



## The Ultimate, High-Performance Peachtree Accounting Solution

**Sage Peachtree Quantum is a value-priced, multi-functional accounting and business management solution that offers strengths in the following areas:**

### Financial Management

Unlike many small business accounting products, Sage Peachtree Quantum is designed to be fully compliant with generally accepted accounting principles (GAAP), with features and checkpoints that provide the accuracy and security to run your business with peace of mind.

#### ● **Real, Double-Entry Accounting for Accuracy and Control**

Double-entry accounting provides for accounts that are accurate and in balance. Sage Peachtree Quantum customers retain control over the bookkeeping process through the use of Accounting Periods and G/L Accounts. In Sage Peachtree Quantum, each accounting period (usually a calendar month) can be locked so that the administrator can select who can edit transactions in prior periods.

#### ● **Accounting Behind the Screens**

When customers select the Journal button in various task windows, Sage Peachtree Quantum displays the corresponding journal entries in the Accounting Behind the Screens window. These are journal entries Sage Peachtree Quantum records when saving a transaction. Users can modify the journal entry by changing the account IDs for each distribution listed in the transaction. This gives them visibility into how a transaction is being posted on both sides of the General Ledger, and allows users the ability to change any of the G/L accounts that the transaction affects.

#### ● **Internal Accounting Review<sup>1</sup>**

Up to 15 checks of your data are performed by the Internal Accounting Review process in Sage Peachtree Quantum. These checks look for suspicious transactions and common accounting mistakes and give the user advice on correcting the transactions.

#### ● **Audit Trail Report**

A key component of this solution's internal control structure is an "always on" audit trail. With the audit trail, Sage Peachtree Quantum can maintain a record of details associated with every transaction.

Some of the information maintained in the audit trail includes who entered a transaction and when; who changed a transaction, when the change was made and what the change was; and who deleted a transaction and when. In addition, the audit trail tracks when each user logs on and off the system and what additions, changes, and deletions were made to master file information. Reviewing the Audit Trail Report is a key internal control measure as it allows business owners and senior managers to monitor each employee's activities within a Sage Peachtree Quantum data file.

#### ● **Cash Flow Manager**

Easily analyze and forecast your cash flow with the use of the cash flow management tool. You will have the ability to know whether or not you will have enough cash to meet current and upcoming financial obligations by managing your cash flow from one location. Additionally, you will be able to export cash flow forecasts into Microsoft Excel or run what-if analysis transactions to see how purchases will impact your cash flow.

#### ● **Sage Peachtree Online Bill Pay<sup>2</sup>**

Use a simple two-step process to pay your bills electronically. With this service, there's no need to write checks, stuff envelopes, apply postage, or copy invoices. Plus, you can improve cash flow management by scheduling the exact day when money is transferred from your account for more accurate payables processing and reconciling. And there is no limit on the number of vendors you can pay. Put down the checkbook and go back to running your business—it's a great way to save time, money...and trees!

## Customer Management

Advanced technology assists you in the important task of managing and nurturing your business' interactions with customers and prospects. Sage Peachtree Quantum can help you organize, automate, and synchronize customer-related business processes, as well as reduce costs of marketing and customer service.

### ● 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 customers' information, such as their converted and unconverted quotes, invoices, receipts, time tickets, aged balances, items and services sold, and much more. Drill down to the detail and quickly take action, too.
- Save time by looking up customers quickly, based on their ID, phone number, or any of their contact information, and filter further based on date ranges. Utilize the Recent Selections link to quickly pull up customers you have already viewed.
- Easily export customer information to Microsoft Excel or PDF, or launch an email from the Customer Management Center.

### ● Multiple Contacts<sup>3</sup>

- Store an unlimited number of customer contacts in Sage Peachtree Quantum!
- The new "Contacts" tab in the Customers screen allows you to keep track of many specific details you need to maintain your relationships for each of your customers.
- Track more details like contacts' titles, phone numbers, email address, and specify the ship-to addresses.
- A new Notes field allows you to track unique information about each contact, like shipping instructions.

### ● Open Multiple Companies<sup>4</sup>

Get your work done faster by being able to open and work in multiple companies within Sage Peachtree Quantum at the same time!

