



Introducing Peachtree by Sage 2010

This release of the Peachtree product line will offer you expanded capabilities around *customization, access, and control*. Features such as the ability to set-up, view, and quickly access specific industry and company information, allow you to keep up-to-date on your industry trends and better manage your customers, as well as address how you find your inventory information quicker and manage customer sales history for better tracking. All of these items are backed by a stronger security set-up ensuring that information is more protected than ever.

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

Peachtree by Sage 2010 – Release Overview

NEW! Transaction History

- 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.
- Save time getting to the information you need to take action!

NEW! Customer Management Center

- Save time by viewing 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 customer's information such as their converted and unconverted quotes, invoices, receipts, time tickets, aged balances, items sold, and much more. Drill down to the detail and quickly take action.
- Save time by looking 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. Utilize the Recent Selections link to quickly pull up customers who you have already viewed.
- Easily export customer information to Excel®¹ or PDF or launch an e-mail² from the Customer Management Center.

NEW! Open Multiple Companies³

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

NEW! Multiple Contacts⁴

- 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.

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NEW! 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.
- Notify users to log out, or automatically log them off in order to run your backup. (Peachtree Quantum only)

IMPROVED! Employee Management

- Save time and reduce errors by keeping track of all your employees' information in one place!
- Store additional employee data within Peachtree such as emergency contact, performance reviews, employment details like hiring date and I-9 verification, additional phone numbers, and much more.
- Easily stay on top of your employees' records by receiving alerts and reminders for key tasks coming up such as review dates.

NEW! Business Analytics powered by iLumen⁵

- See how your company is performing compared to other companies with the new customizable company dashboard!
- Get instant access to view up-to-date key financial trends in order to compare items such as Total Revenue, Gross Margin %, Days Sales Outstanding, and much more.
- Use this tool to help improve your business' financial health and make critical decisions.

IMPROVED! Inventory Management

- Save time looking up items with the ability to search on inventory information in the Description for Sales, Description for Purchases, or the Item Note fields.
- See what your customers are buying with the new Item Sales History by Customer onscreen view and report.
- Streamline your data entry when setting up new items with the ability to set the Item Class default based on your most common inventory type such as Stock, Non-Stock, Service, etc.

IMPROVED! Password Security

- Secure your company's data from unauthorized access with increased password security options.
- Strengthen your password security with new customizable options such as automatic password expiration, multiple incorrect password attempts lockout, no repeat passwords, and masking passwords from other users in Peachtree.
- Maintenance is easier giving users the ability to change their own passwords without relying on the admin, and requiring strong password compliance.

NEW! ODBC/OLEDB Access

- ODBC (Open Database Connectivity) and OLEDB (Object Linking and Embedding, Database) offer you a way to connect to your Peachtree company data without using Peachtree directly.
 - You can create an ODBC or OLEDB connection directly between another application, such as Microsoft Excel or Access
 - The data in your Peachtree company, such as customer records, transactions, and so on can be accessed
 - Allows you to create reports in these other programs and filter or sort your company data in virtually any way you want

NEW! Peachtree Resource Center

- We know you need more than just Peachtree to run your business. That's why we have a variety of products and services that can help meet your needs.
- You'll find a full list of Peachtree services, training courses, marketing tools, and much more readily available as your business needs evolve.
- Get easy access to the latest news, product tips, white papers, knowledgebase articles, and other free resources to help you run your business more effectively.
- No need to look around - just reference the Peachtree Resource Center for all your business needs.

IMPROVED! In-Product Advisor

- Learn the best way to work within Peachtree by leveraging our in-product user tips. These tips will help you discover functions or features that will assist you in learning other areas of the product quicker.
- The Advisor will assist you in pointing out better ways to accomplish common tasks in the program, in areas such as Sales/Invoicing, Inventory, Vendors, Receipts, and General Journal Entries.
- And you can set your experience with Peachtree to maximize the effectiveness of assistance you might require, as well as set the length of time that each message will be displayed.

NEW! Peachtree Quantum - My Dashboard

- Everyone is unique in how they work in Peachtree. Now every user can create their own personalized dashboard to help them clean up the clutter and only focus on what they need to.
- Customize the screens to only show things you do on a regular basis like managing Aged Receivables, or Aged Payables, or Payroll and much more. Mix and match from various functions in Peachtree. Or make another view that shows only the tasks you need on a weekly or monthly basis - you choose!
- However you create your tabs, you will have the ability to customize the individual areas and filter data based on how you need to track it. And security is assured so that only available modules are shown based on the user's security level.

NEW! Peachtree Quantum - Order Process Workflow

- Improve daily efficiency of your business with the new Order Process Workflow system in Peachtree Quantum.
- Keep track of all the moving parts of your order process so nothing gets missed and everything moves along as planned.
- Notify the next person in the process, with a status and specific notes as needed.
- Have one centralized place to keep track of all process statuses, or just your own tasks.
- Automatically send notifications to designated employees/customers/vendors once a task is completed.

NEW! Peachtree Quantum – Multi-User Management

- Now a better way to manage users in Peachtree!
- Send notifications to other users that they need to log out, or if necessary, manually log them out of the company.

1 Requires Microsoft Excel 2002, 2003, or 2007.

2 Requires Microsoft Outlook 2002, 2003 or 2007; Outlook Express 5 or 6; other MAPI compliant e-mail programs.

3 When opening more than one company performance is not impacted; however, you will experience reduced product functionality in those companies opened after the first one.

4 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.

5 Internet access required. Service is embedded within Peachtree 2010, however is also available for Peachtree 2008 and 2009 products via a separate application download from www.peachtree.com.

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