

# Software Installation

**Install the software that tens of thousands of customers choose every year and is accountant recommended. Peachtree software is used by more than 3.1 million small and medium-sized business customers in North America; 6.2 million worldwide.**

The Sage family of software products, which includes Peachtree Complete Accounting, is the leading global supplier of business management solutions and services. Sage is a global company with more than 13,600 employees and more than 25 years experience.

1. Sage Academic Site License, information below and on pages v and vi.
2. Peachtree Complete Accounting 2012: Student Version and Educational Version, page iv.

To register the Student Version software included with the textbook, go online to [www.peachtree.com/student/regi](http://www.peachtree.com/student/regi).

3. System Requirements, pages iv-vi.
4. Software Installation, page vi.
5. Sage Academic Site License, page vi.
6. Peachtree and Firewalls, page vi.
7. Peachtree Complete Accounting 2012 Installation, pages vi-xv.
8. Expiration date, Student Version, PCA 2012, pages xv-xvi.
9. Setting Global Options. Once global options are set, they are in effect for all Peachtree companies, pages xvi-xviii.
10. Computer Lab Installation, page xviii.
11. File Management, pages xviii-xx.
12. Student Version Software, page xx.
13. Educational Version Software, page xxi.
14. Deleting Peachtree, page xxi-xxii.

## SAGE ACADEMIC SITE LICENSE

To obtain a site license for installation on multiple classroom computers, complete the Sage academic site license application at [www.mhhe.com/yacht2012](http://www.mhhe.com/yacht2012); Academic Site License link. The full educational version software is free to schools.

### **Peachtree Complete Accounting 2012: Student Version and Educational Version**

The software included with the textbook is the **Student Version** which can be installed on one computer. To receive a free multi-user **Educational Version**, complete the Sage Academic Site License. The Educational Version can be installed on multiple classroom computers.

The two versions, Student Version for individual installation, and Educational Version for multi-user classroom installation, include the same features. The difference is the Student Version expires after 14 months.

Peachtree Complete Accounting 2012 was used to write the textbook. All Peachtree screen captures are done using Windows 7. Install the software included with the textbook on individual computers. For multi-user installation, complete the Academic Site License from Sage at [www.mhhe.com/yacht2012](http://www.mhhe.com/yacht2012). If you have an earlier version of Peachtree installed (Peachtree Complete Accounting 2011 or lower), see Deleting Peachtree pages xxi-xii.)

### **SYSTEM REQUIREMENTS: Recommended System Configuration** <http://www.peachtree.com/productsservices/complete/system>

#### **Recommended System Configuration**

- 1 GHz Intel Pentium III (or equivalent) for single user and 1.8 GHz Intel Pentium 4 (or equivalent) for multiple concurrent users.
- 512 MB of RAM for single user and 1GB for multiple users.

#### **Minimum System Requirements**

- 1 GHz Intel Pentium III (or equivalent) for single and multiple users.
- 512 MB of RAM for single user or multiple users.
- Windows 7 Home Professional or higher, Vista SP1, XP SP3. (Peachtree does not have a Macintosh version. For Macintosh computers, search for PC compatibility at [www.apple.com](http://www.apple.com).)
- 1 GB of disk space for installation.
- Internet Explorer 7.0 required; Internet 8.0 and 9.0 supported.
- Microsoft .NET Framework CLR 3.5. Requires an additional 280 MB to 610 MB.
- At least high color (16-bit) SVGA video; supports 1024x768 resolution with small fonts required.

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Higher screen resolution may be used. Higher resolution will not affect how the software functions, but the user interface may look different. For example, if you do not have an <OK> button, press <Enter> to start Bellwether Garden Supply or Stone Arbor Landscaping.

- DVD-ROM.
- USB drive: For backing up data, one USB flash drive is recommended with 2GB of storage space.
- All online features/services require Internet access with at least a 56 Kbps modem.

### Integration/Compatibility Requirements

- Excel®, Outlook®, and Word integration requires Microsoft Excel, Outlook, and Word 2003, 2007, or 2010
- Sage Peachtree is certified to meet the Payment Card Industry Data Security Standards (PCI-DSS) for customers who process credit card payments in Sage Peachtree through integration with Sage Exchange. Internet connection required.
- Outlook Sync supported in Exchange 2000 SP2, 2003, 2007 and 2010
- Printers supported by Microsoft Windows XP/Vista/7
- In-product demos require Macromedia® Flash™ Player
- Adobe® Reader® 9.0 required
- Crystal Report® 2008
- SP1 requires installation of Sage Peachtree Premium Accounting or Sage Peachtree Quantum Accounting 2009 or higher. Additional 300 MB of available disk space is required.

