

Chapter 1

Mastering Peachtree Basics

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 - ▶ Navigating the Peachtree screen
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If you've been keeping your financial records by using manual methods, you know how time-consuming it can be. Keeping books manually also provides too many opportunities for human error. Using Peachtree saves you both time and money; in addition, you can know at any moment in time your complete financial status. We know you're eager to get started. Operating a business is a non stop process, but to computerize your accounting, you have to put first things first.

To work effectively, take some time to get comfortable with some of the features unique to Peachtree. In this chapter, you find out how to navigate in the software as well as open and close companies as needed. If you're ready, it's time to dig in.

Starting the Program

You have a choice: You can start Peachtree the easy way or the hard way. We prefer the easy way. When you installed Peachtree, it placed a Peachtree icon (with your permission) on your Windows desktop. Assuming (we know, we're not supposed to assume) that you haven't thrown that icon into the Recycle Bin, you can simply double-click the Peachtree icon (the one with the peachy little peach on it), and the program starts.



To make sure that Peachtree always starts in a full-sized (maximized) window, right-click the Peachtree icon and choose Properties. In the resulting dialog box, on the Shortcut tab, click the drop-down arrow in the Run box, choose Maximized, and then click OK to accept the changes.

If you did throw the icon away or you have so many icons on your desktop that you can't find it, okay, you can start Peachtree the hard way. Choose Start→All Programs and locate your Peachtree Accounting folder.

Choosing opening options

After you start Peachtree, what do you do with it? The Peachtree Start Screen appears as seen in Figure 1-1, beckoning you to do one of several things. You can select any of the following options:

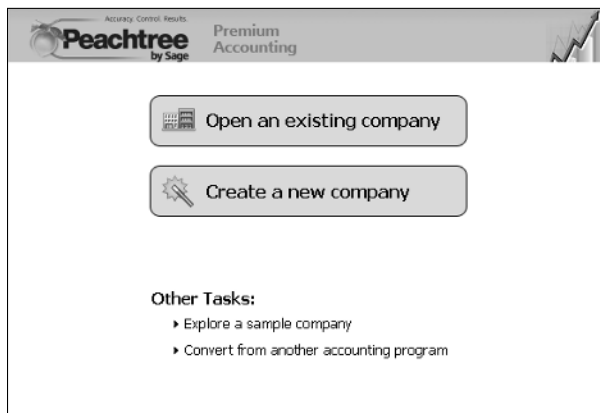


Figure 1-1:
Make a selection from the Start Screen.

- ✓ **Open an Existing Company:** Use this option to open a company already existing in Peachtree.
- ✓ **Create a New Company:** Select this option to set up your business with the New Company Setup Wizard. (Chapter 2 covers this wizard.)
- ✓ **Explore a Sample Company:** Use this option to explore one of several fictitious companies. One company, Bellwether Garden Supply, is a retail and service company that uses most of the features of Peachtree, including inventory and job costing. Depending on the Peachtree edition that you're using, you might have additional sample companies to investigate. You explore Bellwether Garden Supply in the steps in the following section.
- ✓ **Convert from Another Accounting Program:** If you've finally come to your senses and want to transfer to Peachtree from *that other software* (meaning QuickBooks or DacEasy), click this choice. Peachtree makes the conversion pretty painless.

Exploring a sample company

You can best explore Peachtree's features by opening the Bellwether Garden Supply sample company and finding out how to move around in Peachtree. To open a sample company, follow these steps:

- 1. Click Explore a Sample Company.**

If you're using Peachtree First Accounting or Peachtree Pro Accounting, Bellwether Garden Supply immediately opens.

If you're using Peachtree Complete Accounting or above, the Explore a Sample Company dialog box opens.

- 2. Select the radio button next to the sample company that you want to explore.**

For this example, select Bellwether Garden Supply.

- 3. Click OK.**

The name of the currently open company appears at the top of the window in the Peachtree title bar.

