CLIENTS & PROFITS® 5.0

Feature Guide

First Edition

This user guide documents Clients & Profits® 5.0

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How to use this feature guide

This Feature Guide illustrates the best features in Clients & Profits 5.0 for tracking your clients, jobs, costs, billings, and finances. Together with the *Learning Clients & Profits 5.0* tutorial (included separately), 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 5.0.

- The first two chapters, *Introducing Clients & Profits* and *Getting Started*, provide a quick overview of the Clients & Profits 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' 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 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 behaves.

NEED HELP? Call Clients & Profits 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 web site: **www.clientsandprofits.com/support**

For help using any part of Clients & Profits, click the help button from any window to open the online 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 web site. It's continually updated, so it's more timely and helpful than a printed user guide.

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Chapter 6: Clients, Billing, and Accounts Receivable

Chapter 9: Settings, Options, and Preferences

Appendices

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