Sage Peachtree

The Sage Peachtree Insider | May 2011

An Inside Look at Sage Peachtree and Your Business

INSIDE THIS ISSUE

Previous Poll Results

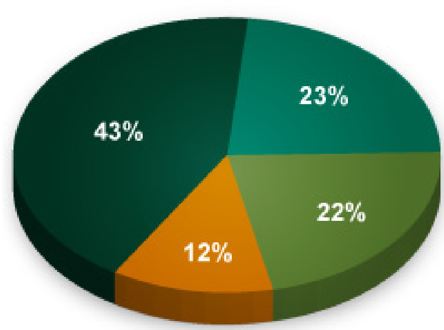
When do you file your annual tax return?

43% I'm always early, way before April 15.

23% I get it in a week or two before the deadline.

22% I usually have to file for an extension.

12% Are you kidding? I get it in 5 min. before the post office closes on April 15.



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Feature Article: Sage Peachtree 2012

Announcing Sage Peachtree 2012!

We're proud to announce the launch of Sage Peachtree 2012! Some of the new features are described in more detail elsewhere in this newsletter, but let's take a few moments to review what's new.

The "stars" of this release help you quickly get to information for better, faster decision-making, and show you how to get more out of your software.

- **Vendor Management Center**. We hope you've already discovered the power of our Customer, Job, and Inventory/Services management centers. The only thing missing was more robust vendor management, and now it's here! It's the fast, easy way to research information for a single vendor – purchasing history, contact information, prices, delivery dates, discounts, and more. Very helpful in managing costs and negotiating prices.
- **System Check.** Ever wonder why your Sage peachtree application seems to haveslowed down? Or how to best respond to an error message that pops up? System Check is a single dashboard view into all your important system statuses. Use the "traffic lights" to see what needs attention, and get advice and links to help resolve potential issues before they occur.
- **Sage Advisor**. We're serious about helping you work more efficiently and get the most out of your software. Sage Advisor provides short, helpful tips right when you need them. Read them now or save them for later; we put the controls in your hands. In fact, some of you helped us design this feature in our usability lab!
- **Sage Peachtree Business Intelligence**. This is a powerful Microsoft® Excel®-based reporting tool that integrates with Sage Peachtree to produce always-current customized reports. Read more in this month's Excel Tips and Tricks.

You'll also find many enhancements to help you work more efficiently. In fact, sometimes it's the little things that mean the most to you every day.

- **Copy Transactions**. An easy way to create a new transaction based on a previous one, then make quick adjustments to items, prices, quantity.
- **Expanded Payroll Fields**. More room to capture payroll information required by 2010 legislation, plus the ability to respond to future reporting requirements.
- **Management Center Enhancements**. More customization, more at-a-glance totals, easier filtering, less scrolling – and yes, now you can scroll with your mouse!
- **Easier Network Installation**. A faster, more accurate multi-user installation process for software upgrades. Your tech guy or Certified Consultant will love this.
- **Workflow Automation**. Just set up default assignments for your Workflow transaction statuses and work is automatically routed to the right person at the right time.
- **More My Dashboard Modules**. More choices and more customization for more roles and departments within the company, including Purchasing and Project Management.

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Sage Summit 2011: A Vacation Destination

Are You Ready for Sage Summit?

Hopefully, you're making plans to join us in Washington D.C. in July. We'll have plenty of learning, networking, and recreational opportunities for you at the Gaylord National Hotel. If you have some extra time and want to take in some of the DC sites, we have a few suggestions.

The many Smithsonian Museums are incredible – so make sure you plan to spend at least 4 hours in any one you visit. There's so much to see in each one! But there are also other museums to consider visiting – like the Spy Museum or the Newseum (devoted to all things newsworthy).

To get a great view of the Washington Monument, check out the observation deck at the Old Post Office Pavilion. Tours of the clock tower are free and, afterwards, you can eat, shop, or enjoy a little local entertainment.

If you're not busy on Tuesday, another "free" attraction to consider is the Butterfly Pavilion at the National Museum of Natural History. A timed-entry ticket is required and can be obtained at the Pavilion box office.

And if you're more interested in making money than in saving it, be sure to visit the US Bureau of Engraving and Printing.

Other places to check out include:

- The Willard InterContinental Hotel where the Reverend Martin Luther King, Jr. wrote his iconic "I Have a Dream" speech.
- The John F. Kennedy Center for the Performing Arts – Wicked is on the calendar for July.
- If you have time, visit another Sage Peachtree customer at Catoctin Creek Distilling Company.

