productivity reports that compare billable versus unbillable time,

time by client, time by task, and more. With practice, these reports can help you see where people are working most effectively.

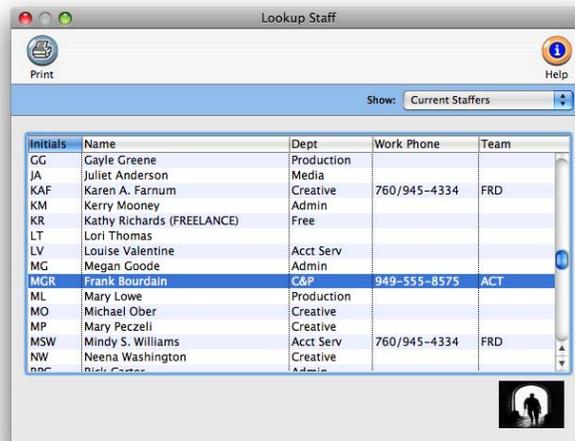
There are different strategies for tracking time (see Time Sheets for more information), but the effort pays off in a greater awareness of your business. Generally, you should track all time, including unbillable time, meetings, administrative time, and sick/vacation/personal time (using an unbillable administrative job ticket works well for tracking unbillable time).

## Staff statistics

The Staff Stats window displays the staff member's total hours for the current year (i.e., the first day of the fiscal year through today), broken down by quarter. All totals are calculated from the staff member's time sheets. The graph compares billing hours by quarter. To graph the top client hours, choose **Top Client Hours** from the show graph pop-up window. You can also display last year's total hours by choosing **Last Year** from the Show pop-up menu.

## Staff billing rates

While every staff member can have a standard billing rate, Clients & Profits X supports a flexible combination of billing rates based on any combination of staff member, client, and job task. Billing rates are copied to time sheets or time cards automatically based on the time entry's client, job, or task.



You can establish different billing rates for one or more tasks, so different kinds of work are billed higher (e.g., computer design time). Each billing rate includes a short note that describes why and how this rate is used. There's no limit to the number of billing rate combinations for a staff member, although more than 25 become difficult to manage and remember. However, special billing rates must be entered individually for each staff member, and not as a group.

There is no special cost rate, since the amount you pay your staff usually doesn't vary by client or task. You can, however, change the cost rate when adding a time sheet (with the right access privileges).

■ A at overtime rate is also available for each staff member. The overtime rate, which is edited in the Billing Rates window, replaces all rates—including special rates. In addition to an overtime billing rate, an overtime cost rate can be used. This means the cost of your overtime hours will be properly accounted for on your job cost reports.

### To automatically create special billing rates

A complete set of special billing rates can be automatically created by clicking the Auto button. A special billing rate record is created for every client using the staffer's standard task. Once special billing rates are automatically created, you should proof and refine them to make them more accurate.

### Time sheets, clients, tasks, and special billing rates

You've got complete control over cost and billing rates on time sheets and time cards. You can manage many different combinations of billing rates by staff member, client, and task—as well as by the job itself. This ability makes

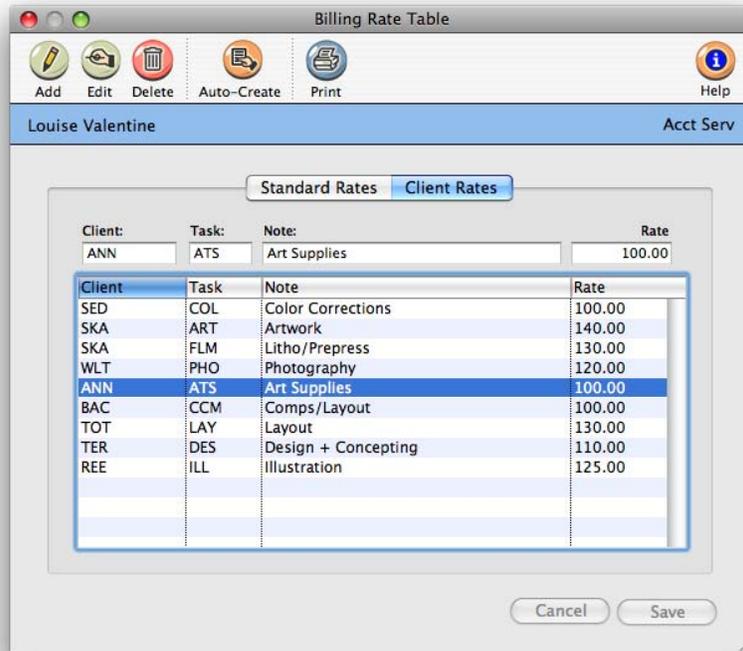
it easier to deal with the needs and demands of various kinds of clients. When a time sheet is added, cost and billing rates are copied to time sheets like this:

1) When the staff initials are entered, his or her cost and billing rates are copied to the time sheet. These standard rates are used first.

2) When a job and task are entered, Clients & Profits X checks the staff member's record for any special rates. If a special rate exists for the staffer, the client, and the task, it is copied to the time sheet—replacing the staffer's standard billing rate.

3) If the job task has a billing rate, it is used instead—replacing any standard or special billing rate. If the client has a guaranteed billing rate, it is copied from the client account when the task is added to the job ticket. The job task's billing rate always has the top priority.

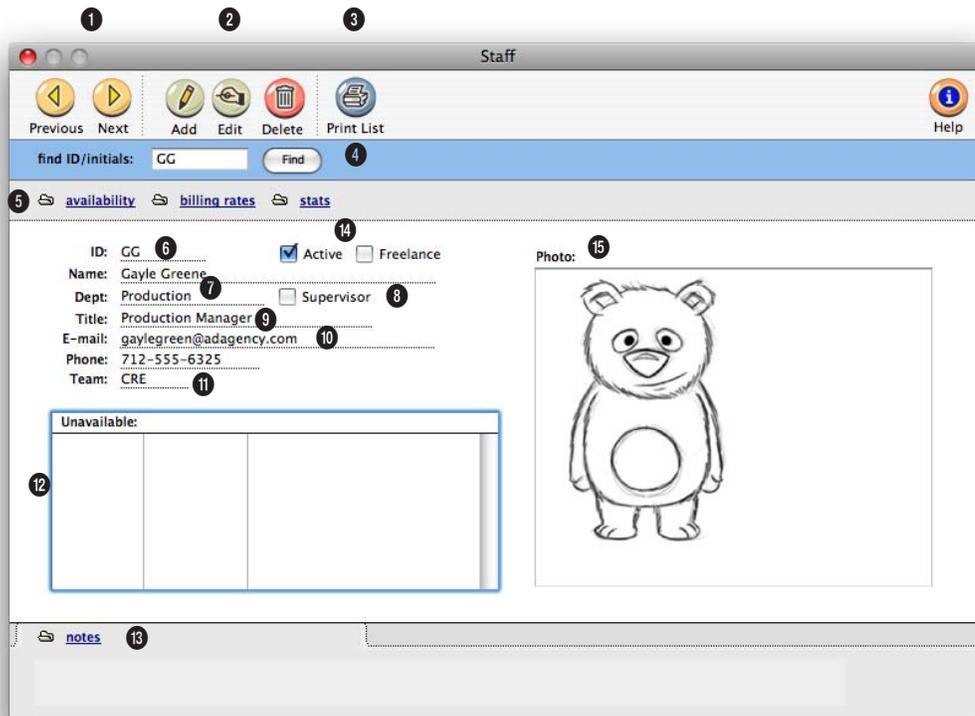
4) Once the rates are copied to a time sheet, they can be changed by entering new rates over the old. Changing a rate on a time sheet is temporary, and doesn't change your standard or special rates in the staff file. Also, there's no limit to what rates can be used.



#### Custom client billing rates.

Every client can have dozens of custom task-based billing rates. These rates can be set up to guarantee a client a special rate for certain tasks. If the job is set to always use client rates, the client's special billing rate will be used automatically when time sheets or time cards are added.

# The Staff window



**Every staff member can be assigned a profit center, such as a business unit or division. Productivity reports can be printed by profit center for better accountability.**

1 Use these toolbar buttons to scroll through the **previous** and **next** staff members.

2 Staff members can be easily added, edited, and deleted using these toolbar buttons. To add a new staff member, click on the **add** button. Click on the **edit** button to edit the staff member's key information such as the staff member's address, title, and work e-mail address. You can also add a scanned signature for sales e-mails and on-line PO approvals. To delete a staff member, click on the

**delete** button. Deleting a staff member is permanent. Once deleted, the same initials can be reused by someone else, or the staff member can be added again later. A staff member with time sheets can't be deleted. Instead mark them as inactive.

3 To print a hard-copy printout of the Staff List, click on the **print list** button.

4 Enter a staff member's initials here to **find** a staff member.

5 Click on these links to see and edit information about the staff member. The **availability** link lets you schedule a staffer using an on-line calendar, as well as enter planned hours for each day. The **billing rates** link contains special billing rates for the staff member. It also allows you to enter in the cost, billing, overtime cost, and overtime billing rate for the staff member. The **stats** link compares the staffer's hours for each quarter, then graphs the results for last year or the current year.

**Each staff member has one hourly cost rate, which can be based on their actual salary or some kind of average. The standard billing rate will be used unless replaced by a staff, client, or task special rate. Use the billing rate link to enter these rates for the staffer.**

6 Each staff member is identified by unique **initials** or employee number. The same initials can't be used twice.

7 Every staff member can belong to a **department**, which is used by Productivity reports.

8 Department **supervisors** will appear with an "X" in the checkbox here.

9 The staff member's **title** is copied to new jobs automatically.

10 Clients & Profits uses this **e-mail** address to notify users about deadlines, status changes, and missing time.

11 Every staff member can belong to an optional account **team**. Productivity reports can be printed by team, which compares time spent by its team members.

12 Using the availability link, staff members can mark them-

selves unavailable for a day or parts of a day. Unavailable times for a staff member for the current month will appear here for easy reference.

