

Job Tickets

Chapter 3

JOB TICKETS

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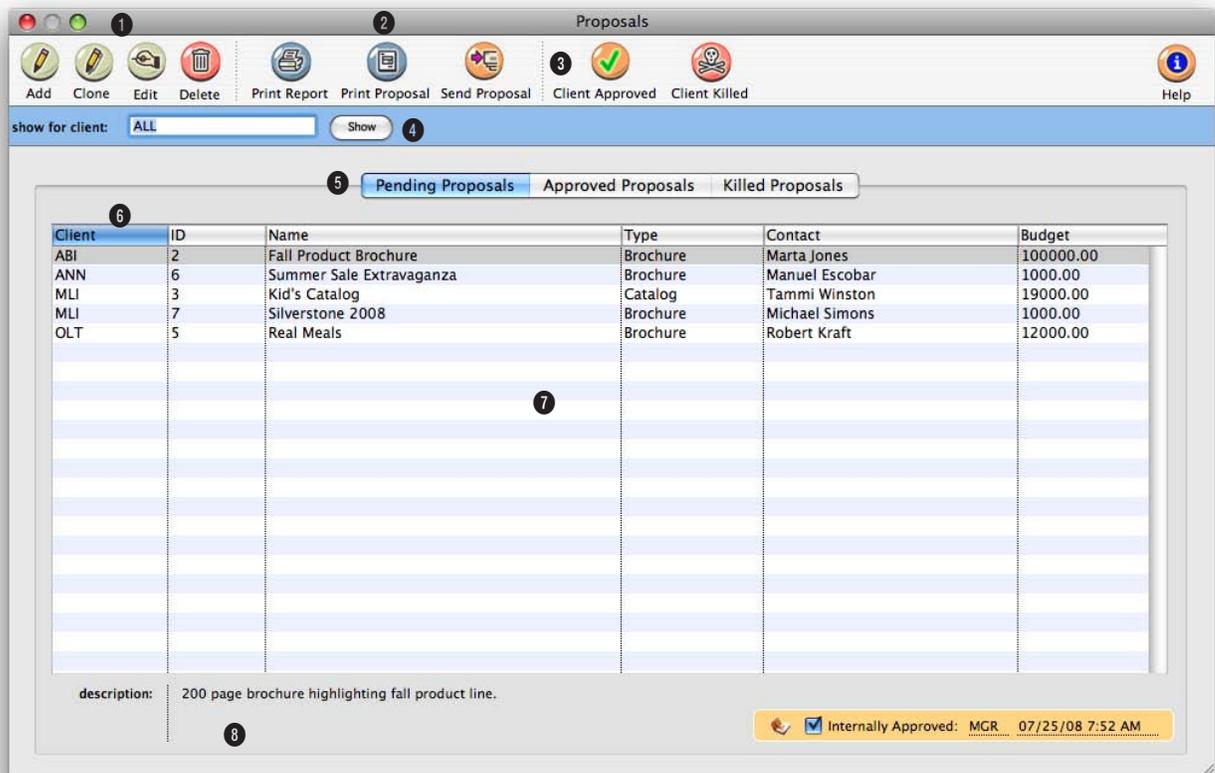
Introduction

Clients & Profits X is based on job tickets. A job ticket is an electronic job jacket that tracks estimates, production specifications, schedules, traffic, costs, time, expenses, and billings. Job tickets replace your paper job folders, log books, and other job tracking systems. Clients & Profits X is the only system you need to track jobs. Since jobs are seamlessly integrated with accounting, there's no double-entry, making your work more timely, accurate, and easier to manage. In this chapter you'll see how to:

- open new job tickets
- manage job tasks
- find, change, delete, and print job tickets and job reports
- create and print estimates
- create and print job schedules and traffic reports
- update traffic and job schedules
- add change orders
- track work in progress and review job costs with View>Point
- print job reports, lists, summaries, and labels

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. It's continually updated, so it's more timely and helpful than a printed user guide.

Proposals



Proposals can be added when pitching an idea to a client. Once your bid is accepted, they can be easily converted into job tickets.

1 Use the window's toolbar buttons to **add**, **clone**, **edit**, and **delete** proposals. Clicking on a button is the equivalent to choosing a menu command.

2 Click on the **print proposal** toolbar button to print a list of requests, which can be sorted by client and status, and limited to a user-defined date range. The proposal prints with a signature line for the client.

3 Click on the **approve** button to automatically create a job

ticket from the proposal. Clicking on the **kill** button changes the proposal's status to killed, but saves it for future reference.

4 Use the **find client** search tool to list proposals for one client.

5 Click on a tab to show pending, approved, or killed proposals.

6 Click on the column headings to sort the proposals list by client, ID, name, type, budget,

or status in ascending or descending order.

7 When the proposal becomes a job, the proposal's name becomes the job's name, and its description becomes the job's description.

8 When you select a proposal, its description appears, giving more detail about the job. Double-clicking on the proposal opens the **edit proposal** window so you can view the full description, creative brief, contact, and other details.

Adding a proposal for every potential job gives you an ongoing record of how much work the agency is putting into new business development.

With the right access privileges, anyone can add proposals. All they need to know is the client, the job name, and a description of the potential work.

1 Every proposal is opened for one client. This is the client who will authorize and approve the job.

2 The **proposal type** classifies a job by the kind of work (e.g., brochures, media, collateral, web site, etc.) from the templates set up as job type/spec sheets.

3 The **proposal name/title** describes the scope of the work.

4 Add a meaningful **start date**

and **due date**. These dates will help the production team better plan schedules and resources for potential jobs.

5 Any name can be typed into **requested by**, or use the **lookup contacts** tool to find a client contact.

6 Enter the proposal's **description**. When the proposal becomes a job, the proposal's description becomes the job's description.

7 The **initial budget** is used to track what the client initially wants to spend on the job. The **charge number/cost center** is an optional account number used by corporate accounting systems to charge back to their departments.

8 The **creative brief** pop-up menu shows the creative brief headings entered in the job type/spec sheet. Only the sections that have text will appear on the printed proposal report.

Job Tickets

The job ticket is the foundation of Clients & Profits. It's an electronic job jacket that manages nearly everything you do, tracking estimates, schedules, costs, time, billings, and profit.

A job ticket is opened for every project the shop gets, including internal work, client presentations, and pro-bono jobs. Each job ticket is given tasks that describe what's being produced, such as artwork, copy writing, design, and printing. Job tasks are completely customizable for flexibility. Job tasks serve many purposes, including estimating, scheduling, job costing, and billing. A job always has at least one task, but can have dozens.

Job tickets are always available on any computer in your shop (if you have the access privileges). So it's easy to review your Job's progress from start to finish. Anything anyone does for your jobs appears in the Job Ticket windows. These production windows let you easily see a Job's estimate, task schedules, traffic milestones, or status. You can also analyze the Job's costs, time sheets, open purchase and insertion orders, and unbilled tasks.

All this makes job tracking much faster than ever before, since there are no more thick job jackets or job binders to sort through. And since everyone in the office works from the same shared database, you'll instantly see anyone's changes as they are made—so you'll always work (and make decisions) from accurate data.

The Job Ticket window has its own File and Edit menu commands for finding and printing jobs. All menu commands work by selecting the File menu with your mouse, then highlighting the command you wish to use.

Jobs are automatically numbered

New jobs are numbered automatically, so there's no need to maintain a separate job book with job numbers. Jobs can be numbered automatically based on your job number settings in Preferences. Automatic job numbers can contain client numbers and the year.

If jobs are numbered sequentially by client, the next number will be copied from the client account. Otherwise, the next number will be copied from the system. The automatic job number can be changed.

To enter your own number, type in your new number over the automatic number. Using your own custom number, however, may interrupt the automatic numbering for upcoming jobs.

If at some point during the Job's existence the job number needs to be changed, a special

Renumber utility, found in Setup > Utilities, must be used. Renumbering a job ticket will change the job number on every time entry, vendor payable, check, job billing, change order, and diary entry that belongs to the job ticket.

Work in progress debits and credits

This is an important distinction, since it differs from other accounting systems. Clients & Profits provides the flexibility to bill anything from a job, whether costs exist or not. A job can be billed for as little or as much as you can get, even if it has no costs. This ability means that your Work in Progress balance may not be what you expect. Because of its flexibility in billing, costs affect the G/L differently than you might expect too. Costs debit the general ledger when they are posted—not when they are billed. You can choose which account is debited, such as a cost of sales account or an unbilled costs inventory account. Posting a client invoice debits A/R and credits income; your cost of sales is unaffected.



Get to work! Production staff members can open frequently-used job windows quickly and easily using their Information Center. The Information Center window also includes an animated daily company message and a photo of the user, just for fun.

Job Ticket Features

Feature	How it works, how it's used
Automatic job numbering	Jobs can be numbered automatically by client or system to alleviate the need to maintain a manual book of job numbers.
Production/billing status codes	Status codes track a jobs progress from start to finish, such as in production, billed, or closed.
Estimates	Estimates are based on the Job's tasks and are flexible so the client can see more or less details.
Change orders	Change orders document changes made to a Job's estimate after the estimate has been authorized. The client signs off on the change order authorizing the needed changes.
Task scheduling	Schedules are based on a Job's tasks. Every task on a job can be scheduled with due dates, start dates, and resources responsible for the work.
Traffic milestones	Each job can contain up to 12 milestones which represent key events or phases of a job (e.g., meetings, approvals)
Job diary	A Job's history is logged on a job diary. A diary entry is automatically logged whenever the job is changed, showing the date and time the change was made and who made it.
Print specifications	Print specifications track minute details of printing including color, size, text instructions, inserts, binders, and packaging.
Work order	Work orders contain specific information for any production or art direction notes and can include a picture which is copied or pasted in.
Creative brief	The creative brief is a worksheet to start and direct your creative, production, and marketing goals. It contains fifteen user-defined headings and fields.
Job type/spec sheets	Job Types/Spec Sheets automate entering jobs by copying preset options and a template of tasks to each job.
Access privileges	Access to change and view jobs can be limited for each user.
C&P e-mail	Clients & Profits can automatically notify staff members via e-mail when jobs are opened, when status codes are changed, when jobs are billed, and when job invoices are paid.
Cloning	Existing job tickets can be cloned into new jobs. Cloning saves time, since the old Job's details, including its estimates, but not due dates, status, or cost and billing amounts, will be added to the new job.
Digital displays	Tracks the Job's progress in terms of completed tasks, hours used, costs, estimate, and days left until due.
Graphs	Two pie charts show how many hours have been used and what percent of the estimate has been billed.

The Job Ticket Window

Job Tickets

find job: 08-ANN-012 history: 07-ANN-011

creative brief estimates print specs change orders work order assets diary approvals view>point: Click here

Number: 08-ANN-012 Advertising Billable Closed
 Client: ANN Ann Fashions, Inc.
 Name/Title: Summer Clearance
 Client contact: Ann Stanford 619/555-4712 AE/team: MGR
 Opened: 06/22/08 MGR Started: 07/01/08 Project: Summer 2008
 Closed: Due: 08/01/08 Priority: Normal

Task:	Resource:	1/4 page	Chg Orders:	Est Hrs:	Billed:	Unbilled:
CRE Creative Concepting	MP	\$880.00	--	16.00	\$55.00	\$165.00
DES Design + Concept	MP	\$600.00	--	6.00	\$32.36	\$97.06
COPY Copywriting	GG	\$550.00	--	5.00	\$22.06	\$66.18
CRV Creative/Design Revisions	--	\$300.00	--	3.00	--	--
LAY Layout	KAF	\$360.00	--	4.00	--	--
PHO Photography	GG	\$720.00	--	6.00	\$35.30	\$105.88
AET Account Management	MGR	\$1,440.00	--	16.00	\$90.00	\$270.00
PMB Print Media Planning/Ordering	AM	\$525.00	--	5.00	--	--
MNE Media-Newspaper	--	--	--	0.00	--	--
WPG Word Processing	CM	\$150.00	--	3.00	--	--
PRF Proof	CM	\$210.00	--	3.00	--	--
		\$5,735.00		67.00	\$234.72	\$704.12

Prod Status: 260 Copy Due Assigned to: AC MGR CD PN AD CL
 Bill Status: 560 Work in Progress Billed CW LT PM RTS PA SC
 Status Note: Appears end of August Days until job due: 007

The job ticket is an electronic job jacket that manages nearly everything you do, tracking estimates, schedules, costs, time, billings, profit, and more.

1 The arrow toolbar buttons can be used to scroll through the previous and next job tickets.

2 These toolbar buttons can be used to add, clone, edit, and delete job tickets. Click the add new job ticket button to add a new job. Existing job tickets can be cloned into new jobs by using the clone job button. Click the edit button to edit the Job's key information found in the Specs window, such as the client contact, job name/title, project, job type, start date, or

profit center. Click the delete button to delete a job ticket. Once a job ticket has costs, hours, or billings it can't be deleted. Instead the job must be closed. Deleting a job is permanent and irreversible. However, the deleted Job's diary entries aren't affected, allowing anyone to see who deleted the job.

3 Tasks can be easily added or removed from job tickets. Click on the add new job tasks button to add a new task to the job ticket. Tasks can be

added to a job at anytime and will be immediately available for estimating, scheduling, costing, or billing. Click the remove task button to remove a task from a job ticket. A job task can be deleted before any costs, time, purchase orders, or billings have been added to it. A job task with activity can't be deleted, preventing billable tasks from being deleted (and not billed). Once a job task is deleted, it is gone forever. However, the same task can be added back to the job later if needed.

Job tickets are always available on any computer in your shop (if you have the access privileges). So it's easy to review your job's progress from start to finish.

4 Clicking the **pre-bill** button lets you quickly bill the client for any portion of the Job's estimate.

5 Use these buttons to print job reports and estimates.

6 A job ticket can be found by entering in the job number here. Or the **find more** link can be used to find job tickets by sequence, job number, client, job name, production status, billing status, project, client po, job type, client contact, or charge number/cost center.

7 **History** keeps track of the job tickets that you previously viewed. Use the pop-up menu to jump to another job ticket.

8 These links allows you to add, edit, view, delete, or print creative briefs, estimates, specs, change orders, work orders, or assets. The **creative brief** is a worksheet that explains to the client the agency's creative process for a particular job. The **estimate** is where you can add, see, and change a Job's estimate amounts. **Specs** can be used to describe in detail to the vendor the specific printing requirements for a particular job. **Change orders** can be added to document changes made to a Job's estimate after it has been approved. The **work order** is used to let the production staff know everything they need to know to start the job (e.g., client, job name/title, and initial budget). The **asset manager** can be used to keep track of the assets (i.e., artwork) belonging to the job ticket.

9 The Job's **view>point** pop-up menu contains links to view and track the Job's progress. Task costs, task billings, task POs, and task IOs/BOs can be used to see the Job's activities. The **job progress** window shows on-the-spot totals for things such as how many hours you've worked, costs you have incurred for each job task, or the gross margin to date. The Job's **work in progress** window is where you can view, edit, transfer, bill, and write-off unbilled costs. The **job snapshot** window is where you can view and print the Job's profitability at a glance. The **job diary** tracks all of the Job's history so user's can see what kind of changes have been made since the job was opened.

10 The Job's key information is listed here for reference. The **job number** appears on all windows and reports. Jobs are numbered automatically when they are opened. A job is opened for one **client**. The **Job's title** is a brief description of the job that appears throughout Clients & Profits. Each job contains a **client contact**, an **agency contact**, and phone numbers. These contacts are the people who are most responsible for getting the work done or approved. The **opened date** shows when the job ticket was added. **Closed date** shows when the job was closed. **Start date** shows when a job was opened or authorized. **Due date** shows when a job should be completed. Jobs can be given an account executive or team code; job lists can be printed by **AE/Team**. Many jobs can be part

of the same **project** and can be tracked together. Many job reports can be printed by project. Click the **closed** checkbox to close a completed job. Closing a job changed its production status to closed automatically. A closed job can be easily reopened by clicking the closed checkbox again.

11 The **priority** status describes the priority level for this job ticket to let staff know which jobs need to be worked on at a quicker pace. Priority levels can be set up in Preferences.

12 A thumbnail from the work order's sketch or scan appears here for reference.

13 The **estimate vs actual hours** graph shows the percent of total hours entered on time cards in red; the blue slice is the percent of estimated hours remaining. A quick glance at this chart lets you see how many client-approved hours the shop has left to complete the job. The **estimate vs billed** graph shows the percent of estimate that has been billed in red; the blue slice is the estimate remaining. As you invoice for a larger percent of the estimate, the green slice will become proportionally smaller.

14 **Job tasks** are used to track estimate amounts, costs, hours, billings, and unbilled costs. The job ticket window lists the Job's tasks, including who's doing the work (i.e., staff member, vendor, or freelancer). Double-clicking on a task lets you see (and edit) its complete details.

15 Clients & Profits X allows you to easily schedule tasks and assign resources to a job and tasks. The Job's **scheduling** window is where you can setup and edit task due dates and resources. The Job's **traffic** window is where you can edit the Job's key traffic information such as the production status code, status note, or milestone dates. The **timeline** window shows a linear graph of the job schedule.

16 **Production status** and **billing status** codes track a job's progress from start to finish, such as estimate pending, in production, ready for billing, or billed and closed. The **status note** is an optional note added to the job to supplement the status code. It can also be used to further describe the job's current status.

17 The **traffic assignments** can be used to assign up to six key staff members who are responsible for the job. Traffic assignments are set up in Preferences. A job's traffic assignments can be made in the traffic window.

18 The **digital display** gives you an up-to-date look at a job's key completion stat—a count-down of days left until the job's due date, the percentage of finished tasks vs unfinished tasks, estimate hours vs actual hours, budget vs costs, or estimate remaining (estimate - billed). The digital display option is set in job preferences (see 9-46).

The Add New Job Window

A job ticket can be opened anytime after it is conceived, and certainly before the work begins. It's important to open new jobs as soon as possible, since purchase orders and time can't be tracked without a job number. Anyone can open a new job ticket if they have the access privileges. All of the job's details can be changed later.