Finally, try these lists for even more info – and make sure you have a great time in DC!

- 100 Free Things to Do
- Things to do in Washington, D.C.
- Other Washington, D.C. Attractions

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Social Media: Be Part of the Conversation

Using Social Media in Product Development

Our latest release – Sage Peachtree Accounting 2012 – caps over a year of planning, production and testing. It involves scores of Sage employees and customers. Customers? Sure! We involve customers like you at nearly every stage of the process. Here's a peek into how we decide what new functionality makes the cut – and how social media tools help.

Roadmap. We have a 3-year road map of our plans for the product. It changes as technology, the economy or your needs change, but it does guide us through the planning process.

Surveys. If you opted in to our in-product surveys, there's a chance that you've already weighed in on one or more questionnaires. We ask you to rank proposed features according to your needs, and sometimes ask you to help us name a particular feature.

Enhancement Requests. If you have an idea for a new feature or product enhancement, you can enter it online. This feedback process lets you describe your idea and vote on other suggestions. We review all requests and use that information in the development process. And we try to get back to you if your idea is implemented.

Social Media. We're very active on Twitter, Facebook and the Sage Peachtree Community. Although different vehicles with different types of participants, they all help us listen to our customers and the business community. There's always a healthy exchange of ideas, and even the occasional disgruntled tweet or post helps us uncover issues that should be addressed.

Usability Testing. The Sage Peachtree campus has an active usability lab where we bring in both customers and non-customers to test concepts and help us refine a feature. The one-way glass allows us to watch as you test our design and uncover what's working and what needs tweaking.

Customer Visits. Our favorite way of gathering input is to visit you at your place of business. By observing your processes and watching you use our software, we can understand more about what you need and why. Many times we try to work in a customer visit when we're traveling for business.

***Note:** We'll be in the Washington D.C. area for Sage Summit in July and would love to come visit your business. Let us know if you're interested.*

As you can see, there are many ways for you to engage with us and share your product ideas and business challenges. We love to hear from you and want to make sure our software is meeting your needs.

Comment on this article

Join the Sage Peachtree Community!

Get answers and advice from the thousands of members of the Sage Peachtree Online Community. Join in the discussion at http://community.peachtree.com

Excel Tips and Tricks: Excel on Steroids!

Sage Peachtree Business Intelligence

We know you love working in Microsoft® Excel®. That's why we started this Excel Tips and Tricks column. However, there's a new 2012 feature that we've been anxious to tell you about – Sage Peachtree Business Intelligence. It's a powerful Excel-based reporting solution that integrates with your Sage Peachtree Accounting software.

Sage Peachtree Business Intelligence uses real-time information pulled directly from your Sage Peachtree Accounting system – and even other databases - to give you easier access to your business information.

You or your accountant can custom-design almost any report you need, giving you total control over your reporting process. Every custom report you make can be saved for future use, sparing you time and effort. And every time you open that report, it is automatically updated with current Sage Peachtree information.

Give it a try! There's a free 60-day trial in your Sage Peachtree 2012 software. Just go to Reports and Forms > Business Intelligence to learn more or get started. It doesn't require a separate installation, and it's Microsoft® Excel®-based, so the tools and features may already feel familiar and intuitive. Plus, there are 7 standard report templates you can use right away. That's what we call fast ROI.

Now it's easier than ever to find the answers you need and make informed decisions with confidence.

Watch a quick video, or read more online at CPA Practice Advisor.

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Business Efficiency

Three Quick Business Efficiency Tips

1. Easy Check Deposits

Did you know driving to the bank to make daily or weekly check deposits is not your only option anymore? The Check Clearing Act for the 21st Century, better known as Check 21, paved the way for remote deposit capture, giving you the ability to deposit checks from the comfort of your office.

To begin, you will need a service provider such as Sage Deposit Boss, a dual sided check scanner, and Internet access. You can deposit checks on your time, 24/7, without the hassle of making a trip to the bank and waiting in lines. All of a sudden your business became more efficient! Learn more.

2. One-Click GL Update for Payroll

It's Friday! The pay period has ended. You've spent valuable time meticulously entering employee work data in your payroll system, and finally hit the Submit button. You're done right? Not so fast! If you're

Continued on next page >

Business Efficiency

< Continued from previous page

using a third-party payroll service, you may have to double your efforts and re-enter that information within Sage Peachtree to ensure those payments are reflected in your general ledger. Not fun. Plus you risk reconciliation errors.

