

Bonus Chapter 1

Customizing the Way You Work

In This Chapter

- ▶ Defining global options
 - ▶ Customizing task windows
 - ▶ Working with repetitive transactions
 - ▶ Creating an event log
 - ▶ Finding lost transactions
-

If old Blue Eyes (that's Frank Sinatra, for all of you who are too young to remember) could do it his way, so can you. Peachtree allows customization of how the program reacts to different things you do.

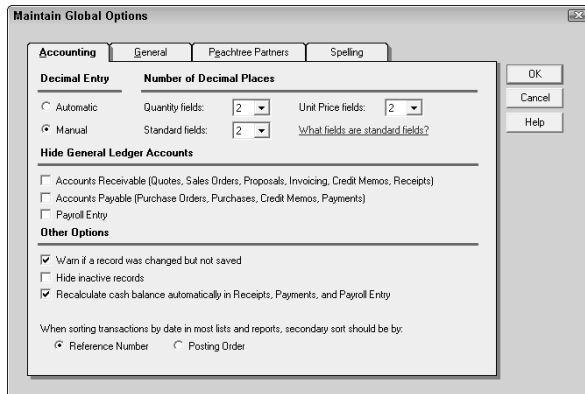
In this chapter, you discover how to customize settings such as the way that numbers display when you type them in, the colors that display, and the fields that you see on your screen during data entry.

Setting Global Options

You can use the Global Options feature to set the way Peachtree functions as well as to select the color of your Peachtree windows. After all, you do want to make sure that it matches your office décor, don't you? You can set various options to control the behavior, look, and feel of the program.

To set the global options, choose Options⇨Global. The Maintain Global Options dialog box appears with the Accounting tab in the front, as shown in Figure BC1-1.

Figure BC1-1:
Personalize
much of
Peachtree's
behavior in
the Global
Options
dialog box.



If you have multiple users, each user can set his or her own global option preferences. See Chapter 18 for information on setting up users.

The Accounting tab

The first section on the left side of the Accounting tab — Decimal Entry — determines how Peachtree inserts decimal points and how many decimal points to use. You have a choice between allowing the Peachtree program to place a decimal point in figures and entering the decimal point yourself.

If you select the Automatic option, Peachtree inserts the decimal point before the last two digits of the number. For example, if you type **10**, Peachtree enters it as 0.10; however, if you select the Manual option for the decimal point entry, Peachtree enters 10 as 10.00.



Most people prefer to set the decimal point entry to Manual. This option affects any field that requires numbers, whether a Quantity field or a Price field.

The section on the right side of the Accounting tab determines the number of decimal places you want for particular field types. For example, if you sell your products only in whole number quantities, you might set the Quantity fields at 0 decimal places. If you charge a price like .2657 each for them, you might set the Unit Price fields to 4 decimal places. The Standard Fields box applies to fields such as Accounts Receivable amount, Average Costing, Sales weight, Total % billed. For a complete list of standard fields, click the What Fields Are Standard Fields link.

Use the middle section on the Accounting tab to optionally hide the General Ledger account number fields in certain task windows. Transactions created with the GL account number hidden automatically use the default General Ledger accounts that you have set up. (You can find out how to set default General Ledger accounts in Chapter 4.)

You can hide General Ledger accounts in the following task areas:

- ✔ **Accounts Receivable:** Select this option to hide GL accounts in the Quotes, Sales Orders, Sales Invoicing, and Receipts windows.
- ✔ **Accounts Payable:** Select this option to hide GL accounts in the Purchase Orders, Purchases/Receive Inventory, and Payments windows.
- ✔ **Payroll Entry:** Select this option to hide GL accounts in the Payroll Entry window.

For example, selecting the Accounts Receivable option changes the look of the Sales/Invoicing window. The Accounts Receivable account and the GL account field of each line item are hidden. When you enter a sales invoice, Peachtree uses the sales default GL account set up for the customer in Maintain Customers/Prospects. If you select an inventory item, Peachtree uses the default GL accounts set up in Maintain Inventory Items for this item.

Should you hide these accounts? Well, look at it this way. If your Chart of Accounts has one GL Sales account and one Accounts Receivable account that you use most of the time, these numbers would never change, so you might as well hide them. You can then generate your invoice faster because you don't have to press the Tab key in these fields when you create an invoice. If, however, the GL Sales account number changes depending on the product or service provided, you should leave the account numbers displayed so that you can change them as necessary.



If you choose the Hide General Ledger Accounts option, you can view and change the transaction's GL accounts by clicking the Journal button in various task windows.

Other options on the Accounting tab include

- ✔ **Warn If a Record Was Changed But Not Saved:** When you select this option, Peachtree displays a warning if you try to exit a new or modified record without saving it. If you deselect this option, you won't see the warning. We strongly recommend that you select this option.
- ✔ **Hide Inactive Records:** When you select this option, Peachtree doesn't display inactive General Ledger, customer, vendor or other records in the lookup lists.

- ✔ **Recalculate Cash Balance Automatically in Receipts, Payments, and Payroll Entry:** When you select this option, Peachtree automatically updates the Cash Balance fields in the Receipts, Payments, and Payroll Entry windows when you post or save transactions. The balance displays as of the date that appears in the task window.

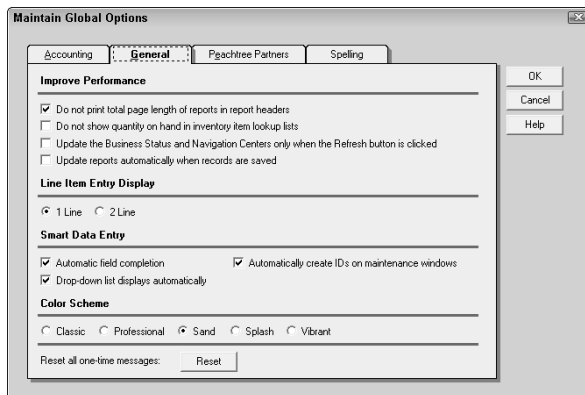
The last option on this tab controls how Peachtree handles a secondary sort. In a large number of reports and in the List dialog box where you select a transaction for editing, you can sort the information by date. If two or more transactions have the same date, the option you select here determines how Peachtree sorts the matching items:

- ✔ By the transaction reference number such as the invoice or check number
- ✔ By the order in which you entered the transactions

The General tab

The General tab, as shown in Figure BC1-2, includes features that affect Peachtree's performance as well as the visual color schemes.