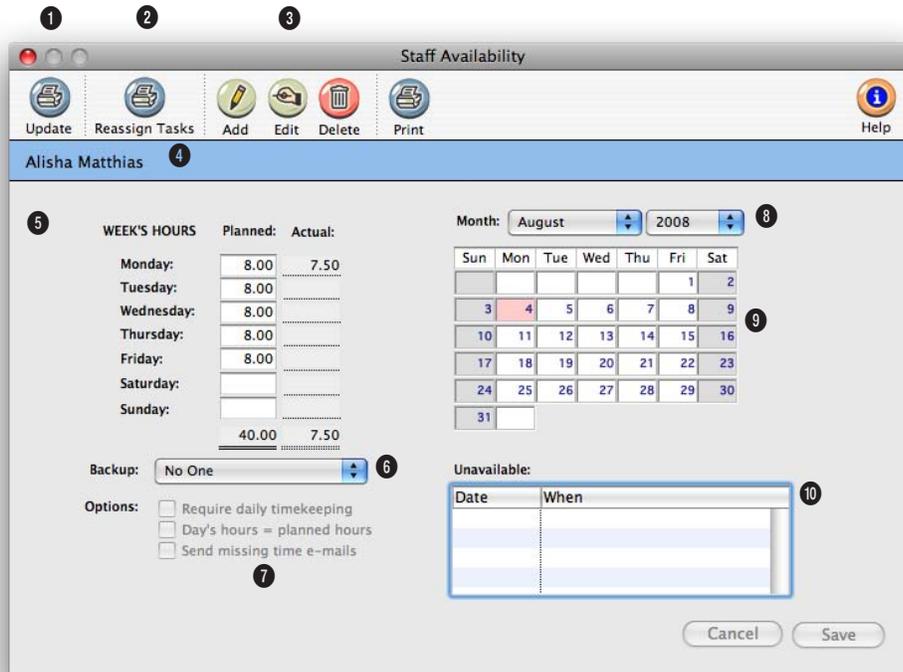
13 The **notes** link lets you enter personal information about the staff member. It appears here for easy reference.

14 Ex-staff members can be made **inactive**. Inactive staffers don't appear on lookup lists and can't be used on time cards. If a staff member is **freelance**, check this setting. Freelance time is added just like regular staff time, but can be analyzed separately on productivity reports.

15 A digitized **photo** or scanned illustration can be placed for each staffer to make the system more personal. This graphic appears on the user's Information Center window.

# Staff Availability

The Staff Availability function lets users schedule themselves as unavailable for any day, morning, or afternoon for up to twelve months in advance. When a user is scheduled for a job task, Clients & Profits checks their availability on the task's due date. If the user is unavailable, the person scheduling the job is prompted to choose another person—Clients & Profits X even proposes a backup person, which can be preset for each staff member.



**A staff member's backup person can be reassigned a staff member's work automatically by using the reassign tasks option.**

1 Click the **update** button to calculate the week's actual hours from the staff member's time cards and time sheets.

2 Click on the **reassign tasks** button to have all of a staff member's work reassigned to their designated backup person. Tasks that are due can be reassigned for the current day, the current week, the current month, or all tasks.

3 Use these toolbar buttons to add, edit, delete, and print

a staff member's availability entries. Click on the **add** button to add a new availability entry making the staff member unavailable for a day or part of a day. Click on the **edit** button to edit an availability entry. To delete an entry, click on the **delete** button. To print a list of the staff member's availability entries, click on the **print** button.

4 The staff member's name appears here for easy reference.

5 The week's **planned hours** are used by the time cards and time sheets to help users track the right amount of hours each day. The **week's actual hours** aren't displayed unless the update button is clicked to save time. This is a great way for a user to instantly check their time for the week.

6 A backup person can be assigned to each staff member. If a staff member's tasks need to be reassigned for any day, week, or month—or all tasks, should

**To make sure that users aren't quitting Clients & Profits X without adding their time first, use the time keeping options available for each user. Use one of the options or both to keep your staff members in line when it comes to entering their time.**

the staff member quit—they will then belong to the backup person.

**7** The **require daily timekeeping** option tells Clients & Profits to compare the staff member's planned hours with their actual hours. The **send missing time e-mail** option will send a reminder e-mail in the morning when the user did not enter in enough time for the previous day. The **days hours = planned hours** option takes it a step further, not letting the user quit Clients & Profits X until they have added enough hours to their time sheet or time card.

**8** The Availability calendar lets users check their schedule for any month. Days on which the user will be unavailable in the morning or afternoon appear in yellow. Days in which the user is out entirely appear in red. Choosing a month from the pop-up menu lets users check their availability for any month in the future.

**9** To check on a day's availability, click on a day cell in the calendar. Any scheduled job tasks will appear in the deadlines list, as well as any scheduled unavailability entries.

**10** Unfinished job tasks appear in the deadlines list when the user clicks on a day in the calendar.

# Vendors

Vendors are suppliers from whom you purchase goods and services through Accounts Payable. The vendor file contains every vendor you'll ever do business with, including account number, name, address, and some account information.

Anyone who bills you with an invoice would be a vendor, especially freelancers. Vendors are paid with checks written in the Checkbook against their unpaid invoices.

The vendor code tracks purchases and invoices for the things you buy. The vendor account keeps a running account balance, so it's easy to see at-a-glance just how much you owe someone. When an invoice is added into Accounts Payable, you'll enter the vendor number first—this links the invoice to the vendor account on reports, especially the account agings.

Deciding who is a vendor is simple: if someone invoices you for things or services you buy, they're a vendor. You can't add a payable invoice unless the vendor exists (although you can add a vendor at the same time as the invoice). Once a vendor is added, it can be used again by entering in the vendor number.

Detailed account information can be easily maintained for each vendor, including task, markup, and notes. This information stays in a central location (your Clients & Profits database) and is generally accessible to everyone. This makes finding vendor information much faster than using someone's Rolodex cards or filing system. This information can be entered, changed, or deleted, any time.

■ A vendor with a balance or any activity (including paid invoices) can't be deleted. Otherwise, its invoices wouldn't have a vendor account balance to update on aging reports.

## How Clients & Profits X manages vendor markups

One of the ways in which markups are managed is through the vendor account. Every vendor can have a special markup percentage. This percentage is copied automatically to every invoice you'll add for the vendor. It's a useful way to precisely control your markups, for more consistency and accuracy. Here's how it works: When a vendor is first added, it gets a markup from your

accounting preferences. This is the standard agency markup. When an invoice is added for this vendor, its markup is copied to the invoice. If a job task has a guaranteed markup (which you would have set up on the client account or task table, per some arrangement), it replaces the vendor's markup. Of course, you can still change the invoice's markup without affecting the job or the vendor account.

This ability lets you program basic markups for different vendors. Some vendors, like printers, might always have the standard 17.65% markup (which calculates to a 15% commission on the cost). Other vendors, like typesetters, might have a 50% markup since their invoices are smaller. Or, a large vendor (like a media firm) might have a 12% markup because of the relatively high dollar volume. In all cases, it's your choice—and one that you can make or change anytime, very easily.

## Vendors, staffers, freelancers, and temps

Staff members aren't vendors, since they're paid through payroll. Staff time is accounted for with time sheets, not A/P invoices.

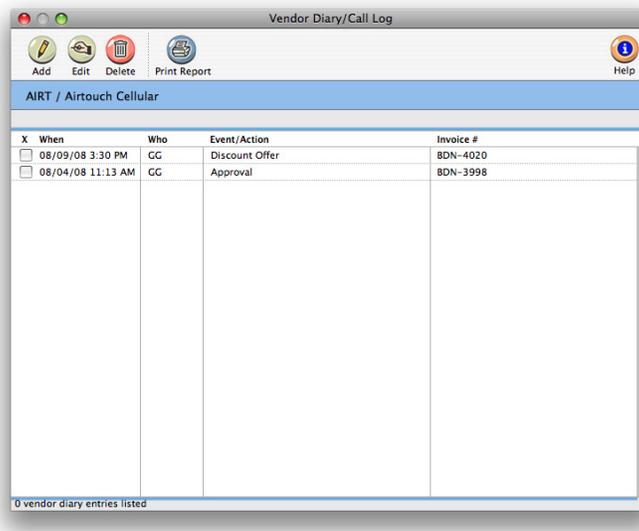
Just what is a freelancer? A freelancer can be both a staff member and a vendor. If you'll track a freelancer's time on an hourly basis with Time Cards or Time Sheets, then he or she is added as a staff member. But if the freelancer is also added as a vendor, then he or she should be added twice—once as a vendor then again as a staff member.

■ The staff member's initials must be different from the vendor number. If a staff member has the same code as a vendor, costs will appear duplicated on job cost reports—but it's just a cosmetic problem. To prevent this problem, give the freelancer slightly different vendor and staff codes.

What are temps? A temp acquired from a temporary placement agency is not a vendor; instead, he or she is a staff member. So who is the vendor? The placement agency is the vendor, since they'll be sending you bills for the temp's hours worked.

## To see a vendor's statistics

The Vendor Statistics window displays the total purchases (including the number of invoices) for each quarter of the current year. To see last year's totals, choose Last Year from the Show pop-up menu. Clicking the Graph button



The vendors lookup list can be opened any time by choosing **Lookup > Vendors**.

calculates the quarterly totals and draws a graph. Clicking the Print button prints a hard-copy version of the stats window.

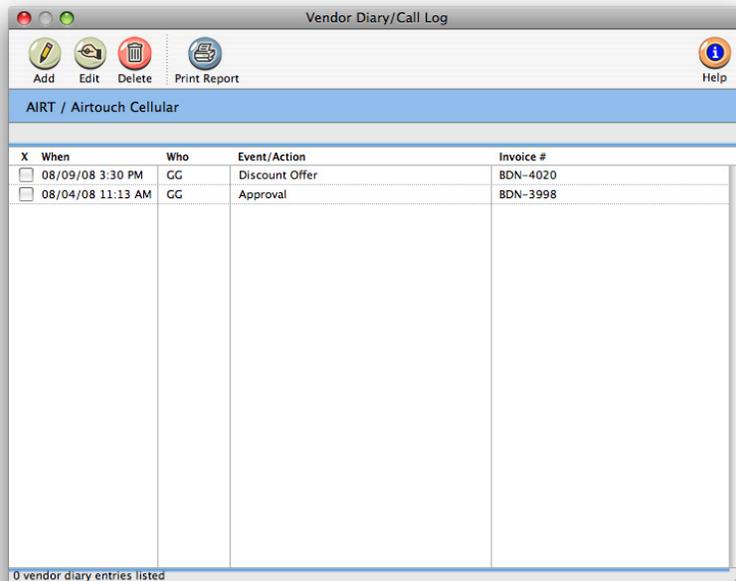
### To print a vendor's account ledger

The account ledger shows a detailed listing of the vendor's invoices. The report shows at a glance just what you've purchased from a vendor. It can be a helpful report, giving you valuable financial data that you can use when negotiating better prices.

problems, such as overdue invoices, credits pending, etc.... Since each entry has a "resolved" checkbox, the Vendor Diary window clearly shows at-a-glance which entries are still pending. Once the vendor's issue is closed, anyone can mark the entry as "resolved."

