



## Sage Peachtree 2011 Release Overview

This release of the Sage Peachtree product line is easier than ever. It simplifies your everyday tasks so you can **get more work done**, with features such as easier installation, streamlined services billing and a setup advisor for maintenance records. Sage Peachtree 2011 **gets you to your data faster** so you can work more efficiently with the new Inventory and Services Management Center, improved job management and the Quantum job navigation center. Finally, the new change order processing, enhanced assemblies reporting and Quantum interactive job reporting provide tools to help you **increase business profitability**.

*Features listed vary by product. Please visit [www.peachtree.com](http://www.peachtree.com) for a list of specific product features.*

### Get more work done.

#### **NEW!** 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.

#### **NEW!** 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.

#### **IMPROVED!** Easier Install

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.



One Northbrook Plaza  
5 Revere Drive Suite 200  
Northbrook, Illinois 60062

847.835.0979

[northbrookconsulting.com](http://northbrookconsulting.com)



Certified Consultant

Accuracy. Control. Results.

# Sage Peachtree



## Get to your data faster.

### **NEW!** 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.

### **NEW!** 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. (ex. At Risk, On Schedule, Late)

### **IMPROVED!** 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

### **IMPROVED!** 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.

### **NEW!** Quantum 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.

### **NEW!** 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".



One Northbrook Plaza  
5 Revere Drive Suite 200  
Northbrook, Illinois 60062

847.835.0979

[northbrookconsulting.com](http://northbrookconsulting.com)

**sage**

Certified Consultant

Accuracy. Control. Results.

**Sage Peachtree**



## Increase business profitability.

### **NEW!** 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).

### **IMPROVED!** 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

### **NEW!** Interactive Job Reporting

Quick, on-the-fly custom reports with real-time totals 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 Excel which makes it very easy to continue to customize. You can send the output to multiple formats - Excel, PDF or email.