Figure BC1-2:
Options on
the General
tab control
Peachtree's
performance
behavior.



The first four options affect how Peachtree performs:

- ✔ **Do Not Print Total Page Length of Reports in Report Headers:** When you deselect this option, Peachtree calculates the total number of pages in a report before printing the report. Selecting this option allows reports to print faster, skipping the initial calculation of the total number of pages prior to printing. Instead of displaying page 1 of 12 or page 2 of 12 in the report header, your reports will display page 1 or page 2.

- ✔ **Do Not Show Quantity on Hand in Inventory Item Lookup Lists:** Selecting this option speeds up the display of inventory item lookup lists because it skips the process of calculating each item's current quantity on hand every time you display the inventory item lookup list.
- ✔ **Update the Business Status and Navigation Centers Only When the Refresh Button Is Clicked:** Selecting this option improves Peachtree's performance by not refreshing the Business Status until you manually click the Refresh button on the Button Control Bar.
- ✔ **Update Reports Automatically When Records Are Saved:** Leaving this option unchecked helps performance whenever you have a report open in the background. Instead of recalculating each open report every time you make a change to a record, the report data updates only when you bring the open report to the foreground.



Depending on the configuration of your computer, you might or might not see a noticeable improvement when selecting these performance options.

In the Line Item Entry Display section, you can determine whether Peachtree displays one or two lines for each line item in the various task windows. For example, two-line entry displays the name and description of the account, and single-line entry allows display of more items on the window.

With the options in the Smart Data Entry section, you can enable lookup lists to display instantly and anticipate what you want to enter. These options make data entry faster in most cases. Unless you have a very slow computer, you'll probably want these features activated:

- ✔ **Automatic Field Completion:** Anticipates what you're typing by filling in the field with the nearest match to the characters you enter as you type them. With it, you can avoid having to type all characters.
- ✔ **Drop-Down List Displays Automatically:** Allows Peachtree to automatically display a list of choices when you place the insertion point in a lookup field and type at least one character. We recommend you select this option.
- ✔ **Automatically Create IDs on Maintenance Windows:** This option, selected by default, tells Peachtree while in the Maintain Vendor, Customers, Employees and so forth, to automatically create an ID based on data you enter in the name or description field.

In the Color Scheme section, you can select colors for Peachtree windows and dialog boxes. When you select a color scheme, this default affects all Peachtree companies you open at this computer. If you change a color scheme preference, you must exit and restart Peachtree before the color changes take effect.



These color schemes apply only to windows and dialog boxes within the Peachtree program — not to other Windows applications or the Windows desktop.

Last, you see the Reset button; as you work in Peachtree, you will see messages that you can disable. The Reset button reactivates any disabled messages so that they appear when the respective condition warrants it.

The Peachtree Partners tab

This option controls how Peachtree interacts with its partner add-in programs, such as FAS, Timeslips, or Direct Deposit. We recommend that you do not change this setting. See Bonus Chapter 4 for more information on Peachtree add-in programs.



If you use Peachtree add-in products and you use Peachtree security features, make sure you set the security access level to Full for the COM & DDE Data Access area, located in the Company Tasks area. See Chapter 18 for information on using Peachtree security.

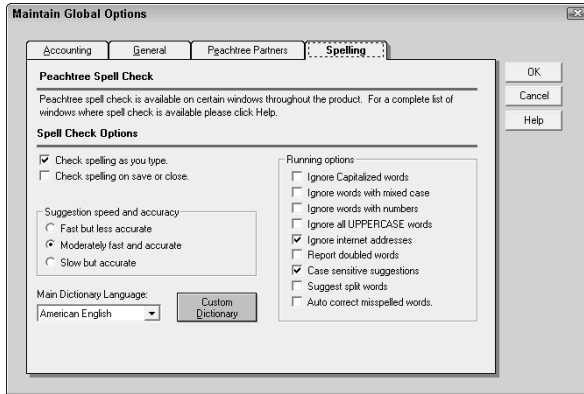
The Spelling tab

Spelling errors can ruin the professional impression that you're trying to maintain. If your flying fingers frequently fumble (wasn't that a great alliteration?) on the keyboard, Peachtree can show you the error of your ways and often offer corrections. By default, Peachtree will check spelling in most task windows and note fields while you work, highlighting misspelled words in red as you type them. Right-click a misspelled word to see a list of suggested replacement words and then click the word you want in place of the misspelled word.

If the word is spelled correctly but Peachtree doesn't recognize it — a term specific to your industry, for example — you can add the word to the dictionary so that Peachtree recognizes it as a correctly spelled word. You manage your spelling preferences using the Spelling tab of the Maintain Global Options dialog box, as shown in Figure BC1-3.

On the Spelling tab, you can set up Peachtree to check spelling when you save or close a transaction as well as control the speed of the Spell Check feature.

Figure BC1-3:
Use this dialog box to control the behavior of the Spell Check feature.



You can speed up the spell-checking process if you take advantage of Peachtree’s capability to automatically correct spellings that you identify. This feature is very useful in helping you correct typing mistakes that you make on a regular basis or to recognize special terms you use on a regular basis. For example, if you regularly type *teh* instead of *the*, set up an autocorrect action to make Peachtree automatically replace *teh* with *the* every time you type it — without asking you about it.



Use this feature to store abbreviations for long words or phrases. For example, you can store an acronym like *ssa* and tell Peachtree to replace it with *Social Security Administration*.