The screenshot shows the 'Add New Job' window with the following fields and callouts:

- 1: Client (ENG)
- 2: Number (Automatic)
- 3: Commissionable checkbox (checked)
- 4: Name/Title (Meeting the Customer-Focus Challenge)
- 5: Start Date (07/25/08)
- 6: Desc/Specs (Interactive DVD-ROM driven kiosk displays for ENG's corporate "Focus on the customer" challenge.)
- 7: Client Contact (Katherine Burnfield)
- 8: Prod. Status (10 - New Job)
- 9: AE/Team (FRD)
- 10: Flash File (ENG_FOCUS.FLA)
- 11: Assigned to (AC, KOM, CD, ETP, AD, IMC, CW, CG, PM, TS, PA, VVH)
- 12: Division (Millram)
- 13: Bill Rates From (Client)
- 14: Initial Budget (4600.00)
- 15: Chg#/Cost Ctr (1-3838A)
- 16: Added By (MC)

Any new work should be opened as a job ticket as soon as possible, since purchase orders, time, and other costs can't be tracked without a job number.

1 Every job is opened for one client who will authorize and approve the work.

2 New jobs are numbered automatically, or can be entered manually. The job number contains up to 10 letters and numbers, but must be unique.

3 Job type/spec sheet classifies a job by the kind of work (e.g., brochures, web site, etc.). Details from the job type's spec sheet, including user-defined fields, are copied to the new job.

4 The job name/title describes the scope of the work. It appears on windows, reports, estimates, and invoices.

5 The new job contains a client contact, an agency contact, and phone numbers. These contacts are the people who are most responsible for getting the work done or approved. Start date shows when a job was opened or authorized. Due date shows when a job is to be delivered.

6 The job's description appears

on estimates, job reports, and invoices to clearly describe everything about a job that the client needs to see.

7 To keep a job ticket from having billable costs posted to it, click on the **always unbillable** checkbox. Each job task can also be marked as billable or unbillable in the Edit Job Task window.

8 New jobs get a default "new" production status when they are added. This status identifies

Adding a new job is easy: all someone needs to know is the client number, job name or title, and the work's description or specifications.

brand-new jobs on the Daily Job Status report.

9 An AE or team can be assigned to every new job. Jobs are tracked and printed by AE/team.

10 Every job has six customizable fields to track special details that don't fit anywhere else. The labels are copied from Preferences or from the job type/spec sheet, but they can be changed here. User-defined fields appear on the printed estimate, but not invoices.

11 The production and creative people who are responsible for this job are entered into the **assigned to** fields. Jobs are tracked by these traffic assignments.

12 A job can be opened for an optional profit center. The jobs

assigned to a **profit center** can only use tasks that belong to that profit center. Job reports can be printed by profit center. The **bill rates** setting determines how rates will be charged to the job's tasks.

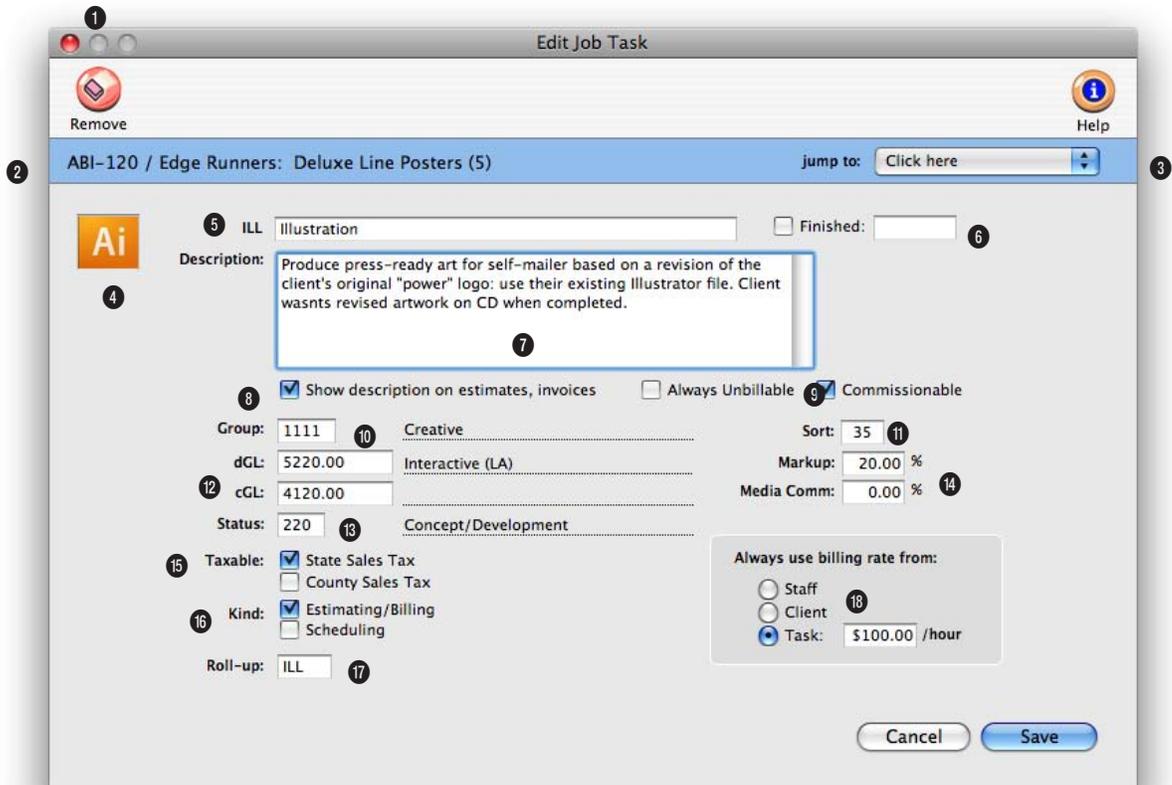
13 Jobs can be billed by staff, task, or client rates.

14 Enter what the client initially wants to spend on the job on the **initial budget** line.

15 **Charge number/cost center** is an optional account number used by corporate accounting systems to charge back their departments. It appears on estimates and invoices. The **initial budget** is used to track what the client initially wants to spend on the job.

16 The initials of the staffer who added the job are automatically entered on the **added by** line.

Job Tasks



Each job ticket is given tasks that describe what's being produced, such as artwork, copy writing, design, and printing. They are completely customizable for flexibility.

1 The remove button can be used to delete the task from this job ticket. Once a task has activity (i.e., costs, billings) it can't be deleted.

2 The job number and title are listed here for reference.

3 The jump to pop-up menu allows you to quickly view another task on the job ticket.

4 Each task can have a custom icon to illustrate its function. Task icons are copied from the

Task Table to new job tasks and appear on work to do reports.

5 The task code uniquely identifies the task on costs and billings, like ART or COPY. The task name briefly describes the task's purpose or function, such as Artwork or Copy writing. Clients see task names, but not task codes, on estimates and invoices. Once added, the task code can't be changed but can be renumbered using Utilities.

6 Job tasks marked as finished don't appear on traffic reports.

7 The task's description appears on printed estimates, invoices.

8 To show the task description on many job reports, check the show description checkbox.

9 Use the always unbillable option to prevent billable costs from being added to a job task.

10 Job tasks can be arranged

Job tasks serve many purposes, including estimating, scheduling, job costing, and billing. A job always has at least one task, but can have dozens.

into user-defined **groups** by entering an optional group number.

11 Job tasks can be sorted within a group using a **sort number**.

12 Each task can have its own standard debit G/L account (**dGL**, for job costing) and credit G/L account (**cGL**, for billing) that will be automatically copied to A/P invoices, checks, and A/R invoices.

13 A job task can be tracked using a production **status**, just like the job.

14 Each task can have its own **markup**, which replaces the vendor's markup on A/P invoices and POs. A media commission can also be added for each task. The media commission is copied to Media and Insertion Orders.

15 Each job task tracks up to two **sales taxes**, or it can be nontaxable. The task itself determines whether or not the billing amount is taxable. The client account will determine what the tax rate is for estimating and invoicing.

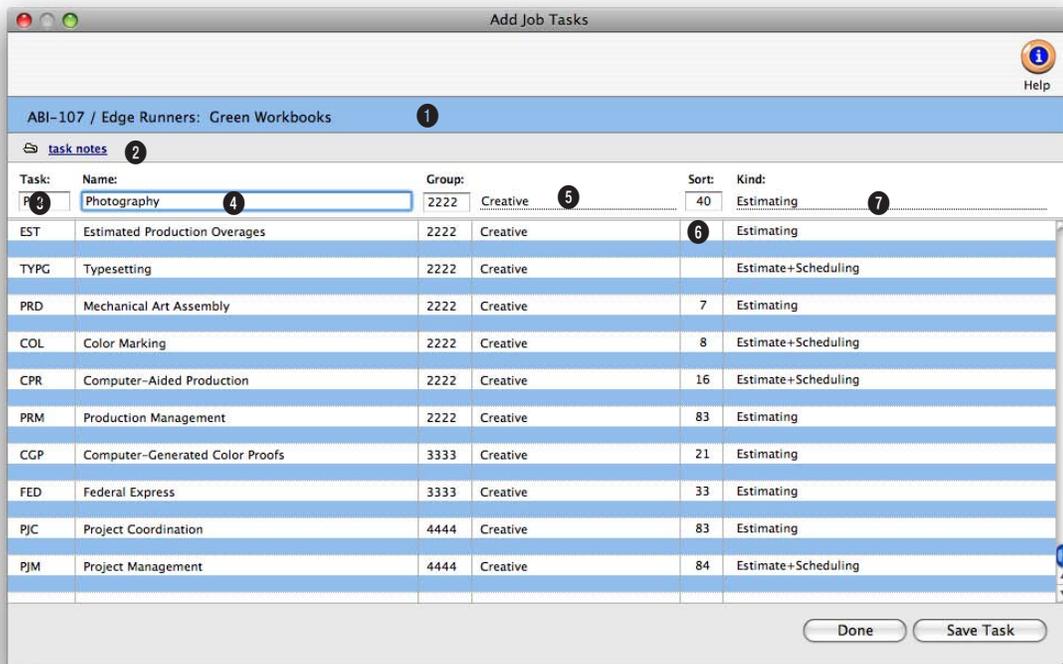
16 Each task can be set as an **estimating/billing task**, **scheduling task**, both, or neither. Estimating tasks appear only on the estimate window, and will be billed on A/R invoices. Scheduling tasks appear only on the job schedule, and can't be estimated or billed. Tasks with neither option are for internal job costing only, and won't be billed.

17 The **roll-up** option allows you to combine several tasks belonging to the same group to be combined into one task total on the estimate and/or invoice.

18 You can control the **billing rate** used on time cards and time sheets by choosing a billing rate method. The standard setting is changed in Preferences, then copied to each job. Both clients and staff members can have different sets of billing rates.

Adding Job Tasks

Jobs need tasks for estimating, scheduling, job costing, and billing. What tasks appear on any given job ticket is entirely up to you—you have complete control over the task table. Once a task is added to a job, work can begin. Estimates can be made, schedules can be figured, and costs can be entered.



Jobs need tasks for estimating, scheduling, job costing, and billing. Once a task is added to a job, work can begin.

1 The job number and name/ title appear here for reference.

2 To enter a long task description, click on the **Task Specs** link. The Task Description window opens, containing any notes explaining the task. Notes can also be added or edited by double-clicking on the task from the job ticket window. These notes can appear on the printed estimate, and are copied to invoices.

3 A task code is any combina-

tion of letters or numbers, up to four characters long. If the task is found in the Task Table, its description, group, and other details are copied to this job ticket.

4 The **task description** appears on estimates, invoices, schedules, and job and cost reports. Clients see the task description, so make it meaningful (and not especially confidential or complicated). It is copied from the Task Table, but you can change the task description anytime.

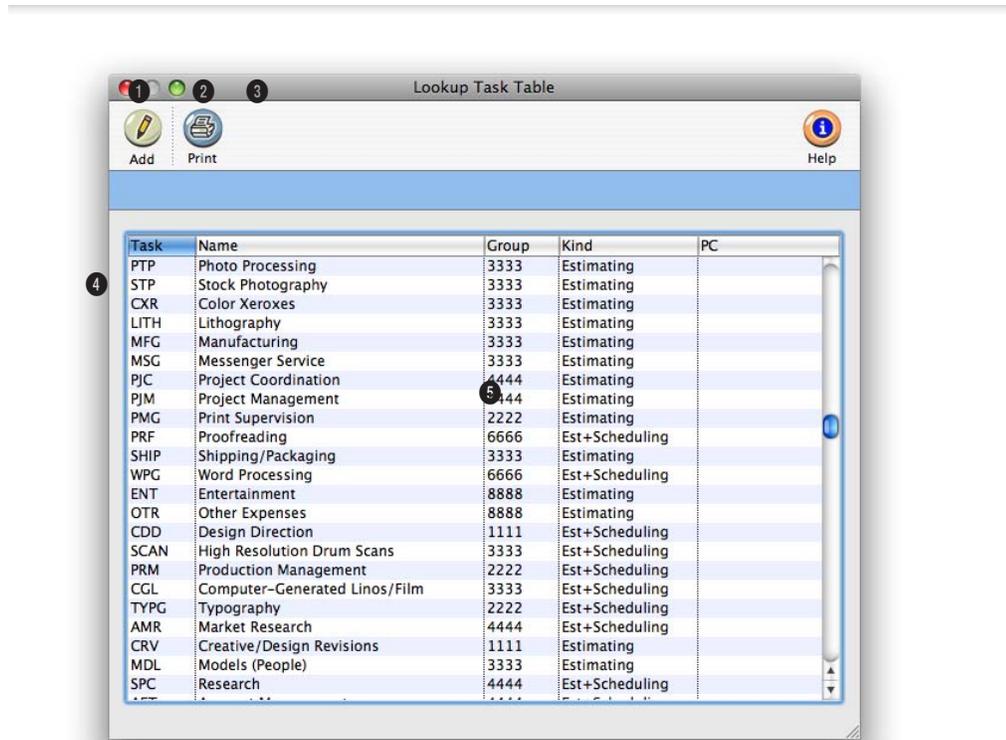
5 **Groups** are used to arrange and categorize tasks on estimates and invoices. The group number needs to be part of the Groups table (see the Setup menu to create your own group numbers and names). On estimates and invoices, tasks are sub-totaled by group number. Clients don't see group numbers; instead, they see the group name (in bold). Groups are optional. If you don't want tasks to be sub-totaled on estimates and invoices, leave the

A task code is any combination of letters or numbers, up to 4 characters long. If the task is found in the Task Table, its description, group, and other details are copied to this job ticket. The task description appears on estimates, invoices, schedules, and

group field empty.

6 Tasks are sorted within groups by the **sort** number. You can use any number you want, and the sort order can be changed any time. If you enter sort numbers, tasks are sorted even if no groups are used. If you don't enter which they were added.

7 A task can be an estimating task, a scheduling task, or both. The default task **kind** appears here, but can be changed for each job, with the right access privileges.



Add job tasks from the Lookup Tasks table by double-clicking on the task or using the drag-and-drop feature.

1 Click the **show all** button to see all tasks, including inactive tasks.

2 With the right access privileges, staffers can **add** tasks to the Lookup Task Table. The new task can be used instantly for estimating, scheduling, costing, and billing.

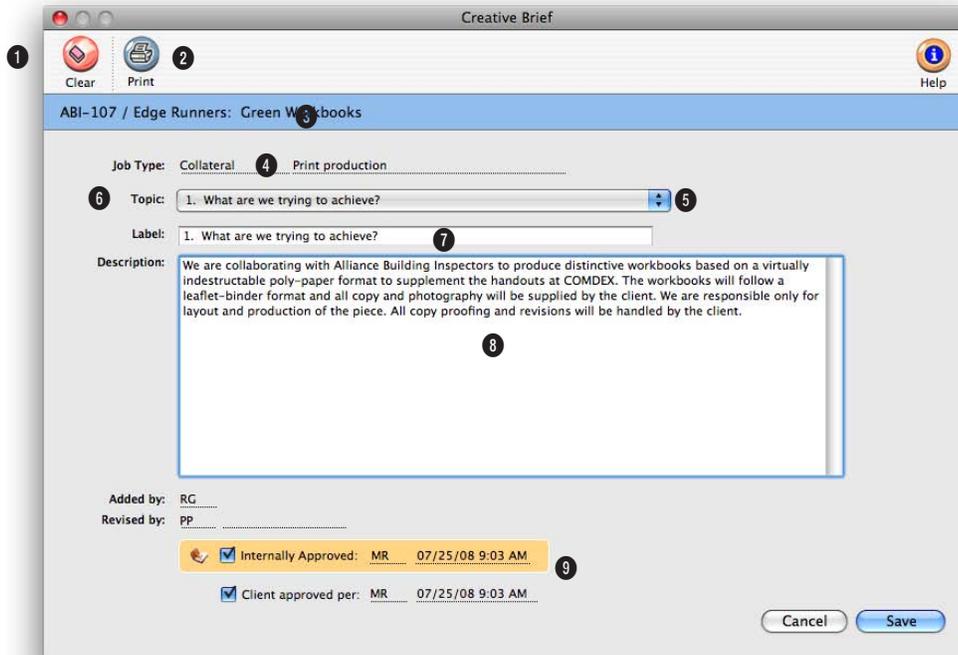
3 Click the **print** button to print a list of job tasks.

4 The task list shows the task code, a description of the task, its group, and kind. The Lookup Task Table automatically sorts by task code, but you can click on the column headings to sort by other information.

5 Add a task to a job by double-clicking on it, or drag-and-drop it. To drag-and-drop a new task to a job, click once on the task to select it, then click again and hold. When the pointer becomes the grabber hand, drag the task from the lookup list to the add task line in the Add Job Tasks window.

Creative Briefs

The creative brief explains to the client the agency's creative process for a particular job. It provides focus and direction for those managing and working on the job, documenting the strategic, creative steps the agency will perform to design and produce the work. It helps outline what needs to be accomplished by the work.