### Recurring payables

Each vendor can setup a schedule of recurring payables for overhead expense items that are paid monthly or quarterly, such as rent or equipment lease payments. Recurring payables are a real time saver. Once a recurring payable has been added, it can be scheduled to recur for as many times as you like in the upcoming year. Whenever a user opens the Accounts Payable window, Clients & Profits will check for the days scheduled recurring payables. If found, the user is prompted to convert them to regular invoices. Once converted, these invoices are like any other an can be proofed and posted.



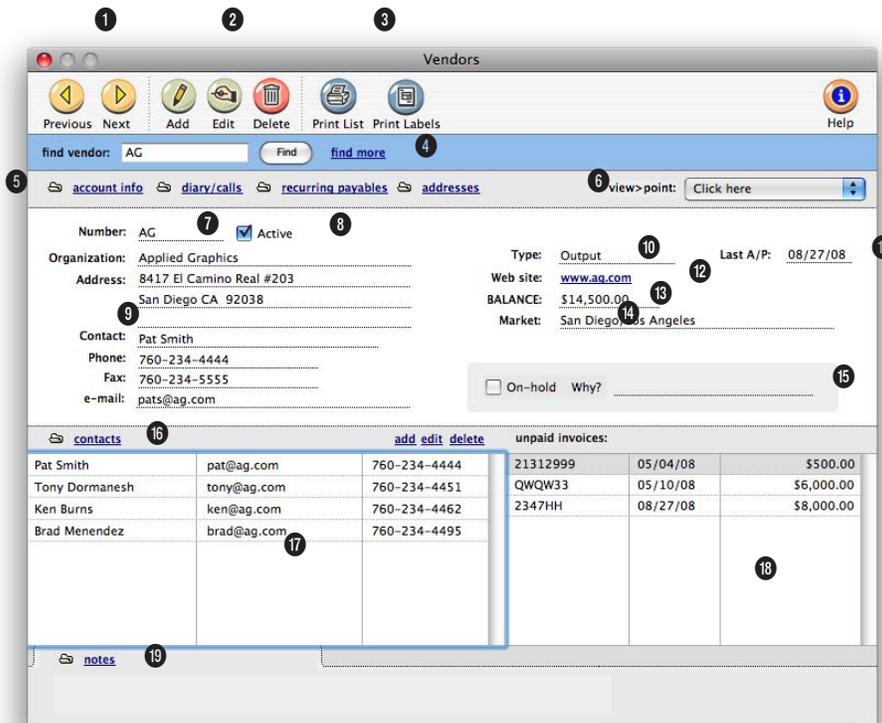
- Recurring payables can also be scheduled for a specific overhead expense payable from the Accounts Payable window.

### The vendor diary

The vendor diary does not keep an automatic log of every vendor activity. That would create an immense number of entries. Instead, the vendor diary is used like a daily log. Anyone who works with one vendor account can make notes about phone calls, meetings, etc. These entries are intended to help accounting people to manage vendor accounts and to track payables and payments.

Each vendor diary entry includes the date and time it was added, as well as the initials of the staff member who added it. The entry's subject and description are user-defined. Vendor diary entries can be useful for tracking

# The Vendor window



**Who is a vendor? A vendor is someone who invoices you for things or services you buy.**

1 Use the toolbar buttons to scroll through the **previous** and **next** vendors.

2 Vendors can be easily added, edited, and deleted using these toolbar buttons. To add a new vendor, click on the **add** button. To edit the vendor's account information, click on the **edit** button. To delete a vendor, click on the **delete** button. Any vendor with a balance or any activity (including paid invoices) can't be deleted. Instead, mark them as inactive.

3 To print a hard-copy printout of the Vendor List report, click on the **print list** button. To print a set of vendor labels, click on the **print labels** button.

4 Enter a vendor code here to **find** a vendor. Or click on the **find more** link to find vendors by sequence, number, or organization.

5 Click on these links to add/edit/view the vendor's account information, vendor diary/call log, recurring payables, and ad-

resses. The vendor's key information (i.e., organization name, address, markup %, terms, etc.) can be edited by clicking on the **account info** link. The **diary/calls** link lets you keep track of important phone calls and other communications with the vendor in one place. Diary entries can also be e-mailed to staff members and the vendor. Repeating invoices for overhead expenses such as rent, lease payments, and insurance can be set up as recurring payables by clicking on the **recurring**

**The vendor file is a central location to maintain all of the detailed account information for your vendors that is generally accessible to everyone. This makes finding vendor information much faster than using someone's Rolodex cards or filing system.**

payables link. A routine expense can be scheduled up to one year in advance, making unposted entries into Accounts Payable automatically on any scheduled date. Each recurring payable can debit up to six G/L accounts. If a vendor has a separate address that purchase orders and checks need to be mailed to, click on the **addresses** link to enter them.

**6** Use the **view>point** pop-up menu to view the vendor's account ledger or account statistics. The View Account Ledger window shows a listing of all the payables added for the vendor with their respective payments and balance. The Account Statistics window displays the vendor's total purchases for the current year (i.e., the first day of the fiscal year through today), broken down by quarter. The window also displays a graph of the vendor's quarterly purchases for the current year or last year.

**7** Each vendor is identified by a customizable 10-character **number** or a code. Any combination of letters or numbers can be used, but it must be unique.

**8** If a vendor has an "X" in the active checkbox, then it is an active vendor. Vendors that are no longer used can be made inactive by unchecking the **active** checkbox in the Edit Vendor Account Info window. Inactive vendors don't appear on the lookup list nor can purchase orders or payables be added for them.

**9** The vendor's organization name, address, phone number, fax number, and the key contact's e-mail address appear here for easy reference. The vendor's company name and address appears on printed checks. Vendor lists and mailing labels can also be printed with addresses.

**10** Vendors can be categorized by a user-defined **type** code. This code can be used on custom reports to list all of your media publications, for example.

**11** The date of the **last-added A/P** invoice for this vendor appears here for easy reference.

**12** The vendor's **web site address** appears here for easy reference.

**13** The vendor's **balance due** is updated instantly as A/P invoices and checks are posted.

**14** The vendor's **market** appears here for easy reference.

**15** A vendor can be put **on-hold** for any reason (e.g., the production manager is mad at them, the owner wants better prices, a credit still hasn't been made, etc.). When a user tries to add a purchase order or an A/P invoice for an on-hold vendor, the **why?** message appears—and they can't add their entry.

**16** Click on the **contacts** link to add/edit/delete contacts for the vendor.

**17** The vendor's contacts are displayed here with their e-mail addresses and phone numbers for easy reference.

**18** The vendor's unpaid payables are displayed here for easy reference.

**19** Click on the **notes** link to enter descriptive notes about the vendor. These notes are for internal use, and don't appear on reports or checks.

# Vendor Account Information

**Applied Graphics** 1

Organization: Applied Graphics 3 4  
 Address: 8417 El Camino Real #203  
 San Diego CA 92038  
 Active 5  
 Key Contact: Pat Smith 6  
 Main Phone: 760-234-4444 Fax: 760-234-5555  
 E-mail: pats@ag.com  
 Web site: www.ag.com 7  
 Market: San Diego/Los Angeles 8  
 Task: CDS 9  
 Cost dGL: 1800.00 10  
 AP cGL: 2100.00 Current Portion of Long Term Debt  
 Discount cGL: 8200.00 Discounts on Accounts Payable  
 Pop-up A/P note: 11

On-hold: 2  
 Type: Output  No RFQs 12  
 Tax ID: 533-49-3873 13  
 Terms: 2 %/ 10 days, Net: 30 14  
 Markup: 20.00 % 15  
 Check memo: 16  
 Options:  Include checks on year-end 1099 report 17  
 Auto-allocate checks 18  
 1099 - Rents  
 Media kind: Magazine  
 Media Vendor ID#: MV-39  
 Media Comm: 15.00 % 19

Cancel Save

Utilize the pop-up A/P note to remind your A/P clerks of important information (e.g., “terms are different, net 45) about the vendor before they add a payable for the vendor.

1 The vendors name appears here for reference.

2 A vendor can be put on-hold for any reason (e.g., the production manager is mad at them, the owner wants better prices, a credit still hasn't been made, etc.). When a user tries to add a purchase order or an A/P invoice for an on-hold vendor, the why? message appears—and they can't add their entry.

3 The vendor's organization name appears here.

4 You can change the vendor name by entering it here. The name appears as the payee when a check is added for this vendor.

5 This is the vendor's main address. A separate address can be entered for checks and/or purchase orders in the Vendor Address window.

6 This is the vendor's key contact. More contacts can be entered in the Vendor Contacts window.

7 This is the vendor's company web site address.

8 The vendor's market can be entered here. It is primarily used by media vendors.

9 Production vendors (i.e., vendors who work on jobs) can have a default job task. When a payable invoice is added for this vendor, its task will be entered automatically. It's not required, but can make job costing more consistent (e.g., a printing vendor's costs will always be charged to the task PRNT).

**To simplify your tax reportings at the end of the year, use the include checks on year-end 1099 report option. This option automatically marks all the vendor's checks for 1099 status when they are added and copies in the vendor's tax id number.**

Overhead vendors don't need a default task since their invoices don't affect jobs.

**10** Every vendor can have default payable and discount G/L accounts. These accounts are copied to new invoices automatically, where they can be changed if needed. The default cost account will be used when overhead costs are entered for the vendor.

**11** The **pop-up A/P note** is an on-line reminder to users who add this vendor's invoices. The note appears every time an invoice is added for this vendor.

**12** Each vendor can have an optional **type** that categorizes the kind of work they do. Custom reports can be created analyzing purchases by type of vendor.

**13** The vendor's **tax ID** appears on year-end 1099 forms.

**14** The vendor's payment terms are copied to new invoices. They are used to calculate early-payment discount amounts, as well as for cash flow analysis.

**15** Production vendors can also have a **standard markup**. This percentage will be copied to every invoice from this vendor, but is superceded by the job task's markup (if one was entered).

**16** This **check memo** (e.g., "payment on account") is copied to every check written for this vendor. To not print a check memo, leave this field blank.

**17** Check this option if the vendor typically gets a 1099 form (e.g., freelancers, consultants, small businesses, etc.). If checked, every check written for this vendor will be totaled on the year-end 1099 report.

**18** If you tend to always pay off a vendor's unpaid invoices on time, checking the **auto-allocate checks** option saves a step.

**19** Use this section if the vendor is a TV/radio station, publication, or other media company. Use the **media kind** pop-up menu to choose what type of media the vendor sells. The **media vendor ID** number field is used by the C&P Media Link to find a station or publication that has a different number in a media buying system like TAPSCAN, Strata, or SmartPlus. The **media commission** is copied to broadcast and insertion orders.

# My Information Center

The My Information Center window is an intuitive, visual alternative to using menu commands to open windows. There are three kinds of Information Center windows, depending on what kind of work a user performs: Production, Accounting, and Production/Accounting. Each window has different buttons for using jobs, time cards, purchase orders, etc.