Getting around town

When you first open a company, it might appear a little bit intimidating. On the left side, Peachtree displays the Navigation Bar. You click a Navigation Bar topic as one method to get into the seven various Peachtree Navigation Centers such as the Business Status Center shown in Figure 1-2 or the Employees and Payroll Center. The Navigation Centers show the work flow of the selected center and quickly take you to a window where you can perform relevant tasks. Each Navigation Center also displays key information relative to the selected center. For example, in the Employees and Payroll Center you can see a list of employees and 1099 vendors as well as quick links to recently used employee reports while in the Customers and Sales Center, you can see a list of customers.

Under the Navigation Bar is the Shortcuts section. The Shortcuts section contains links you can click to quickly jump into Peachtree windows that you use in your business on a day-to-day basis. See Bonus Chapter 1 on this book's Web site, www.dummies.com/go/peachtreeefd, for instructions on customizing the Shortcuts so they include the features you use most often.

The large section on the right is where Peachtree displays the various Peachtree centers. By default, when you open your company, you see the Business Status Center. You can find out how to customize the Business Status Center in Bonus Chapter 2 on this book's Web site.

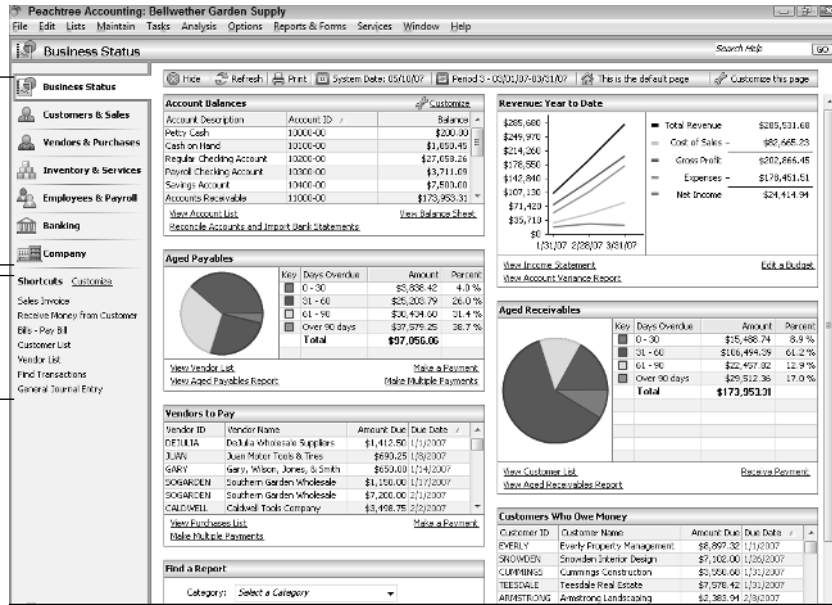


Figure 1-2: Selecting options by using the Navigation Bar.

Shortcuts section
Navigation bar

At the top of the open center you see the Button Control Bar that displays, among other things, the current system date and the current accounting period. (See Figure 1-3.)

Figure 1-3: The current accounting period appears on the Navigation Bar toolbar.



Like many applications today, Peachtree provides a variety of ways to use the software. You can perform your Peachtree duties by using the Button Control Bar, the Shortcuts section, or — a more traditional method — menu commands.

Choosing menu commands

The pull-down menus should be a familiar sight from your other Windows programs. Even though all the menu choices are important, you're likely to spend the majority of your time in Peachtree using the following four main menu choices:

- ✓ **Maintain:** Using the choices on this menu, you can set up and edit the information records that form the foundation for transactions in your Peachtree company. For example, you can store vendor, customer, inventory, and employee information, including names, addresses, and phone numbers.

A *record* is all the information about one person, product, event, and so on. Every record in a database contains the same fields. A *field* is one item of information in a record, such as an ID, a name, or a transaction number. To explore the kinds of information that you store in Peachtree, see the “Exploring fields and records” section, later in this chapter.