### Multi-User

- Multi-user environments are supported in Sage Peachtree Complete Accounting and higher
- Multi-user mode is optimized for Windows Server 2003 or Windows Server 2008 client-server networks, and Windows XP/Vista/7 peer-to-peer networks
- A maximum of five licensed named users are allowed. A named user account is granted a license when selected in the user maintenance screen
- 1 GB of disk space for installation of components on server.

**IMPORTANT: Read Me—ACADEMIC SITE LICENSE**

For classroom installation on multiple computers, complete the Sage academic site license application online at [www.mhhe.com/yacht2012](http://www.mhhe.com/yacht2012); link to Academic Site License.

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### Terminal Services

- Windows 2003 or 2008 Server along with Remote Desktop Connection or Remote Desktop Web Connection client is required to run in a Windows Terminal Services environment. No more than 5 named users.
- Terminal Server requires additional memory when more than one user is running under Windows Terminal Services. An additional 21 MB RAM is recommended for each additional user.

## SOFTWARE INSTALLATION

This section gives you instructions for installing Peachtree Complete Accounting 2012 (PCA) software. *Check with your instructor to see if Peachtree has already been installed in the classroom or computer lab.*

### Sage Academic Site License

To install Peachtree Complete Accounting 2012 on multiple classroom computers, complete the site license application at [www.mhhe.com/yacht2012](http://www.mhhe.com/yacht2012); Academic Site License link.

The Student Version software included with the textbook should be installed on one computer.

### Peachtree and Firewalls

Peachtree and its database, Pervasive, can be mistakenly identified as an intrusion threat by many firewall and anti-virus programs. If not addressed properly, this may cause installation to fail or Peachtree may not start or run properly.

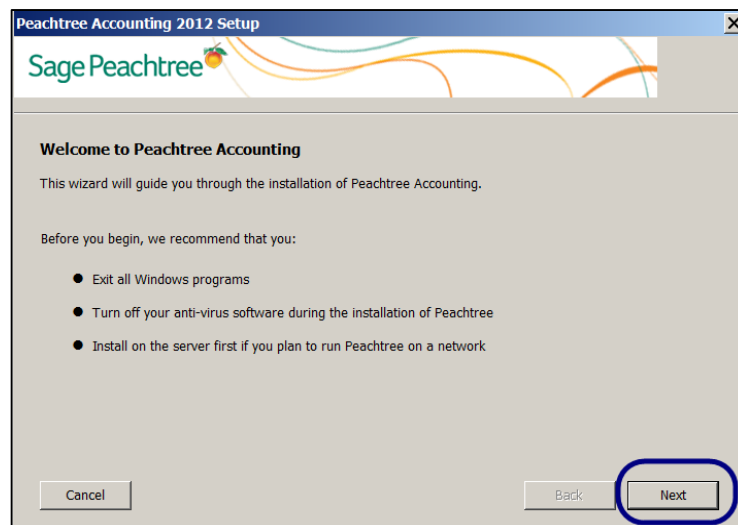
Go to this website to review information about firewalls and antivirus software, [www.peachtree.com/supportTraining/commonIssues/firewall/](http://www.peachtree.com/supportTraining/commonIssues/firewall/). The textbook's website at [www.mhhe.com/yacht2012](http://www.mhhe.com/yacht2012) includes more information at the Frequently Asked Questions link to How do I check my Firewall and Antivirus software.

### Peachtree Complete Accounting 2012 Installation

Follow these steps to install PCA 2012 on an individual computer (non-networked). The installation steps that follow are consistent with the Windows 7 operating system. If you are using Windows Vista or XP, your steps, and some of the screen illustrations, will differ slightly. For more information, refer to File Management, pages xviii-xx.

