

Installing the Clients & Profits X Upgrade

Clients & Profits X is a major upgrade that features dozens of new features and hundreds of enhancements. It replaces your existing Clients & Profits 5.x applications throughout your shop. These instructions explain how to install the new upgrade.

Clients & Profits X is installed separately on every computer that uses it. The installation steps are straightforward: (1) run the Clients & Profits X installer, (2) start Clients & Profits X, (3) open your database and perform the one-time conversion, then (4) register your database and activate your software.

Installers for both Mac OS X (10.3 or higher) and Windows XP/2000 are included on the Clients & Profits X CD. These installers copy the new files into a Clients & Profits X folder on your hard disk.

The new C&P Player no longer needs to be manually serialized. The program is installed with a 10-user demo serial number, which is replaced by your unique serial number by a new web-based software activation system (see next page).

Clients & Profits X will automatically convert C&P 5.0.6 databases. **But if you hadn't updated to C&P 5.0.6 (or later), you'll need to manually prepare your databases using the Prep C&P X Database utility** (see right).

The first time Clients & Profits X opens your database, it'll prompt you to convert your database. This process takes from 10 minutes to several hours depending on your database's size. The database can only be converted if no one else is currently using Clients & Profits. If you use multiple databases, each one needs to be converted separately. Once your database is converted, it should be registered. Registering your database is required for software activation.

Everyone who uses Clients & Profits in your shop needs to upgrade to C&P X at the same time. While you can open your Clients & Profits X database with Clients & Profits 5.x, mixing old and new versions on the same database can cause data problems and is **not** recommended.

The C&P X CD has a "learning" folder which contains a new Acrobat-based **Feature Guide** that illustrates the best features in Clients & Profits X. For step-by-step instructions on how to use Clients & Profits X, click on any window's **help button** to access the online user guide (internet access is required).

For help, please call the Clients & Profits Helpdesk at **(800) 521-2166** from 7 AM to 5 PM Pacific time. Or, send e-mail to:

helpdesk@clientsandprofits.com

System requirements

All versions of Clients & Profits X require 128mb of RAM, 40mb of free hard disk space, an Ethernet connection to your file server, and an internet connection (required for the online user guide and the database registration/software activation). The program's system requirements and performance vary by platform:

Macintosh: The Mac version of Clients & Profits X runs on any Power Mac, iMac, PowerBook, iBook, or eMac with Mac OS X 10.3 ("Panther") or later. On Mac OS X, Clients & Profits X runs as a native application.

■ Do not use versions of pre-Panther versions of Mac OS X or else it will damage your Clients & Profits X database. Always use Mac OS X 10.3 or later.

Windows: Clients & Profits X for Windows runs on any PC with Windows XP or Windows 2000.

■ Do not use Mac OS X Server to share a Clients & Profits X database between Mac and Windows users or else your database will be damaged. Cross-platform environments needs a Windows-based file server or Mac OS 9-based AppleShare IP.

The Clients & Profits X (www.cnp-x.com) web site features detailed technical information, including up-to-date hardware recommendations.

■ You no longer need Adobe Acrobat or PrintToPDF to send PDF attachments from Clients & Profits. The ability to print PDFs of any report, list, or form are now built-in.

Converting your C&P 5.x databases

Clients & Profits X works with databases created by any previous version of Clients & Profits.

■ Your database must end **.df1** (e.g., myaccounting.df1) to be recognized by Clients & Profits X.

If you've been using Clients & Profits Classic/Job Tracker/Pro 5.0.6 (or later), then your database can be opened directly by Clients & Profits X. If not, you'll need to:

1 Copy the **Prep C&P X Database** plug-in application from the C&P X CD's Extras folder to your Clients & Profits folder.

2 Open Clients & Profits 5.x like you normally do, then choose File > Open Plug-in Application.

3 Open **Prep C&P X Database** then choose File > Open Database.

4 Find and open your database, follow the prompts, then quit Clients & Profits when finished. The database is now ready for Clients & Profits.