The creative brief is a worksheet that creatives and account service can use to document the strategic, creative steps the agency will perform to design and produce the work.

1 The printed creative brief can be attached to the printed estimate for the client's review, or printed separately and distributed internally. To print a hard copy of the creative brief, click on the print button.

2 The creative brief can be e-mailed in PDF form to selected staff members, the job's traffic assignments, or to the client by clicking on the e-mail button.

3 The job number and title appear here for reference.

4 The job type/spec sheet for the job is listed here for reference. The job type/spec sheet includes up to fifteen preset topics for the creative brief.

5 The creative brief can be approved on-line to indicate that the client has approved it. Once approved, no more changes can be made to the creative brief. If needed, the creative brief can be unapproved, but only by the user who approved it.

6 The topic pop-up menu can be used to choose which topic to add or edit the description for.

7 The label is automatically copied in when a topic is selected. The label can be customized for this job ticket only. The labels appear on the printed creative brief.

8 The description contains all of the information necessary for accomplishing this step in the creative brief.

The creative brief is an integral function of the electronic job jacket—anyone with access to jobs can see it. And because it's on-line, changes that anyone makes to the creative brief updates the database instantly. Users will always be looking at the most up-to-date version on the creative brief.

9 The added by initials shows the user who added the creative brief. The revised by initials shows the user who last edited the creative brief. It also includes the date and time the creative brief was last edited. If the creative brief has been approved, the initials of the user who approved it will appear here.

Original Recipe Design
Creative Brief

Job:	07-ENG-046	Date:	05/21/07
Name/Title:	Meeting the Customer-Focus Challenge	Page:	1
Client:	Corporate Engineering & Services		
Type:	Interactive		

Project Description (What is it?)

An interactive CD-ROM for HOTEL, Inc. with pockets to hold collateral from existing HOTEL projects such as Team Channel, Celebrate America, and Color Studio.

Target Audience (Who are we talking to?)

Primary: The printing industry, pre-press professionals, independent graphics consultants, power users with corporate graphics departments, industry media (newspapers, trade magazines, journals).

Secondary: Distributors, business partners, financial analysts, individual investors.

Purpose (What must the advertising accomplish?)

The primary purpose of the CD-ROM is to provide information about Corporate Engineering Services, and more importantly, communicate the company's history of innovation, financial stability, and credibility.

The CD-ROM should communicate - to a corporate audience, in a corporate tone - that Corporate Engineering Services is:

- The market leader in pre-press and corporate graphics
- A leading source of innovation for the industry
- Has a 10-year track record of financial stability
- Features a broad range of experience & management
- Provide superior customer service from end-users, developers, consultants, and the trade

Style & Tone (What do we want them to think?)

They should look to ENG as a capable, innovative partner in their engineering needs. The brochure should strike a balance between hip and corporate, so that it can appeal to all target audiences.

Copy Points (What are we trying to say?)

The client will provide copy, photographs, and graphics that illustrate:

- ENG's history in engineering innovation
- ENG's marketing and sales expertise (providing personal service throughout US and Canada)
- Experienced management (include a group photo outside new building)
- Mission statement ("expect the best")
- Financial strength ("10 years of consistent growth")
- Progressive, can-do corporate culture (emphasise our low turnover)
- ISO 9000 certified

Benefits (What benefits does the project/company offer? What makes us unique?)

- Engineering innovation (cite industry awards, patents)
- Experienced management (over a dozen industry veterans in key management positions)
- Substantial R&D
- Strong corporate culture with intelligent, committed staff
- ISO 9000 certified

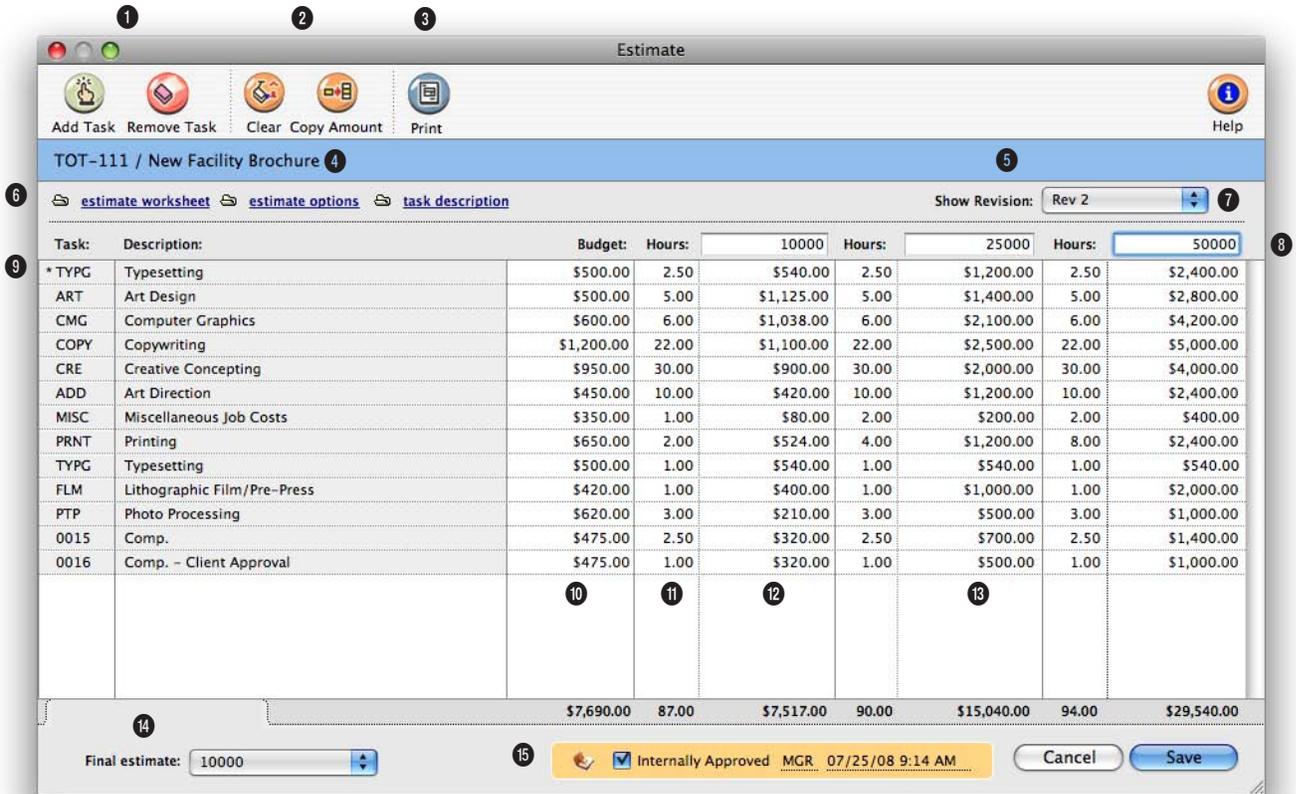
Call to Action (What do we want the viewer/reader to do?)

Point viewers to new interactive web site: www.eng.com

Legal/Technical Requirements (What information is mandatory to include?)

Clear all financial information with legal first -- avoiding forward-looking statements.

Estimating



Estimates are flexible. An estimate can be revised and reprinted as many times as the client or account executive needs.

1 Any estimate/billing job task can be added to the job ticket from the estimate window by using the **add task** button. Only tasks that have no costs, time, or billings can be deleted from the job ticket using the **remove task** button in the estimate window.

2 To erase the entire estimate, use the **clear** toolbar button. Estimate amounts can be copied from one column to the next by using the **copy amounts**

button.

3 Use the **print estimates** button to print the estimate.

4 The **job number and name/title** appear here for reference.

5 The job's **initial budget** is the ballpark amount that was entered when the job was opened and appears here for reference. The initial budget doesn't appear on the printed estimate.

6 Each job task has its own

pop-up estimate worksheet that can contain hours and amounts for up to four staff members (including their own billing rates) and up to four kinds of expenses (including markups). The estimate can be formatted in many different ways by using the **estimate options** button. The **task description** button can be used to edit the job's description, taxable setting, and roll-up task.

7 The job's previous estimates can be recalled using the **show**

Estimates feature three different customizable estimate amounts. All three columns can be used when estimating large jobs with either phases or differently priced options.

estimate revision pop-up menu. The menu lists the job's prior revisions, plus a New Revision option to start a new revision.

8 There are three customizable column headings that can be used to format the job's estimate.

9 The job's tasks are sorted by group and are identified with an asterisk if they are taxable.

10 The budget is your cost for the task before markups, fees, and commissions. The budget amount is used in reports to compare the budget vs estimate and for budget alerts to warn users when they're near or over budget on a job task.

11 The estimate hours for a task are the number of hours you estimate it will take to finish the task. Job reports use these hours to compare against actual hours.

12 The estimate amount can be calculated using the estimate worksheet. Double-click on the task line to open the estimate worksheet, then enter staff, hours, and rates. The data entered here is copied to the estimate.

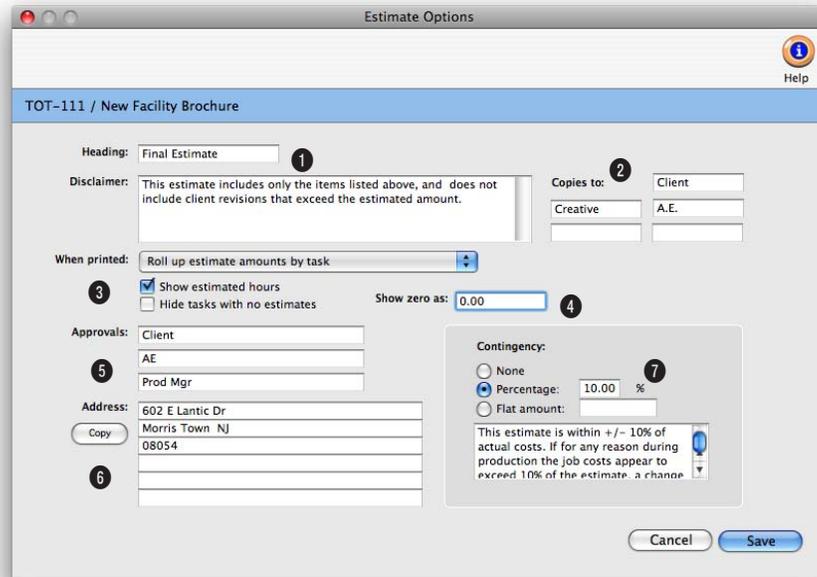
13 Before approval, an estimate can have up to three estimate amounts to show clients different versions of the estimate.

14 The final estimate—the one that the client approves—appears on the job ticket window,

job summaries, and other reports.

15 The estimate can be approved on-line to indicate that the client has approved it. Once approved, no more revisions can

be made to it. If needed, the estimate can be unapproved by the user who approved it.



Estimate options gives you substantial control over the what appears on the printed estimate for a job, overriding the standard settings.

1 The standard estimate heading appears at the top of the printed estimate, but it can be changed to something more meaningful to the client, such as Authorization.

2 Up to five copies of the same estimate can be printed at once using the distribution list. The names entered print at the bottom of the estimate.

3 The pop-up when printed menu and the show hours and hide tasks checkboxes let you control how tasks and estimate amounts are displayed on printed estimates.

4 Tasks without estimate amounts can appear on printed estimates with any kind of text (e.g., No Charge or TBD) instead of \$0.00.

5 Up to three approval names can be entered. The approval names appear at the bottom of the estimate along with a signature line for each approval.

6 Click the copy button to copy the client's regular address to the estimate.

7 An estimate contingency (either a percentage or flat amount) can be added, along with a description. The contingency description appears below the contingency amount on the printed estimate.

Printing Estimates

Presentation-quality estimates can be printed anytime from your job tickets. Estimates are designed especially for laser printers, and have many options (such as font, margins, and company logo) that let you tailor the estimate to your client's needs. Estimates can be printed individually or by project. A single estimate can be printed, combining all the jobs from one project. Copies of a job estimate can be printed for up to five different names, which are entered in Estimate Options. Estimates can be printed, revised, then reprinted as many times as needed—regardless of job status.

You can show one of the three estimate amounts, or show all three on the same estimate. The All Estimates (totaled) option adds all three estimate amounts together; use this option to estimate jobs with phases, where each phase is a separate estimate column. Changes made to the estimate's heading, copies, and don't print distribution copies affect only this printed estimate.

■ If you have Adobe Acrobat, estimates can be printed as PDF files and attached to e-mails sent directly from Clients & Profits. To save or e-mail an estimate as a PDF file, choose PDF from the print to pop-up menu.

To print estimates

1 From the Job Ticket window, click the  (i.e., Print Estimate) button, or choose File > Print Estimates.

The Print Estimates window opens. The currently-displayed job number is entered automatically, but can be changed.

2 Enter a job number.

3 Choose which estimate should be printed, its options, then choose a destination from the Print to pop-up menu.

Use the print distribution copies option to print up to five separate copies of each job estimate. It lets you print copies without using carbonless, multi-

part forms. A copy will be printed for each distribution name entered into the Estimate Options window. If no distribution names have been entered, only one copy of the estimate will be printed.

4 Click Print.

To print a project estimate

Jobs that belong to the same project can be printed together by entering a project name. (Since the word "project" is customizable, it may be called something else.) The project's estimate can be printed separately (i.e., one page per job) or combined to show all jobs on a single page (or pages).

1 From the Job Ticket window, click the  (i.e., Print Estimate) button, or choose File > Print Estimates.

2 Choose Project from the For pop-up menu, then enter

a project name.

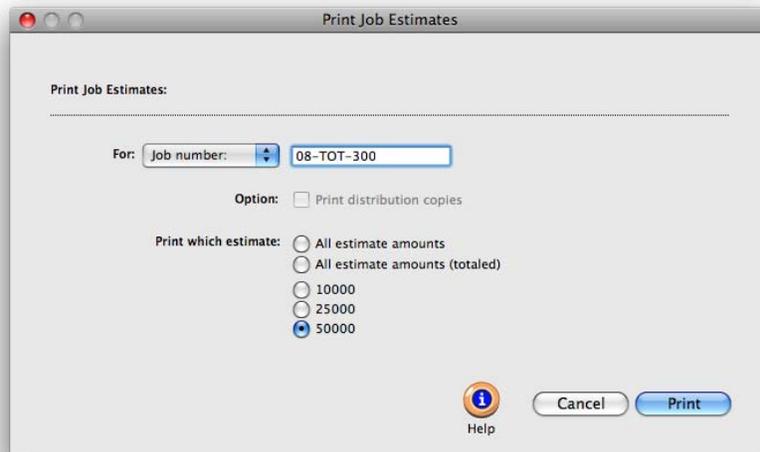
If you're not sure about a project name, choose Lookup > Client Projects then double-click on a project name. Its name will be copied to the Print Estimates window.

3 Select the estimate printing options, then click Print.

Use the print one estimate for this project option to combine all of the project's jobs onto a single estimate. Instead of printing separate pages for each job ticket, the jobs will be shown together. The client will get a single estimate showing separate sections, with subtotals, for each of the project's jobs. Since the project estimate is unique, not all of the job's estimate display options may appear.

E-mailing estimates

To e-mail an estimate, first choose "E-mail" from the print to menu in the toolbar, then print the estimate as you normally do. The estimate will be saved as a PDF then attached to an e-mail. You'll be prompted to choose which client contacts get the estimate. E-mailed estimates won't get distribution copies.



Printing project estimates.

To print a project estimate that combines all of the jobs that have the same project name, click on the For: pop-up menu, choose the Project option, then enter the name of the project.

The printed estimate



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Marta Jones
American Bios/Integrated Systems

Date
Number
Revision
AE/Team
Cost Center:
Due Date:

Estimate

05/21/07
06-ABI-173
Original
AK
3-394-94989
09/14/06

Name/Title: Blieue Sample & Die Lap Top Package
Acct. Super. Tammy Burns
Phone: 213 999-1927
Desc/Specs: Design/Layout & Production of Package
Blue Sample & Die
Copy Refinement
Name Treatment - color
B&W layouts (rough)
Tight B&W Layouts
Final Mechanical Art
B&W Line Drawings

Description	Estimate:
Creative	\$2,520.00
Production	\$1,770.00
Fulfillment	\$576.00
Account Management	\$330.00
Subtotal	\$5,196.00
*8.2500 % State Sales Tax:	\$428.67
TOTAL	\$5,624.67
Including 10.00% contingency:	\$6,187.14

This estimate includes only the items listed above, and does not include client revisions that exceed the estimated amount.

Approvals

Client _____ Date: _____

Printing Specifications

When a job involves large amounts of printing, its printing specifications can be described in a detailed, on-line form. The Printing Specifications form explains to the vendor the specific printing requirements for a particular job. It is a worksheet that production people can use to define a print job's physical characteristics, such as at size, binding, and cover stock. It replaces any manual print ordering form you may be using now.

The Printing Specifications form explains to the vendor the specific printing requirements for a particular job.

With Clients & Profits, printing specifications is an integral function of the electronic job jacket. Like the work order and creative brief, it is just another part of the job ticket. Because it's part of the job ticket, anyone with access to jobs can see it. And because it's on-line, changes that anyone makes to the printing specifications form updates the database instantly. Users will always be looking at the most up-to-date printing specifications for the job.

1 The printing specifications can be deleted at any time by clicking on the **delete** button.

2 Click on the print button to **print** a hard copy of the printing specification.

3 Many individual printing specifications can be created for a single job, making it easy to spec complex, multipart printing projects.

4 The printing specifications form itself is comprehensive,

but isn't customizable. The names of the field labels can't be changed. In addition not all of the form's sections needs to be used. The sections that have no text will appear blank on the printed Printing Specifications form.