- Toggle between companies in just one click without closing your current company.
- Enter your user ID & password once and Sage Peachtree Quantum will remember it until you close the system.

### ● ACT! Integration<sup>5</sup>

With ACT! Link for Sage Peachtree, customers can easily synchronize key data between their Sage Peachtree Quantum accounting solution and ACT! contact and customer management solution.

#### Access customer information in an instant

With ACT! Link for Sage Peachtree and ACT! by Sage, you'll have the details of your customers and vendors such as credit information, current balance, last invoice and payment, open quotes, sales orders, receipts, and more, right at your fingertips!

ACT! Link for Sage Peachtree is included with the purchase of Sage Peachtree Quantum.

#### With ACT! Link for Sage Peachtree Quantum you can:

- Eliminate duplicate data entry to save time every day
- Keep customer information current in both systems automatically
- View real-time accounting summaries from within ACT!

## Inventory Management/Vendor Management

Sage Peachtree Quantum helps you manage the delicate balance between the cost and benefits of inventory. The true cost of carrying inventory, such as storage, insurance and taxes, can have a significant impact on your business's profitability. Sage Peachtree Quantum offers the functionality to assist you in managing the line between too much inventory and not enough, as well as the added responsibility of assortment, turnover, and high-volume purchases.

- Inventory Tracking and Replenishment
- Inventory Pricing and Multiple Costing Methods
- Inventory and Services Management Center
- Serialized Item Tracking & Costing
- LIFO & FIFO Costing
- Warranty Tracking
- Quantity Discounting
- Just in Time Purchasing Flexibility
- Assembly History Tracking
- Storing of additional inventory attributes
- Commissionable Item Tracking
- Drop Shipments
- Master stock and sub item tracking
- Work Ticket Tracking

### ● **Inventory Tracking and Replenishment**

Inventory tracking is a real strength of Sage Peachtree Quantum. Small business owners can easily create and track inventory items based on user defined attributes such as size, color, style, and more. Customers can maintain accurate Quantity on Hand information by reserving inventory requested on Purchase Orders and Sales Orders. They can even set up Sage Peachtree Quantum to monitor inventory levels. When inventory reaches a predetermined level, Sage Peachtree Quantum automatically creates a purchase order to replenish inventory. It's also possible to create purchase orders from sales orders and invoices.

### ● **Inventory Pricing and Multiple Costing Methods**

Sage Peachtree Quantum makes it easy to update inventory prices. Establish up to 10 different, customizable price levels per item. It's easy to update prices by a specific dollar amount or percentage. Apply a pricing change to a handful of items or everything in inventory. A simple, point-and-click process allows the customer to apply price increases or decreases globally, rounding prices to a specific cent or dollar amount. Customers can choose among several inventory costing methods. Average, LIFO, FIFO, and Specific Unit costing are available.

### ● **Inventory and Services Management Center**

Quickly and easily get insight into the usage of your inventory and services. A customizable dashboard helps you 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 assembly relationships.

## Employee Management and Payroll

Save time and reduce errors by keeping track of your employees' information in Sage Peachtree Quantum. Centrally maintain detailed employee records, such as hiring data, demographic information, emergency contacts, performance reviews, and more. Receive alerts for key tasks such as review dates. Everything you need to ensure accuracy is in one place. Keep track of employee time – or have each employee track their own time – for payroll and job costing.

Track common employee benefits and deductions based on your company's needs for more accurate tracking.

Setup automated email alerts to be notified when important dates are coming up, such as I-9 re-verification, performance reviews, or birthdays.

Manage payroll yourself from within Sage Peachtree Quantum or choose from payroll services that include print-n-sign tax forms, e-filing, direct deposit, and even full service outsourced payroll.<sup>6</sup>

## Jobs Management

Sage Peachtree Quantum offers helpful tools to optimize your business processes, manage resources, track projects, tasks and time, and put your business in the best possible position for improved profitability and sustainable growth.

### ● Job tracking

Job and Project Management Center allows you to see the various components of a job from one convenient spot, and you have the complete job picture—from start to finish—available from a single location.