When Clients & Profits X opens a database or the first time, it will be automatically reorganized. This process takes between 10 minutes and several hours depending upon the size of your database and the speed of your computer. **For better performance, do not reorganize your database over the network.**

This database reorganization is a one-time procedure. It must be performed separately on each database you use. 100% of your data is converted, so nothing is lost. Once converted, the database can be opened and used by other C&P X users.

For up-to-date information about installing, configuring, and using the Clients & Profits X upgrade, please visit www.cnp-x.com/support/release_notes.html

To install the Clients & Profits X upgrade for Mac OS X

Before installing the upgrade, be sure to quit Clients & Profits 5.x if it is running.

- 1 Find your current Clients & Profits 5.x folder on your hard disk and move any custom reports, databases, and other files you want to save out of the folder. Then drag the Clients & Profits folder to the trash.
- 2 Insert the Clients & Profits X CD into your Mac.
- 3 Double-click on the *Install Clients & Profits X* installer application.
- 4 Follow the installer's prompts to copy the new Clients & Profits folder on your hard disk.

The Clients & Profits X folder will appear on your hard disk in the Applications folder or, optionally, in the location you chose.

- 5 Move any files you saved into the new Clients & Profits X folder.

If you use aliases: If you'd set up an alias to Clients & Profits 5.x, it needs to be deleted (since they point to the old version which has been replaced). You'll need to create a new alias that points to Clients & Profits X.

- 6 Open the Clients & Profits X application. At the Introduce Yourself prompt, click on the Open Database button to find your database, then enter your initials and password.



Clients & Profits X

Database shortcuts Click the Open Database button to find and open your C&P 5.0.6 (or later) database. The database will be converted automatically then added to the pop-up menu for easy access.

To install the Clients & Profits X upgrade for Windows

Before installing the upgrade, be sure to quit Clients & Profits 5.x if it is running.

- 1 Find your current Clients & Profits 5.x folder on your hard disk and move any custom reports, databases, and other files you want to save out of the folder. Then drag the Clients & Profits folder to the trash.
- 2 Insert the Clients & Profits X CD into your PC.
- 3 Follow the installer's prompts to copy the new Clients & Profits folder on your hard disk.

The Clients & Profits X folder will appear on your hard disk in the Programs folder or, optionally, in the location you chose.

- 4 Move any files you saved into the new Clients & Profits X folder.

If you use shortcuts: If you'd set up a shortcut to Clients & Profits 5.x, it needs to be deleted (since they point to the old version which has been replaced). The installer automatically creates a shortcut for Clients & Profits X on your desktop.

- 5 Now start the Clients & Profits X application. At the Introduce Yourself prompt, click on the Open Database button to find your database, then enter your initials and password.

Software Registration and Activation

Clients & Profits X uses an internet-based registration system to validate each software installation. The registration process takes only seconds and does two things: It registers your software with the C&P Helpdesk and activates the database with your installation of Clients & Profits X.

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

- 1 Choose Setup > Software Registration then click the Register button.

- 2 Enter your company name and address, then press Return.

You'll receive an e-mail confirmation once your software is ready to be activated.

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

Using C&P 5.x utilities, plug-ins, custom reports

Since Clients & Profits X has a completely new architecture, it has limited backward-compatibility with prior tool and utilities:

Custom Reports Custom reports created with Clients & Profits Pro 5.x can **not** be used with Clients & Profits X's new report writer. But since Clients & Profits X databases can be opened by C&P 5.x, you can still print custom reports as you have before. Or, you can have the reports reproduced in Clients & Profits X.

My Clients & Profits! The My Clients & Profits! 5.x web server can share a database with Clients & Profits X without any changes to your current configuration.

Media Link The Media Link utility is now integrated into Clients & Profits X, so the stand-alone utility isn't needed.

Export/Import Old versions of this data repair tool can't be opened by Clients & Profits X. A new version is included on the C&P X CD's Extras folder.

Plug-in Applications Custom utilities or plug-in applications created for C&P 5.x will **not** work and will have to be reprogrammed in Omnis Studio 4.