Clicking one of the Information Center's buttons is the equivalent of choosing a menu command—there's no difference between using a button or choosing a command.

The Information Center is optional for each user; if set, the window appears nearly every time another window is closed. This makes the Information Center a valuable, consistent reference for your users. The Information Center window also contains a system-wide information message (which is entered in Agency Information) and an optional photograph of the staff member.

## To show a staff photo in the Information Center

The user's photograph in the Information Center is shown from the Staff window. A user's photograph needs to be pasted into the Staff account using a graphic program like Photoshop. The staff photo can be any digitized black-and-white or color photo (or illustration, if it's more flattering).

## To include a message in the Information Center

Any kind of short message can be included on Information Center windows. The message itself is entered into the general preferences, then it is copied to other users. It can be changed anytime (once a day, throughout the day, weekly, etc.).

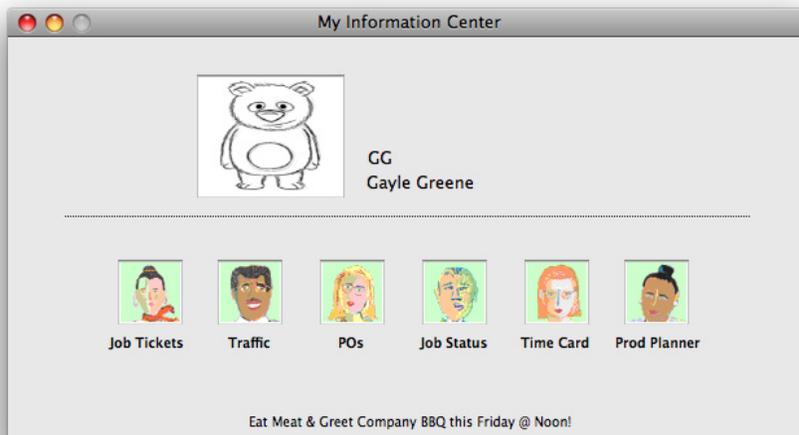
■ The Information Center message is animated, so it will scroll, flash, and otherwise try to grab the user's attention.

■ To minimize padlocks, it's best to only change the Info Center message when no one is using Clients & Profits X (e.g., when others are at lunch, early morning, at night, etc.)

## To include a special message in the Information Center

Daily messages replace the standard message on your Information Center window. The standard message, which is entered in general preferences, appears automatically when the Information Center window is opened. But if you create daily messages, they will be shown instead.

In addition, a special message can be entered that appears whenever staff members use their time cards. These messages can remind users of staff meetings, vacation days, client presentations, or other events. Everyone sees the same daily messages each time their Information Center window opens. Up to a

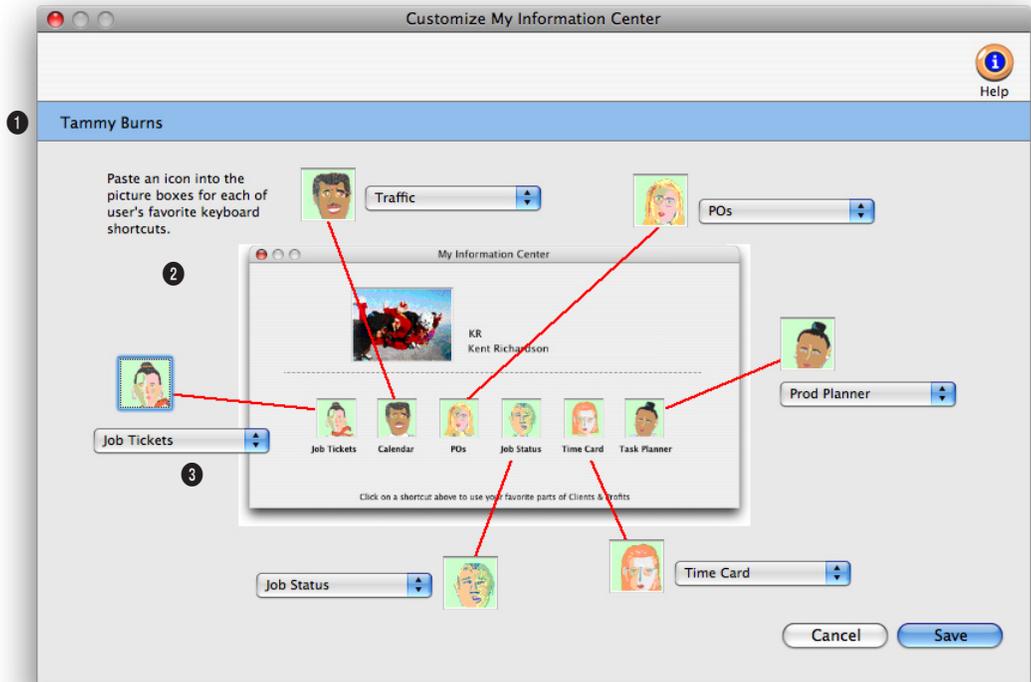


Each user can have his or her own customized My Information Center shortcut window. The window's shortcuts are programmed by a system manager in the Users, Access & Passwords window. Each button's graphics can be customized, too.

year's worth of daily messages can be scheduled.

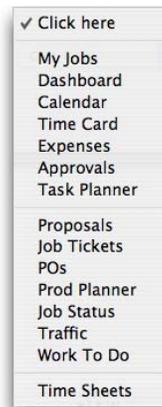
■ Clients & Profits X allows you to create up to a year's worth of daily message records starting with today's date.

Each user can have his or her own customized My Information Center window. It will open automatically when other windows are closed, providing users will a quick way to access their most frequently used Clients & Profits X functions.



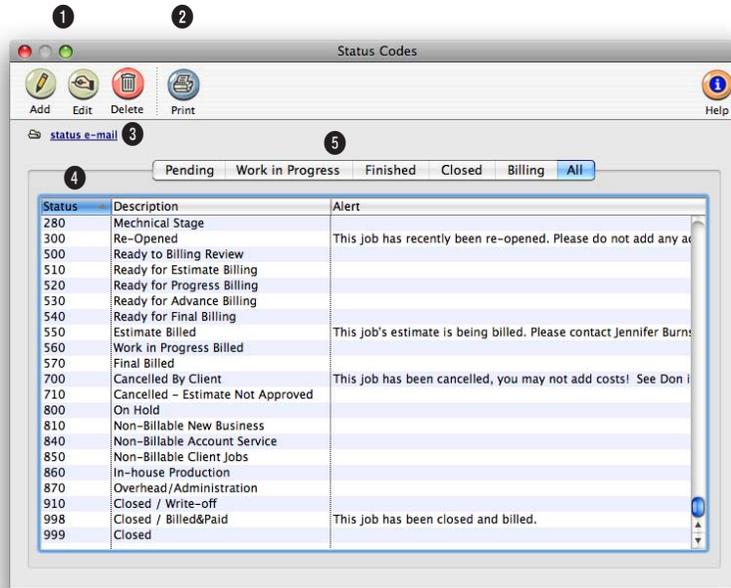
Every Clients & Profits X user can have their Information Center window customized to fit their individual needs.

- 1 Each custom My Information Center window is unique for each staff member.
- 2 The My Information Center window can have up to six shortcuts. When the Customized My Information Center window is first opened, the default shortcuts and graphics are entered automatically.
- 3 For each shortcut you can choose a command from the pop-up menu (see right) and paste any kind of graphic for the shortcut.



# Status Codes

The status code is the single most important tool you have for managing jobs. Status codes are the basis for the daily and weekly job lists and traffic reports. Jobs are categorized by status, so you'll always know how many jobs are pending client approval, in production, or awaiting final billing. Every job has a production status and a billing status. From the moment a job is opened, it has a status code. As the job progresses, its status will change. This enables anyone who cares about jobs—account executives, coordinators, production managers, and more—to see their exact status. Also, job tasks can also be tracked and managed with status codes.



**Default status codes can be set as preferences and will be applied automatically whenever a new job is added, billed, paid, closed, or reopened.**

1 Status codes can be easily added, edited, and deleted. To add a new status code, click on the **add** button. Status codes can be changed at anytime by clicking on the **edit** button. Changing the status description affects what appears on windows, job lists, and traffic reports. If you change the status code's number, it doesn't change the same status code on existing jobs. To delete a status code, click on the **delete** button.

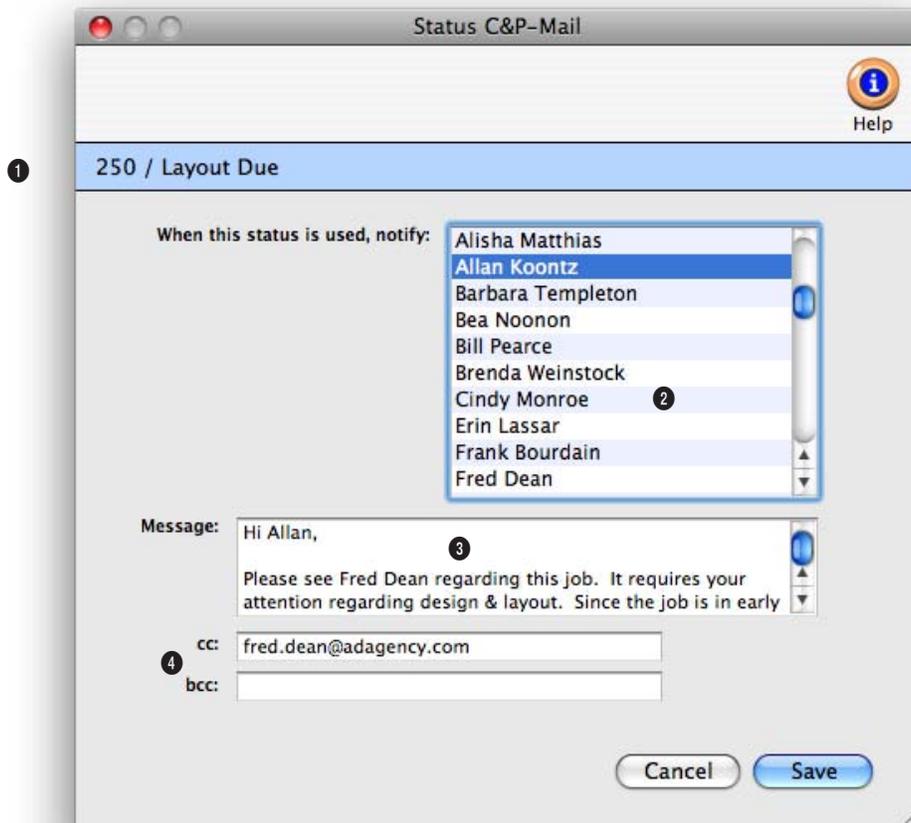
2 To print the Status Table report, click on the **print** button.