**Student Version software installation requires that you complete Sage Peachtree's registration process online at [www.peachtree.com/student/regi](http://www.peachtree.com/student/regi). Before you insert the Peachtree Complete Accounting 2012 DVD included with the textbook, complete Step 1.**

- Step 1: To obtain a serial number for software installation, go online to [www.peachtree.com/student/regi](http://www.peachtree.com/student/regi). To complete Step 11, page ix, you must use the serial number provided and complete any additional online registration and activation steps.
- Step 2: Insert the Peachtree Complete Accounting 2012 DVD in the DVD drive. If an AutoPlay window appears, click Run autorun.exe. (Or, select Browse the DVD. Select autorun.exe.)
- Step 3: At the Welcome to Peachtree Accounting window, select Install Peachtree Accounting. If a User Account Control window appears, click <Yes> with Windows 7; <Continue> with Vista.
- NOTE:** If a window prompts that your computer is currently using a default network protocol, IPV6, that may cause Peachtree to run slowly, read the information. Then, click <Yes>.
- Step 4: A Preparing to Install window appears. When the scale is complete, the Welcome to Peachtree Accounting window appears. The Welcome to Peachtree Accounting window is shown below.

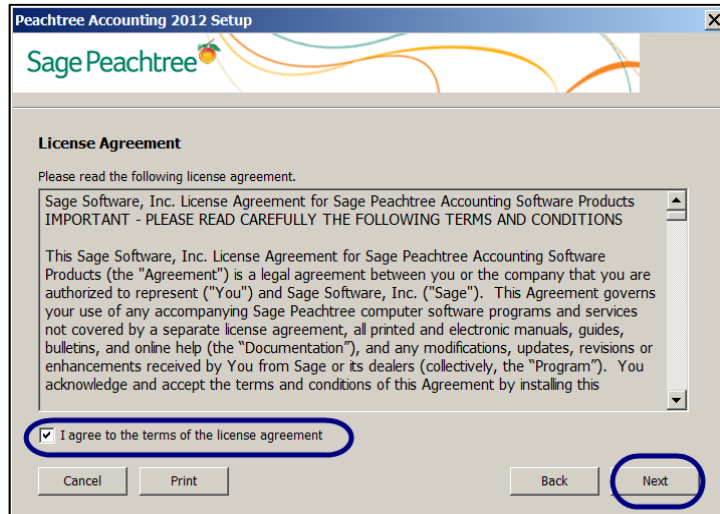


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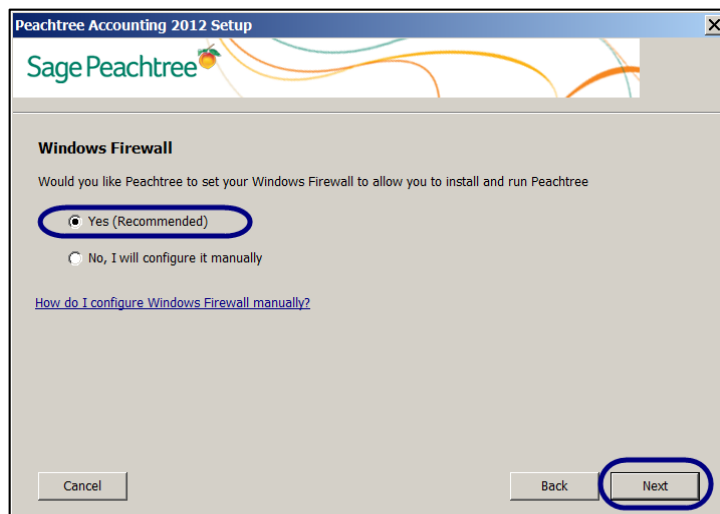
Step 5: Click .

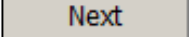
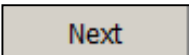
Step 6: When the License Agreement window appears, click on the box next to I agree to the terms of the license agreement to place a checkmark.

