# Sage Peachtree 2009 – 2012
# Product Overview

## New! Sage Peachtree 2012

Sage Peachtree is the accurate, easy-to-use accounting software that provides the insights and control you need. With the Sage Peachtree internal accounting checks, comprehensive audit trails, module- or screen-level security, and robust reporting, you get the accuracy, control, and information you need to make decisions that help increase profitability.*

This release of the Sage Peachtree product line helps you **get to your information faster**, simplifies everyday tasks so you can **get the right work done**, and provides tools to help you **make informed business decisions**.

**Features vary by product. Please visit www.peachtree.com for a list of specific product features.*

### Copy Transactions

Quickly create a new transaction based on a previously saved one, allowing you to easily make modifications instead of manually recreating every line item. This feature is available on seven screens: Quotes, Sales Orders, Proposals, Sales Invoicing, Purchase Orders, Purchase Invoices, and General Journal Entries.

### Sage Peachtree System Check

An early warning and monitoring tool to help identify potential Sage Peachtree application issues and offer advice on how to resolve them, thereby increasing peace of mind and preventing possible downtime or lost productivity.

### Sage Peachtree Business Intelligence[1]

Sage Peachtree Business Intelligence is a reporting and analysis solution integrated with Sage Peachtree. Using the familiar interface of Excel, it enables more robust, custom reporting and easier access to Sage Peachtree data.

### Vendor Management Center

Gain greater visibility into all the information you need for a specific vendor on one customizable dashboard.

### Management Center Enhancements

User-friendly enhancements to how information is viewed and used within the customizable My Dashboard and Management Centers. Includes automatic totaling of columns from transaction lists, changing the number of lines displayed within each module in the customized view, and making it easier to find default and selected items in a scrolled down list when filtering for information.

### Sage Advisor

Sage Advisor helps customers experience the full value of their software investment. Through personalized dashboards, engaging "show me how" videos, on-screen help and other business resources Sage Advisor helps customers learn more about their Sage Peachtree product, discover new ways to simplify their processes, and obtain valuable business advice.

## SAGE PEACHTREE 2012 (cont'd)

### Expanded Payroll Fields

More fields on both the employee and employer/company payroll records allow for recording of additional benefits, deductions and liabilities, and help customers comply with legislative requirements, such as the Health Care Act of 2010. There are now a maximum of 40 fields available for each, up from 30 employee fields and 10 employer/company fields.

### Easier Network Installation

A more efficient installation option for multi-user versions of Sage Peachtree that allows you to run multiple workstation installs simultaneously while greatly reducing the number of steps required.

### New My Dashboard Modules

Eleven new modules for My Dashboard -- including General Journal Entries, Inventory Adjustments, Payroll, Assemblies, Purchases Received, Top Vendors, and Item Purchase History by Vendor -- push its value beyond the sales team and into the purchasing and operations groups, allowing more people in the organization to work better and faster.

### Workflow Automation

Establish default assignments for all of your Sage Peachtree transaction statuses to ensure that work is routed to the appropriate person at the right time. Easily view and add transaction tracking notes from the Customer Management Center.

## SAGE PEACHTREE 2011

### Inventory and Services Management Center

A customizable dashboard that helps users process large quantities of information about a single inventory item or service at a glance. It enables quick research, comparisons, and decision making. Excellent for understanding quantities, usage, and complex assemblies relationships. Provides answers to inventory questions about last unit price, number of units, vendors, open transactions, backorders, and more. Manages assemblies at-a-glance by seeing items on BOMs, component usage, assemblies built, and work tickets. Helps evaluate business impacts of a service -- usage, revenue, and more. You will spend less time digging for information when tracking inventory or planning purchases, especially locating specific items in a list of thousands with similar names.

### Streamlined Service Billing

For businesses that provide services, you can quickly invoice customers for any unbilled time and expenses. Users can filter unbilled items by date, customer or job. The outstanding time and expenses are then transferred directly to an invoice. Improving your billing efficiency can translate directly into business results. The faster you collect revenue owed to you, the sooner you can put it to productive use. The existing invoicing process remains the same; you decide which method to use.

**Job Status Indicators**

Customizable statuses with visual “red/yellow/green stoplights” for easy identification. Sage Peachtree has four default statuses, but the field is completely customizable to meet the needs of your business. You can easily delete, rename, or change the color-coded stoplight button attached to each status. You can add virtually unlimited new status types. (eg., At Risk, On Schedule, Late).

**Job & Project Management Center**

Proactively manage your projects with easy access to job information in one centralized place. A second tab on the new Job Navigation Center provides a customizable, dashboard view of information “per job”, “per job/phase” or “per job/phase/cc”.

**Interactive Job Reporting**

Quick, custom reports with totals that can be developed from job modules on the dashboard. You can customize what information you want or need to see on each job module. The totals line on each module now automatically updates when new information is shown. The Job Profitability module with comparisons of Original, Estimated vs. Committed and the various filters can make this one module into hundreds of reports. The totals carry the sum function to Microsoft® Excel® which makes it very easy to continue to customize. You can send the output to multiple formats - Excel, PDF or email.

**Job Navigation Center**

“One Stop Shop” for accessing all job-related information including tasks and reports in a centralized dashboard. You can view a complete list of jobs and drill down to the details from the list. The new Job Status Indicator makes it easy to see or sort by the status. New buttons allow you to easily access Job Phases, Cost Codes and Change Orders in the Job Tasks window.