3 Users can be notified whenever a job status changes by setting up status e-mail for a status code using the **status e-mail** link. Status e-mail can be sent to a user's e-mail account or even a pager.

4 The Status Table lists status codes by number, but you can resort the list by clicking on any column heading. Each status code appears with their

code, description, and category. Double-click on a status code to view its details and alert settings.

5 The status **category** is used to classify status codes as: Pending, Work in Progress, Finished, or Closed. Status categories are optional, but they provide an extra level of security in larger shops because you can restrict users (in their Access Privileges) to only choosing status codes within a selected category.



**Users can be notified whenever a job status changes by setting up status e-mail for a status code. Status e-mail can be sent to the user's e-mail program or even a pager.**

1 The status code and description appear here for easy reference.

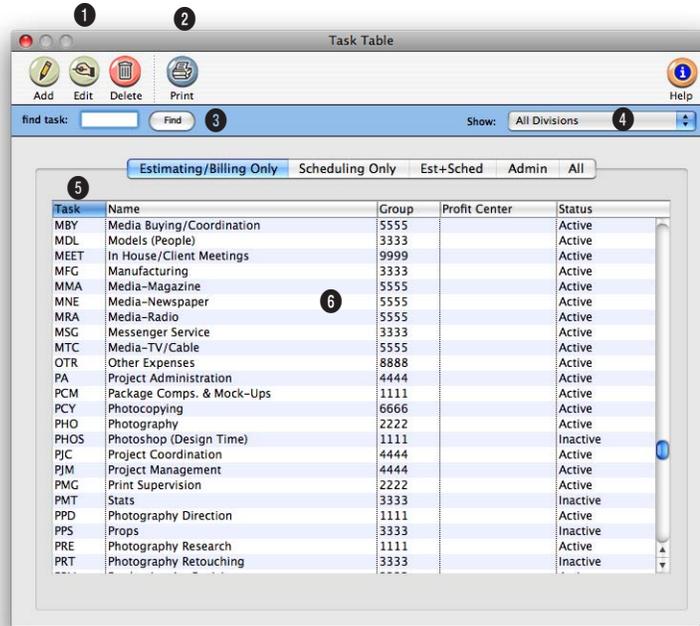
2 Select one or several staff members to send the status e-mail to when a Job's status changes.

3 A special text message can be entered for the status e-mail notification.

4 Additional staff members or someone outside the company can also be notified by typing in their e-mail address in the cc: or bcc: fields.

# Task Table

Tasks are the basis for estimating, scheduling, job costing, billing, and job profitability reports. Since they serve so many functions, they're very important. Tasks are **flexible**. Every job has at least one task, but may have dozens. The task table is a central warehouse for every task you've ever used, or will use. The task table itself may contain hundreds of tasks. Each task has standard details, or defaults, that are copied to your jobs. This information, including sales tax settings, markups, and billing rates, automate much of your job tracking. You can add new tasks, make changes, or delete tasks anytime, for any reason.



**The tasks you add to your Task Table reflect the diversity of the work you do. Your tasks are completely customizable. That's why no two companies have the same tasks.**

1 Tasks can be easily added, edited, and deleted. To add a new task, click on the **add** button. Once a task is saved, it appears in the Task Table for others to see and use immediately. To edit a task's information, click on the **edit** button. To delete a task, click on the **delete** button. A task can only be deleted if it isn't used anywhere in the program.

2 To print the Task Table report, click on the **print** button.

3 Enter a task code here to **find** a task.

4 Use the **show profit center** pop-up menu to see tasks for all profit centers or only one specific profit center.

5 Tasks are listed in order by the task code. You can change the sort order by clicking on any column heading.

6 Tasks are displayed with their code, name, group, profit center, and status. Double-click on a task to edit it.

**Edit Task**

Task:   Active  Always Unbillable

Name:  Icon:

Group:

Roll-up:

Desc:

cGL:   (e.g., income)

dGL:   (e.g., job costs)

PC:

Bill rate:

Lead time:  days

Sort:  Sort on schedule:

Markup:  %

Sales tax:  State Sales Tax  County Sales Tax

Approval:  Requires Approval To be approved by (optional):

Update existing job tasks

Kind:  Estimating  Scheduling  Commissionable

Buttons: Cancel Save Help

**Every task can have an optional custom icon. These task icons appear on selected job and traffic reports.**

1 The task code identifies the task in the program and contains up to four letters or numbers. The task name describes its function or purpose.

2 Tasks that are currently being used on jobs are **active**. Inactive tasks don't appear on lookup lists and can't be added to jobs.

3 If a task is marked as **always unbillable**, all costs added to it won't calculate a gross amount.

4 **Group** is used to subtotal tasks together on reports, estimates, and invoices. Also,

a **roll-up** task code can be entered to combine this task with another task.

5 An optional **description** can be added. It appears on estimates and invoices.

6 A default **cGL** and **dGL** can be added for the task. They will be automatically copied to invoices, payables, and checks when the task is used.

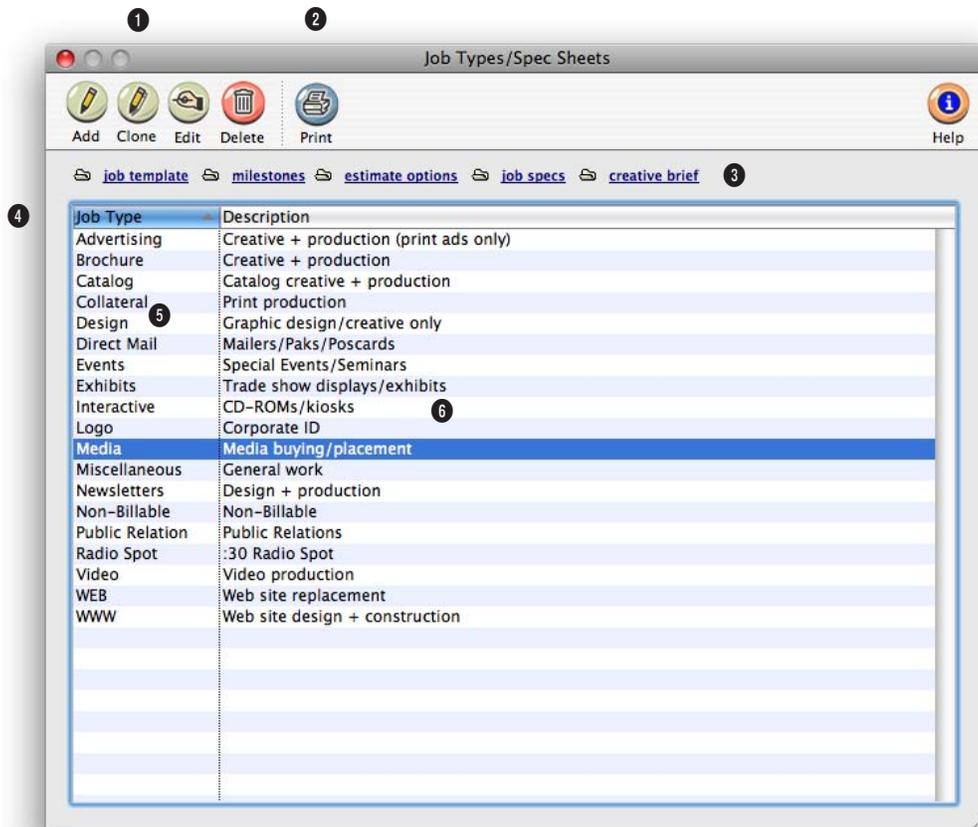
7 A task assigned to a **profit center** can only be added to jobs added for the same profit center.

8 A default **billing rate** and **markup** can be added for billing and job costing purposes. A **lead time**, **sort**, and **sort on schedule** can be added to facilitate job scheduling.

9 Scheduling-only tasks will appear in the job schedule. Estimating/billing only tasks can be used on estimates and billings.

10 Use this option to copy your changes to existing job tickets.

# Job Type/Spec Sheets



**Spec sheets are used for speeding up the process of opening routine jobs. They help keep jobs of the same type more consistent, since they include the same basic details.**

- 1 Job types can be easily added and deleted. To add a new job type, click on the **add** button. You can add dozens of job types. To delete a job type, click on the **delete** button.
- 2 To print a hard-copy printout of a list of job types, click on the **print** button.
- 3 Use these links to edit the default settings for a job type. Click on the **job template** link to add/edit a job type spec sheet. A spec sheet contains all the

tasks, estimate hours, and lead times for a job type.

Use the **milestones** link to add a job type's traffic milestones. Milestones are the key, big events in a Job's life: creative meetings, client presentations, management approvals, print dates, and more. Milestones are used to show the Big Picture of open jobs on traffic reports and job lists. They help you keep from missing the Job's most vital and critical dates, from its start to completion. Milestone

headings are always copied from the Spec Sheet to the job ticket. To be consistent with other jobs of the same type, they can't be modified on an individual job ticket. The headings themselves can only be changed in Spec Sheets—which will affect every open job that has the same job type.

Click on the **estimate options** link to enter the job type's standard estimate options (e.g., disclaimer, user-defined fields, sales tax, etc.).

**There is no difference between a job type and a spec sheet. A job type is simply a name that identifies a spec sheet. Each type of job has its own unique characteristics that affect how you track, estimate, cost, and bill your work. The spec sheet simply organizes these various characteristics in one place, where they can be used later on new jobs.**

Click on the **job specs** link to enter in a default description for a job type.