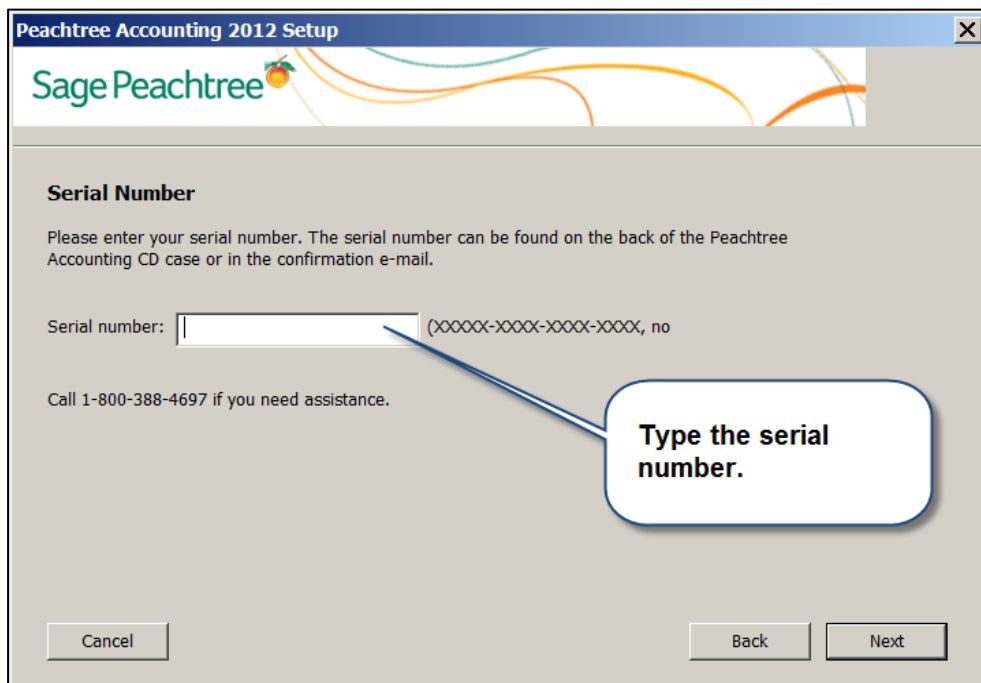


Step 7: Click .

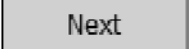
Step 8: The Windows Firewall window appears. Accept the default for Yes (Recommended).



- Step 9: Click . The Firewall Settings window appears; read the information. You may need to disable your antivirus software. (Refer to page vi, Peachtree and Firewalls.)
- Step 10: Click . The Searching for Previous Installations window appears. This may take several minutes.
- Step 11: The Serial Number window appears. Type the serial number given when you completed Step 1, page vii. If you have *not* obtained the serial number, go online to [www.peachtree.com/student/regi](http://www.peachtree.com/student/regi).

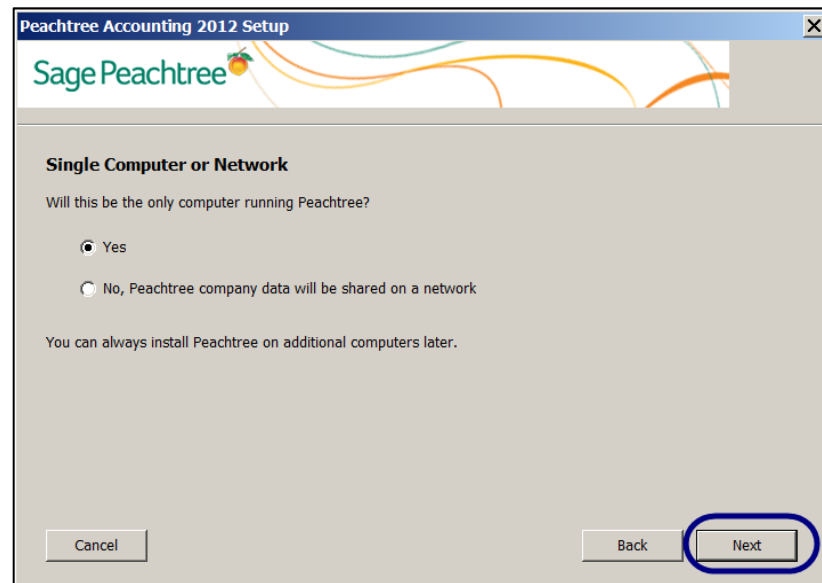


**NOTE TO INSTRUCTORS/SCHOOLS:** If you are installing the software received with the Sage Academic Site License, type the serial number found on the label within the DVD case.

- Step 11: Click .
- Step 12: The Single Computer or Network window appears. Make the appropriate selection. Yes is the default for individual computers.