The Printing Specifications form



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Original Recipe Design
Printing Specifications/Request for Quotation

Job: 07-MLI-689 **Date:** 01/24/07
Name/Title: Summer Sales Brochure **Page:** 1
Prod. Contact: Gayle Green
Phone/E-mail: 760-999-9999 gayle@mail.com
Project Desc: Summer Sales Brochure: 12 pages 4/4 + cover

Format: Folded Brochures **NEED QUOTE BY:** 02/28/07
Quantity: 12000
Prepress: We will supply final files on disk or FTP site. Printer to provide digital proofs.

PRODUCTION REQUIREMENTS

Trim/Bleed: full bleed
Folds to: 8.5x11

STOCK:
Weight: 80#
Finish: Gloss
Type: Book
Special Stock: Lustro
Available from: Xpedx

BINDERY:
Drill: 3 hole
Fold/Glue: Glued sleeve Cut
Stitching: Saddle
Tabs: 2 - yellow

Wrapping: Folded Brochures

Special Items: Die Cut Spot UV
 Foil Stamping Special Bind
 Laminating Gluing
 Press Check

Special Notes: Spiral bind on 8.5" side

INK:	Color Side 1	Color Side 2	Coverage Side 1	Coverage Side 2
Process:	4/4	4/4	100%	100%
PMS:			%	%
Metallic:			%	%
Coating:	Spot Varnish	Spot Varnish		

DELIVERY INFORMATION

Delivery Date: 03/18/07
Delivery: Printer to deliver
Deliver to: Advanced Mailing
12092 Palomar Airport Road
Carlsbad CA 92938
Qty: 10000
Total Lighting Products
Attn: Creative Services
1000 Lighting Way
Covina CA 94018
Qty: 1990
Advertising Agency
Attn: Account Executive
4755 Oceanside Blvd
Oceanside CA 92056
Qty: 10

Traffic

Clients & Profits is a complete production/traffic manager, providing an easy way to print daily job status, weekly traffic, and staff work to do reports. The traffic system has four parts: job tickets, production and billing status codes, traffic milestones, and unfinished tasks.

The job ticket is the basis of the production, traffic, and scheduling system. Jobs have status codes that categorize their progress through completion. A standard collection of status codes, called a Status Table, is completely customizable. Everyone uses the same status codes to classify their own jobs, such as Awaiting Approval, Estimate Pending, In Production, and Closed - Ready for Billing. Since status codes offer a consistent, predictable way to track a job's progress, they make it easy to coordinate many jobs among different account executives or teams.

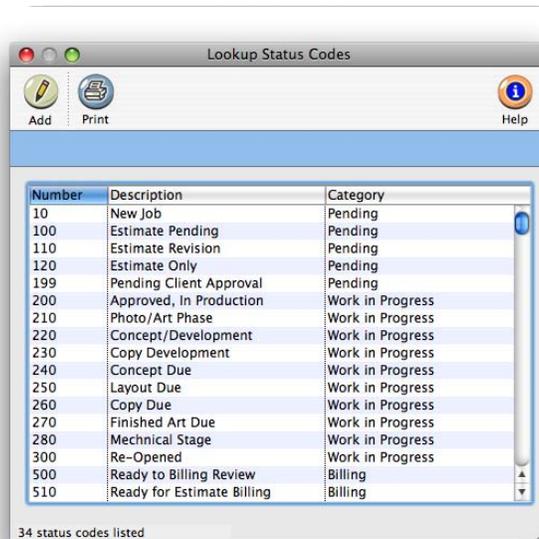
While jobs and status codes show the big picture, it's the job tasks and due dates that really get the work done. Every job task can have a due date, start date, and a resource assigned to do the work. Jobs can be scheduled in detail, so you'll know what's due every day. Work to do reports show the day's unfinished job tasks, with a separate page for each person. Job schedules can be moved forward, backward, or otherwise rearranged anytime—and the daily work to do reports are updated automatically.

Traffic reports show jobs by status, including important dates and times. These key events, called milestones, track client meetings, creative approvals, press checks, and more. A job can have up to twelve different traffic milestones (you can use any or all twelve as needed; different kinds of jobs will need more or less detail). Milestones can vary by job type, so they are included as part of a spec sheet. Traffic reports group jobs by job type, showing, for example, all of the brochures, radio spots, ads, etc. for easier job tracking. Jobs may not need milestones unless they are complex.

The key people responsible for getting jobs done can be assigned to each job. These traffic assignments can then be used when printing traffic reports.

Tasks vs. milestones

Each job type has up to 12 milestones to track its key events and deadlines. Unlike tasks, they're usually not the individual steps needed to do the job. Tasks, in contrast, track the daily work required to complete the job. Tasks contain much more detail, including start date, due date, who will do the work, and several different long descriptions. Milestones enhance the status report by showing the job's vitally important dates and times, instead of every unfinished task. Milestones are best for tracking only the big deadlines that can't be missed. Traffic reports are printed by status code, while work to do reports are printed by due date. Unlike traffic reports, job and task schedules can be printed for any period of time (e.g., the week after next). Use tasks when you want to schedule each step the job will take. Task reports are more flexible, and can be sorted by many factors such as resource and client for more flexibility.



The screenshot shows a window titled "Lookup Status Codes" with a table of status codes. The table has three columns: "Number", "Description", and "Category". The status codes range from 10 to 510. The categories include "Pending", "Work in Progress", and "Billing".

Number	Description	Category
10	New Job	Pending
100	Estimate Pending	Pending
110	Estimate Revision	Pending
120	Estimate Only	Pending
199	Pending Client Approval	Pending
200	Approved, In Production	Work in Progress
210	Photo/Art Phase	Work in Progress
220	Concept/Development	Work in Progress
230	Copy Development	Work in Progress
240	Concept Due	Work in Progress
250	Layout Due	Work in Progress
260	Copy Due	Work in Progress
270	Finished Art Due	Work in Progress
280	Mechanical Stage	Work in Progress
300	Re-Opened	Work in Progress
500	Ready to Billing Review	Billing
510	Ready for Estimate Billing	Billing

34 status codes listed

Dozens of status codes for jobs and tasks. The Status Table contains dozens of custom status codes for tracking production, billing, and task status. Each status code can notify staffers when it is added to a job ticket.

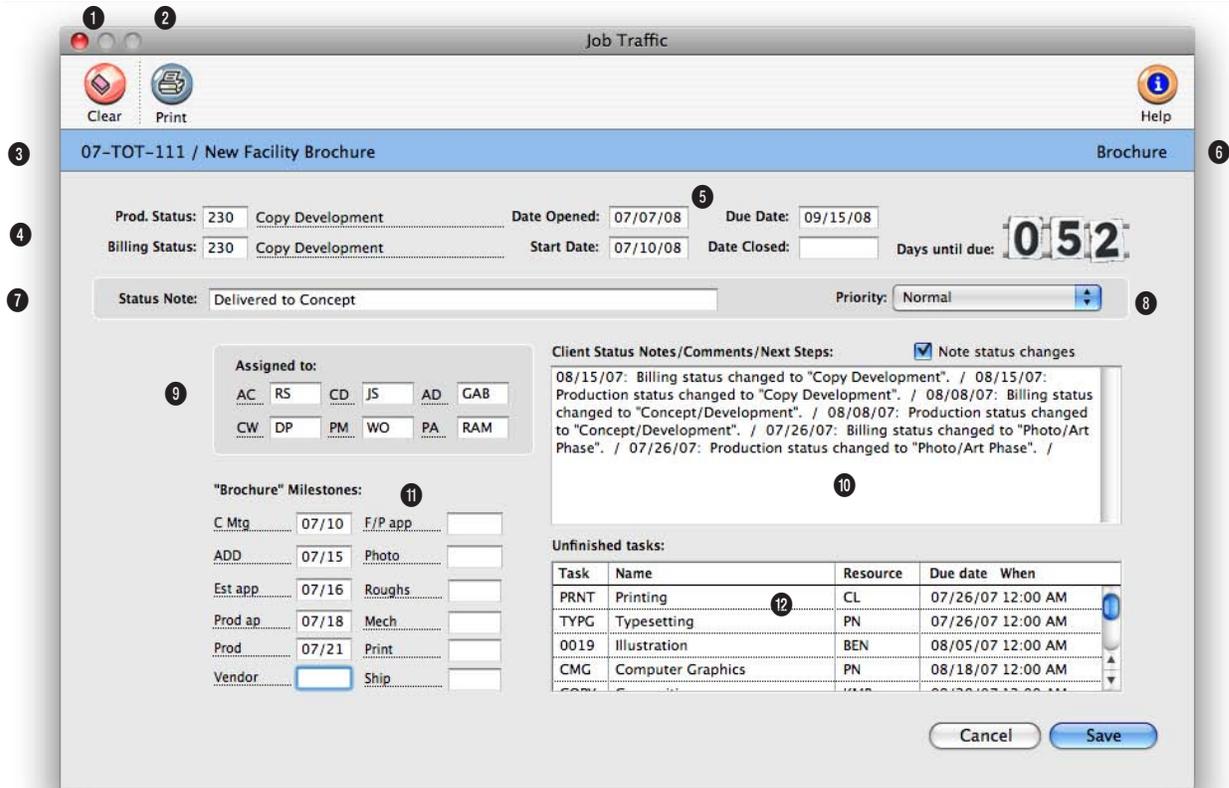
manager's unbilled job report. Likewise, the accounting manager can maintain a job list showing unbilled, closed, or unbillable jobs by billing status without interfering with production. This is because the production status and billing status are essentially unrelated to each other on the job ticket. All job reports can be printed by production or billing status. This way, the production department and the accounting department can see jobs their own way. The production status and billing status share the same status table, but can have entirely different meanings. Since status codes are user-defined, it's your choice. The job can have the same status, such as awaiting approval or closed, billed for both the production and billing status.

■ To add, change, or delete a status code, choose Setup > Status Table.

Traffic Features

Feature	How it works, how it's used
Daily job status reports	The jobs' production status can be quickly and easily updated throughout the day, then summarized every morning on the Daily Job Status report.
Weekly traffic reports	The Weekly Traffic reports lists open jobs and their traffic milestones. The jobs' milestones can be updated throughout the day as they change, then summarized for weekly traffic meetings.
Weekly task planner	Anyone who works on jobs can see their week's deadlines from the Weekly Task Planner window. Scheduled job tasks can viewed for the next four weeks.
Work to do	Production and traffic managers can review unfinished job tasks by client, staff member, AE/team, etc. from their own PC in real-time. Tasks can be instantly and easily rescheduled here.
Traffic analysis	Snapshot reports analyze job tasks to track on-time performance, missed deadlines, and more.
Automatic e-mail notification	Clients & Profits notifies staff members via e-mail when job tasks are due, when a job's status has been changed, when a client is billed for a job, and when the client pays the job's invoice. In addition, upcoming follow-up calls can be scheduled for clients in the Client Diary.
Custom status codes	The Status Table can contain hundreds of different production, billing, and task status codes. Status codes are use to categorize jobs based on their progress, from start (i.e., "new job") to finish (i.e., "closed") and every stage in between. All traffic reports show jobs by status.
Status notes	Each job can have a customizable status note to briefly describe the job's current status, or its next step. Status notes appear on the Daily Job Status report and other traffic reports.
Status alerts	Status codes can include customizable status alerts. These alerts can be set to stop a staff member from working on a job that's not approved, already billed, or closed.
Traffic milestones	All traffic information for a job can be updated from one window. You can also view a list of unfinished tasks and add lengthy status notes.
Easy traffic updating	The key phases or production steps (i.e., work flow) for every type of job can be pre-defined for traffic reports. The job's traffic milestones help production and traffic staff manage work flow.
Pop-up job traffic window	A job's production/billing status, status notes, milestones, next steps, and due dates can be easily and quickly updated while entering time, as well as from the Job Tickets window.

Job Traffic



The Job Traffic window provides a manager’s perspective on the job’s progress with a days until due counter, unfinished task list, and roomy status notes field.

- 1 The job’s traffic assignments can be cleared any time by clicking on the clear button.
- 2 Click the print button if you need a hard copy of this job’s traffic report.
- 3 The job number and name/ title appear here for reference.
- 4 The production status and billing status can be changed by entering a new status code over the old status code. If you’re not sure which status

code to use, choose Status Codes from the Lookup menu. Double-click on a status code from the Lookup window. The status code will be copied to the Traffic window automatically. A job diary entry will be created each time the production or billing status code is changed.

- 5 The job’s start date and due date can be changed in the Traffic window. Changing these dates here doesn’t affect the job schedule (so Work to Do

reports won’t be affected). To change the stat and due dates for job tasks, use the Reschedule function in the Job Schedule window once the Traffic changes are saved. You can also enter the date closed for the job in this window.

- 6 The days until due counter keep a running tab on how close the shop is to meeting the job’s due date. The numbers normally appear in green, but when the job is overdue, they turn red and begin counting the days overdue.

With the active days counter and unfinished tasks list, traffic managers can easily see what needs to be completed to get the job finished on time.

7 The **status note** supplements the job's current production or billing status. It lets you enter a brief description that appears on the Job Ticket window, on some job lists, and traffic reports.

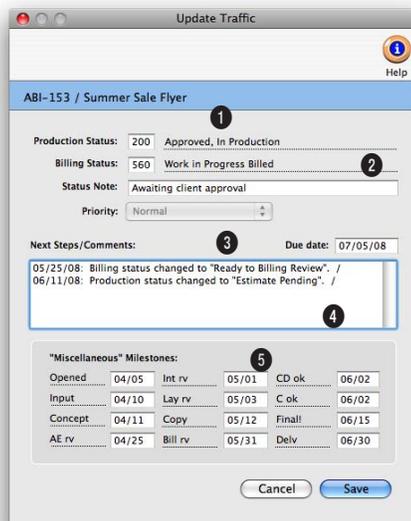
8 The job's **priority** can be changed by clicking on the pop-up menu and choosing one of the six customizable priority levels. A job diary entry will be created each time the job's priority is changed.

9 The job's **traffic assignments** (i.e., traffic names) are the initials of the creative and production people most responsible for getting the work done. Traffic reports can be printed for any one of the job's traffic names.

10 The **client status notes/comments/next steps** can be used to create progress reports for clients (see the Client Status report in the Job Lists) with any kind of information you want.

11 If the job was added using a job type/spec sheet, its **traffic milestones** can be edited. Jobs without a job type won't show milestones.

12 The job's **unfinished tasks** are listed for an overall view of what needs to be completed. This field shows the task, who it is assigned to, and when it is due. When tasks are marked done, they no longer appear on the this list.



With the right access privileges, staffers can open the pop-up Update Traffic window and update the job's traffic right from their Daily Time Card or Time Sheets.

1 The job number and name/title appear here for reference.

2 The **production status** and **billing status** codes can be changed, and a **status note** added. If automatic e-mail is enabled, an e-mail will be sent

to the appropriate staffers when the status codes are changed.

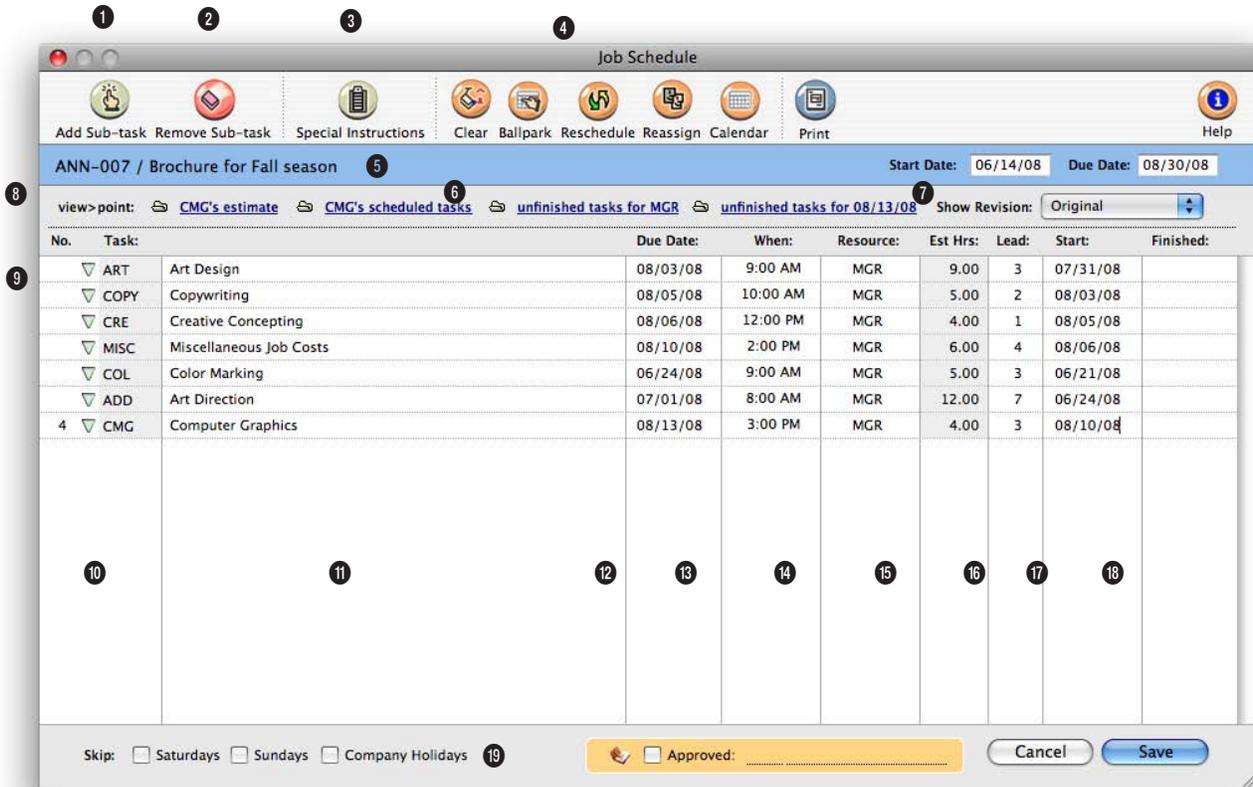
3 The job's **due date** appears here for reference.

4 **Traffic next steps/comments** will appear here, and can be

updated as the job progresses.