To add words or phrases to a custom dictionary, follow these steps:

1. Choose Options → Global to open the Maintain Global Options dialog box; then click the Spelling tab.

2. Click the Custom Dictionary button.

Peachtree displays the Custom Dictionary dialog box, as shown in Figure BC1-4.

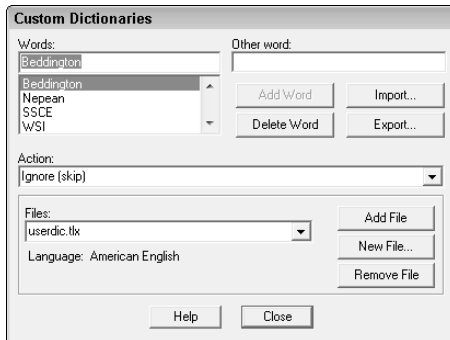
3. In the Words text box, type the misspelling you want corrected.

4. In the Other Word text box, type the correct spelling.

5. From the Action drop-down list, select the Auto Change (Use Case of Checked Word) option.

Figure BC1-4:

Use this dialog box to identify misspellings to automatically replace with the correct words.



6. Click the Add Word button.

Peachtree adds the misspelled word and its correction to the list. You can repeat Steps 3–6 for each misspelled word you want Peachtree to automatically correct.

7. Click the Close button. Then in the Maintain Global Options dialog box, click OK.



Whenever you type one of these words that you added, Peachtree replaces it with the replacement word you provided. Note that you must type the word that you added exactly as you added it. For example, if you add *ssa* but you type *SSA*, Peachtree will not make the replacement.

Navigating Peachtree

We all know that some people are more analytical by nature, and others are more artistic and graphical. Peachtree includes a feature — the Navigation Bar — designed to satisfy the appetites of those with the creative eye. You can find it on the left side of your screen. With seven different centers, including the Business Status Center, you can use the Navigation Bar as an alternate method to open transaction and maintenance windows or to run reports. You can find out about customizing the Business Status Center in Bonus Chapter 2.

Clicking any center on the Navigation Bar displays a list of applicable and common choices for the selected center. In Figure BC1-5, you see choices and information related to Employees & Payroll.

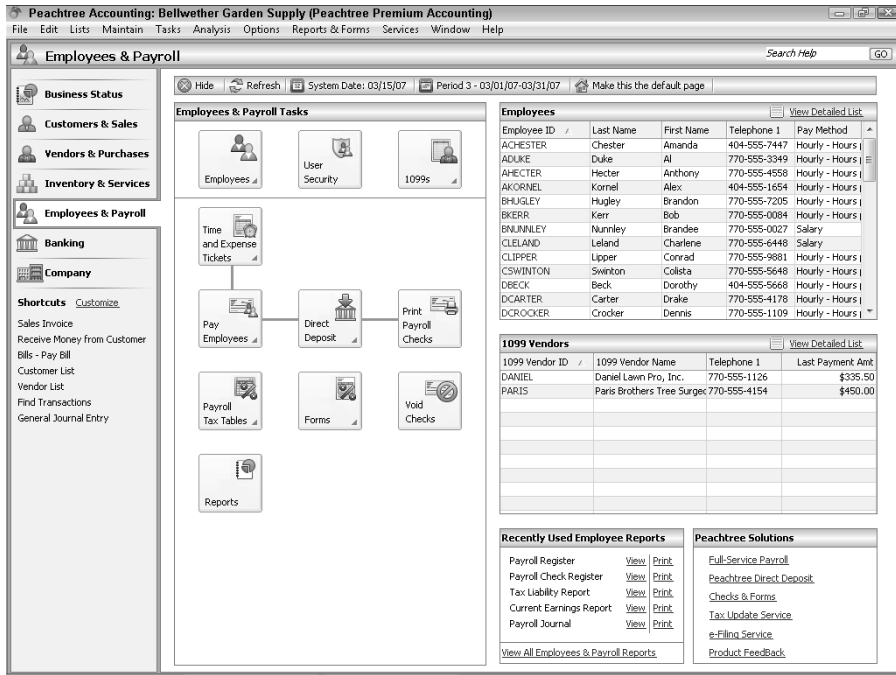


Figure BC1-5:
Use the Navigation Bar to quickly access Peachtree features.



You then click the choice with which you want to work. Some buttons take you directly to a specific task, while others (such as Employees) provide you with a small menu of choices. Buttons that provide a menu have a small arrow in the lower-right corner.

Customizing Shortcuts

Beneath the Navigation Bar is a series of Shortcuts (links) that take you quickly to the Peachtree screens you use in your daily business. There are seven default shortcuts, but you can customize them to better meet your personal needs by removing the ones you don't use and adding others you'd like to use. Click the Customize link to see the Customize Shortcuts dialog box, as shown in Figure BC1-6.

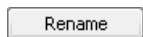
Figure BC1-6:
Add your common tasks and reports to the Shortcuts bar.



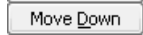
From the Customize Shortcuts dialog box, you can do any of the following:



✔ Select a shortcut and click the Delete button (as shown here) to remove the shortcut.



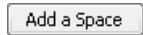
✔ Select a shortcut and click the Rename (as shown here) to give the shortcut a name more familiar to you.



✔ Select a shortcut and click the Move Up or the Move Down button (both shown here) to rearrange its order in the Shortcuts Bar.



✔ Click the Add a Shortcut button (as shown here) to display a menu of Peachtree choices, including customized reports, from which you can choose.



✔ Click the Add a Space button (as shown here) to insert a [Space] entry in the Selected Shortcuts list box. You can then move the space up to separate the shortcuts: for example, to separate the Customer shortcuts from the Vendor shortcuts.