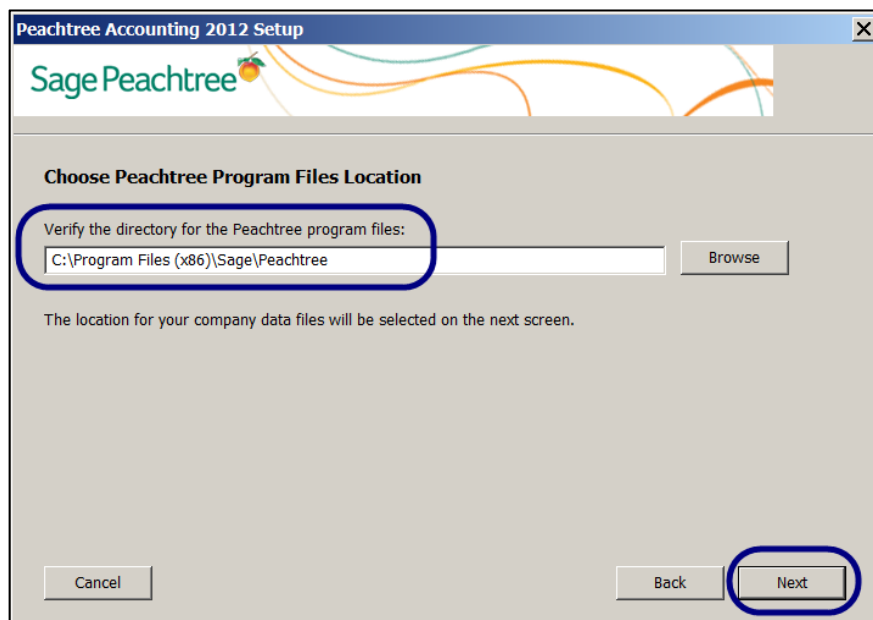
## x Software Installation

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Step 13: Click .

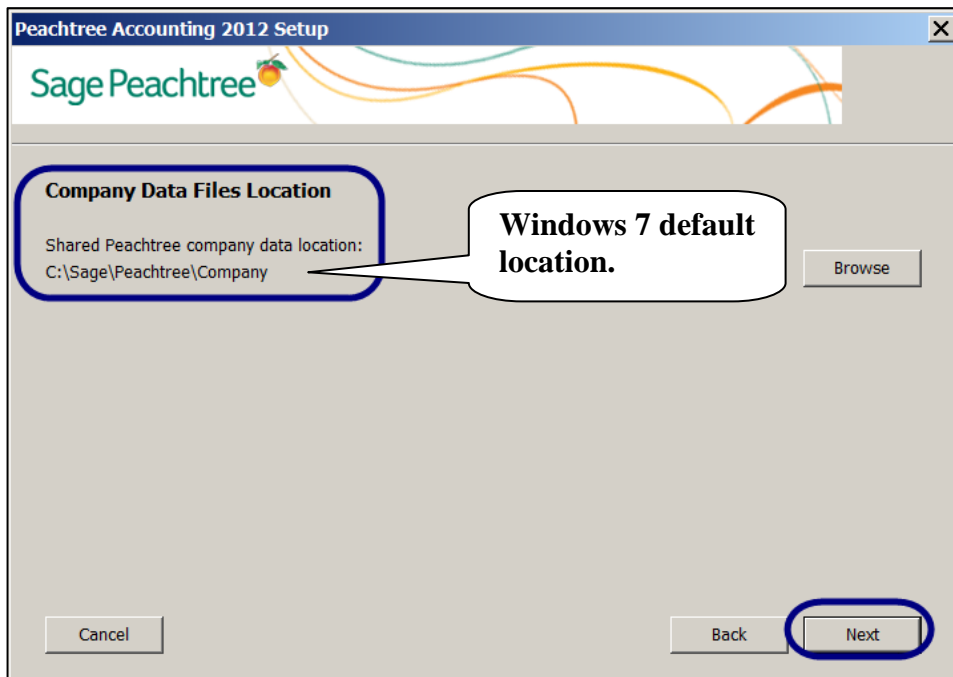
Step 14: The Choose Peachtree Program Files Location window appears. The author suggests accepting the default installation directory at C:\Program Files (x86)\Sage\Peachtree. (On Windows Vista and XP computers, this location will differ.)

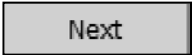




Step 15: Click .