5 The job's **milestones** appear here, and can be updated. When saved, the new milestone information appears on the traffic reports.

Job Scheduling



The ability to coordinate hundreds of tasks and resources through a common job schedule is one of Clients and Profits X' greatest strengths.

1 Sub-tasks are special tasks used exclusively for scheduling. They are added to schedule different people are multiple deadlines fro the same task. Sub-tasks are scheduled and updated like regular tasks. They also appear on work to do reports, but don't affect estimates, job costing, or billing. Any number of sub-tasks can be added to the job schedule using the add sub-task button.

2 sub-tasks can also be removed from the schedule at any

time using the remove sub-task button.

3 The job's entire schedule can easily be erased using the clear button. Use this shortcut only when the schedule is wrong and you need to start over from scratch. The ballpark schedule button can be used to automatically create a job schedule based on either the job's start date or due date. The ballpark function looks at the job's tasks, evaluating which tasks are finished first (based on their

schedule sort order) and lead time. The reschedule button works like the ballpark function, except it preserves the relative time (i.e., the days between the start date and due date) for each task, while changing the start date and due dates for each task based on a new job start date or due date. When the resource assigned to a job task can't do the work (i.e., they've been moved to a different account team, they've quit, etc.), the resource's tasks can be easily reassigned to someone

Job scheduling is completely flexible. You can schedule jobs when a new job is opened, after the job is approved, or at any other time.

else using the **Reassign** button.

4 Click on the **Print Schedule** button to **print** a hard copy of the schedule.

5 The **job number** and **name/title** appear here for reference. The job's **start** and **due** dates are used by the **Ballpark** and **Reschedule** functions to calculate start and due dates for each job task.

6 Clicking on the **calendar** link opens the job's calendar window, which lists the deadlines for a selected date.

7 It's easy to see other deadlines without closing the job schedule window by using the **view>point** pop-up window. **This task's schedule** option shows deadlines for other jobs for the currently selected task. **This resource's tasks** option shows deadlines for other jobs for the currently selected resource person. **This day's tasks** option shows the deadlines for other jobs for the currently selected due date.

8 Special instructions can be added or edited for tasks in the job scheduling window. Tasks with **special instructions** will appear with a red "X" by its task name. For convenience, the pop-up **estimate worksheet** can be viewed from the job schedule window. The task's estimate amounts, including details such as staff members, estimated hours, and expenses, can be viewed from the pop-up

estimate window.

9 The job's schedule tasks are listed in the order in which they are completed (i.e., the step number). The **step number** is copied from the Task Table, then entered for each task. If empty, tasks are sorted by task code.

10 Clicking the **show sub-tasks** arrow shows or hides the task's sub-tasks. The job schedule window opens showing sub-tasks automatically.

11 The **task name** describes the task's purpose or function. It is copied from the Task Table but can be changed on a job. It appears on estimates, schedules, job reports, and invoices. Tasks that have specifications are identified with a red "X".

12 The **due date** field is the date on which the task should be completed. Clients & Profits checks due dates against company holidays, which are based on your job scheduling preferences.

13 The due time field indicates **when** the work is due. Job tasks can be scheduled for a specific time of day, like 3:00 PM.

14 The **resource** is the staff member, freelancer, or vendor who is responsible for doing the work.

15 The job task's **estimated hours** appear here for reference. For regular job tasks, the

estimate hours are entered in the estimates window, not the job schedule window. Estimated hours for a sub-task here. The estimated hours for sub-tasks can't exceed the regular task's estimated hours.

16 The **lead time** is the number of days needed to complete the task. If a task is to be completed the next day, enter the lead time as one day. If the task is to be finished on the same day, enter the lead time as zero.

17 The **start date** is the date on which the task's work is to begin. It is calculated based on the due date and lead time, but it can be changed. Start date appears on job schedules, the daily work-to-do window, and work-to-do reports.

18 The **finished date** is the date on which the job task was completed. It isn't updated automatically, so someone needs to note when each task is done. The finished date can be easily updated from the edit job task window, job schedule window (when you're updating tasks for the same job), the work-to-do window, the update schedules window (when you're updating many tasks), or from the time card (using the pop-up edit schedule window). The finished date is optional, but it will tell you how well you're meeting your planned deadlines. Tasks with finished dates no longer appear on the work-to-do reports.

19 The **skip Saturdays/Sundays** option lets you prevent users from scheduling tasks on weekends. If the shop works weekends, uncheck the appropriate days. When the option is enabled, a task that's scheduled for a Saturday or Sunday will be automatically scheduled for the next Monday.

A job's tasks can be reassigned, rescheduled between resources, or the job's schedule can be cleared with a single mouse-click.

the task specifications link. For convenience, the pop-up estimate worksheet can be viewed from the timeline window. It shows the task's estimate amounts, including details such as: staff members, estimated hours, and expenses. Clicking the calendar link opens the job's pop-up calendar window which lists the deadlines for a selected date.

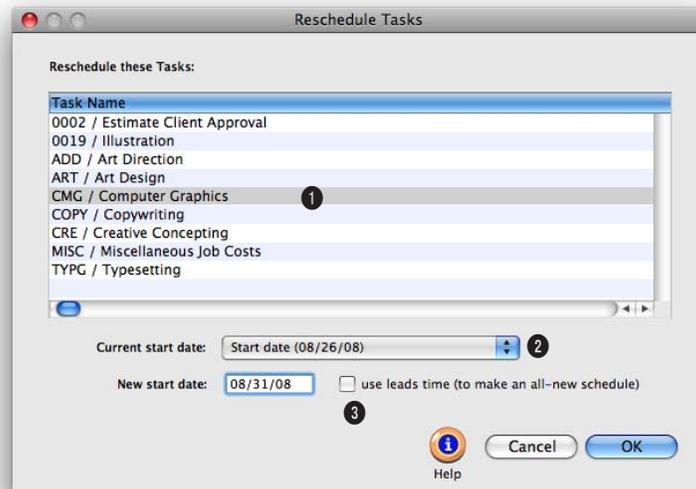
7 The job's scheduling tasks are listed here in chronological order based on their start dates. Click on any task to select it, then choose the reschedule or reassign toolbar button to edit the task's schedule or staff assignment.

8 The task's start date shows the date assigned in the Job Schedule window. Changing the start date in either the Job Schedule window or with the reschedule tool here will reorder the task list so that tasks are always listed chronologically by start date.

9 The task's due date is copied from the Job Schedule window. The due date can be edited either here, using the reschedule tool, or in the Job Schedule window.

10 The job's time line shows how tasks on the job relate to each other based on their schedule. Since the task time line is a graphical representation of the tasks' start and

due dates, editing those dates will recreate the graph. For jobs that span more than six months, use the previous and next toolbar buttons to scroll into the future.



Rescheduling tasks is easy, quick, and accurate with the reschedule tool.

1 Any task can be rescheduled based on its start or due date.

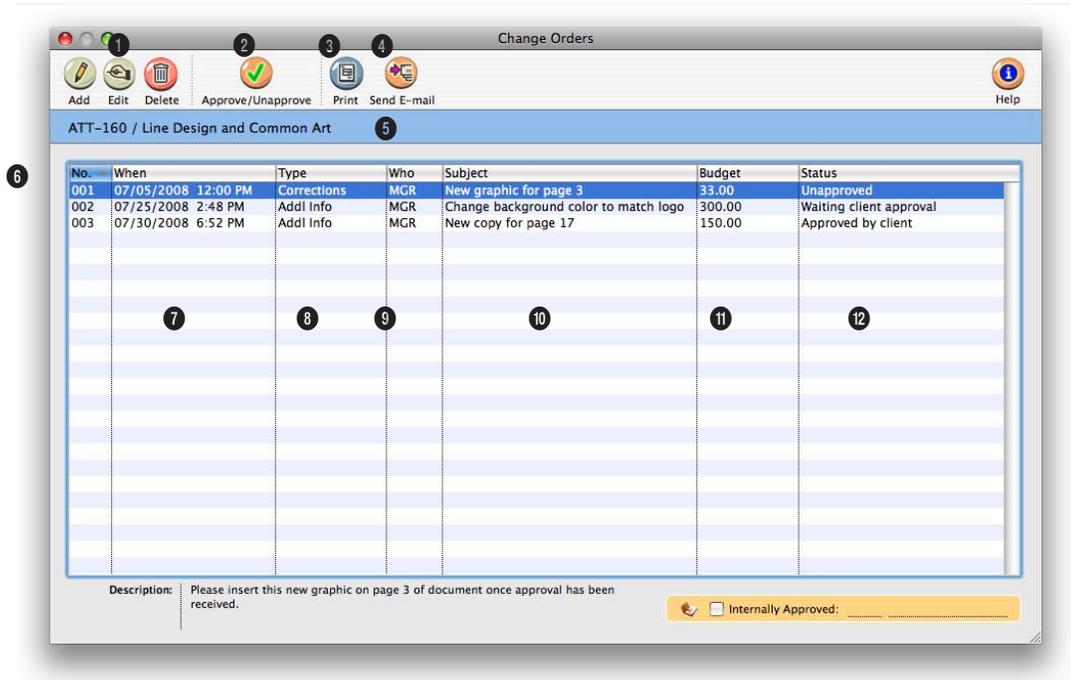
2 The current date will automatically copy to the current date field. Enter the new date you want to reschedule the tasks for. Any holidays entered into preference (and Saturdays

and Sundays) are automatically skipped.

3 When you click OK, tasks are automatically rescheduled in the Job Timeline, Job Schedule, and Work to Do and other reports.

Change Orders

Change orders document changes made to a job's estimate after it has been authorized. They prevent potentially costly misunderstandings between the agency and the client when a job has gone over budget. When a change is requested (by either the client or the agency, it doesn't matter), a change order can be added then printed. The printed change order resembles an estimate.



Change orders document changes made to a job's estimate after it has been authorized. They prevent potentially costly misunderstandings between the agency and the client when a job has gone over budget.

1 These toolbar buttons can be used to **add**, **edit**, and **delete** change orders. Click the add change order button to add a new change order to the job. Click the edit change order button to edit an existing change order's status, description, amount, and other information. Click the delete button to delete a change order.

2 Click on the **approve** button to approve a change order. Once a change order has been approved, it can't be edited or

deleted, so make sure all the information is entered correctly before approving it.

3 Click the **print** button to print the change order for client approval. The change order template can be set up so that the shop's logo prints on it, or so that it prints on your letterhead.

4 Click the **send e-mail** button to create a PDF file for the change order and automatically e-mail it to the client contact.

5 The **job number** and **name/title** are shown in the Change Orders window for reference.

6 The change orders that have been added, and information about them, are listed here. Clicking on any column heading sorts the list by the information in that column. Click on the **arrow** tool on the right to sort the information in the ascending or descending order.

7 The date and time the change order was created is

Change orders are better than printing a revised estimate, since it doesn't remind the client of the job's total cost. Clients see only the change order amount. A change order doesn't affect the job's original estimate, either.

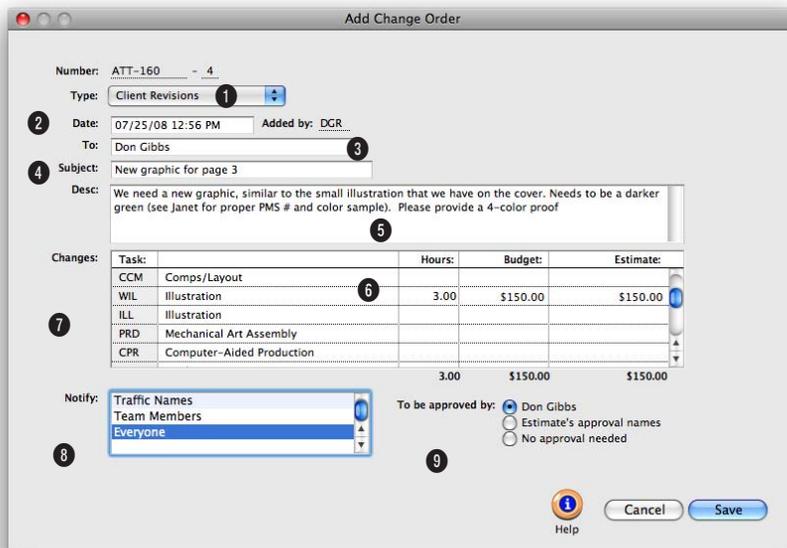
shown in the **when** column.
8 The **type** of change order (additional information, agency corrections, client revisions, FYI, or other) is listed here. Sorting by type will help managers better understand where changes are originating.

9 The initials of the person who created the change order are listed in the **who** column.

10 For a quick summary of what information is on the change order, the order's subject is listed in the **what** column.

11 The **budget amount** of the change order is included here, rather than the estimate amount (the amount the client will pay).

12 The **status** column shows which change orders have been approved, and if so, when and by whom.



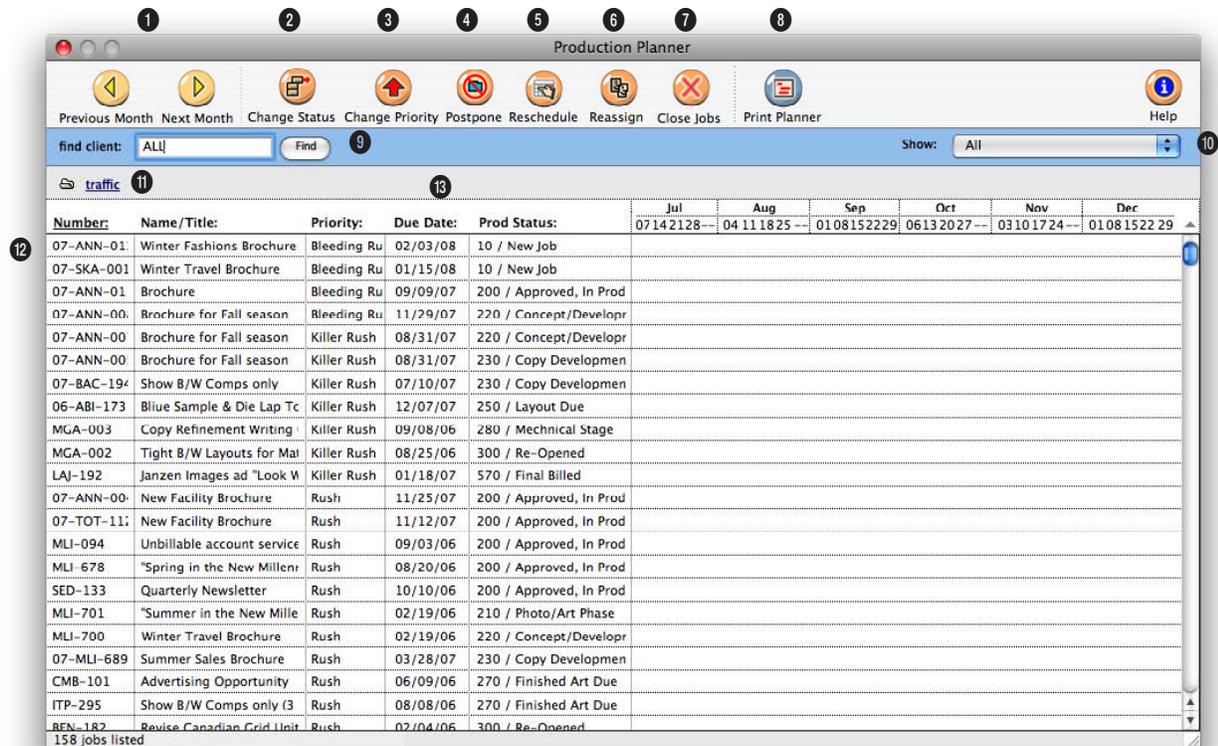
Everything needed to document changes to a job can be added in the Add Change Order window.

- 1** Change orders are numbered sequentially to track how many change orders have been added to a job.
- 2** Use the **type** pop-up menu to categorize the change order. It appears on the printed change order, and includes Additional Info, Agency Corrections, Client Revisions, FYI, and Other, which allows you to create your own change order type name.
- 3** The **date** and time the change order was added is en-

- tered automatically, along with the staffer's initials who added the change order.
- 4** The name of the client contact is automatically entered on the **to** line, but can be changed.
- 5** Enter a brief description of the change on the **subject** line.
- 6** Change orders can contain a lengthy **description** to document the change. They appear on the printed change order.

- 7** Every task that is on the job is listed. Add hours, a budget amount (your projected cost) and the estimated amount you'll show to the client. Only the tasks have amounts will appear when printed.
- 8** If enabled, an automatic e-mail will be sent to staffers selected in the **notify** list. There is no limit to the number of staffers you can select.
- 9** The names chosen using the **to be approved by** button appear at the bottom of the printed change order.

Production Planner



The Production Planner gives you an overview of selected job's key information such as the due date, production status, priority, and schedule timeline.

1 The previous month and next month buttons can be used to see the job timelines for different months.

2 To change the production status for a selected job ticket, click on the change status button.

3 To change the priority for a selected job ticket, click on the change priority button.

4 To postpone a selected job ticket by start date or due date,

click on the postpone button.

5 A job ticket's schedule can be rescheduled from the production planner window by clicking on the reschedule button. You can reschedule the job by start date or due date.

6 Selected job tickets can be reassigned by clicking on the reassign button.

7 Jobs can be closed from the production planner window by clicking on the close jobs button.

8 Click the print planner button to print a hard copy of the production planner report.

9 In the production planner window, you can view job tickets for one client or for all clients. To find jobs for one client only, enter the client number into the find field.

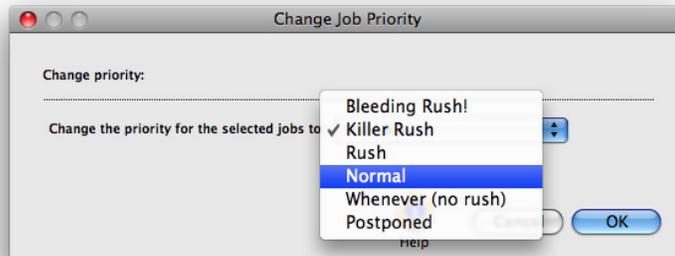
10 To view job tickets for a specific priority level, use the show pop-up window to select a priority level.

