FEBRUARY 2011

Spring Cleaning: Personalize and Tidy Up Your Peachtree Desktop

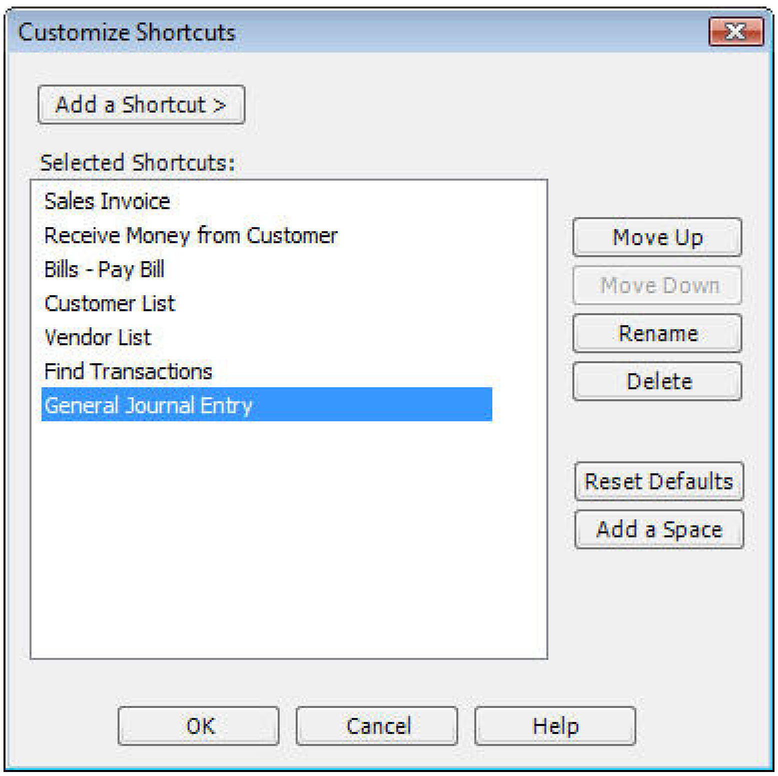
If you live in a region of the country that suffers through winter, you know that March signals the beginning of spring cleaning. Peachtree's interface is so clean and understandable that you don't really have to clean it up, but a little tweaking can make your daily accounting tasks easier and faster.

Savvy Shortcuts

Peachtree software uses a standard Windows menu system that can get you where you're going quickly. There are better options, though. For example, the Navigation Bar, located on the left side of the screen, divides the program's tasks by category, like **Customers & Sales**.

But you may want to break it down further by individual tasks themselves. That's where **Shortcuts,** located directly below the category links, come in. Peachtree installs a default set, but they are highly customizable.

To get started, click the **Customize** link next to **Shortcuts**. This window opens:



Peachtree's Shortcuts*, located in the Navigation Bar, can be customized to contain links to the individual tasks that you use most often.*

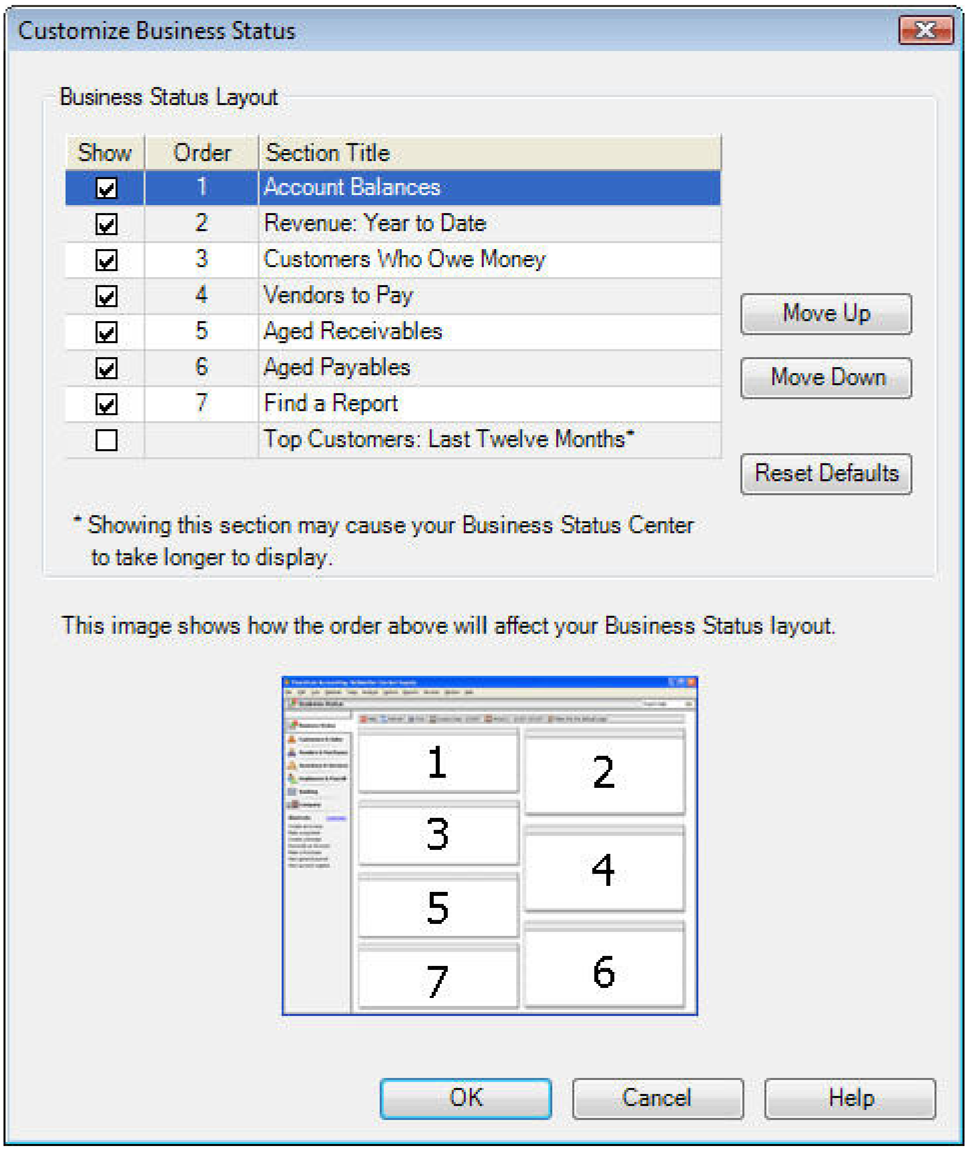
To add a Shortcut, click **Add a Shortcut.** A menu opens outlining the primary functions in the program, like **Reports** and **Inventory & Services.** Scroll over one, and a sub-menu pops out containing a list of tasks in that area, like **Bills – Enter Bill.** Click on the one(s) you want, and you'll be returned to the main window.