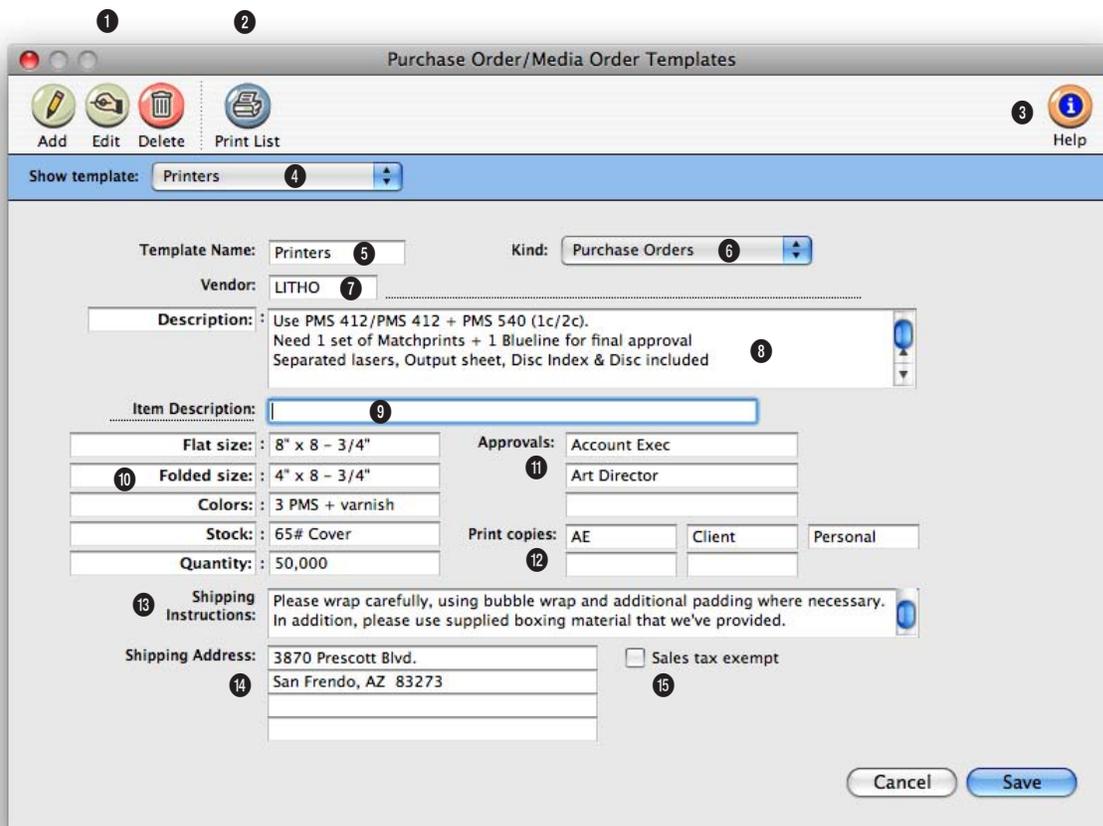
Click on the **creative brief** link to enter in default headings for the job type's creative brief. If a job ticket is added for a job type without default creative brief headings, a creative brief can't be entered for the job ticket.

**4** Job type/spec sheets are listed in order by their job type name.

**5** The **name** describes the job type. Jobs are sorted by job type on job lists, traffic reports, and profitability reports, so the name should be meaningful. The same name can't be used twice.

**6** A **description** can be added for a job type/spec sheet to further describe the job type/spec sheet.

# Order Templates



**Order templates help automate adding routine purchase or media orders. They contain common, but important, information about a kind of purchase.**

1 Order templates can be easily added, edited, and deleted. To add a new order template, click on the **add** button. Dozens of order templates can be added at any time. To change the settings for an order template, click on the **edit** button. To delete a template, click on the **delete** button. Deleting a template doesn't affect any orders that used it. Once a template is deleted, its name can be reused later on a new template.

2 To print a hard-copy printout of the Order Templates list, click on the **print list** button.

3 Click the **help** button to use the web-based user guide.

4 Use the **show template** pop-up menu to find and view an order template.

5 The **template name** identifies the template. It should be short, unique, and descriptive. When orders are added, the

templates appear in the show template pop-up menu.

6 Use the **kind** pop-up menu to create an order template for a purchase, insertion, or broadcast order.

7 A template can be created for one vendor, such as a printer, if it has special information (like shipping instructions). If left empty, you'll be prompted to enter a **vendor** number when adding the order.

**When an order is added, you'll select a template by selecting a template name from the pop-up menu. The order template's information will be automatically copied to the new order where it can be edited to make it more exact for that particular order.**

**8** The standard **description** is copied to new purchase orders as a time-saver. The description label is also customizable (e.g., Description, Quantity, or Instructions). Both the label and the description can be changed on the purchase/insertion/broadcast order itself without affecting the template.

**9** The **item description** appears next to the amount in the body of the printed order.

**10** The template's **user fields** correspond to user fields on purchase orders. These optional fields are used to store and display special information on purchase, insertion, or broadcast orders.

**11** Three standard **approval** names can be defined for each template. These approvals are copied to new orders.

**12** The **print copies** setting prints separate copies of a purchase, insertion, or broadcast order for up to five people (or places, such as Job Jacket).

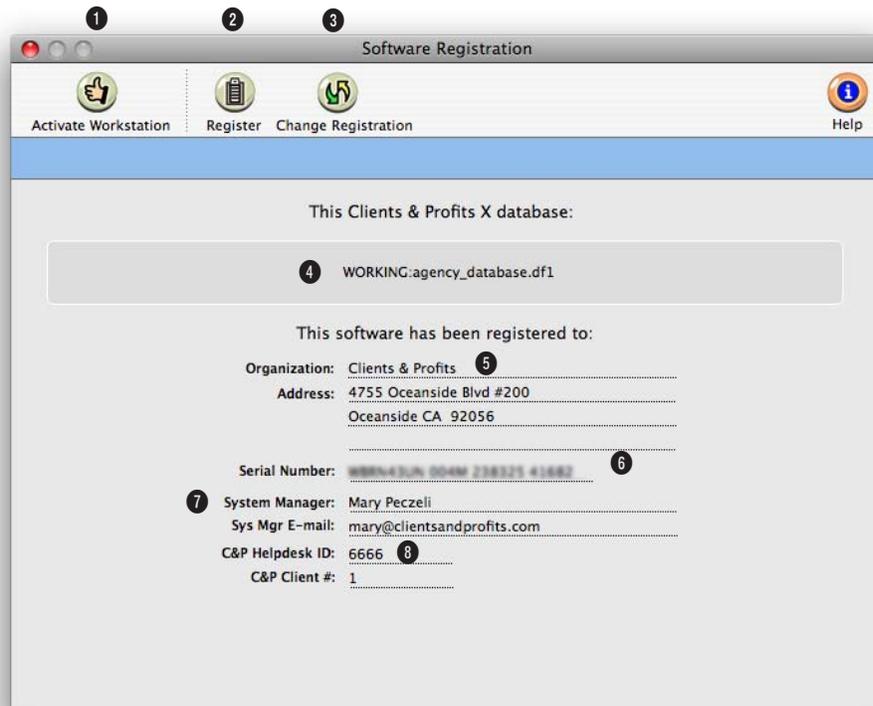
**13** **Shipping instructions** explain how an order is to be delivered or otherwise handled.

**14** The **shipping address** shows where an order is to be delivered.

**15** The **Sales tax exempt** setting instructs the vendor not to charge sales tax on their invoices.

# Software Registration

Clients & Profits X uses an internet-based registration system to validate each software installation. The registration process takes only seconds and helps the C&P Helpdesk know who's using the Clients & Profits X software. Software registration is required to change your database's agency information.



**Every Clients & Profits X database you use needs to be registered and activated separately to show the correct organization name and address.**

Software registration does two things: It registers your software with the C&P Helpdesk and activates the database with your installation of Clients & Profits X.

Software registration only needs to be run once for each database. Each workstation, however, will need to be activated the first time Clients & Profits X is used. The activation step process automatically installs the C&P X serial number, which controls multi-user access to your database.

You can use Clients & Profits X for multiple databases as long as they are used by the same people in the same location (as described in our license agreement). However, each database needs to be registered and activated from the Software Registration window.

Clients & Profits respects your privacy. No other information about your organization or your database is transmitted or stored. Your encrypted database information is used for software registration purposes only.

1 Clicking activate updates your database's organization name and address. Activation also installs your C&P serial number, which allows the database to be shared between many users. Your database must be registered before activation (see below). The activation process requires an internet connection. Any user can activate a database.

2 Click the register button to register your Clients & Profits X database. Registration is a one-time procedure that's required

**Clicking “Activate” looks up your Clients & Profits serial number, which controls how many users can share the database concurrently. So there’s no need to enter it manually. When you add additional users later, the serial number is updated automatically.**

when you open a database for the first time. The Register Database pop-up window prompts you for the database’s setup information, including its system manager. This information—and nothing else—is encrypted then e-mailed to the C&P Helpdesk for verification. Once your registration details have been verified, you’ll be notified by e-mail to activate your database. Once activated, your organization name will appear on printed reports.

3 Click the **change registration** button to update the database’s organization name, address, and system manager. Once the new registration information is verified, you’ll be notified via e-mail to activate the database. Once activated, you’ll see the new organization name on printed reports immediately. Only system managers can re-register a database.

4 This is the name and location of the currently opened Clients & Profits X database.

5 The **organization name and address** identify this database. The name appears at the top of every report.

6 The **serial number** controls multi-user access to the database. The middle set of characters shows how many simultaneous users can work at the same time (e.g., 002W means you have a 2-user serial number). The serial number can only be changed by registering the database then clicking the activate button.

7 The **system manager** is the person most responsible for operating and maintaining Clients & Profits X and its database.

This person will be the key contact for the C&P Helpdesk.

8 The **C&P Helpdesk ID** identifies your Clients & Profits X software installation. The **C&P Client #** is your customer number in our CRM system. Both are printed on your sales invoice or are available by calling the Clients & Profits Helpdesk at (800) 521-2166.

Register Database

Register this Clients & Profits X database:

WORKING:agency\_database.df1

C&P Helpdesk ID: 9372

C&P Client #: 894

Organization: The Ad Agency

Address: 3874 Kidman Ave. Suite 340  
Chicago, IL 38974

System Manager: Nicole Sayer

E-mail: nicole@theadagency.com

SMTP Server: mail.adagency.com

Mail Server Authentication (optional)

User Name: nicole

Password: nicknick812

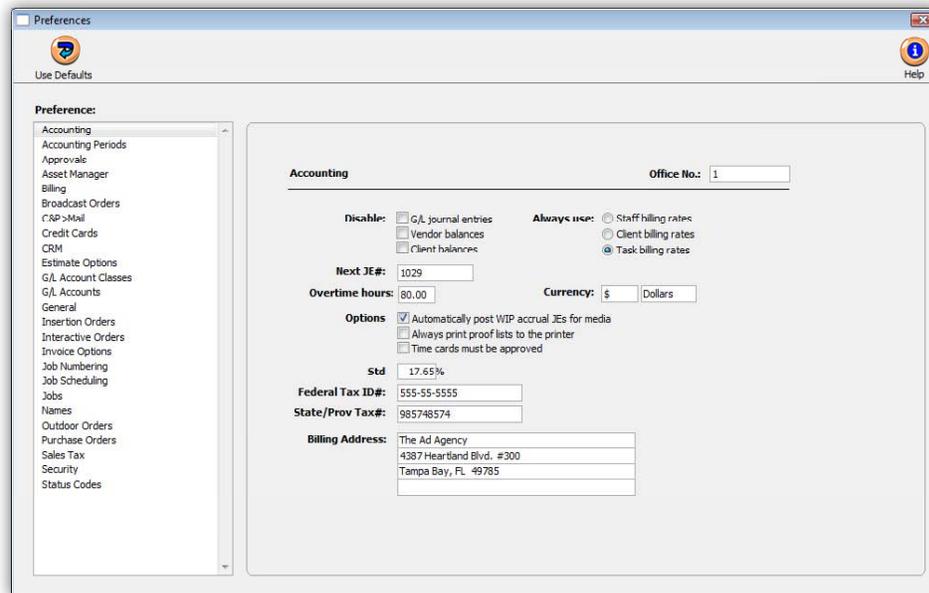
Sign up for the free C&P User Group

Help Cancel Register

Only system managers can register software. The database’s organization name and address can be changed any time by clicking the Change Registration button, enter the name information, then clicking Register. The new details will be sent to the C&P Helpdesk, who will verify the change then notify you by e-mail. Upon notification, click the Activate button to complete the registration.