The Rush Manager, a built-in part of the Production Planner, lets you assign prioritize jobs. Rush jobs are automatically moved to the top of the list for immediate attention.

11 A selected job ticket's traffic information (i.e., status note, milestones, traffic assignments, etc.) can be updated by clicking on the **traffic** button.

12 Jobs can be sorted by job number, name/title, priority, due date, or production status by clicking on a column heading.

13 Double-clicking on a job ticket will automatically take you to the job ticket window for the selected job.



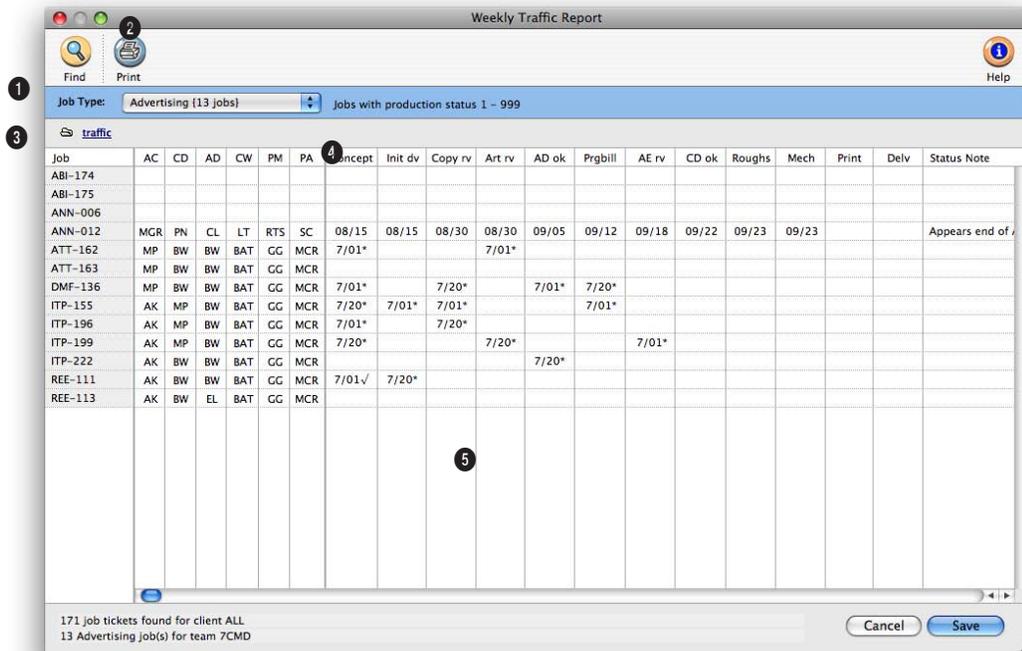
Change a job's priority any time using the Change Job Priority tool.

The six job priority names are set up in the Clients & Profits system preferences, so you can use names that are most meaningful to your shop. The

names shown here are the default names, but you can enter anything you want, including numbers.

Weekly Traffic Report

The job's traffic assignments, milestone headings, and traffic milestones appear in spreadsheet form on the Weekly Traffic Report window. Jobs can be selected for updating at random by clicking on the milestone you want to change. The new traffic information will replace the old in the Job Traffic Milestone window. When the report is updated, it can be instantly printed and distributed to the production and traffic staff.



The Weekly Traffic report is the place to go when you need to update the traffic for many jobs at once.

1 Click on the **find** button to select jobs by AE/Team, client, or traffic assignment, and a range of production or billing status codes.

2 Once you've updated your jobs, click the **print** button to print a weekly traffic report showing your changes.

3 The **job type** pop-up menu lists the names of your job types. Use the pop-up menu to choose a job type and you'll see its jobs displayed in the win-

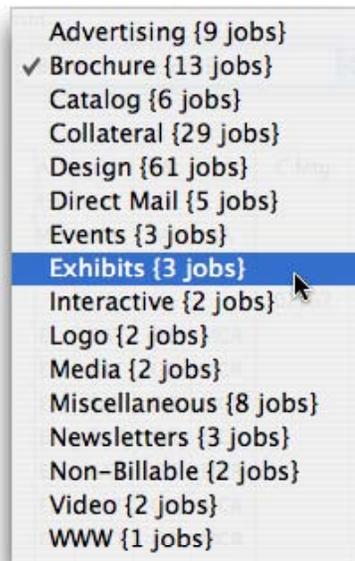
dow. Once you've updated a set of jobs, use the pop-up menu to select a different set of jobs by choosing another job type. When you choose a job type, its milestone headings appear above the job table.

4 Click the **traffic** button to change a selected job's traffic notes, production status, billing status, and other traffic information.

5 Any job that belongs to the chosen job type appears in

the table. Jobs are sorted by job number, and display their traffic milestones—which you can change. It works like a spreadsheet: click on the job milestone you wish to change, make your change, then press Tab. When you've made all of your changes, click Save.

The Weekly Traffic report lists the job type's traffic assignments and milestones at the top of the window.



The pop-up job type menu lists the job types, including a total of each open job type.

The job type names are added when Job Type/Spec Sheets are set up and describes the type of job. When adding a job type to a new job, it will automatically be added to the traffic report for the job type.

This pop-up job type menu lets you choose which set of jobs to update, as well as how many of each type of job is currently open in the shop.

Daily Job Status Report

Number	Name/Title	Production Status:	Priority	Status Note:
06-ABI-173	Blue Sample & Die Lap Top Package	250 Layout Due	Killer Rush	Layout due at 2pm today
06-DMF-149	Unbillable account services - 2006	220 Concept/Development	Whenever (no r	
06-MLI-688	Summer Brochure	200 Approved, In Production	Normal	
06-TOT-112	New Facility Brochure	220 Concept/Development	Normal	
07-ABI-174	Advertising for new location	120 Estimate Only	Normal	
07-ABI-175	Summer New Products	200 Approved, In Production	Normal	
07-ANN-003	Styling all Summer	200 Approved, In Production	Normal	
07-ANN-004	New Facility Brochure	200 Approved, In Production	Rush	
07-ANN-005	Brochure for Fall season	230 Copy Development	Killer Rush	Approved
07-ANN-006	Print ad for new loation	200 Approved, In Production	Normal	
07-ANN-007	Brochure for Fall season	270 Concept/Development	Killer Rush	
07-ANN-008	Brochure for Fall season	220 Concept/Development	Bleeding Rush!	1 day for Art only
07-ANN-009	New Facility Brochure	100 Estimate Pending	Normal	
07-ANN-010	New Facility Brochure	200 Approved, In Production	Normal	
07-ANN-011	Brochure	200 Approved, In Production	Bleeding Rush!	Job approved today
07-ANN-012	Summer Clearance	260 Copy Due	Normal	Appears end of October
07-ANN-013	Winter Fashions Brochure	10 New Job	Bleeding Rush!	
07-BAC-194	Brochure	230 Copy Development	Killer Rush	Job Approved July 2nd
07-BAC-195	30 page brochure	230 Copy Development	Normal	In Development
07-MLI-682	Unbillable account services - 2006	230 Copy Development	Normal	
07-MLI-683	Summer New Products	200 Approved, In Production	Normal	
07-MLI-689	Summer Sales Brochure	230 Copy Development	Rush	Awaiting client meeting
07-MLI-692	New job added 10.1	210 Photo/Art Phase	Normal	

The Daily Job Status report is designed to be printed every morning to summarize the shop's work in production. The production or billing status for many jobs can be easily and quickly updated every day.

1 Click on the **find** button to select jobs by AE/Team, client, or traffic assignment, and a range of production or billing status codes.

2 Click the **print** button to print the daily job status report. Job status reports can also be printed, with more options, from the job tickets window and from snapshots.

3 Click on the **traffic** button to update the selected job's traffic information such as the

milestones, start and due dates, and traffic notes.

4 Jobs can be sorted by job number, name/title, status code, priority, or status note by clicking on a column heading.

5 The job's **production status** or **billing status** will appear here, based on how jobs were found. Highlighting a job's status selects it, which allows you to change its status code. Pressing tab selects the next job. Tabbing past the status

code displays its description.

6 The job's **status note** will appear here and can be edited.

The Daily Job Status report can be printed by client, resource, or traffic assignment, and can be limited to a production status or billing status range.



The pop-up Find Job Tickets window lets you quickly review specific jobs.

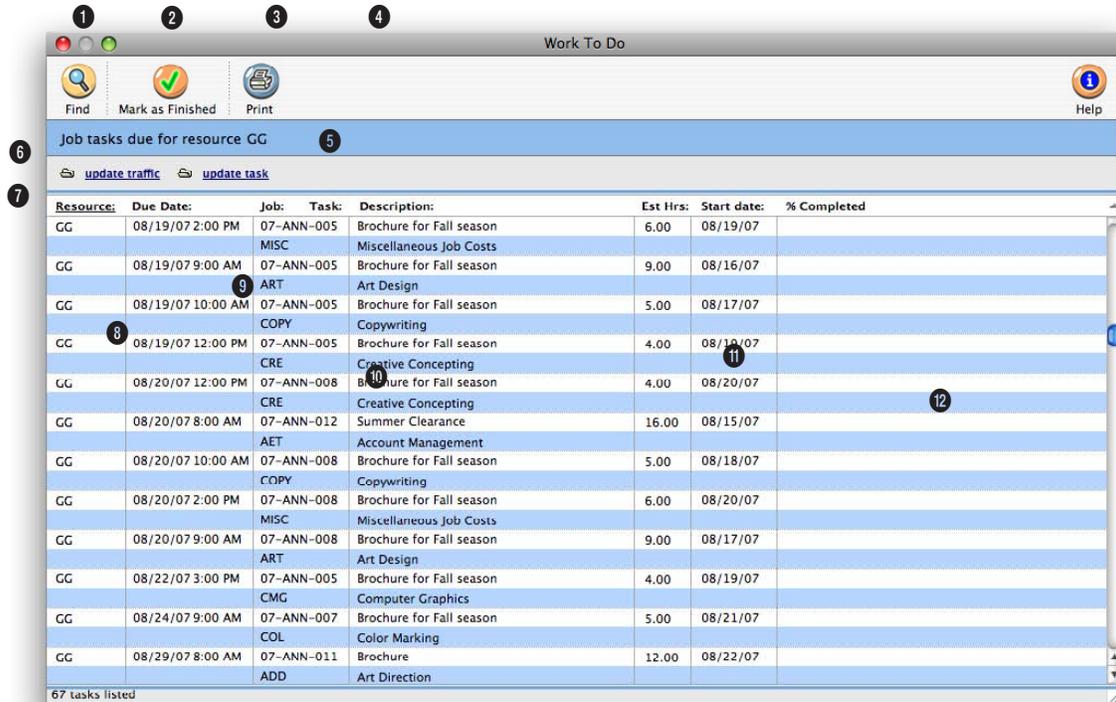
1 Use the pop-up find menu to review jobs by client, AE/team, or for one of the job's traffic names (e.g., creative director). In the search field, enter the word ALL if you want to see jobs for all clients, all AEs, or all jobs assigned to a traffic name.

2 Click either the production status or billing status button to find job tickets by their status code.

3 Enter the status code range to narrow the search.

4 To move all jobs assigned a rush priority, check this box.

Work To Do



The Work to Do window provides a sophisticated dialog box to find unfinished job tasks by due date, start date, resource, client, or AE/team—for any period of time.

- 1 Use the previous and next buttons to scroll through the unfinished job tasks.
- 2 Click the **find** button to find a different set of unfinished tasks by client, resource, AE/team, etc. and a range of dates.
- 3 Several job tasks can be marked as finished at the same time by highlighting one or more tasks and then clicking on the **mark as finished** button. The selected tasks will be marked as “finished” and will get a finished date as today

- 4 Click the **print** button to print a work to do report showing the currently-displayed unfinished job tasks.
- 5 The report's parameters appear here.
- 6 Use these two links to change a job task's traffic and schedule information. In the **update traffic** window you can edit the task's production and billing status, status note, and other key traffic information. In the **update task** window you can edit the job task's scheduling

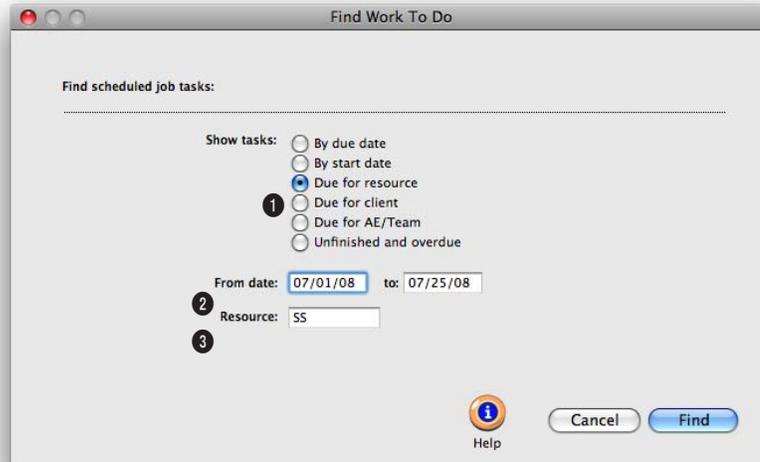
- information.
- 7 Unfinished job tasks can be sorted by resource, due date, job number, task, description, estimated hours, or start date by clicking on any column heading.
- 8 The task's **resource** is the staff member, freelancer, or vendor who is assigned to do the work.
- 9 The **due date** is the task's deadline.
- 10 The job number, name/title,

The Work to Do report automatically sorts by due date, with the most urgent tasks listed first, but can be resorted by clicking on the column headings.

task code, and task description appears for each unfinished task listed in the window.

11 Each task's estimated hours are included for easy reference. To see the task's actual hours (and hours remaining), double-click on the task.

12 The start date shows the date on which work on the task should be started. Work to do and job schedule reports can be printed by start date.



Use Find Work To Do to see what needs to be done so everyone stays on schedule.

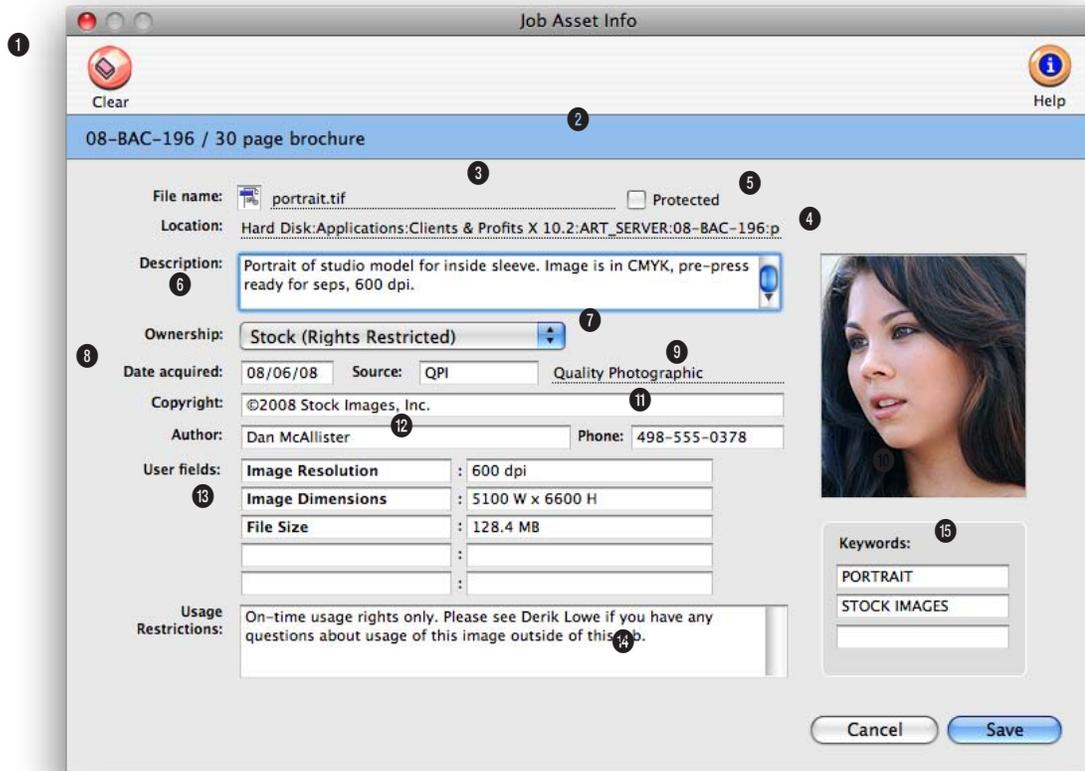
1 Click one of these **show tasks** buttons to list work to do by due or start date, resource, client, or AE/team. Click the unfinished and overdue option to list just those tasks that need immediate attention.

2 Fill in the **date** fields to narrow your search to a certain time period. To search for dates

within the current month, just type in the date. Clients & Profits fills in the month and year for you.

3 The **resource** field will only appear if you are searching by resource, client, or AE/Team. The resource is the initials of the person who is assigned to do the work.

Asset Manager



The Job Asset Info records legal information about ownership, usage, and more for a job's asset.

1 The clear toolbar button deletes all information about the asset in the Job Assets Info window.

2 The job number and name/title is shown here for reference.

3 The asset's file name is entered here. This file name needs to be entered exactly so that it the physical file is recognized by the Asset Manager.

4 The location shows where the

file is stored on the art server.

5 Check the **protected** option if you don't want this asset's information deleted or cleared. Only system manager-level users can protect as asset's information. This setting only protects the asset information, not the file itself. It won't prevent someone from moving or deleting the file from the art server.

6 Add a **description** of the

asset so that it can easily be differentiated from similar files. The more detail you add here, the less time you'll spend opening the wrong files later.

7 Use the **ownership** pop-up menu to show who owns the digital file. The choices include agency, client, artist/writer, stock (royalty-free), or stock (rights restricted).