Here, you can modify your list in a number of ways, by clicking on icons to rename or delete your Shortcuts, move them up or down, and insert spaces between them. When you're done, click **OK** and choose to save the new configuration if you've changed it.

An Illuminating Page

If you're using Peachtree Complete or higher, you can access a very informative page called **Business Status.** This is where you may want to start every business day, as it lays out the key numbers related to your business, in graph and report form, like **Customers Who Owe Money** and **Aged Payables.**

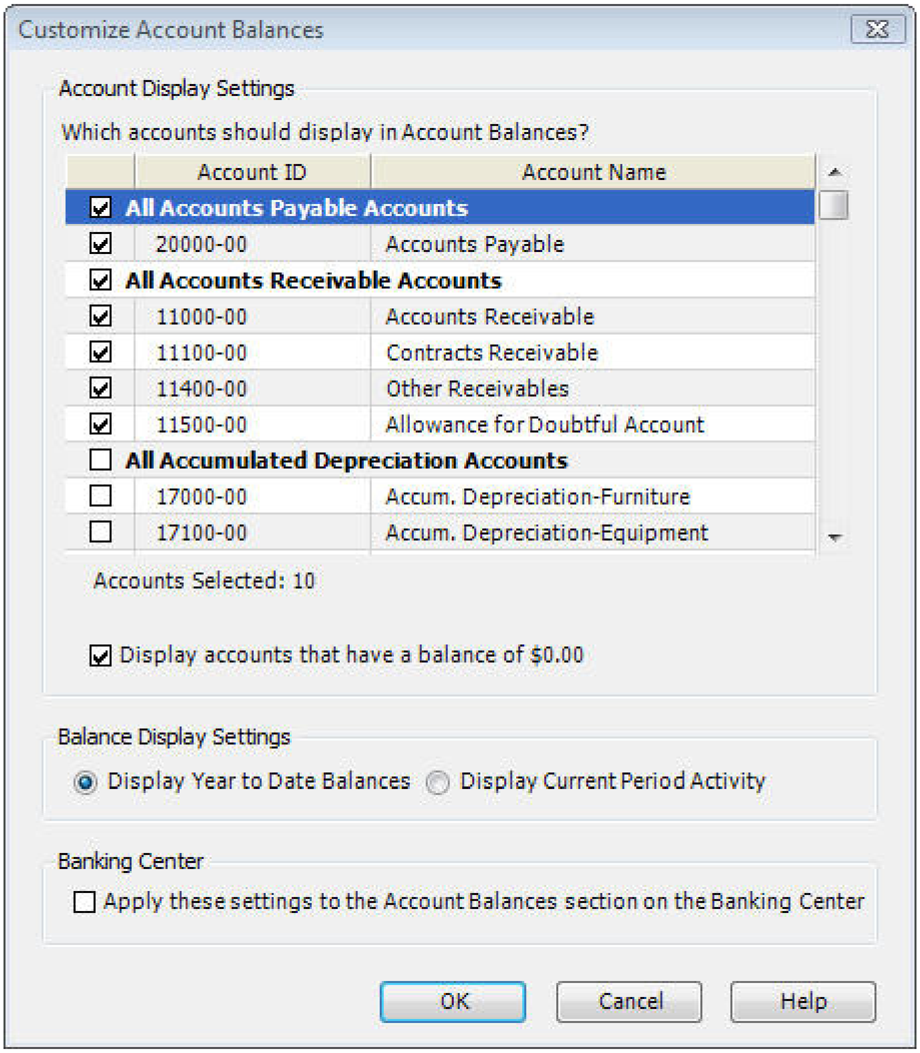
Like the Shortcuts pane, this feature is customizable. Simply click the **Business Status** button in the Navigation Bar. Then click the **Customize this page** link, which is located in the thin gray horizontal bar at the top right of the screen. You'll see a window like this:



Peachtree's Business Status *page displays key financial data that the program tracks. You can modify the layout and content of this page to better meet your needs.*

There are eight blocks of data that can be displayed on the *Business Status* page. You can add and delete these by checking and unchecking boxes, and change their order by clicking **Move Up** and **Move Down**. (Displaying the maximum number of reports and graphs may cause the page to display more slowly.)

You can also customize the critical **Account Balances** report, as shown here:



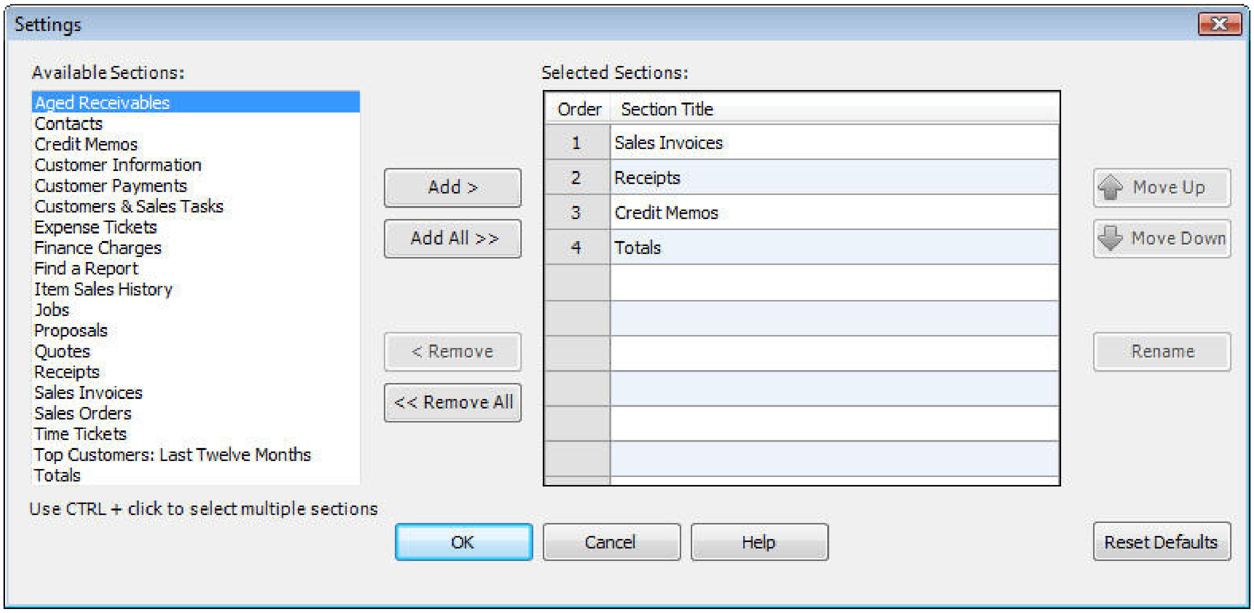
You can customize the Account Balances *report on the* Business Status *page to include or exclude specific accounts, and to alter other elements on the display.*

Customize Your Customer Management

There are enough new features in the 2011 Peachtree line to warrant an upgrade, especially if you're a version or two back. One of these is the new Customer Management Center, available in Peachtree Complete and higher. This screen offers an easy way to manage all of your customer information in one place.

To get there, click on **Customers & Sales** in the Navigation Bar, and then click on the **Customer Management** tab. Four mini-spreadsheets open, displaying, for example, Sales Invoices, Receipts, and Credit Memos (a fourth lists totals). To see it in action, click the arrow next to **Customer ID**, and select a customer from the drop-down list. You can change the date range to get another view by clicking the arrow in the box next to **Date Range.**

Click **Customize this page** in the narrow horizontal gray band near the top of the screen. This window opens:



Customizing the Customer Management Center *is easy. You simply select entries from the left side and click* **Add,** *or choose from the list on the left and click* **Remove** *to delete.*

To add items from the left to your customer display, you simply select them and click **Add.** If you want to remove any of them, highlight them and click **Remove.** Then click **OK.** When you return to the main screen, you'll find your newly configured layout in place.

Complete Customization

You'll find additional customization all through Peachtree, things like custom fields and customizable forms and reports. But to get the most out of Peachtree's modification tools, it's a good idea to have us help you. We can help you implement the changes that make the most sense to your business, and make Peachtree your own, saving you a lot of time and effort.