- ✓ **Lists:** This menu displays lists of . . . well, just about everything stored in Peachtree — customers, vendors, checks, journal entries, and so on. Any list can be sorted and customized (see Bonus Chapter 1 on this book's Web site) to better help you locate desired information. Figure 1-4 illustrates a list of Inventory Adjustments made during a specified period.



Item ID	DescriptiveName	Period	Date	Reference
500 83	POST-36210		3/1/2007	AD0331
ECON-15110	Garden Hose - 50 Ft	3	3/2/2007	AD0332
POST-36210	Clay Flower Pot - 6 in.	3	3/5/2007	AD0333
AVRY-10050-LG-EFL	Prefabricated Birdhouse	3	3/4/2007	
AVRY-10050-LG-EFL	Prefabricated Birdhouse	3	3/15/2007	
AVRY-10050-SM-EFL	Prefabricated Birdhouse	3	3/15/2007	
AVRY-10050-SM-HTL	Prefabricated Birdhouse	3	3/15/2007	
AVRY-10050-SM-HTL	Prefabricated Birdhouse	3	3/15/2007	
AVRY-10050-SM-PTR	Prefabricated Birdhouse	3	3/15/2007	

Figure 1-4:
Displaying
a list of
transactions.

- ✓ **Tasks:** Use this menu to do your normal day-to-day work. You can bill your customers, buy materials, and pay your workers by using the Tasks menu.
- ✓ **Reports and Forms:** This menu is where it all comes together and you can see the results of all your hard work.

Opening a Company

Maybe you need to keep numbers for more than one business. Peachtree enables you to account for the financial information of more than one company. Although you can open only one company at a time, you can switch back and forth between companies very easily.

The steps to open a company differ, depending on whether you're opening a company while already in a Peachtree company or whether you're opening a company from the Peachtree Start Screen.

Opening a Peachtree company from within Peachtree

If you're already in a Peachtree company and want to open a different one, follow these steps:

1. Choose File⇨Open Company (or press Ctrl+O).

You get an annoying little message telling you that you're closing the current company. Peachtree allows only one open company at a time.

Select the Do Not Display This Message Again check box to permanently disable the message box.

2. Click OK to acknowledge the message.

The Open dialog box appears.

3. From the Open dialog box, click the company name and then click OK.

The newly opened company name appears at the top of the screen. No matter which company you open, the menu choices remain the same.



Opening a recently used Peachtree company

If you find yourself frequently switching back and forth between several companies, Peachtree provides an easier method, the Open Previous Company option. This option lists up to ten previously opened Peachtree company names from which you can select.

Choose File⇨Open Previous Company. From the list of previously opened companies that appears, choose the one you want to open. If the annoying

little message appears, click OK, and Peachtree opens the company you selected.

Opening a company from the Peachtree Start Screen

If you're opening a company from the Peachtree Start Screen, a different dialog box appears. To open a company from the Peachtree Start Screen, follow these steps:

- 1. Click Open an Existing Company to display the Open an Existing Company dialog box.**

This dialog box lists the companies that you recently opened in Peachtree. If the company name that you want to open doesn't appear, click the Browse button and make your selection from the Open Company dialog box.

- 2. Click the company name that you want to open and then click OK.**

The selected company opens.

Exploring Peachtree's Windows

Most windows in Peachtree are similar. They have places for you to fill in information and buttons that you use to take actions in that particular window. The Maintain Customers/Prospects window is typical of many other windows that you use in Peachtree. For an example, open Bellwether Garden Supply and choose Maintain↔Customers/Prospects. Take a stroll around this window.

Managing window sizes and placement



Depending on your screen size and resolution, you might not see enough of a window to suit your needs. Some windows, such as the Sales/Invoice window, display more lines when made larger. If you resize the window manually, Peachtree remembers that setting and uses it each time. You can also click the Windows Maximize button (as shown here in the margin), and Peachtree remembers that you like the window maximized.