8 Enter the date the asset was acquired.

Enter three keywords for each asset. When you use the find tool to search for an asset, Clients & Profits will look for these keywords.

9 Enter the asset's original source, if applicable. Since assets are usually purchased, the source is a vendor code.

10 Paste a thumbnail of the graphic to help better recognize the image later on.

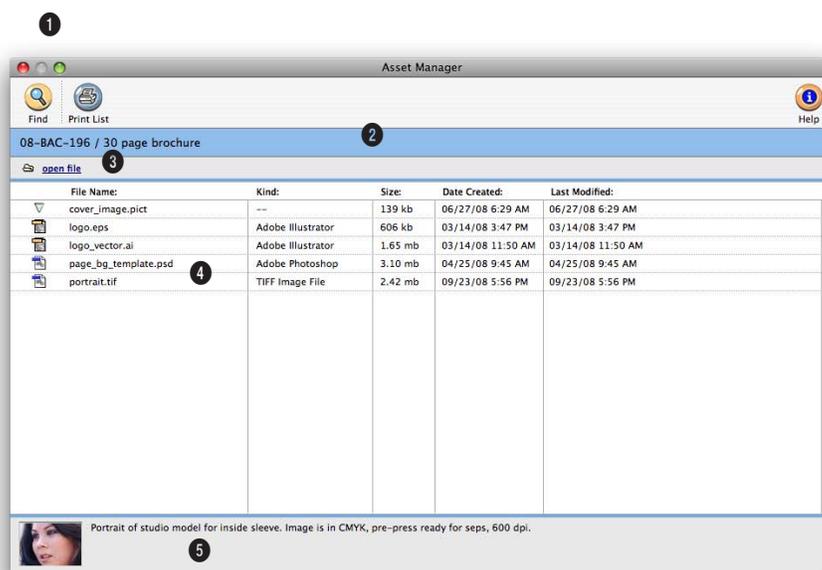
11 Add copyright information, if applicable, so the appropriate copyright information can be included when the asset is used.

12 The author of an asset is the contact person most responsible for creating it. If you ever need to request another file, changes, or additional information, the person entered here will be the person to contact. Be sure to add their phone number as well.

13 There are five customizable user fields to enter any specific information that your shop needs to track. Enter any information here that is meaningful.

14 Enter any usage restrictions here to minimize any misuse of the asset.

15 The three keywords entered here are the search words. When searching for a graphic based on keywords, every asset that has that word listed in one of the keywords field will appear in the search results list.



All of a job's assets are listed in the Asset Manager window, and can be opened (and their application launched) right from Clients & Profits.

1 Use the arrow buttons to select the previous and next job asset. Use the find button to search for an asset by keyword. The print list button prints a list of the job's assets.

2 The job number and name appear here for reference.

3 After selecting an asset from the list, click the open file button to launch the asset's application and open the file.

4 All of the job's assets appear with a file type icon, file name, size, and created and modified date. The assets can be sorted

by any of this information by clicking on the column heading.

5 The asset's description (from the Job Asset Info window) appears here.

View>Point

Clients & Profits provides many ways to track a job's progress on-line. Use the pop-up view>point menu as a fast way to gather information you need about a job, such as task costs, billing, POs, IOs, and BOs. You'll also find job progress reports, work in progress reports, the job snapshot, and the job diary.

Task costs Click on the view tasks option to see the Job Costs (by Task) report. This report sorts a job's costs by the task, date, number, and hours. It also shows the net and gross costs, the unbilled cost amount, and whether or not the task has billings applied to it. The report is totaled for a quick summary of how much time and money the shop has invested in the job, and what the gross revenue to date is.

Task billings Click on any task in the job ticket, then choose the view task billings option to see the hours and amount billed for a specific task.

Task POs Click on any task in the job ticket that a purchase order was created for, then choose the view task POs option to see the job commitments (POs) report. The report shows the PO number, the date the PO was created, the vendor the PO was created for, the net and gross cost (net cost times the markup), and the purchase order status.

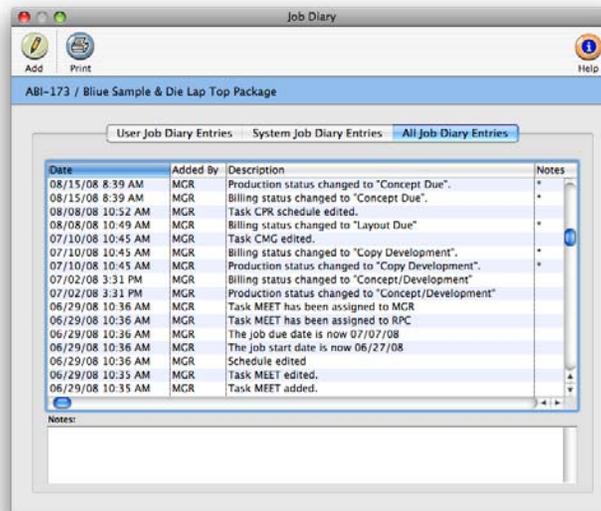
Task IOs/BOs Click on any media task in the job ticket that an insertion order or broadcast order was created for, then choose the view task IOs/BOs option to see the job commitments (i.e., IOs/BOs) report. The report shows the insertion or broadcast order number, the date the order was created, the vendor the order was created for, the net and gross cost (net times the markup), and the order status.

Job Progress Click on the view job progress option to open the Job Progress

window. To review a job's progress. The job progress window shows on-the-spot totals to date. This window lets you quickly see how many hours you've worked and the costs you've incurred for each job task. You'll get an analysis of the job's total estimate, estimated hours, gross margin to date, and budget remaining. These amounts are updated as costs are posted, so the Job Progress window is always current. You can't change the amounts on job tasks here, since they are made up of vendor payables, time sheets, change orders,

and more. You can however use the window's toolbar buttons to print the job's costs, as well as, its billings and purchase orders. Other toolbar buttons let you verify the job's costs and billings, and print the job's Job Progress report. For jobs with large numbers of tasks, the Show Groups pop-up menu lets you compare the progress of different groups of tasks at one time.

WIP Managing work in progress—the job's unbilled costs, time, and expenses—is completely automatic. There are three ways to look at work in progress: from jobs and tasks, from the costs themselves, and from the general ledger. Each has important distinctions, and all three work together to track your billable costs. Anyone with access to costs can edit work in progress.



Who deleted that task?"

Job diary entries are made automatically whenever tasks are added or removed, traffic is edited, and more. Double-clicking on a diary entry shows its full details. Selected entries can be printed by pressing down the Command (or Ctr in Windows) key then highlighting the entries to print then clicking the Print button.

Work in progress is primarily a function of job billing. Adding costs starts the work in progress system. A cost, whether it is a vendor purchase, a time entry, a check, or an out-of-pocket expense is given a job number and a task. The cost's net and gross amount (which include your markup) are posted to a job task. Billing is based on the job task's unbilled amount. When you bill a job, its tasks are copied to the invoice—including their billable amounts. You can freely change the invoice's billing amount up or down, regardless of the task's actual costs. So billing isn't literally connected to a job's costs.

Costs track when they're billed automatically. When you bill a job, the task's billing amount is applied to its costs. The billing amount updates the oldest cost first, then works forward through the remaining costs. You can find a cost and see its billing information: the invoice date, amount billed, and invoice number. For more accurate job costing, costs can have a billing status (e.g., unbilled, billed, or partial). Costs can be tagged with a billing status to keep them from being billed (e.g., on hold, unbillable). Work in progress reports show either unbilled job tasks or costs to help you plan your

Each job ticket has a diary that tracks the job's history, offering complete accountability from the job's start to its finish. It helps users see what kind of changes have been made since the job was opened through when the job was closed.

The Job Progress window gives managers a summary of the job's progress and profitability to date, including completion totals for hour hours and costs. Get drill-down task information on costs and billings using the three tools at the top right.

invoices better.

Job Snapshot The Job Snapshot window supplies account executives, account coordinators, and others with an up-to-the-minute snapshot of a job's progress. Quick calculations show the job's remaining estimate and profitability. This helps users catch any problems before they become serious—and expensive or troublesome to fix. A job's advance billing balance appears in the Snapshot window. The balance is the amount you can apply against upcoming invoices for this job.

Account executives can use the Job Snapshot to better plan the upcoming billings. By entering the date and amount of the job's next billing, pre-billing reports can be printed. These reports show what's expected to be billed during the next billing cycle. The job's account executive will be notified by e-mail on the billing date. Account executives can use the job snapshot to review a job's estimates vs. actuals. If a job looks like it is costing too much, the over budget amount can be entered into the snapshot window. Progress reports can be printed showing these problem jobs, so that they can be watched more closely.

Job Diary Each job ticket has a diary that tracks the job's history. The job diary helps users see what kind of changes have been made since the job was opened. A production manager can see a job's history from his or her own computer, instead of tracking down and interrogating everyone who worked on it.

Job diary entries are made automatically when many kinds of changes are made. Entries are made when the job is opened, then any time the specifications, estimates, or schedules are edited. They are also made

whenever new tasks are added, removed, or changed as well as when the status is updated. Closing the job makes a diary entry, as does deleting a job. A deleted job's diary stays in the database—so it's easy to know who deleted a job ticket. The deleted job's diary can be printed from job reports.

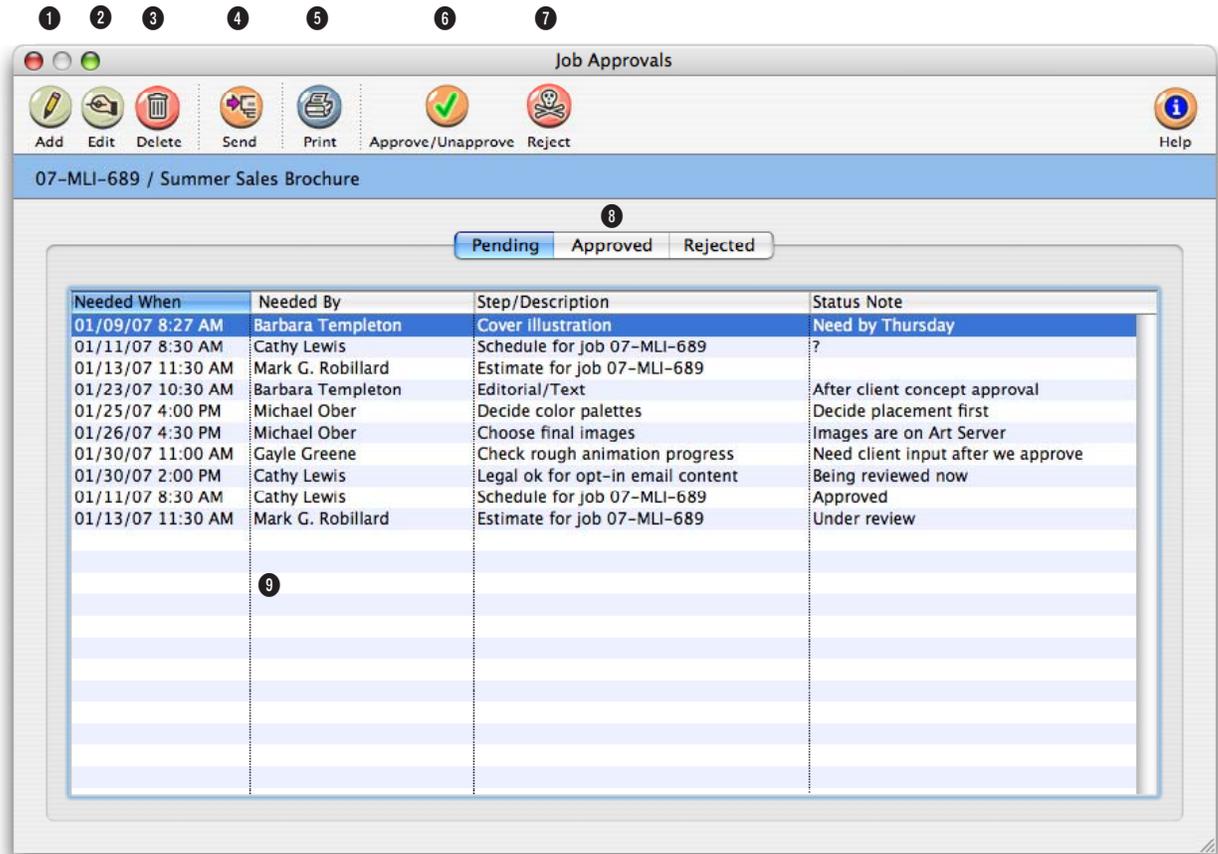
Each diary entry shows the date and time a change was made and who made it. A short, default description describes each entry. In addition, a user can include a longer explanation if

needed. The information on an existing diary entry, except for the notes, can't be changed. New entries can be added manually to document client meetings, memos, and phone calls important to a job's progress. The Show Diary Entries option allows a user to see all diary entries, user generated entries only, or system generated entries only. Diary entries don't appear on client reports, but can be printed with job reports.

Task	HOURS			COSTS		
	Budget	Actual	%	Budget	Actual	%
CMG Computer Graphics						
CRV Creative/Design Revisions		1.50			\$286.25	
CPY Copywriting						
PHOS Photoshop		3.00			\$75.00	
TYPG Typesetting		5.00			\$125.00	
CPR Computer-Aided Production		15.50			\$875.00	
PJM Project Management		2.00			\$50.00	
CGL Computer-Generated Linos/Film						
PA Project Administration		0.50			\$12.50	
PRM Production Management		3.25			\$97.50	
		30.75			\$1,521.25	
			Percent complete/hours: 0.0%			Percent complete/cost: 0.0%

Up-to-date task totals The Job Progress window shows a job task's totals to date. For each job task you'll see its budgeted hours and budgeted costs compared with its actual hours and actual costs. The percentage of budget used is calculated for each job task, easily showing how much of its budget remains.

Approvals



The Job Approvals window tracks all of a job’s pending, approved, and rejected approval requests from its start to its completion, keeping a record of all of the approved, rejected, and pending approvals for estimates, schedules, content, change orders, and tasks.

1 Anyone can add a request for a generic job approval, or an approval for content, by clicking the **add** button in the Job Approvals window.

2 To edit an existing approval, select it from the list, then click the **edit** button. Or simply double-click the approval to open the edit Job Approval window.

3 Delete an approval by highlighting it from the list, then click the **delete** button.

4 Click the **Send** button to send a selected approval request via e-mail.

5 To print a hard-copy of a request to the printer, select the approval, then click the **print** button.

6 Approve or unapprove a request by selecting it, then click the **approve/unapprove** button.

7 Job approval requests can be rejected outright by clicking once on an approval request to

select it, then click the **reject** button.

8 Approval requests are displayed separately by status: Pending, Approved, and Rejected. Click any tab to see all requests for a particular job.

9 Approval requests are listed by date needed, oldest first. Requests shown in the list can be sorted by clicking on any column heading. Double-clicking on an approval request displays its complete details.

Anyone can request an approval for any step during a job's lifetime. These steps can be ok'd by any staff member with the correct approval access privileges.

The screenshot shows a window titled "Add Job Approval Request". It contains the following fields and controls:

- Job:** 07-MLI-689 Summer Sales Brochure
- Requested by:** Frank Bourdain
- Step/Description:** Cover Illustration (1)
- To be approved by:** Kathy Richards (2)
- Needed when:** 08/21/08 10:22 AM (3) RUSH
- Instructions:** Here's a draft of the concept for the cover illustration. The colors are temporary. What do you think? (4)
- Status Note:** Waiting for client approval (5)
- File:** Hard Disk:Applications:Clients & Profits X 10.2:ART_SERVER:08-BAC-196:cover_image.pict (6)

Buttons include "Get File to Approve", "Draft", "Cancel", and "Save". A "Help" icon is located at the bottom right.

1 The step/description describes the type of request being made. It identifies this request on the Approval Manager window and makes up the subject on the notification e-mail.

2 All of the staff members who can approve this type of request, as well as the client contacts with content approval, appear in the to be approved by drop-down menu.

3 Enter the date and time you need the approval by in the needed when field. If you want this approval request rushed, click on the RUSH checkbox.

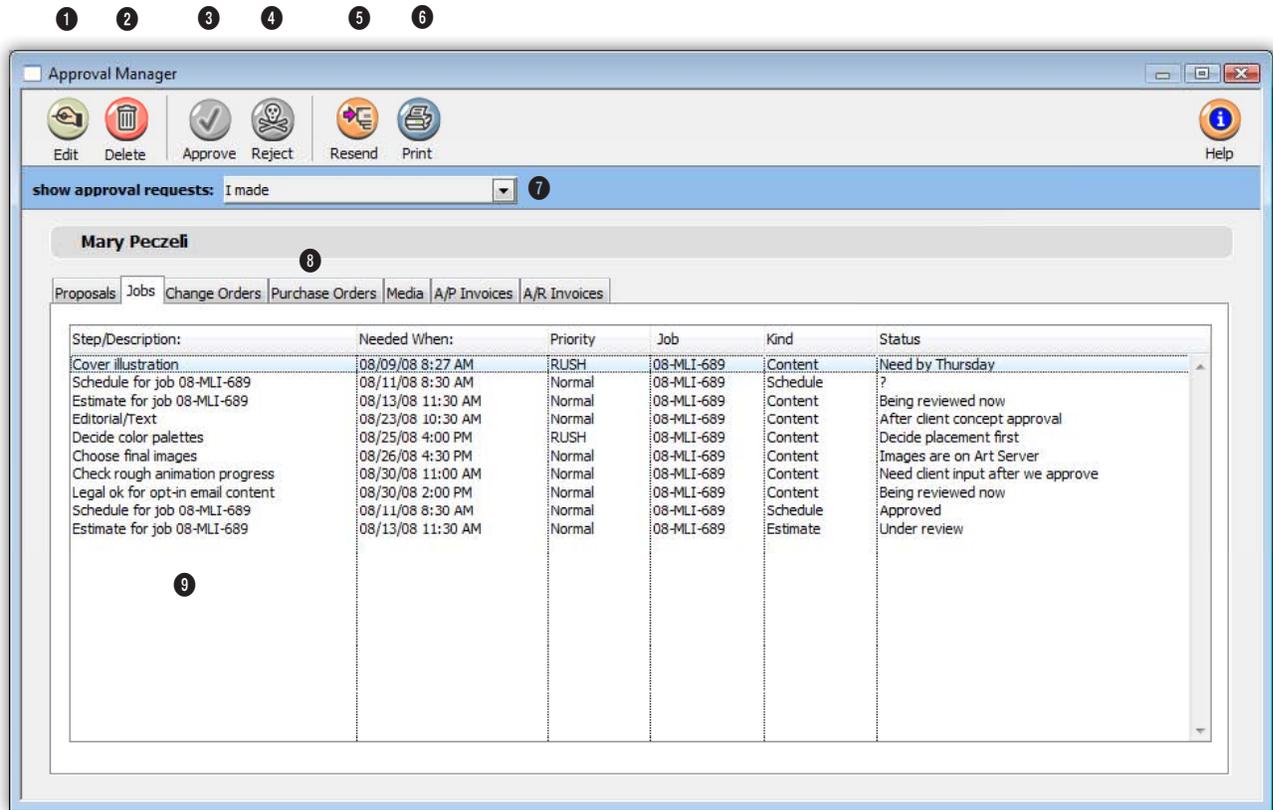
4 The optional instructions can be used to explain why you need this request approved.