There's a gem of a feature within Sage Peachtree Managed Payroll that allows for seamlessly updating your general ledger – PeachSync. It's the only payroll data import function fully integrated with your Sage Peachtree software, and very simple to do. Watch this short video to see for yourself. Now you'll have more time to enjoy your weekend!

3. View Different Parts of an Excel Worksheet at One Time

A very handy feature of Excel is its ability to allow you to view more than one copy of your worksheet, and for you to be able to scroll through each pane independently. You can do this by using a feature called Split Panes, which lets you split your worksheet both horizontally and vertically.

- Select the **View** tab then click on **Split** (Excel 2007 & 2010).
- For earlier versions — Excel 2003, XP and 2000 — click on the **Window** menu and select **Split**. View step-by-step instructions

When you split panes, the panes of your worksheet work simultaneously. If you make a change in one, it will simultaneously appear in the other. If you wish to move the split, just place your mouse over it, hold down your left mouse button and drag to where you want it. To get rid of the split, just double click it, or go to **Window > Remove Split**.

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FAQ

Q **How can Sage Peachtree 2012 help prevent costly work interruptions?**

A The new System Check feature in Sage Peachtree 2012 provides the tools to proactively monitor application health and resolve issues before they affect your productivity. System Check displays a snapshot of critical statuses and allows you to manage important maintenance tasks like Backup, Data Verification, Internal Accounting Review and more in one central location. System Check also offers a new utility for quickly identifying and inactivating unused customer records. Get all the details in this month's Tip of the Month.

Q **How can the Workflow Automation feature in Sage Peachtree Quantum 2012 increase the efficiency and effectiveness of our staff?**

A Workflow Automation can help you maintain efficient, effective processes by ensuring that that the right people are working on the right tasks at the right time. With Sage Peachtree Quantum 2012, you can now automatically assign transactions based on their status. With default assignments set for each of your transaction statuses, you can be confident that work is routed to the right people at the right time. This offers better process control and can help reduce bottlenecks and accelerate turnaround time.

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Retirement Readiness: Retirement Savings Goals

Retirement Savings Goals: Create and Start Saving

Brought to you by Retirement Services for Sage Customers

We're five months into 2011. Are you still following through on your New Year's resolutions?

If you're like most people, few of those goals are ever reached successfully. Yet, studies show that creating and documenting specific attainable goals increases your chances of success by approximately 300%.[1]

Apply this technique to your retirement goals, both personally and as a plan sponsor making decisions on behalf of your employees.

It is your responsibility as a fiduciary to set goals for your company's retirement plan. The following questions might get you started:

- Why are you offering a retirement plan to your employees?
- What is the plan's annual savings goal?
- Are employees on track to reach retirement with enough money to live on?
- How will you determine this and make improvements, if necessary?

Knowing is half the battle. Once you have the proper information you can take action to reach your goals.

For example, if your employees aren't saving enough to live on in their golden years, implementing automatic enrollment or a company matching program may entice them to contribute more to receive the "free money."

Once you're created your goals, document them, review and note progress regularly. Share these goals and report their status to increase awareness and create a sense of shared accountability around the issue. This "team goal" approach will help keep more employees on track for success. Learn more.

Follow Retirement Services for Sage Customers on Twitter.

1. Harvard Business Review, Nine Things Successful People Do Differently

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Sage Peachtree Tweet of the Month

Last months' most popular @PeachtreebySage Tweet:

Is Your Payment Processing Service Adequate? A Chocolate Company Switches to Sage Payment Solutions http://read.bi/hwAnuK by @ramonray CC @davidsonchoc

PeachtreeBySage

Follow us to get daily tips and news about Sage Peachtree, small business resources, and social media information.