- Quickly access frequently used job tasks on the intuitive dashboard.
- Track projects at the job level, job/phase or job/phase/cost code level.
- Format job IDs with up to 20 alphanumeric characters.
- Format cost code IDs with up to 20 alphanumeric characters.
- Track an unlimited number of user-definable cost and phase categories.
- Track estimated and actual schedule dates.
- Create unlimited user-definable job status codes with visual “stop light” indicators.
- Make notes and attach documents to your jobs.
- Closely track Change Orders and their approvals to make sure each job remains profitable.
- Track subcontractor insurance such as general liability and workman’s comp.

### ● Entry and streamlined processing

Intuitive interface allows for the entry and assignment of one or more jobs per AR or AP transaction. Receive an optional warning if no job was entered for error-free job tracking and reporting. All project resources can efficiently collaborate, so everything stays on schedule with Order Process Workflow tracking.

### ● Flexible Billing and Job Costing Capabilities

- Track expense and revenue project totals by job, phase, and cost code by year, quarter, month, week, or specific accounting period.
- Track actual and committed job costs and revenues to always know job profitability throughout the project.
- Apply Labor Burden rates for employees at the Job or Company level
- Progress Billing for % of Contract or % of Completion
- Ability to withhold retainage<sup>x</sup> per the contract terms.

### ● Job Reporting

Create ad hoc reports on the fly using the interactive jobs reporting and output to Excel, Adobe PDF or email. Many job reports can be customized to your needs, such as, Retainagex, Job Profitability, Job Ledger details, or Work in Progress. Create your own job reports using Crystal Reports® 2008.

## Analysis Tools/Reporting

As your small business needs develop, so does your need for specialized reporting and analysis tools. Sage Peachtree Quantum provides premium features that allow you to access information quickly and create detail reports easily.

### ◆ Standard Reporting

Sage Peachtree Quantum offers over 140+ customizable reports that give you the data you need – the way you want it – to recognize opportunities, to steer your business and to help increase profitability. It also gives you even more advanced analysis capability with Crystal Reports® 2008, the leading industry report writing tool, allowing you to create your own specialized reports.

All Sage Peachtree Quantum reports can be output or saved using industry standard format types – email, Adobe or Excel.

### ◆ Sage Peachtree Business Analytics<sup>7</sup>

Sage Peachtree Business Analytics, powered by iLumen®, allows you to truly know how your company is performing financially. Benchmark your company's performance compared to other companies in your industry or geographic region. This feature gives you instant access to key financial trends and industry-specific benchmarking reports so you know where you stand.

- Quickly evaluate financial performance and identify challenges and opportunities within your business.
- Customize parameters to specific industry, SIC or NA-ICS code, revenue and asset, geographic region, and/or size range.
- Choose the metrics upon which to focus comparisons.
- Base evaluations on the metrics that matter most to you: Total Revenue, Gross Margin %, Days Sales Outstanding, and much more.

### ◆ Cash Flow Manager

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### ◆ Multi-Year Reporting & Budgeting

Compare budgets and financial results across multiple years within your General Ledger reports and Financial Statements, as well as drill down to the details. Use this functionality to get improved trending analysis, better research, and more accurate forecasts based on prior year activity.

### ◆ Personalized User Dashboards

Create personalized navigation so you no longer have to wade through screens and menus you don't use. Customize your dashboards by creating tabs to organize key, real-time information and access it easily. View relevant tasks and filter data based on how you need to track it. Quickly see who your most profitable customers are, what bills need to be paid, and what is owed to them. This assists in making more effective decisions from one convenient location within the software.

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 Sage Peachtree Quantum. Or make another view that shows only the tasks you need on a weekly or monthly basis – you choose!

You will have the ability to customize the individual areas and filter data based on how you need to track it. Security is assured because available modules are based on each user's security level.

## Workflow Management

The Order Process Workflow system in Sage Peachtree Quantum keeps everyone informed in real time of all the details in your sales and purchase processes, so that anyone with the approved access can instantly know where your order is, when it's due, who's handling it or what's the problem with it. You can customize triggers, steps and statuses that are crucial to your company.

### ● **Order Process Workflow**

- 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 the work involved in the process, or see just your own tasks.
- Automatically send notifications to designated employees/customers/vendors once a task is completed.
- My Inbox on My Dashboard monitors the status of a user's processes and transactions and allows them to take action.

