

Getting Started and Using Peachtree on a Daily Basis

This one-day class will help both Peachtree users that are just getting started or those that are using Peachtree on a daily basis and want to be sure they are using it correctly. It's also helpful to those that want to use features they haven't set up yet. You'll learn about processing transactions and how they affect the general ledger and financial statements.

Getting Started with Peachtree!

- Setting up company information, accounting methods, accounting periods and posting methods
- Setting up program preferences and options
- Navigating around the program
- Defining the chart of accounts and customizing the chart of accounts
- Setting up customers and vendors
- Setting up sales tax
- Setting up inventory items
- Setting up payroll

Processing Customer Transactions

- Creating quotes for customers and clients
- Creating sales orders, customer invoices, sales receipts and credit memos
- Posting customer payments and making deposits

Processing Vendor Transactions

- Creating purchase orders and receiving inventory
- Recording vendor invoices
- Paying vendor bills and recording manual checks

Processing Payroll Transactions

- Paying employees
- Computing and making payroll tax deposits
- Payroll reports

Utilities

- Adding records on the fly
- Voiding transactions
- Account reconciliation
- Making and restoring a backup

This class is an instructor led class. We have found that students learn more if they are watching the instructor since they can focus on the subject being discussed, take notes and ask questions. We are also able to cover more material in a shorter period of time, thereby giving you more education for your investment. All students will receive a workbook with important tips and tricks. This class will use Peachtree 2009.

All classes run from 9:00 to 4:00 with a one-hour lunch break. Lunch is on your own.