To manually resize a window, place your mouse pointer around the border of any window until the pointer appears as a double-headed arrow. Click and drag the border until the window is the appropriate size.

Exploring fields and records

The main part of a Peachtree window consists of fields. Stop for a moment and ponder these components. When we refer to fields, we're not talking about the places where corn grows. *Fields* are pieces of information that fit into a *record*, which is a type of electronic 3 x 5 index card. A record is all the information about one customer, vendor, employee, or inventory part, but a field is one piece of the record such as the ID, name, or phone number. In Figure 1-5, the record is all the information about Archer Scapes and Ponds, and Nancy Archer is in the Contact field.

The screenshot shows the 'Maintain Customers/Prospects' window. At the top, there's a menu bar with 'File', 'Edit', 'Go To', 'Window', and 'Help'. Below the menu bar is a toolbar with icons for 'Close', 'New', 'List', 'Save', 'Save & New', 'Delete', 'Change ID', 'Event', 'Log', 'Letters', and 'Reports'. The main area is titled 'Maintain Customers' and contains a form for a customer record. The 'Customer ID' field is 'ARCHER'. The 'Name' field is 'Archer Scapes and Ponds'. There are checkboxes for 'Prospect' and 'Inactive'. The 'General' tab is selected, showing fields for 'Contact' (Nancy Archer), 'Customer Type' (LAND), 'Account Number', 'Telephone 1' (770-555-4660), 'Billing Address' (778 Oakland Parkway), 'Telephone 2' (770-555-4661), 'City, ST, Zip' (Alpharetta GA 30052), 'Fax' (770-555-4662), 'Country', 'E-mail' (narcher@sample.peachtree.com), 'Sales Tax' (GACHER), 'Web Site' (www.peachtree.com), and 'Balance as of May 10, 2007: \$7,424.67'. There is a 'Copy to Ship Address 1' button. Below the main form is a 'Customizable Fields' section with five numbered fields: 1. Second Contact (Susan Lord), 2. Lawn Care Srv? (No), 3. Monthly Service? (Yes), 4. Qonly Mailing? (Yes), and 5. Referral (Internet). A link 'Customize these fields for your business' is at the bottom right.

Figure 1-5:
Each record
has many
different
fields.

Looking up information



Some fields, such as Customer ID, have either a magnifying glass or an arrow for a drop-down list next to them. These fields contain *lookup lists* that display a list of your customers (or vendors, accounts, employees, inventory items, and so on). You can choose a record from a lookup list. Depending on the global options that you set, a lookup list might automatically appear as you type any character in the field, or you can click the lookup list button (the magnifying glass or down arrow, as shown in the margin here) to display the list that's relevant to the current field. (See Figure 1-6.) See Bonus Chapter 1 at www.dummies.com/go/peachtreefd for more information on setting global options.



Optionally, on most lookup list fields you can display the list by either clicking the right mouse button in the lookup list field or pressing the Shift key along with the question mark (?).

Figure 1-6:
Display
available
choices in a
lookup list.



You can do any of the following while in a lookup list:

- ✓ **Select a customer (vendor, item, and so on) and then click OK.**
Peachtree displays the highlighted record and closes the lookup list.
- ✓ **Click Cancel to close the lookup list without selecting a record.**
- ✓ **Use the Find feature to search for a string of characters.** The search covers any text that you can see in the displayed list. The Find feature is not case sensitive. Press Enter after you type the lookup text in the entry box. Peachtree highlights the first item that matches your request.
- ✓ **Click Next to find the next instance of the previously entered Find text.** If no next instance exists, the Find feature skips to the first instance in the lookup list. If no instance exists, the Next feature does nothing.
- ✓ **Click Sort to sort the displayed list alphabetically by either the ID or the name.** Numbers come before letters.
- ✓ **Use the Help option.**
- ✓ **Use the New button.** This is available only in the Task lookup windows, to add customers, vendors, employees, or inventory items on the fly, which means Peachtree adds the record right in the middle of entering a transaction.

