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ACCOUNTING

The Sage Peachtree Perspective

New Column: The Sage Peachtree Perspective

Melody Steelman • Apr. 16, 2010

I would like to introduce you to our newest regular column, “The Sage Peachtree Perspective.” As many of you know, The CPA Technology Advisor launched a regular column six years ago dedicated to the world of QuickBooks — “The QuickBooks Advisor,” written by Doug Sleeter. That column was introduced because you (our readers) asked for help in dealing with the large client base seemingly determined to use QuickBooks.

Well, you have spoken once again, and we have listened. Many of you are Sage Peachtree users and have small business clients who are either using Sage Peachtree or who are looking for an alternative to what they are currently using. Sage Peachtree has a significant market share, and the company has a strong network of firms around the country through its Sage Accountants Network. The feedback has been compelling enough that we recognize the value in adding a regular column that teaches you how to take advantage of the functionality of the product in order to make your firm and your clients' businesses more efficient and more profitable. Through tips, tricks and how-tos, this new column will highlight the benefits of the Sage Peachtree product line and show you how to better navigate and utilize the many opportunities that are just waiting to be discovered.

As many of you know, Sage Peachtree has been around for years. We've watched the product grow and mature with great success, with significant upgrades and enhancements added each year. The Sage Peachtree product line offers a full

spectrum of versions: Sage Peachtree Pro Accounting, Sage Peachtree Complete Accounting, Sage Peachtree Premium Accounting, and Sage Peachtree Quantum. Numerous industry-specific options are available, as well, including versions for contractors, distributors, manufacturers and nonprofits. Sage also offers a variety of payroll solutions that integrate with its Sage Peachtree product line: Sage Peachtree Simple Payroll, Sage Peachtree Select Payroll and Sage Peachtree Managed Payroll. As well, Sage provides three support plan levels to ensure that you, your firm and your small business clients stay current with the latest product offerings. All Sage Peachtree technical support is US-based.

Additional features like credit card processing, online bill pay, the ability to attach documents to transactions and records, all make Sage Peachtree a sound solution. For those of you who haven't looked at this product line lately, now would be an opportune time to take a good, thorough look. As you can see in Image 1, Sage Peachtree developers have done an excellent job incorporating popular dashboard features into the product. This growing trend in how products present information is one of the best tools in business management, providing customizable at-a-glance snapshots of key business metrics for viewing, sorting, monitoring and reporting.

Another area of strength is the product's ability to produce a financial statement, with proper formatting, that can be passed along to clients. Many firms using QuickBooks have struggled to produce financial statements that can be given directly to their clients. The financial statement designer component of Sage Peachtree is built to do just that (see Image 2). And as you can see in Image 3, customized client financial statements can be included in a report group to be printed at any time.

Many accounting firms tell us that their small business clients find it difficult to get the training they need to use their accounting software in the most efficient and accurate manner. To meet this growing need, Sage has introduced its Sage University online learning series to help train you, your staff and your small business clients on the correct way to use Sage Peachtree and to generate transactions.

Sage University is an excellent tool that every firm should take advantage of to gain valuable product skills, but it is our hope that this new column will also help meet the needs and answer some of the questions you and your small business clients have about the best methods and processes for using Sage Peachtree to increase productivity and efficiency.

And while I am the one introducing this new column and providing a quick overview of the Sage Peachtree product line and offerings, I will not actually be the one writing

this column in subsequent issues. Rather, I would like to take this opportunity to introduce Brian Tankersley, the individual who will be writing this regular column beginning with the June 2010 issue. Some of you may already know Brian or know of him through his work nationally as a speaker and consultant with K2 Enterprises (www.k2e.com). Brian is a CPA and CITP (Certified Information Technology Professional) based in Knoxville, Tennessee. He is a frequent speaker at continuing education courses on auditing and technology, and is a senior faculty member with Becker Professional Education.

Brian has written periodically for *The CPA Technology Advisor* in recent years and also publishes a nationally recognized blog on accounting and technology at <http://blog.bftcpa.com>. Brian was selected as one of *The CPA Technology Advisor's* "40 Under 40" in both 2007 and 2008. He has experience working in accounting firms as both a "normal" accountant and a technology manager, has supported small business accounting software for more than 10 years, and has also worked with clients and accounting firms on internal IT issues. He serves as a member of the Sage Accountants Network Peachtree Advisory Council, and I believe the practical experience and insight Brian will bring to this column will help you be more effective in your day-to-day work with the Sage Peachtree product line.

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