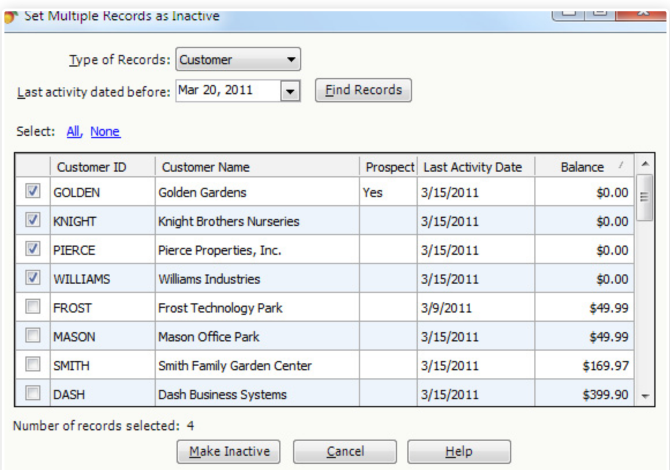
Tip of the Month

Quickly Inactivate and Hide Customer Records

With Sage Peachtree 2012, you can now quickly inactivate all of your unused or unneeded customer records from one convenient window. You no longer have to open each record separately and search for the latest activity.

Make Inactive

To access this new window, select the new **System** navigation center from the navigation bar. In the **Data Maintenance** section, click the **Make Records Inactive** button. You can also access this window by selecting **Maintain** from the file menu and then **Make Records Inactive**.



	Customer ID	Customer Name	Prospect	Last Activity Date	Balance
☑	GOLDEN	Golden Gardens	Yes	3/15/2011	$0.00
☑	KNIGHT	Knight Brothers Nurseries		3/15/2011	$0.00
☑	PIERCE	Pierce Properties, Inc.		3/15/2011	$0.00
☑	WILLIAMS	Williams Industries		3/15/2011	$0.00
☐	FROST	Frost Technology Park		3/9/2011	$49.99
☐	MASON	Mason Office Park		3/15/2011	$49.99
☐	SMITH	Smith Family Garden Center		3/15/2011	$169.97
☐	DASH	Dash Business Systems		3/15/2011	$399.90

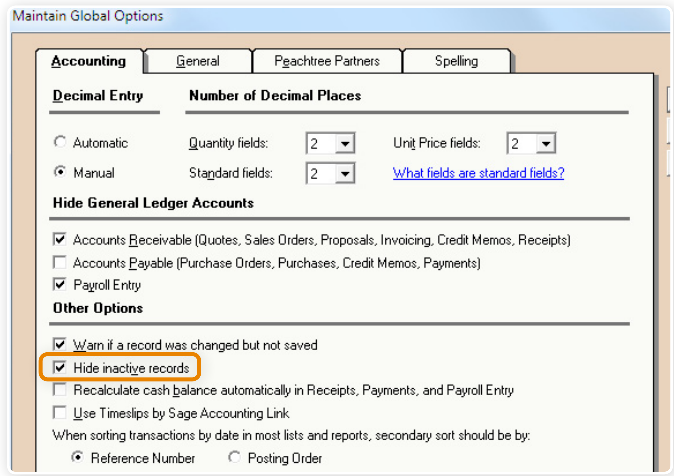
The **Set Multiple Records as Inactive** window lets you make multiple customer records inactive at one time. By default, the table will automatically display active records that have not had any activity in the past 180 days. You can optionally change the date and then click **Find Records** to update the table.

Select **All, None** or mark the checkbox for each record that you want to make inactive. To help speed up your selections, you can sort the table by clicking on a column header. For example, if you want to make inactive only those customers that have a zero balance, click the **Balance** column header to sort the records by balance.

When you are finished with your selections, simply click the **Make Inactive** button and then **Yes** to the confirmation prompt. Sage Peachtree will then make the records inactive.

Hide Inactive

If you would like to remove inactive records from your lookup lists and list windows, select **Options** from the file menu and then **Global**.



In the **Other Options** section of the **Accounting** tab, place a checkmark next to the **Hide inactive records** option. Click **OK** and Sage Peachtree will hide all records marked as inactive from your lists. Note that this option does not remove the records from your system, it only hides them. Inactive records will still appear in reports, and the transaction history of an inactive record will remain in your journals.

Purge Inactive

Because the records are now set to inactive, they will be eligible for purging when you run the **Purge Wizard** (available from the **System** navigation center, or under **Tasks > System > Purge Wizard**).

Want more tips like this?
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The Sage Peachtree Facebook Fan Page has business news, special offers, tips and occasional contests. "Like" us and become a fan today!

Top Online Community Discussions

The Sage Peachtree Online Community over the past month:

- Entering charitable contributions
- Checking account reconciliation
- Peachtree 2010 for Mac OS X
- Error Importing CSV for Sales Order Journal
- Cost changes