5 The optional status note can be used to give this approval request a little more information. It works similarly to the

status note on job tickets and purchase orders.

6 If this approval request involves content (i.e., artwork, copy, layouts, etc.) you can select any digital file to attach to the notification e-mail. To attach a file, click the Get File to Approve button then choose the file from the Open dialog box.

Approval Manager



The Approval Manager simplifies and automates the entire approval process for jobs, artwork and content, estimates, purchase and insertion orders, media plans, vendor invoice, and client invoices.

1 Edit any approval by selecting it from the list, then clicking the **edit** button.

2 To delete an approval, select it from the list and click the **delete** button.

3 Delete an approval by highlighting it from the list, then click the **delete** button.

4 To approve a request, click once on an approval request to select it, then click the **approve** button. Once approved,

the person who requested the approval will be notified via e-mail that it was approved with changes -- which are included in the e-mail.

5 If an approval needs to be sent a second time, select it from the list, then click the **resend** button.

6 To print an approval request, select it from the list, then click the **print** button. The printed approval request displays the job, client, requestor, step/

description, date needed, the optional file to approve, and any accompanying instructions on a single printed page.

7 The window will display both the requests awaiting your approval as well as the requests you've made yourself. To see the approval request you've made, choose "I made" from the "show approval requests" drop-down menu.

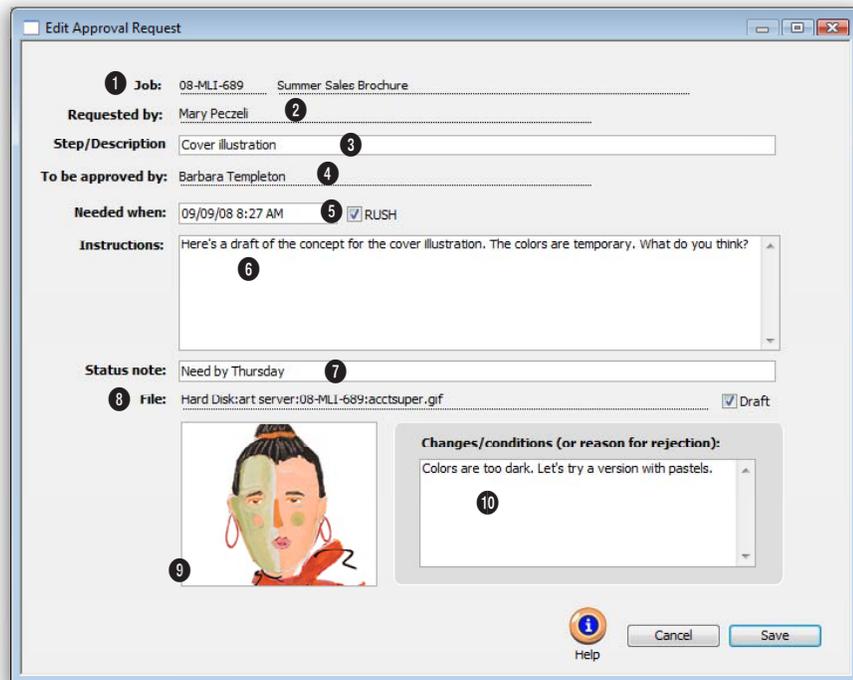
8 Approval requests are displayed separately by kind:

All of the different approval requests are gathered together in the Approval Manager window. It shows all of the requests you made -- and the requests made of you. From this window you can track the status of your requests, as well as approve new requests.

proposals, jobs, purchase orders, media, A/P invoices, and A/R invoices). Click on a tab to see the approval requests. Double-clicking on an approval request displays its complete detail. Pending, Approved, and Rejected. Click any tab to see all requests for a particular job.

9 Approval requests are initials listed by date needed, oldest first. Requests shown in the list can be sorted by clicking on any column heading. To reverse the sort order of a column, click on the column heading again. Urgent requests are identified as "RUSH" in the Priority column but are still ordered by date needed.

The Approval Manager window only shows pending approval requests. Once a request is approved, it is removed from the list. The approved request is saved in the Clients & Profits database for auditing on custom reports, but can no longer be displayed (except for jobs, which saves and displays approved and rejected requests).



1 The job number for the approval request being edited appears here.

2 The person who initially added the approval request is listed here.

3 The **step/description** describes which step of the job requires approval.

4 The name of the person who needs to approve this request

appears here.

5 The date the requested step is to be completed goes here. If this job is a rush, click the RUSH checkbox.

6 Special instructions for this step go here. This should be as detailed as you wish.

7 A customized status of this step can be added here, for instance, the day it's needed by.

8 If this approval is for a job asset, the complete path to the file is listed here. If the file is not final, click the Draft checkbox.

9 A thumbnail of the file can appear here.

10 If there are special conditions or reasons why this step has been rejected, or yet to be approved, they should be listed here.

Printing Job Reports

Job Production Everything someone needs to know about a job's production can be printed here, including production specifications, schedule and traffic details. There is something for everyone: Account executives can print their own job tickets, seeing the job's essential specifications. Production managers can print their own schedules, helping them juggle the who's, what's, and how's of each job. Traffic managers can print their own daily traffic checklists, making it easier to get the right people working on the right tasks—and getting the work done on time. Creatives can print work orders and creative briefs giving them all the details they need.

Reports can be printed for one job ticket or for one project.

Job Accounting Job accounting reports help keep you well informed about the most important parts of your business: jobs, costs, billings, and profits. All the job's monetary details can be printed here, including outside costs, time, and what needs to be billed. Account coordinators can print their own job progress, cost, and billing reports, helping them plan the month's billings as the costs occur—not weeks later.

The numbers you see on job reports are always timely, since jobs are updated instantly as costs are posted. So you'll always know that what you're looking at isn't outdated and inaccurate, helping you make better, more informed decisions. Reports can be printed for one job at a time, or for many jobs selected by project.

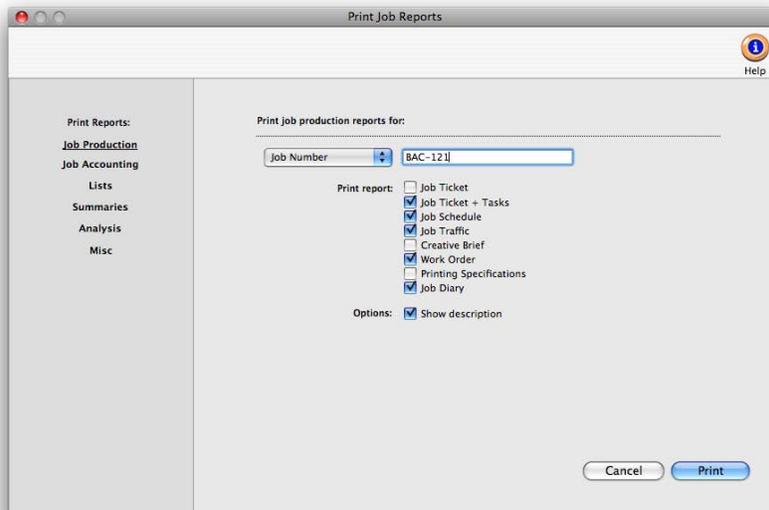
Lists Job list reports give you an overview of your jobs. The Job lists can be printed for all jobs or jobs for just one client, project, or AE/Team. The lists can also be printed for a range of status codes and dates.

You can easily see all the jobs currently in-progress, or all the jobs opened for a specific client this year. Account executives can print a list of their own job tickets, seeing the job's essential specifications. Production managers can get a list of all the jobs currently in-progress. Reports can be printed for many jobs selected by a production or billing status range and a date range.

Summaries Job Summary reports give you an overview of each job. The reports provide a way to evaluate the progress of jobs. The reports can be sorted by project code, job type, client, or AE/team.

The numbers you see on job reports are always timely, since jobs are updated instantly as costs are posted. So you'll always know that what you're looking at isn't outdated and inaccurate, helping you make better, more informed decisions. Reports are printed for many jobs selected by client or project.

Analysis Job Analysis reports compare estimates to actual billings and budgets to actual costs. Potential problems can be spotted before they become real problems. Account executives can identify jobs that may be going over budget, giving you time to talk to the client and issue a change order before the final billing.



Miscellaneous Miscellaneous job reports are reports that aren't used for production, accounting, or analysis. Instead, these reports have special purposes and are used infrequently. They are printed like other job reports. The Job Archive Directory report lists closed jobs and the location of their digital files. The report shows the job's archived on field to help creatives, production people, and account executives find old, stored digital artwork for clients quickly and easily.

■ The information you see on job reports is always timely, since jobs are updated instantly as schedules and traffic are updated. So you'll always know that what you're looking at isn't outdated and inaccurate, helping you make better, more informed decisions.

■ Job reports can be printed to the printer, screen, or exported to a spreadsheet-compatible text file by using the Print to pop-up menu.

Job Reports

Job Production	
Job Ticket	The Job Ticket shows the basic details of a new job, including the job number, name/title, and specifications. It is an ideal report for informing everyone about new jobs. It can also be used as a cover sheet for the job jacket or attached to artwork.
Job Ticket + Tasks	The Job Ticket + Tasks shows all the information on the Job Ticket report and includes job tasks, estimates, estimated hours, budget (the amount you'll spend before markups), task due date, and the person who is to do the work.
Job Schedule	The Job Schedule shows the job tasks, due dates, and start dates. Job tasks are sorted by the schedule sort number—which should be the order in which tasks are performed—then due date. As tasks are completed, the finished date is updated and appears on the printed Job Schedule.
Job Traffic	The Job Traffic report shows jobs and traffic milestones. The job's milestones and traffic comments/next steps appear at the bottom of the report for easy reference. Jobs without milestones don't show milestone information.
Creative Brief	The Creative Brief provides fifteen user-defined fields and headings designed to direct your creative, production, and marketing goals.
Work Order	The Work Order report is used for any production or art direction notes.
Print Specifications	The Printing Specifications report outlines every minute detail about printing.
Job Diary	The Job Diary report shows the job's history (e.g., when tasks were added, specs changed, etc.). Diary entries are sorted by date and time, showing who did the entry and what happened. Since job diary entries aren't purged, they provide a good audit trail for deleted jobs. When a job suddenly disappears, you can see who deleted it by printing this report for the deleted job's number. The last diary entry on the report will show who deleted it.
Job Accounting	
Job Summary	The Job Summary shows the job's estimates, change orders, estimated hours, actual hours, net POs, total costs, billings to date, and currently unbilled balances for each task. Job tasks are sub-totaled by group, then sorted by each task's sort number. The show budgets option replaces the change order amounts on each job with the budget amount.
Detailed Job Summary	The Detailed Job Summary shows all the information of a Job Summary, but calculates vendor buyouts, time cost, outside gross costs, and estimate remaining.
Job Costs	The Job Costs report shows vendor purchases (from A/P), time sheets, checks, in-house expenses, and job cost transfers. Costs are sub-totaled by kind (i.e., payables, time, etc.) or by task by choosing the Kind or Task option. Unposted job costs won't appear. The show cost amounts option shows or hides the net cost amount on job costs. If this option is selected, you'll only see gross amounts—the net cost and cost rates will be hidden.
Unbilled Job Costs	The Unbilled Job Costs report shows only costs that need to be billed; it's a better pre-billing analysis report than the standard Job Cost report.
Job Billings	The Job Billings report lists posted client invoices, including advance billing amounts and unpaid balances. It also includes unposted invoices, which are marked with an asterisk for identification.
Job Commitments	The Commitments report shows purchase, insertion, and broadcast orders. The report shows the balance remaining on an order based on A/P invoices. The Open PO amount is the balance remaining on a PO based on posted vendor invoices, using the gross amounts.

Job Reports (con't)

Change Orders	The Job Change Orders report summarizes change orders added for client revisions, additional information, agency corrections, F-Y-I's, and other changes.
Job Progress	The Job Progress report is identical to the Job Summary, but shows only gross amounts. Each task's estimate, estimate hours, actual hours, open purchase orders, billings, change orders, and unbilled amounts with commissions and markups are shown.
Job Lists	
Job List	This report lists jobs by job number. It's a simple report, showing jobs sorted alphabetically by job number. For each job you'll see the job number, client, job name, start or due date, and production or billing status.
Job List by AE/Team	This report lists jobs by client, but also shows the job's totals to date. A separate page is printed for each AE/team for easy distribution. AE's can use these reports to track client budgets on jobs weekly, while there's still time to make changes. For each job you'll see job number, job name, status—plus the total estimate, billings, and unbilled amounts. The estimate remaining percentage is calculated automatically for each job, showing how much of the estimate hasn't been billed.
Client Job List	This simple report lists jobs by client. For each client, jobs are sorted alphabetically by job number. For each job you'll see the job number, job name, start date, due date, job type, and production or billing status.
Client Status Report	This report lists jobs by production or billing status. Jobs are grouped by status, based on whether you selected production or billing status, then sorted alphabetically by job number. For each job you'll see the job number, job name, client, start date, due date, AE/Team, contact, and status note.
Job List by Job Type	This report lists the jobs by job type. For each job type, jobs are sorted alphabetically by job number. For each job you'll see the job number, job name, production or billing status, and the job's traffic milestones.
Project Job List	This report lists jobs by project name. Jobs are grouped by project name, showing the job number, job name, start and due dates, and production status. Jobs without project names are listed first.
Job List (wall chart)	This report is designed to be an easy-to-read, quick reference job list. It lists jobs by client using an extra-large font size. Each job shows its job number, job name, start date, and due date. This jumbo job list can be posted on studio walls each week to track job numbers for each client.
Job Log	This report replaces your manual job book. It lists jobs by job number, and shows the job name, client, start date, due date, AE/team, project, and job type. A prompt will give the option to include the task schedules. With this option, jobs are listed alphabetically by job number, but also show tasks with start or due dates. For each job you'll see the job number, job name, due date, start date, and production status. Each job task shows its task code, task name, due date, start date, resource, and status.

Job Summary

Job Summary	The Job Summary shows the job's estimates, change orders, estimated hours, actual hours, net POs, total costs, billings to date, and currently unbilled balances for each task. Job tasks are sub-totaled by group, then sorted by each task's sort number. The show budgets option replaces the change order amounts on each job with the budget amount.
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Job Reports (con't)

Detailed Job Summary	The Detailed Job Summary shows all the information on a Job Summary, but also includes vendor buyouts, time costs, outside gross costs, and calculates the estimate remaining.
Project Job Summary	The Project Job Summary shows all the Job Summary information summarized by job and groups the jobs by project with totals for each project.
Job Type Summary	The Job Type Summary shows all the Job Summary information summarized by job and groups the jobs by job type with totals for each job type.
Client Job Summary	The Client Job Summary shows all the Job Summary information summarized by job and groups the jobs by client with totals for each client.
AE/Team Job Summary	The AE/Team Job Summary shows almost all the Job Summary information summarized by job and groups the jobs by AE with totals for each AE.
Snapshot Worksheet	The Snapshot Worksheet shows jobs that have been updated in the Job Snapshot window. The report lists jobs and their next billing date, costs needed to finish the job, and time needed to finish the job. Account executives can use this report to plan next month's billings or track each job's completion.
Job Analysis	
Estimates vs Billings	This report shows a summary of each job by client. The total estimate, change orders, amount billed, and remaining unbilled costs are shown for each job. A remaining estimate amount is calculated based on the total estimate (and change orders) minus the total amount of billings and unbilled costs.
Projected Revenue	Each job is listed by client. The projected revenue is calculated for each job based on the job's estimate and budget amounts.
Advanced Billings	The Advanced Billing report lists all jobs with an advanced billing amount. For each client, the jobs are listed showing the job number, job name, start date, due date, advanced billing amount, and the production or billing status.
Small Jobs	The Small Jobs report shows a list of jobs where the estimate, billings, estimate hours, or actual hours are less than a chosen amount (e.g., all jobs with billings less than \$10,000.00).
Large Jobs	The Large Job report shows a list of all jobs where the estimate, billings, estimate hours, or actual hours are more than a chosen amount (e.g., all jobs with actual hours more than 100 hours).
Client/Job Budget Analysis	This report shows jobs by client and compares each job's budget amount to the actual costs incurred.
Over-Budget Jobs (Watch List)	This report lists jobs by client and shows only those jobs whose costs exceed the job's budget.
Job Miscellaneous	
Unbillable Jobs	This report lists all jobs that are marked with the Always Unbillable option.
Job Archive Directory	This report lists closed jobs and the location of their digital files. The report shows the job's archived on field to help creatives, production people, and account executives find old, stored digital artwork for clients quickly and easily.