**Easier Data Entry for Jobs**

Four usability improvements that reduce steps and enhance data entry for jobs. When you select the job on the first line of a transaction it automatically populates to the following lines – no additional clicks required. You don’t have to take your hands off the keyboard to select the correct job, phase, or cost code. You can easily find the correct job because the customer name is now shown in the dropdown list. You can opt Sage Peachtree to warn you if you have forgotten to enter a job on sales or purchase transactions

**More Room for Job Notes**

Job notes field has been expanded to allow the user to enter more information. You can cut/paste information from emails or other documentation directly in this field. You can also bring data directly into Sage Peachtree using the import/export feature.

**Change Order Processing**

Allows Change Order tracking and list view/reporting, provides a new Change Order Form to capture approvals, and updates estimated revenues and expenses with approved changes. Eliminate manual change order tracking processes and keep all of your information in one place. Tracking features include noting when a change order is approved, when it is applied to transactions, any changes to projected end date, and maintaining all notes applicable to the change order. You will have better insight into the impact of change orders on jobs’ revenues and expenses (down to phase and cost codes).

## SAGE PEACHTREE 2011 (cont'd)

### Enhanced Assemblies Reporting

Handle assemblies in new ways with modules on the Inventory and Services Management Center. Users can customize the dashboard for at-a-glance, detailed information about a specific assembly item. Enables quick research, comparisons, and decisions about complex assemblies relationships. Each module is still controlled by existing security measures and will automatically respect the security settings you have today. Provides Answers to inventory questions about quantity on hand and cost of all components, quantity needed of this item in each assembly, and more. Managing assemblies can be done at-a-glance by seeing items on BOMs, component usage, assemblies built, and work tickets. Each Sage Peachtree user in the office can customize assemblies reporting on the Inventory and Services Management Center to their own unique needs

### Easier Installation

Improvements to the installation process make it easier and faster to upgrade to the latest release. Sage Peachtree can detect and apply the settings from the last release. There are fewer screens with more guidance; and it's easier to install more than one Sage Peachtree accounting software product, or move up to a different Sage Peachtree accounting software product.

### Setup Advisor

A retractable panel is docked to the side of each screen in which customer, vendor, employee, inventory and other records are maintained in Sage Peachtree. Each time a field within one of these screens is selected, the panel automatically displays related instructions, descriptions, and links. The guide panel can be turned on or off for each user.

## PEACHTREE BY SAGE 2010

### Transaction History

Save time getting to the information you need to take action!  Easily and quickly view all history related to a particular customer or vendor transaction throughout the entire chain of events at any point in the sales or purchase process.  View forward from a quote to a receipt or backwards from a payment to a purchase order.

### Customer Management Center

View the details you need all-in-one-place to better manage and service your customers without missing a beat.  Create a customizable dashboard view of your customers' information such as their converted and unconverted quotes, invoices, receipts, time tickets, aged balances, items sold, and much more.  Look up customers quickly based on their id, phone number or any of their contact information or recently looked up customers, and filter further based on date ranges.   Export customer information to Microsoft Excel, PDF or email.

### Open Multiple Companies[2]

Get your work done faster by being able to open multiple companies within Peachtree at the same time!  Open all of your companies and toggle to the company you need without closing your current company.  Save time by not having to re-enter your login information when switching between companies.  Enter your user id & password once and Peachtree will remember it until you close Peachtree.

## Multiple Contacts[3]

Store a virtually unlimited number of contacts per company in Peachtree! The new “Contacts” tab in the Customers screen allows you to keep track of any specific details you want regarding multiple contacts per company. Track more details like multiple contacts titles, phone numbers, e-mail address and specify the bill-to and ship-to contacts. A new Notes field allows you to track unique information about each contact.

## Automatic Backup

Automate your backup process for any time that is convenient for you and your company! No more hassles or worries about the safety and security of your data. With Peachtree Automatic Backup, set up your schedule once, and the rest is taken care of for you. Peachtree doesn’t even have to be running to make the scheduled backup.

# PEACHTREE BY SAGE 2009

## Multi-Year Reporting[4]

New General Ledger reports and Financial Statements functionality allows you to report on data outside of two open years, while retaining the control to lock down prior years and purged data. This access will allow you to compare budgets and financial results across multiple years, and drill down to the details. Use this new functionality with existing capabilities on transaction reports, to get improved trending analysis, better research, and more accurate forecasts.

## Cash Flow Management

Now you can view your current cash status easier than ever before. With an improved cash management tool, you can easily see how much money is coming in and going out, so you always know how your business is performing. In addition, with an improved forecasting tool, you will be able to quickly create forecast scenarios, and export them to Microsoft Excel, to better track how your business might perform down the road.

## Comprehensive Payroll Management

Access to a full payroll management tool for your business is available, with set-up improvements and expanded offerings for benefits and deductions. These expanded feature improvements offer you a better way to account for items that you need to effectively manage your business.

## Real Time Alerts

Experience real-time notifications whenever a non-standard AP and AR account is entered into a transaction. And you will be alerted when a non-cash account is entered into a cash account field in receipts or payments. Now the ability to catch and correct potential accounting errors is easier than ever. Also, when working in a multi-user environment, each workstation will be automatically be notified that a tax update has occurred.

## Improved Performance

Now you can get up and going faster. Quickly open companies within Peachtree to access information. As well, minimize the amount of down-time caused by users being blocked out of screens in a multi-user environment.

[1] Additional fees required. After the sixty day free trial, the service is only available with Sage Peachtree Complete Accounting and higher products.
[2] When opening more than one company, you will be able to perform all functions except those that require exclusive company access or third-party integrations in companies opened after the first one.
[3] There is a maximum of 20 ship to addresses and 1 billing address per customer. Only 2 contacts per customer can be synced with Outlook.
[4] Upon upgrading to Peachtree 2009, 3 years of converted Peachtree Financial Statement data and account balance data on General Ledger reports will be readily accessible, as well as data for future closed years.