## Security/Multi-User Management

More users mean more security concerns. Sage Peachtree Quantum helps ensure security of your sensitive data, and let's you control which users have access to which data and features.

### ● **Sage Peachtree Online Backup<sup>8</sup>**

Fast, secure, efficient backups of your Sage Peachtree Quantum financial data and other business critical files such as documents, Excel spreadsheets and email. Automatically schedule backups. Access your data from the Web on any computer.

### ● **Multi-User Management**

All the tools you would expect in a multi-user system, such as:

- Accommodates 5, 10, 15, 20, 30, 40 licensed, named users<sup>9</sup>
- Optimized database capacity<sup>10</sup>
- Send notifications to other users that they need to log out of Sage Peachtree Quantum, or if necessary, manually log them out

### ● **Role Based Security**

Sage Peachtree Quantum provides the ability to control user access with a high degree of precision. Role-based security controls allow for screen-level and report groups access control. Administrators can select from more than 100 specific areas to give Add, Edit, View-Only, or No Access rights to each user. You can even block access to key navigation screens.

### ● **Speed and Performance**

Sage Peachtree Quantum SmartPosting is a Windows service that manages the posting of transactions independently of the client workstation. It saves times because you can continue to add and save transactions without having to wait for the posting to finish, plus it alerts you to errors or problems since the SmartPosting Manager monitors the state of the service running in the background.

### ● **Automatic Backup**

Schedule your company's Sage Peachtree Quantum backup to run recurring and automatically during non-business hours.

## Features specific for your Industry: Accountants, Manufacturing, Distribution, Construction and NonProfits

Sage Peachtree Quantum offers features for companies in industries such as: Manufacturing, Distribution, Construction, Nonprofit and Accounting. These industry-specific features are designed to help specialized companies better manage operations by handling their specific functionality and reporting needs without sacrificing the strength and flexibility of a robust accounting solution.

### Construction:

- Construction Specific Operational Reports
- Labor Burden Assessment
- Progress Billing
- Retainage Management for Companies Using Accrual Based Accounting
- Subcontractor Insurance Tracking

### Nonprofits:

- Donation Receipts
- Fundraising Letter Template
- Member and Pledges Fees Outstanding
- New customer/Donor Welcome Letter Template
- Unified Chart of Accounts
- United Way based Chart of Accounts

### Distribution:

- Buy/Sell in Different Units
- Enhanced Kitting and Assembly Capabilities
- Inventory Trend Analysis
- Order/Sell Using Vendor Part Numbers
- Quantity Price Breaks
- Distribution Specific Operational Reports

### Accountants:

- Access Client Data from any Sage Peachtree 2011 product
- Set-up, Open and Edit
- Restore Client Backups

### Manufacturing:

- Enhanced Assembly Capabilities
- Creation and Tracking of Work Tickets
- Enhanced BOM Management
- Buy/Sell in Different Units
- Manufacturing Specific Operational Reports
- Integration with MISys SBM solution

1 Sage is not liable or responsible for any fines or penalties that may result from errors in your company accounting records. The Internal Accounting Review is not intended to uncover all questionable transactions.

2 Subject to approval and to Sage terms of service. Additional fees, internet access and checking account required.

3 There is a maximum of 20 ship to addresses and 1 billing address per customer.

4 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.

5 Internet access required. Must have a license for ACT! by Sage version 2007, 2008 or 2009.

6 Subject to approval. Additional fees, Internet access and credit card required. Not Available with Sage Peachtree First Accounting.

7 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](http://www.peachtree.com).

8 Includes access to 100MB of storage space for one year from date of installation. Upgrade to next Sage Peachtree release required to continue free yearly service beyond initial term. Subject to third party terms and conditions. Internet access required. Terms, conditions, pricing, features and service options subject to change without notice. Windows Server 2003 and Terminal Services are not supported.

9 Multi-User licenses available in of packs of 10, 15, 20 or 30. A maximum of 30 licensed, named users is allowed. Only the first 30 named users selected in the user maintenance screen are considered licensed, named users.

10 Peachtree does not impose a hard limit on database capacity, however, individual performance will vary depending on actual number of transactions, database size, and number of concurrent users. Data management efficiencies are also realized in the Peachtree 2010 products.