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*From the April/May 2010 Review of [Small Business Accounting Systems \(Locally Installed\)](#).*

### Peachtree

Premium Accounting, like a fine wine, seems to get better with age. Always an accountant favorite, Peachtree has really ramped up its product improvements and enhancements since being purchased by Sage, making Peachtree a staple in the offices of millions of small businesses worldwide.

#### **BASIC SYSTEM FUNCTIONS:**

Installation of Peachtree has always been problem free for me, and with the new enhanced installation, it's even quicker than ever before. Total installation time was approximately 10 minutes and will be dependent upon your computer.

During the new company setup, users can choose the business type that best fits the company's needs, such as construction, distribution, manufacturing, retail or service. The installed chart of accounts will reflect the business type chosen. Peachtree's user interface is customizable so only the information that users want displayed will show on-screen. The Business Status page displays various statistics, with up to eight different displays available. Company navigation centers offer quick drill-down for easy information entry. All financial functions such as customers and sales, vendors and purchases, inventory and services, employees and payroll, and banking are displayed on the left side of the screen. Data-entry screens are nicely arranged, with numerous options on the toolbar above that can be performed in conjunction with the transaction being processed. Peachtree Complete and higher (including Premium) has job, phase and cost code costing capabilities, and Peachtree Quantum features a new job management center.

Other industry-specific features can be found in the various industry-specific

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tickets, handle credits and returns, pay bills and void checks. The AR function enables users to process quotes and proposals, track job costing, process sales orders, produce invoices, and manage finance charges.

Sales tax functionality is found in the customers and sales center and can be easily set up by simply entering the appropriate tax rate and the individual rates that encompass that rate. In order to track tax data, users will need to enter the tax agency information and account number for posting.

Peachtree has an excellent audit trail that tracks date, time, user name, action, transaction ID and reference number, and the amount of each transaction. The audit trail report will display this information in an easy-to-read format. Peachtree Premium does not offer multi-currency options or multi-location capability at this time, but Peachtree Quantum Manufacturing Edition does support multiple locations.

#### **DAY-TO-DAY OPERATIONS:**

Peachtree easily processes customer quotes, which are then easily converted to sales orders. Invoices can be created and then printed directly from the converted sales order, and payments are easily applied on accounts. Also available is the option to "broadcast" a sales invoice, which processes multiple invoices that incur the same charge. Cash sales can be entered as well as prepayments and credit memos. Credit card payments can be processed manually or with a swipe machine. Point-of-sale functionality is not available in this version of Peachtree, but is available via third-party integrated solutions, and it also integrates with UPS.

The customer management screen allows users to display sales invoices, receipts, credit memos and totals in a fully customizable display. Customer information

is easily tracked, with standard contact information available, as well as purchase

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for review. Inventory items can be set up for assemblies, and an excellent selection of inventory reports and a new dashboard assists with product performance tracking.

Users can email invoices or statements directly from Peachtree Premium Accounting. Remote access is available by using Peachtree Remote Access. The program can be set to synch with Outlook, and vendor e-payments can be made using the Peachtree Online Bill Pay feature.

#### **MANAGEMENT FEATURES:**

The Business Status screens display a series of dashboard reports that are chosen by users, with eight different views available, including account balance, aged payables and revenue YTD. Users can opt to display any number of these eight views. The reports option displays a list of report categories and all the reports found within that category. Reports can be run individually or in groups. All reports contain numerous setup options and various filters. Crystal Reports for Peachtree is included with Peachtree Premium Accounting and provides custom report creation with a wizard for easy setup and customization. All reports can be emailed to recipients or exported to Excel or PDF.

User security is better than ever with the following access levels: entire product, select access or no access. Select access allows administrators to assign access rights and tasks within each module with varying degrees of access (full, view only, add, edit, none).

#### **INTEGRATION/IMPORT/EXPORT:**

Peachtree offers ODBC/OLEDB access, which strengthens the products import/export capabilities. The import/export filter allows users to select specific fields that need to be imported or exported. Files must be in comma-separated ASCII (CSV) format. Also available is the ability to convert QuickBooks data into

Peachtree. A long list of third-party add-on products, as well as some of the

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Peachtree Premium Accounting contains a solid Help function, as well as a "What's New in Peachtree" guide. A setup guide provides a handy reference to all areas that need set up. A User's Guide is also available. The vendor provides brief tutorials on frequently used function, and links to customer support and service, as well as the Peachtree website, are also included. All service releases are listed on Peachtree's website and can be easily downloaded at any time. The company also provides 30 days of free access to the Sage University and Peachtree Community. Payroll tax tables can also be downloaded from the Payroll navigation center.

The Peachtree Knowledgebase contains a long list of FAQs with detailed answers, and it can be searched by keyword, product line, answer ID or phrase. The customer service chat option is also free. Three levels of support plans are available: Monthly Support, Freedom Support and Peachtree Business Care. All offer phone and email support, live chat and website support access.

## **SUMMARY & PRICING**

Peachtree Premium Accounting 2011 is \$499.99 for a single-user system and \$1,199.99 for a five-user version, and includes functionality for our core module set of GL, AP, AR and Payroll. Peachtree by Sage offers small business users a wide array of products suitable for the very small one-person office to the multi-user environment. Peachtree Premium 2011 is loaded with new features and enhancements, and will be a good fit for those looking for a product that offers ease of use without sacrificing solid accounting and reporting functionality.

## **2010 OVERALL RATING:**

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