After you make your selections, click OK. Peachtree revises the Shortcuts Bar. If you add more than ten shortcuts, you'll see a More Shortcuts link at the bottom of the bar. Click the link, and the rest of the shortcuts appear on a menu. Note that a space counts as one of the ten shortcuts that appear in the Shortcuts Bar. If you add a space within the first ten shortcuts, the Shortcuts Bar displays only nine shortcuts, and you'll see the More Shortcuts link.

Listing to the Left: Working with and Customizing List Windows

Peachtree contains lots of lists. You can see a list of almost any transaction type (such as invoices, purchases, or general journal entries) as well as lists of general records (such as customers, vendors, employees, inventory, or jobs).

Peachtree lists are extremely flexible and customizable, so you can add or delete fields; change the order by which the list is sorted; and reorganize the fields to better meet your needs. In addition, you can select records to edit, add new records, or generate tasks right from the list. For example, from the Vendor List window, you can add a new vendor, create a purchase or payment for the vendor, or view vendor-related reports.

Using list windows



Peachtree provides several ways to access lists. You can choose Lists from the main menu and then select the list you want. You can select the List option from a Navigation Center button, or you can click the List button (as shown here) from a record or task toolbar.

Any of these methods opens a list window, such as the Sales Order List window you see in Figure BC1-7.

Figure BC1-7:
Open a list window to view previously saved information.

Customer ID	Period	Date	SO No.	Amount	Customer Name
STANLEY	3	3/12/2007	10339	\$118.99	Stanley Contract Design
ARMSTRONG	3	3/2/2007	10322	\$63.49	Armstrong Landscaping
CHAPPLE	3	3/5/2007	10340	\$476.84	Chapple Law Offices
CUMMINGS	3	3/7/2007	10314	\$69.86	Cummings Construction
ALDRED	3	3/7/2007	10333	\$42.39	Aldred Builders, Inc.
FROST	3	3/9/2007	10341	\$211.89	Frost Technology Park
ARCHER	3	3/12/2007	10338	\$13.73	Archer Scapes and Ponds
CUMMINGS	3	3/12/2007	10339	\$21.19	Cummings Construction
FREEMOND	3	3/13/2007	10315	\$269.10	Freemond Country Club
TEESDALE	3	3/13/2007	10317	\$5,238.12	Teesdale Real Estate
TEESDALE	3	3/13/2007	10334	\$317.99	Teesdale Real Estate

At the top of the list, you see the header information where you can select a date range. List windows that show transactions (such as customer invoices, purchase orders, or paychecks) initially show transactions for the current period. From the Date Range drop-down list, you can select a different date range or period; if you change the date range, Peachtree displays information for the new date range next time you open the window.



Date ranges are available only in the transaction list windows and not in the record maintenance lists.

In the main list section of the window are columns of data. If a column is too narrow and you can't see all the information, you can widen it. Conversely, if a column is too wide and takes up excess room, make it narrower. For either adjustment, place your mouse pointer over the small vertical bar to the right of the column heading. When the mouse pointer changes to a double arrow, drag the bar to the left or the right to resize the column.



If your List window is not large enough, you might not be able to see all the fields. Resize the window by dragging the outside window edges or maximize the window by clicking the Maximize button.

Peachtree indicates the current sort column by a small triangle in the column heading. Click any column heading to sort by that field. Click the heading again to sort by that field in descending order.

By entering information into the Search For text box, you can search your company data for the record or transaction by using criteria that you specify from the List window. For example, in the Sales Order List window in Figure BC1-7, you can search for sales orders using customer ID numbers, customer name, sales order dates, numbers, amount, or posting period.



For an alternative method for locating elusive data, see the upcoming section, "Finding Transactions."

After you select a search criterion, type some information about the transaction into the Search For box that matches the criterion you selected. The ID number and transaction dates, numbers, or totals are self explanatory; if you choose Period as your search criterion, set the Date Range field to All Transactions and enter the period number in the Search For box.



Search text is not case sensitive. Typing *Abc*, for instance, will call up values with *abc*, *Abc*, and *ABC* in the specified field.

Click the various buttons on the List window toolbar to create a new transaction or open an existing one. You can also use the toolbar buttons to print, e-mail, export to Excel, or even create a PDF file from your list.

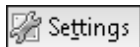
Customizing a List window

Each Peachtree user, based on his or her security rights, can customize any List window, and the changes are saved exclusively for that user. In addition, if you have several companies, you can have different settings for each company. See Chapter 18 to set user security rights.

Follow these steps to customize a List window:

1. Display the list you want to customize.

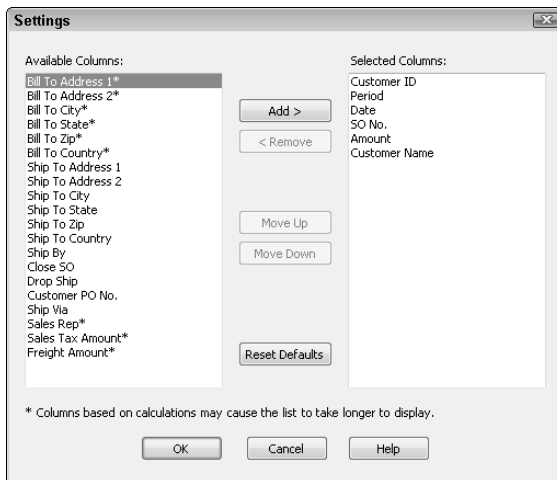
You can display the list through the List menu, from a Navigation Bar button, or through a Maintenance or Task window.



2. Click the Settings button on the toolbar (as shown here).

A Settings window like the one seen in Figure BC1-8 appears. On the left is a list of fields you can use, and on the right is a list of the fields that are currently displayed.

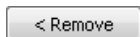
Figure BC1-8:
Select which columns you want to see in the List window.



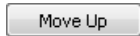
3. Perform any of the following actions:



- *To add a field:* Click a field from the Available Columns list and then click the Add button (as shown here).



- *To remove a field:* Select a field from the Selected Columns list and then click the Remove button (as shown here).