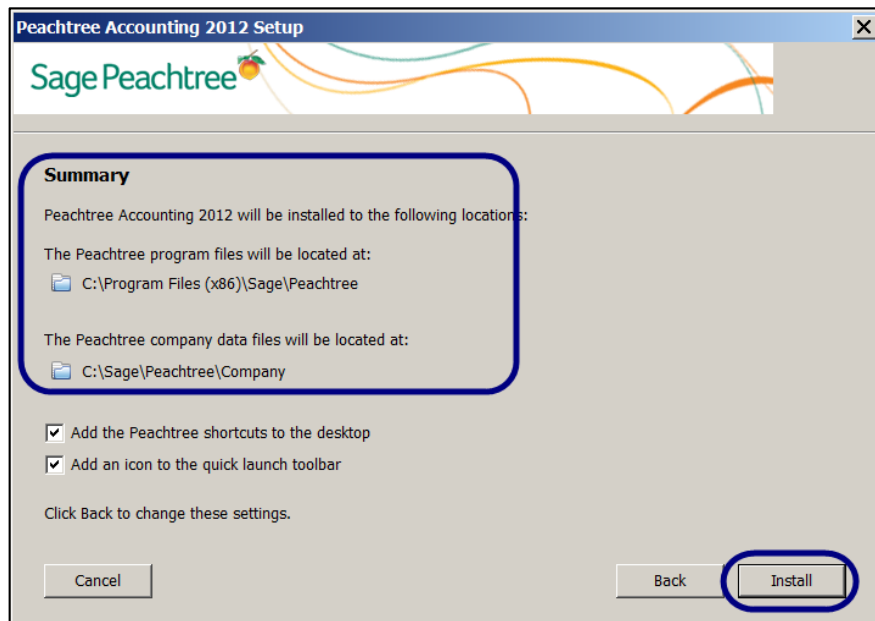
Step 16: The Company Data Files Location window appears. Accept the default, C:\Sage\Peachtree\Company or click Browse to set another location. (*Hint:* Your Company Data Files Location may differ. Refer to page xix, step 2.) The Company Data Files Location window is shown below.

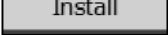


Step 17: Click . The Summary window appears. Read the information on the Summary window. (*Hint:* Your program files and company data files may be in different locations. Refer to File Management, pages xviii-xx.) The Summary window is shown on the next page.