# Preferences

You can customize Clients & Profits X without programming by setting its preferences. These preferences change the way Clients & Profits X behaves, so you can tailor it more closely to how you work. Most of the important system settings are changed from the Preferences window. This window lets you select and modify each of the different settings separately, for simplicity.



**Preferences lets you tailor Clients & Profits X to fit your organization’s needs. You can customize things such as job numbering, accounting periods, sales tax, etc.**

To change the system’s preferences, like the General preferences shown above: On Mac OS X, choose Preferences from the Apple menu. On Windows, choose Setup > Preferences. Once the Preferences window opens, click on a preference category from the list.

Make your changes then either click the window’s close box or choose another preference; your changes are saved automatically. The changes take affect instantly.

Since these settings are used by everyone system-wide, every user’s preferences are updated when these changes are saved. To prevent record-locking, it’s best—but not required—that no one uses Clients & Profits while you’re changing your system preferences.

■ To change your organization name and address (which appears on reports and forms), choose Setup > Software Registration. This information can only be changed by a system manager.

## Preferences

Preference	Settings that can be customized
Accounting	Disable G/L journal entries (if you don't use the G/L), vendor balances (if you don't use C&P for A/P), client balances (if you don't use C&P for billing); standard billing rate (staff, client, or task); the next JE and A/R number; options for using WIP accruals, always printing proof lists to the printer, and time approvals; standard markup.
Accounting Periods	The names of the two fiscal years and accounting months; current period; first day of your fiscal year.
Asset Manager	The option to automatically create a folder for new jobs; the name of the art server; asset file types (including their icon); optional custom fields for the Asset Info window.
Billing	Prevent duplicate invoice numbering; next A/R number; billing workflow.
Broadcast Orders	Media department name and address; standard disclaimer; auto-numbering options; next order number; logo for printed order; distribution copies for printed broadcast orders.
C&P>Mail	SMTP mail server; system manager e-mail address; automatic e-mail settings.
Credit Cards	Accounts for importing downloaded credit card statements; merchant list with default accounts.
CRM	Terms for labelling different kinds lead customers (e.g. ,past clients, current lists, hot leads, etc.)
Estimate Options	Heading; standard disclaimer, approval names, and contingency; margins; logo for printed estimate.
G/L Account Classes	Terms for labelling different types of G/L account classes on financial reports.
G/L Accounts	Default account numbers for cash, A/R, A/P, income, expenses, media accruals, etc.
General	Date format; spell checking, find time by Staff or Number, animated intro, paper size, etc.
Insertion Orders	Media department name and address; standard disclaimer for print orders; auto-numbering options; next order number; logo for printed order; distribution copies for insertion orders.
Invoice Options	Heading and logo for printed invoice; standard invoice note; e-mail body for sending invoices.
Job Numbering	Setting for automatically numbering new jobs, including the next number.
Job Scheduling	A list of holidays to skip when scheduling job tasks.
Jobs	Traffic names; billing workflow; priority levels; settings to require charge numbers and job types; options to keep jobs from being closed; show completion setting for the Job's digital display.
Names	Customizable labels for terms like clients, jobs, profit centers, etc.
Purchase Orders	Distribution copies; standard user-defined field labels; approval names; standard disclaimer; logo for printed purchase orders; settings for automatic numbering; margins.
Sales Tax	Standard settings for two different sales taxes, including tax rates and liability G/L accounts.
Status Codes	Default status codes used for new, closed, reopened, billed, and paid jobs.

# C&P E-mail

One of the key features in Clients & Profits X is the innovative use of internet-based electronic mail. It works with industry-standard SMTP-based mail servers to automatically send e-mail from Clients & Profits X to staff members. C&P e-mail is sent automatically (such as when a job is opened or its status codes changes) or based on scheduled entries added by users.

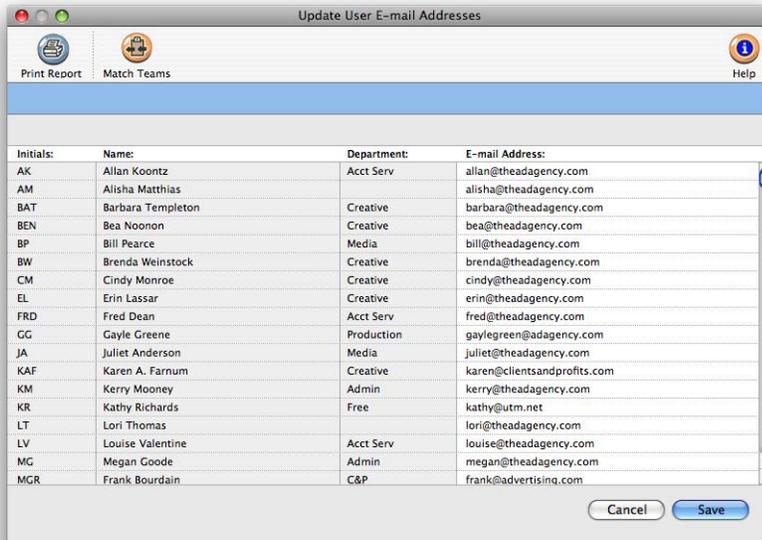
Two things make C&P e-mail work: a SMTP server and e-mail addresses for each staff member. To start sending automatic e-mail, you'll first need to enter the name of your SMTP server into Clients & Profits. It must be a standard SMTP-based mail server, and not a proprietary server like ccMail, QuickMail, etc. (unless you're using a newer version that speaks SMTP). The mail server must be available full-time because Clients & Profits sends mail throughout the day.

Every staffer must have an e-mail address (e.g., john@agency.com). For security reasons, C&P e-mail is generally sent only to staff members and not to people outside the shop. This prevents confidential information from being sent to clients, vendors, and possibly competitors. However, "cc's" (i.e., carbon copies) and "bcc's" (i.e., blind carbon copies) have no such limitation. This means users who manually send e-mail from Clients & Profits can potentially send it to anyone.

■ E-mail that is sent from the Help E-mail window to the C&P Helpdesk is considered to be confidential and private. However, e-mail sent to the C&P User Group or the C&P Wish List is considered public and can be read by anyone subscribing to those mailing lists.

The Clients & Profits e-mail system is based on a built-in calendar. Stored mail is automatically checked each morning when the first user opens the database. Any pending mail is then sent. E-mail is automatically sent from these areas:

**TimeCop** Staff members who haven't accounted for enough hours (i.e., actual vs. planned) on the previous day's time card/time sheet get a user-defined reminder via e-mail. A copy is sent to their department manger.



**Updating e-mail addresses.** The Update Departments window lets you easily update the department and e-mail address settings for all staff members at one time.

**Quick Check** The system manager is notified via e-mail if the periodic Quick Check finds a problem with the database.

**Media Calendar** Scheduled entries from the media calendar can remind media department staffers of space closing dates, material due dates, dates of special promotions, and meeting dates.

**Cash Flash** A daily "cash flash" of the shop's current cash, A/R, and A/P balances can be e-mailed to agency management. In addition, e-mail "ticklers" can be scheduled to remind the accounting staff about unpaid invoices, tax deposits, appointments, and other follow-up items.

**Client Diary** When a user adds a diary entry, a copy can be e-mailed to selected staff members. Entries can be scheduled to be sent in the future to automate account follow-up.

**Job Tickets** E-mail can be automatically sent to accounting, production, or management when a new job is opened, its status code is changed, or the job is closed. Production people are notified of impending task deadlines several days ahead of time via e-mail. A copy of a job diary entry can be e-mailed when it is added. E-mail is also sent whenever a new change order is saved.

# Spell Checker

Clients & Profits X features a powerful built-in spell checker that's optimized for both databases and the advertising and design industries. It works like a spell checker in a word processor, except that it is designed especially for a Clients & Profits X database, which uses form-based windows instead of paragraphs of text.

The spell checker automatically checks selected fields when a window is saved, looking for misspelled words, duplicate words, and unique words and terms using a customizable user dictionary.

(In a few windows, such as the Time Card, the spell checker checks each field interactively as you tab from field to field.)

Not every field is checked for spelling. Fields like the job number, invoice date, project, contact names, and user-defined fields are skipped since they typically have unique words, phrases, and abbreviations that aren't usually found in dictionaries.

■ The spell checker does not check for bad grammar or misspelling (or misused) punctuation.

The spell checker's standard dictionary contains over 100,000 words, including commonly used advertising, design, and production terms like "PMS", "4C", "mailer", "1/4-page", etc.

In addition, each user has his or her own custom dictionary. Words can be added to the user dictionary by clicking the Add button from the spell checker window.

## To enable the spell checker

- 1 Choose Preferences > General.
- 2 Click on the Check Spelling When Saving, then click Save.

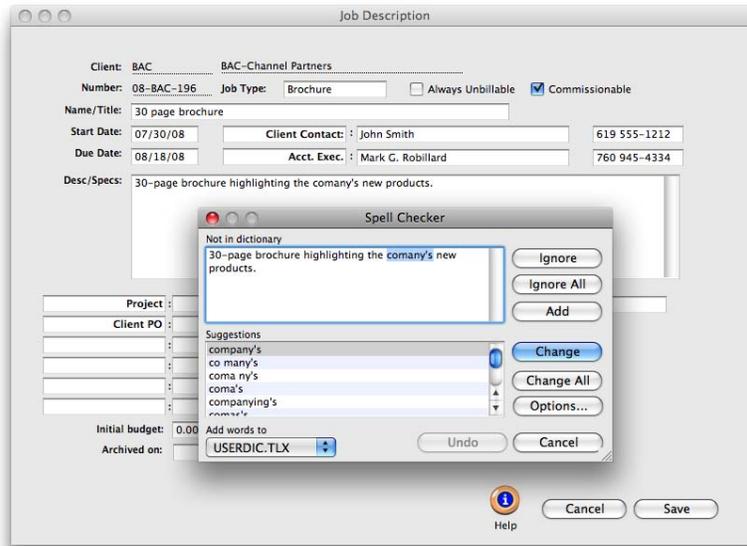
The spelling checker will start checking for misspelled words immediately. It can be easily disabled by unchecking the setting in Preferences.