- *To change the order in which the fields appear in the List window:* Select a field in the Selected Columns section and click the Move Up or the Move Down button (both shown here).
- *To completely reset the column settings to the Peachtree defaults:* Click the Reset Defaults button (as shown here).

Fields with an asterisk next to them are calculated fields. Adding many of them to a list may slow down the performance of the list.

4. Click OK.

The List displays the fields you select.

Customizing Data Entry Windows

Over the years, our clients have commented that they want to be able to enter their data quickly and go on to the next project. To aid in this goal, Peachtree allows you to modify several of the Peachtree windows to display certain portions of the window while hiding others. For example, if your business doesn't use job costing, why not hide the Job text box in the Sales/Invoicing or Purchases/Receive Inventory windows? By hiding a portion of the window, the person entering the data skips the hidden areas, which allows for faster data entry.

You can use these customized windows — known as *templates* — to enter data in the following task windows: Quotes, Proposals, Sales Orders, Sales/Invoicing, Purchase Orders, and Purchases/Receive Inventory.

For example, you can remove the Jobs and Ship To information from the Sales/Invoicing window. Here's how to customize the data entry window:

1. Choose Tasks and then select the task window you want to customize.

In our example, we want the Sales/Invoicing window.

2. Click the Layout button on the toolbar (as shown here).



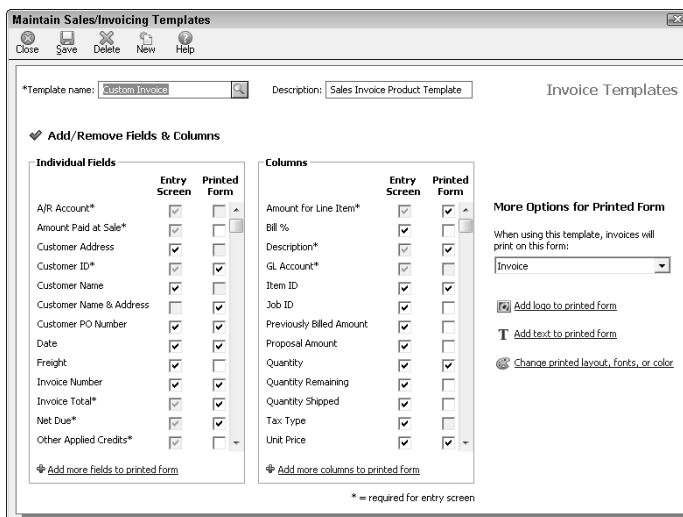
A listing of available templates appears, with a check mark next to the template currently in use.

You can't edit or delete predefined templates. To customize a template, you must first create a new, customized template.

3. From the list of templates, click Customize xxx Template, where the xxx represents the task window you are using.

In our example, the Maintain Sales/Invoicing Templates window appears. See Figure BC1-9.

Figure BC1-9:
Customize
the data
entry
window
display.



4. In the Template Name field, type a unique name for the template.

For example, you might want to use your company's name.

5. Press the Tab key and enter a description of the template.

Now you can determine which fields you want to be hidden during data entry.

6. Select the fields and columns you want on the screen and deselect the fields and columns you don't want.

Some fields are required and cannot be hidden. Required fields are grayed out and unavailable for change.



You can also customize a printed form associated with this task. However, for better form design, we recommend that you customize the form as we show you in Chapter 13.



7. When you finish modifying the template, click the Save button and then click the Close button (both as shown).

Figure BC1-10 illustrates a Sales/Invoicing window after customizing it.

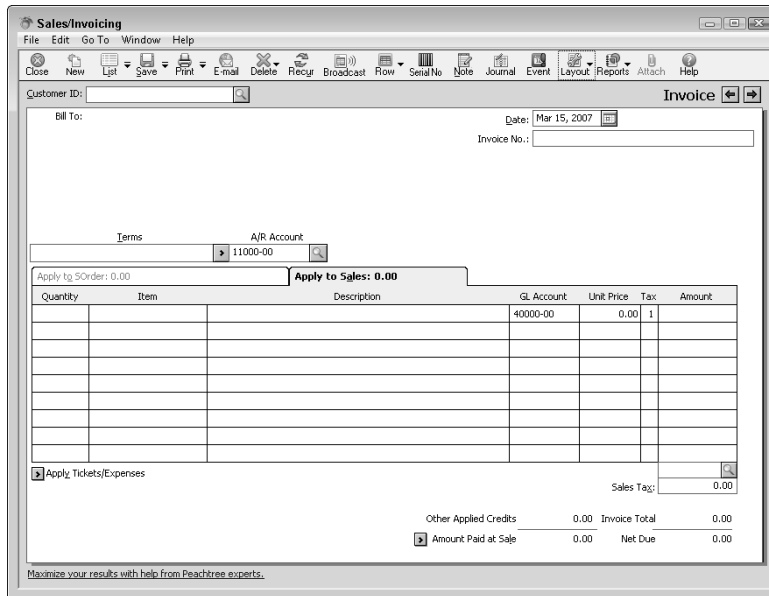


Figure BC1-10:
A
customized
data entry
window.

Simplifying Repetitive Transactions

Memorized transactions can save you a great deal of time in repetitive data entry tasks. Because they're different from recurring transactions, you can use memorized transactions repeatedly and at whatever time interval you choose. You can enter memorized transactions for General Journal entries, Quotes, Sales Invoices, Purchase Orders, and Payments. (For some odd reason, though, you can't create memorized Purchases. We don't know why.)

With memorized transactions, you can enter the GL accounts and general information without knowing an exact amount. They are great for transactions that occur irregularly because they don't automatically post, and you can use them as needed.

Creating memorized transactions

Suppose that you sell a product line in which a customer will probably need several parts at once, instead of just one part. By creating a memorized Sales Invoice, each time one of these units is sold, you won't need to look up or enter the invoice information. As an example, in the sample company, we sell birdhouses. When a customer orders a birdhouse and a pole, we give the customer some birdseed at no charge. To create a memorized transaction to store the invoice information, follow these steps:

1. Choose Maintain → Memorized Transactions.

A submenu of available memorized transactions types appears.

