



CLIENTS & PROFITS[®] X

Feature Guide

First Edition

This feature guide documents Clients & Profits® X

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CLIENTS & PROFITS, INC.

The Triangle Building
4755 Oceanside Blvd., Suite 200
Oceanside, CA 92056 USA
(760) 945-4334 Voice
(760) 945-2365 Fax
(800) 272-4488 Sales
(800) 521-2166 Helpdesk

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How to use this feature guide

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

- The first two chapters, *Introducing Clients & Profits X* and *Getting Started*, provide a quick overview of the Clients & Profits X software.
- Chapter 3, *Job Tickets*, illustrates job tickets, estimating, scheduling, and traffic. To see how to track time, add purchase orders, manage vendor payables, and write checks, see Chapter 4, *Job Costing*. Chapter 5, *Media*, describes Clients & Profits X's media planning, ordering, and tracking capabilities. *Clients, Billing, and Accounts Receivable*, Chapter 6, guides you through billing client, as well as tracking unpaid invoices, making client payments, and printing statements.
- To learn how Clients & Profits X manages accounting see Chapter 7, *General Ledger*. Chapter 8, *Snapshots*, explains how to print essential reports showing jobs, traffic, costs, work in progress, vendor and client account balances, productivity, and profitability, as well as financial statements.
- Chapter 9, *Settings, Options and Preferences*, shows system managers how to set up users, assign access privileges, set up vendors, and customize how Clients & Profits X behaves.

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

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

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

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Glossary

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