## User dictionary

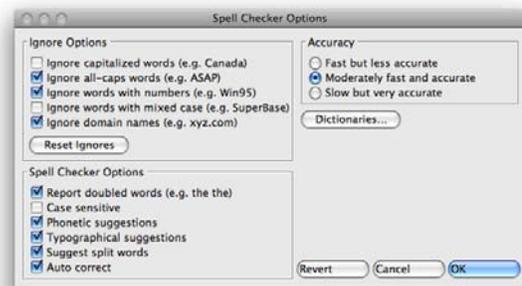
The user dictionary is stored in the Clients & Profits X database, so is shared among all of your C&P X users. This means if one person adds a new work to the user dictionary, it is instantly available to everyone else's spell checker.

## Spell checker options

When the spell checker window opens its options can be customized by clicking the Options button. The Spell Checker Options windows lets you open additional dictionaries, as well as set the spell checker to ignore certain kinds of words.

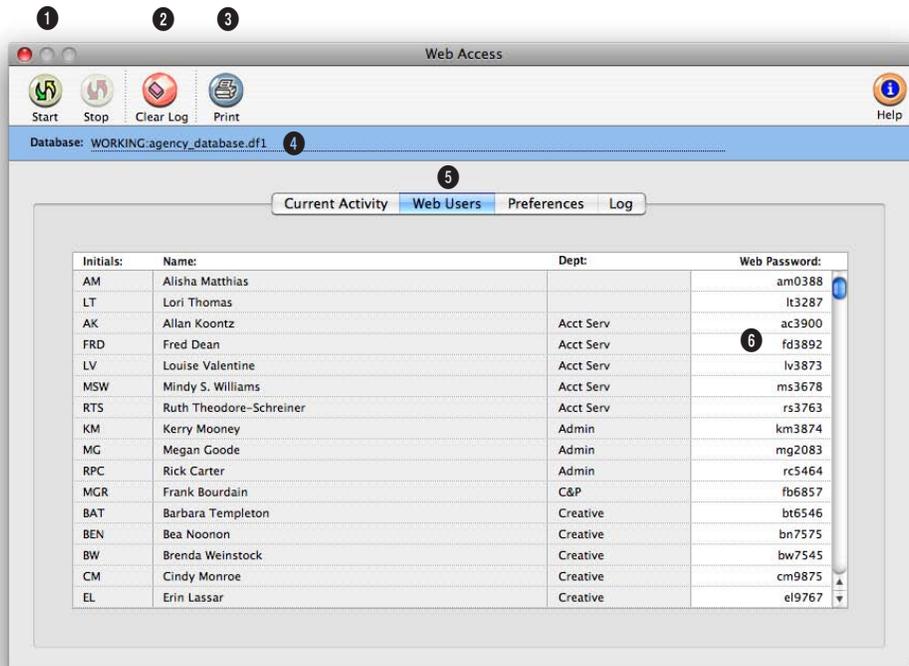


**Checking for misspellings**  
Like other spell checkers, the C&P spell check suggests the correct spelling for the misspelled word. Clicking Change All or Ignore All skips a word until you quit Clients & Profits X.



# Web Access

Clients & Profits X's web-based time card allows any staff member to track their hours worked from any internet-connected web browser. It offers real-time access to the shop's database of clients, jobs, and tasks. The time they entered on their web-based time card appears on job reports instantly, just like the standard C&P X time card.



**Any staff member with a web password can access their web-based time card. Only a system manager can change web passwords and start the C&P X web server.**

The built-in Clients & Profits X web server lets any staff member use their time card from a web browser, whether they're inside the office, on the road, working from home, or visiting a client.

The web server allows an unlimited number of staff members to use the web time card, based on what your server hardware can handle.

Complete instructions for installing, configuring, and run-

ning the Clients & Profits X web server is available at: [www.cnp-x.com/user\\_guide](http://www.cnp-x.com/user_guide)

1 Clicking **start** tells the C&P X web server to start listening for incoming requests. When a request is made by a staff member's web browser, Clients & Profits X prompts them for their user ID and password. If the user enters a valid ID (the same one they use in the Introduce Yourself window) and web password, they'll see their daily time card web page. They'll be

able to enter hours for any job and task, including unbillable administrative jobs. Convenient lookup lists are available that list the shop's open jobs and their jobs; clicking on a job or task copies it onto the web time card.

To stop the web server, simply click the **Cancel** button in the web server status message box.

2 The activity log records every request, letting the system manager track who's access-

**The web-based time card requires a dedicated PC to as a web server, but does not need any special server software. It can host internal users or both internal and external users if it has a full-time outside IP address.**

ing the Clients & Profits X web server. Clicking the **clear log** button permanently erases the entries from the web server's activity log.

3 Click print to get a hard-copy report of the web server's activity log.

4 The name of the **database** currently been hosted by the Clients & Profits X web server appears here for reference. Only one database can be hosted per web server.

5 Clicking on a tab displays different information about the Clients & Profits X web server.

The **current activity** tab shows web server's current status (e.g., "running", "idle", etc.) as well as a log showing today's requests by users.

The **web users** tab lists all staff members by department, along with their web password.

The **preferences** tab (see below) lets system managers control some functions of the web server.

The **log** tab shows the web server's complete activity. The web log stores all requests, or hits, since the web server was started until the system manager clears the log.

6 Entering a **web password** here enables the staffers to access the web-based time card. Passwords can only be chosen by the system manager and can only be entered here. Web pass-

words are encrypted and should be changed often. If a staff member doesn't have a web password, they won't be allowed into their web time card.

Web access can be available 24/7. It can shut itself down automatically at a selected time for the nightly backup, then restart itself the next morning.

■ For step-by-step installation instructions, please see: [www.cnp-x.com/userguide](http://www.cnp-x.com/userguide)



# Daily Time Card for iPhone and Web

Clients & Profits X's web-based time card allows any staff member to track their hours worked from a web browser or Apple iPhone®. It offers real-time access to the shop's database of clients, jobs, and tasks. The time they entered on their web-based time card appears on job reports instantly, just like the standard C&P X time card.



**iPhone users can now access their daily time card anytime, anywhere from their phone with the new daily time card, specifically designed for the iPhone.**

1 When you enter your **server's address** from your iPhone, Clients & Profits Web Access is designed to automatically detect that you're accessing C&P from your phone and displays a custom page designed specifically for the iPhone. If you turn your phone, the web access page will even automatically scale to fit the screen.

2 **Today's date** will appear here. If you wish to view, add or edit time from a previous or future day, click the previous or next

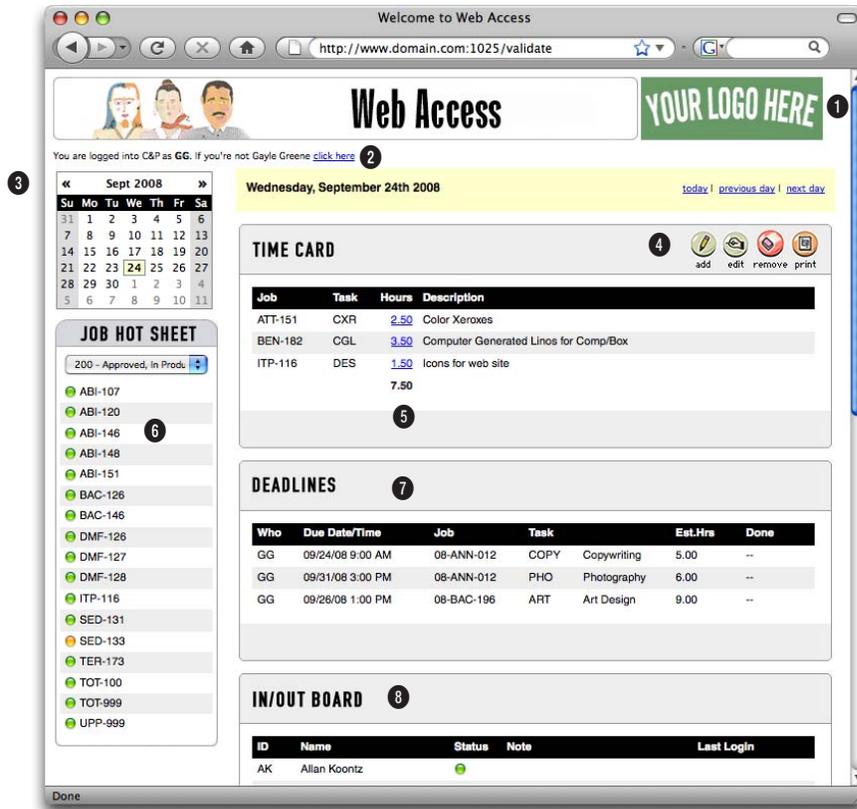
arrows. The number of days users are able to view forward or backward is set in Users, Access & Passwords for each user in Clients & Profits.

3 Clicking the **add** link will take you to the add time web page, where you can add time entries for the jobs in which you are assigned tasks. The add time page uses data-driven drop down menus that allow you to select jobs and tasks easily.

4 To edit time entries, simply click once on the time entry from the list, then click the **edit** link. Simply clicking the edit link without selecting a job will prompt you to select an entry first.

5 To remove a time entry, select the entry from the list, then click the **remove** link.

6 Time entries can also be edited by clicking on the time entry's **hours links**.



**Resembling the Creative Dashboard, the newly re-designed web-based Daily Time Card now includes deadlines as well as your job hot sheet and In/Out Board.**

1 You can customize your web access page to display your company's logo. Simply change the link to the logo file in web access preferences to point to your logo hosted on your server.

2 The database you're connected to, as well as who's logged in will always be displayed here.

3 The current calendar is always displayed here. To jump to a previous or future month, click the next and previous links.

4 To add time to your time card, click the **add** button. To edit a time entry, select it from the list, then click the **edit** button. To remove a time entry, select it from the list then click the **remove** button. To print your time card, click the **print** button. The time card will appear in a separate pop-up window which you can print directly to your printer.

5 Clicking on any of the hour links will open the edit time window, allowing you to edit

those time entries..

6 The Job Hot Sheet lists all jobs that contain tasks which you are responsible for. This list can be filtered using the job status drop-down menu.

7 Your active deadlines are listed in the deadlines table, including due dates and times, tasks and estimated hours.

8 The In/Out board displays the current status of all C&P users in your shop.