2. Select the type of transaction: in this example, Sales Invoices.

The Maintain Memorized Sales Invoices window appears.

3. Create an ID and description that defines the transaction.

IDs can be up to 20 alphanumeric characters, and the description can be up to 30 characters in length.

4. Set the customer ID:

- *If you're designing this memorized invoice for a specific customer:* enter the customer ID in the Customer ID text box.
- *If you're designing this invoice for any customer:* Leave the Customer ID text box blank so that you can use it for any of your customers.

5. Enter the transaction information.

See Figure BC1-11 for an example. Note that this transaction doesn't have an invoice number or date because not all transaction fields are maintained in memorized transactions. The date and invoice number fields display when you actually use the memorized transaction.

Quantity	Item	Description	GL Account	Unit Price	Tax	Amount	Job
1.00	AWRY-10120	Redwood 12-Room Bird House, Attracts P	40000-AV	89.99	1	89.99	
1.00	AWRY-10110	Three-Section pole that will place the bird	40000-AV	49.99	1	49.99	
1.00	AWRY-10140	Thistle Bird Seed Mix 6 lb. Bag	40000-AV	0.00	1		
				0.00	1		

Figure BC1-11:
Memorize transaction for future use.

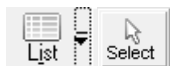


6. Click the Save button (as shown here).

Using memorized transactions

You can use a memorized transaction at any time. To see how to use the invoice we create in the preceding section, follow these steps:

1. **Choose Task**⇨**Sales/Invoicing (or whatever type of transaction you want to use) to display a task window.**



2. **Click the arrow to the right of the List button and click the Select button (both shown here).**

The Select Memorized Transaction dialog box appears, displaying all the memorized transactions relative to the current window.

3. **Click the transaction you want to use and then click OK.**

Voilà! The invoice information appears on-screen. You need to enter only the header information, such as customer name, invoice number, date, and so forth. You can edit the transaction lines as needed. We told you this could save you time!

You can find out how to enter invoices in Chapter 7.



You can also use existing transactions as memorized transactions for later use. After entering the transaction, click the arrow to the right of the Save button and choose the Memorize button (both shown here). Enter an ID and description for the transaction.

Action Items: May I Have Your Attention, Please?

Because being busy is part of daily life, overlooking a circumstance you intended to monitor does happen. Peachtree includes Action Items that assist you in tracking events and situations that are most important to your business. In the Action Items window, you can create events to keep track of certain occurrences or to remind you when a particular situation occurs.

A strange turn of events

Are you a sticky-note fanatic? Is your desk littered with lots of little notes with no clear place to put them, yet you know they are important? If these notes pertain to customers, vendors, or employees, you might want to take a look at the Peachtree Event feature.

Turning off the automatic events

We all know that too much of a good thing is not so good. So it is with the event log. By default, Peachtree keeps a log file of every type of transaction you make for customers, vendors, and employees. No, we're not talking about the journals where the actual transactions are stored. Instead, we're talking about a second place to store a list of transactions. Although the log file is a nice-enough feature, Peachtree's default event log settings tend to clutter a very useful screen with redundant data.



We recommend that you turn off the event log automatic features and create events only when you want them.

To turn off the automatic events, follow these steps:

1. Choose Tasks → Action Items.

The Action Items and Event Log Options window opens.



2. Click the Options button (as shown here).

3. Click the Transactions tab and remove all the check marks from the Create Event column. (See Figure BC1-12.)

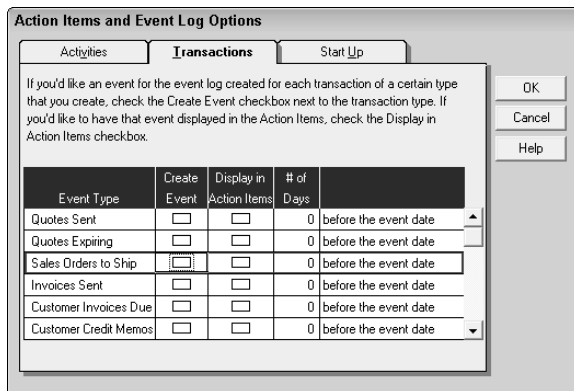


Figure BC1-12:
Keep track of happenings by using Events.



4. Click OK and then click the Close button (as shown here).

Peachtree no longer automatically creates transactions in the Event Log file.

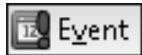
Creating your own events

Suppose that you contacted a delinquent customer and would like to make a note of the conversation, or perhaps an employee received a favorable comment from a customer or a reprimand for being late. Maybe your favorite

vendor sales representative has promised you a special discount on your next order. For notes like these, you can effectively use Peachtree's event log. Throw those sticky notes away! (Well, okay, if you don't want to throw them away, stick them on the cat.)

You can create events from the Maintain Customers, Vendor, or Employees windows; from most task windows involving customers, vendors, or employees; or even from the Action Items window (also available under the Tasks menu).

For this example, we create an event note tracking a telephone call we received about one of our employees:

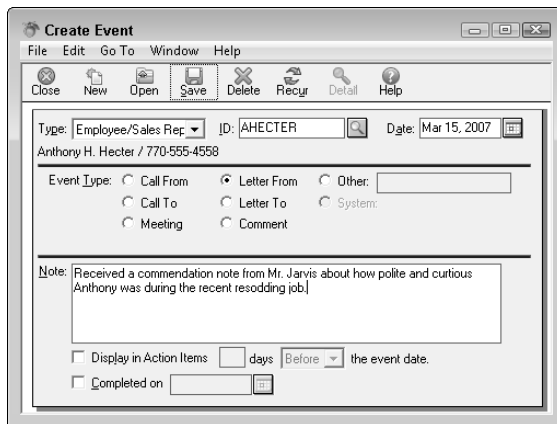


1. Choose Maintain → Employees/Sales Reps to display the Maintain Employees & Sales Reps window.

Optionally, open the Maintain Customer/Prospects or Maintain Vendor windows to enter events pertaining to customers or vendors.