Just browsing



Similar to buttons that you use with a Web browser, Peachtree includes Browse buttons (like the ones here) to quickly scan the next record or the previous record. If you're in a maintenance window such as Maintain Customers/Prospects or Maintain Inventory Items, the Browse buttons move between the records in the order of customer ID or inventory item ID.

If you're in a Task window, the Browse buttons move between the previous transaction and the next transaction.

Making a date

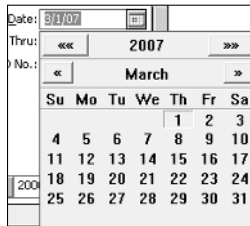
Many Peachtree windows have date fields where you need to enter information based on the calendar. If you're a keyboard-type person, you can simply type the date. Dates need to be typed as numbers. If you want, you can type the date by using the / (slash) key, but the slash isn't necessary. For example, to enter September 16, 2007, type **091607** or **09/16/07**. Be aware that Peachtree doesn't allow you to use a hyphen (-) in a date.



In most Peachtree date fields, you can get away with entering just the first four digits of a date. Peachtree then enters the year. The year is based on the system date displayed on the Button Control Bar.

Now if you're like us, we need a calendar in front of us to select dates. Fortunately, Peachtree fields that require you to select a date also include a calendar, as shown in Figure 1-7, so you can click that to select a date. To select a date from the calendar, follow these steps:

Figure 1-7:
Click a date to insert it into a Peachtree date field.



1. Click the calendar icon next to a date field to display the current month.
2. Click the left-pointing arrow next to the month name to display a previous month or click the right-pointing arrow to display a future month.
3. Click the date that you want for the date field.

The small calendar closes, and the date appears in the field.

Using the window toolbar

Most Peachtree windows include a toolbar located across the top of the window. You use the Peachtree toolbar across the top of the window to complete the various tasks involved with the selected window.



The exact buttons vary slightly from window to window, but most of them have a Close button, as shown here. To get out of a Peachtree window, you can use the Close button or the Windows Close button (X).

If you position the mouse pointer over any button on the toolbar, a small yellow box — a *Tool Tip* — appears to explain the use of the button. Tool Tips are great for those CRS moments when you look at a button and cannot remember its function. CRS (Can't Remember Stuff) is a widespread disease that affects people of all ages, races, religions, genders, and hair colors.



You also use the Save button frequently. The Save button, as shown here, appears on the toolbar if you're modifying data records, such as customers, from the Maintenance menu or if you're using a transaction entry window under the Tasks menu, such as Payroll Entry or Inventory Adjustments. You click the Save button to save the displayed transaction — and if you're using the *real-time* posting method, Peachtree also posts the transaction to the General Ledger (GL). (See Chapter 2 for an explanation of posting methods.)



Post is one of those words with many different meanings. It can be a noun, such as the place you tie your horse, or it can be a verb and mean *to send*. Of course, the latter is how the word *post* is used in accounting, and it means *to save and send*. In Peachtree, you're sending transactions to the GL; then, when you want to find out whether you've made any money this month, Peachtree is able to show you.

Multitasking

Mothers have long been known for their multitasking skills. You've seen them — balancing the baby on a hip, stirring the soup, and answering the telephone all at the same time. You can multitask in Peachtree also.

In almost all Peachtree windows, you can stop and open another window without having to close the first one and then return to the first window whenever you're ready. For example, suppose that you're in the middle of entering a new customer invoice and your boss needs to quickly know how much you paid for the green widgets you ordered last month. You can just open another window such as a List window. Besides a button for the Main Peachtree screen, each open window appears in the Windows Taskbar. Take a look at Figure 1-8 where you can see four different Peachtree window buttons open. Click any button to display the selected Peachtree window.

Figure 1-8:

Work on many different Peachtree tasks at the same time.



Don't forget to visit this book's Web site (www.dummies.com/go/peachtreefd) for more information on Peachtree.