2. Click the Event button (as shown here) to reveal the Create Event window, as shown in Figure BC1-13.

Figure BC1-13:
Record notes in the Create Event window.



Click the Open button to modify an existing event.

3. Choose the employee ID from the ID lookup list.

4. (Optional) Change the date of the event.

You can type the event date or select a date from the calendar icon.

5. Select the option that best describes the note you want to make in the Event Type section.

If you select the Other option, you can write your own description for the type of event.

6. Type a note describing the event (for example, a telephone conversation) in the Note text box.

You can enter up to 255 characters in the Note text box. To start a new paragraph in the Note text box, press Ctrl+Enter.

Click the Open button to modify an existing event.



7. Click the Save button (as shown here) and then close the Event window.

Looking at the event log

You can view the event log through the Maintain Customers, Vendors, or Employees windows. You can see or print all the events pertaining to a customer, vendor, or employee by following these steps:

1. Choose Maintain⇨Employees & Sales Reps (or Customer/Prospects or Vendors).

The Maintain Employees & Sales Reps (or Customer/Prospects or Vendors) window appears.

2. Enter the employee ID in the Employee ID text box or choose it from the lookup list.

3. Click the Log button, and Peachtree displays the log file.



To print the event log, click the Print button (as shown here).

Making a to-do list

One of the more useful Action Items features is creating a to-do list. Keeping track of the things you need to do with the Action Items feature is like having your own little Personal Information Manager (PIM) stored right in Peachtree.

Follow these steps to use the Action Items feature:

1. Choose Tasks⇨Action Items to display the Action Items window.

2. Click the To Do tab.

Use the To Do tab to set up a list of tasks that you need to complete. These tasks are not associated with a vendor, customer, or employee.

3. Enter a date for the first To Do item.

Peachtree assumes that you want to accomplish this task as of the current date.

4. Click the Notes section of the first line and type your first task. See Figure BC1-14.

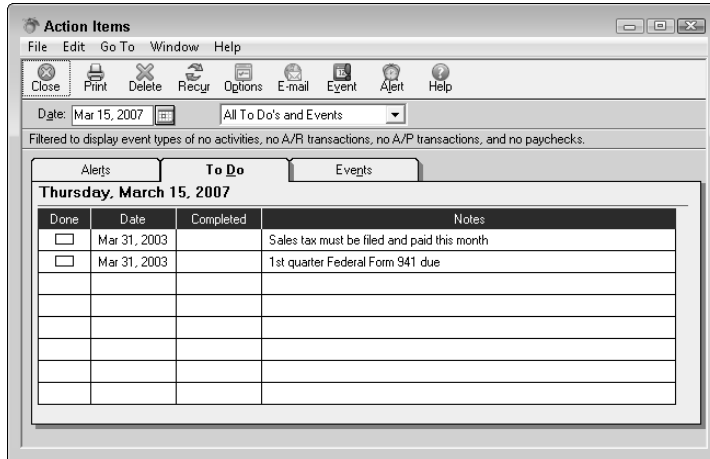


Figure BC1-14:
Help yourself become organized with the To Do list.

After you complete a task, select the Done check box at the beginning of the line. To hide completed items, click the arrow next to the All To Do's and Events drop-down list (at the top of the window) and then choose Uncompleted Events. Peachtree then hides the completed events.

Although you see only eight lines for to-do items, when you reach the last line and press the Tab key in the Notes text box, Peachtree creates a new line and adds a scroll bar.



Other useful buttons are the Delete button to delete a selected to-do task and the Print button to print a copy of your to-do list. (Both buttons are shown in the margin.)



When you close the window, Peachtree automatically saves the to-do list for you.

Setting alerts

Alerts are conditions that you want to be aware of as they happen so that you can take further action. Alerts might warn you of low inventory, a customer credit card about to expire, or an employee working too much overtime.

When the conditions for an alert are met, Peachtree can display it on an alert list or send someone an e-mail about the condition. You can create alerts for employees, vendors, customers, inventory items, and General Ledger accounts that meet certain criteria. Follow these steps to create an alert:

1. Choose **Tasks** → **Action Items** to display the **Action Items** window.
2. To create a new alert condition, click the **Alert** button (as shown here).



The Set Company Alerts dialog box appears, as shown in Figure BC1-15.

Figure BC1-15:
E-mail a standard alert message, a customized message, or both.

E-mail	Apply To	From	To	Type	Condition	Amount
<input checked="" type="checkbox"/>	G/L Account	60000	89000	Balance-Year to Date	>=	10,000.00
<input checked="" type="checkbox"/>	Inventory Item	AVFY-10100	TOPI-40100	Quantity on Hand below Minimum		
<input type="checkbox"/>	Employee	ACHRISTY-0	TMASZK-01	Total Hours-Per Paycheck	>=	80.01
<input type="checkbox"/>	Vendor	ARBOR-01	ARBOR-01	Purchase Volume-Current Period	>=	3,000.00

Alert Description: Alert me for accounts from: 60000 to: 89000 >= 10,000.00

Email Information:

To: infoster@sample.peachtree.com Subject: Please double-check posting.

Cc: tmaszk@sample.peachtree.com

Bcc:

Standard Message: This message is to notify you of the following: <G/L Account Description>, account number <G/L Account ID>, has a year to date activity greater than or equal to 10,000.00. The activity for the fiscal year <MM/DD/YY> to <MM/DD/YY> is <amount>.

E-mail Note: Melvin: Could you double-check the general ledger for these accounts to make sure that we haven't made a mistake in posting? Thanks.

3. Click the next available blank line in the list.
4. Select the **E-mail** check box if you want to send an e-mail message notifying someone of the alert condition.

You enter the e-mail recipient information in the bottom section of the window. Alternatively, click the arrow next to a recipient box to display a list of all customer, vendor, and employee e-mail addresses stored within Peachtree.



To generate e-mail messages from within Peachtree, you must use a MAPI-compliant, default e-mail application such as Outlook or Outlook Express. If your default e-mail system is AOL, you can't send e-mail alerts from Peachtree because AOL is not a fully MAPI-compliant e-mail application.



5. Select whether the alert condition applies to a customer, vendor, employee, inventory item, or GL account, as well as which customer, vendor, employee, or GL accounts you want to include.

Peachtree does not allow you to leave fields blank or amounts at zero.

6. Select the information type you want the alert condition to monitor.

The available options depend on whether you are monitoring a customer, a vendor, an inventory item, or a GL account.

7. Select the condition you want to monitor and enter an amount appropriate to the type of information you have chosen.

The choices you see vary, depending on the type of alert selected.

8. Click OK.



Peachtree doesn't automatically send the alert messages. Choose Tasks, Action Items, and then click the E-mail button to generate the e-mail alerts in batch mode.



Click the Alerts tab in the Action Items window to see a list of current alerts.

Finding Transactions

Sherlock Holmes, where are you? Looking for specific transactions can be time consuming and feel like detective work. In many cases, the Customer and Vendor ledger reports give a lot of information, but what about employees? What if you're looking for inventory information that could be affecting a customer or a vendor, such as which customers purchased product XYZ this year? Fortunately, Peachtree includes a Find Transactions feature that makes your sleuthing work much easier.

You can activate the Find Transaction feature at any time or from any window in Peachtree. To search for transactions, follow these steps:

1. Choose Edit→Find Transactions or press Ctrl+F.

The Find Transactions window opens, showing a number of conditions by which to search.

2. Enter the criteria for which you want to search.

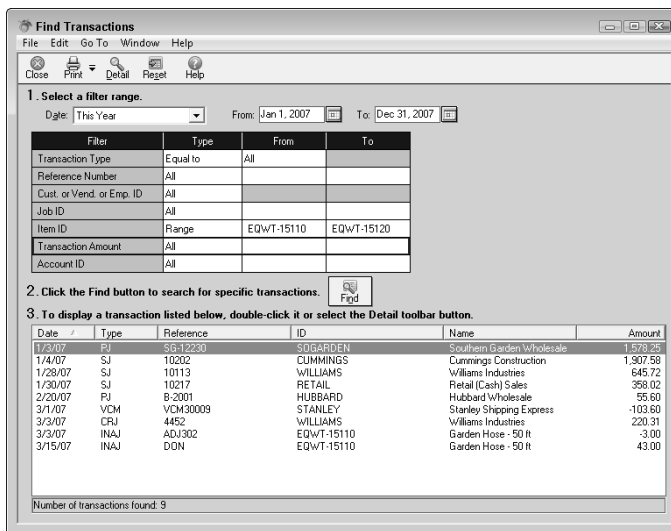
You can use any option by itself or in combination with another option. If you combine two options, Peachtree searches for a transaction that matches both criteria, so using more than one option limits the number of transactions Peachtree finds. Here are the conditions you can use to search:

- *Date*: Find transactions based on To and From dates.
- *Transaction Type*: Find transactions based on the type of transaction such as Invoice, Purchase, or Inventory Adjustment.

- **Reference Number:** Find transactions based on the transaction reference number. You entered this number when you created the transactions. For payments, the reference number usually refers to the check number.
- **Customer, Vendor, or Employee ID:** Find transactions for a specific or range of customers, vendors, or employees.
- **Job ID:** Find transactions related to a specified job.
- **Item ID:** Find transactions related to a specified inventory item.
- **Transaction Amount:** Find transactions equal to, greater than, less than, or within a specified dollar range.
- **Account ID:** Find transactions that affect specified GL accounts.

Figure BC1-16 shows an example. We want to see any transaction this year involving our garden hoses, which are our inventory item IDs of EQWT-15110 through EQWT-15120. We let the Find Transactions feature do the detective work for us.

Figure BC1-16:
Search for transactions here.



3. Click the Find button (as shown here).

Peachtree searches all journals for any transactions referring to the field(s) data you specify. The results display at the bottom of the Find Transactions window.

The window lists each transaction with the date, type, reference, ID, name, and amount. The Type field indicates the source of the transaction. Table BC1-1 shows the possible transaction types as well as the name of their respective journals and the source of the reference.

<i>Type</i>	<i>Name</i>	<i>Source</i>
ASBY	Assemblies Adjustment Journal	Build/Unbuild Assemblies
CDJ	Cash Disbursement Journal	Payments
CM	Credit Memo	Customer Credit Memos
CRJ	Cash Receipts Journal	Receipts
ET	Expense Ticket	Time/Expense
GENJ	General Journal	General Journal Entry
INAJ	Inventory Adjustments Journal	Inventory Adjustments
PJ	Purchase Journal	Purchase/Receive Inventory
PO	Purchase Order Journal	Purchase Orders
PRJ	Payroll Journal	Payroll
QT	Quote	Quotes
SJ	Sales Journal	Sales/Invoicing
SO	Sales Order Journal	Sales Order
TT	Time Ticket	Time/Expense
VCM	Vendor Credit Memo	Vendor Credit Memos



Click any column heading to sort the transactions in descending order by the selected column. Click the column heading again to sort the transactions in ascending order.



Double-click any transaction line to view or edit the actual transaction. Click the Reset button to clear the criteria and start a new search.



Click the Print button (as shown here) to print a report.



After you finish reviewing the transactions, click the Close button (as shown here) to close the Find Transactions window.



Peachtree also includes a Find Transaction report. Choose Reports & Forms⇨Company and then double-click the Find Transactions Report. The default report shows all transactions (assemblies, credit memos, general journal entries, invoices and so forth) for the current date. Click the Options button to filter the report. See Chapter 14 for information on filtering reports.