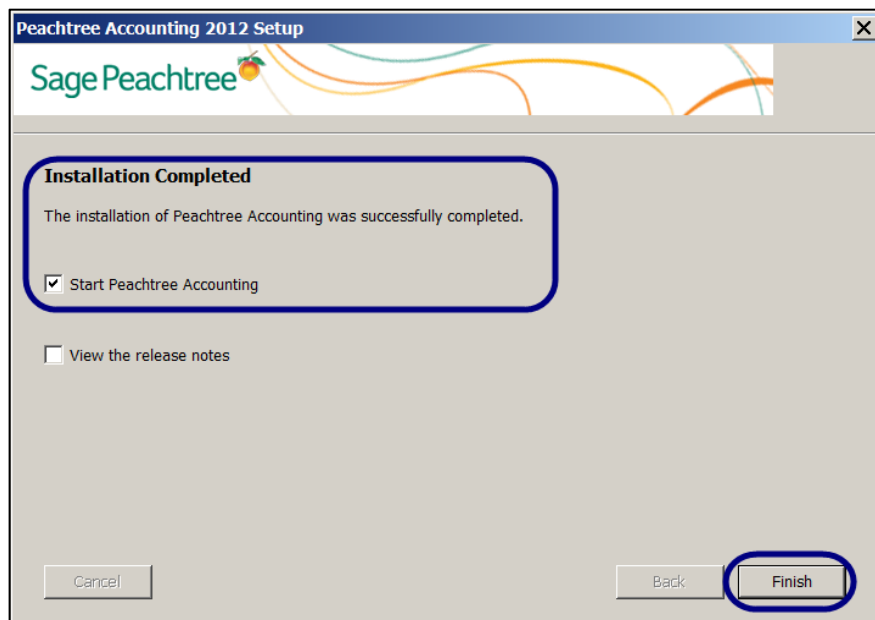
## xii Software Installation


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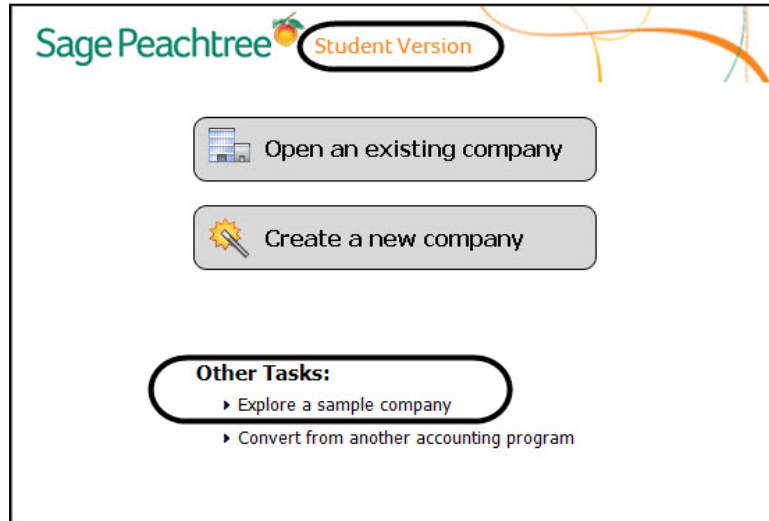
Step 18: Click . Peachtree starts to install. Be patient. Installation takes several minutes.

Step 19: Read the Installation Completed window. Observe that Start Peachtree Accounting is selected.

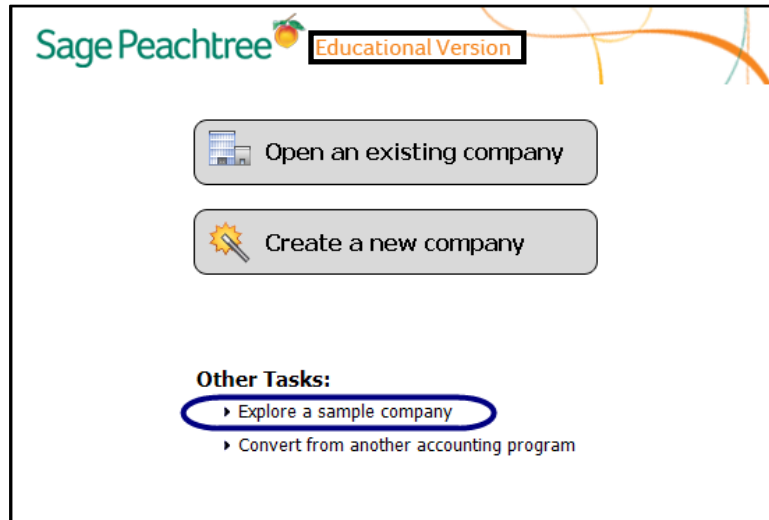


Step 20: Click . The Sage Peachtree Student Version or Sage Peachtree Educational Version startup window appears. Both versions include the same features.

Student Version software included with textbook:



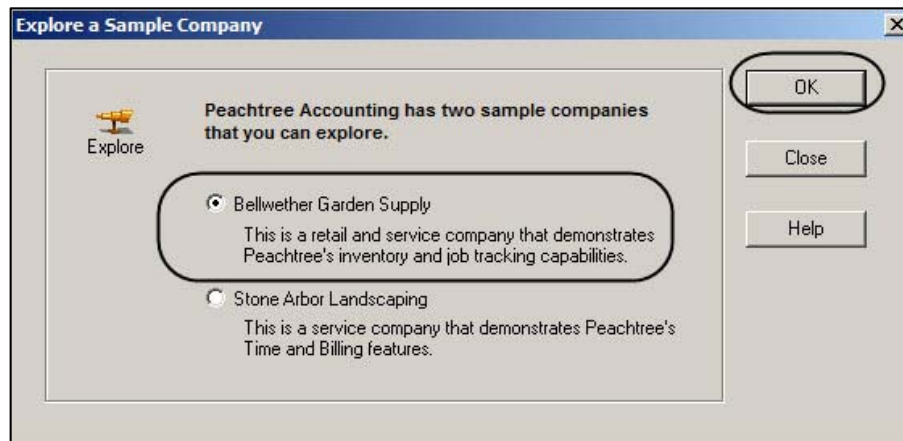
Educational Version software (classroom version received with Academic Site License):

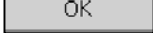


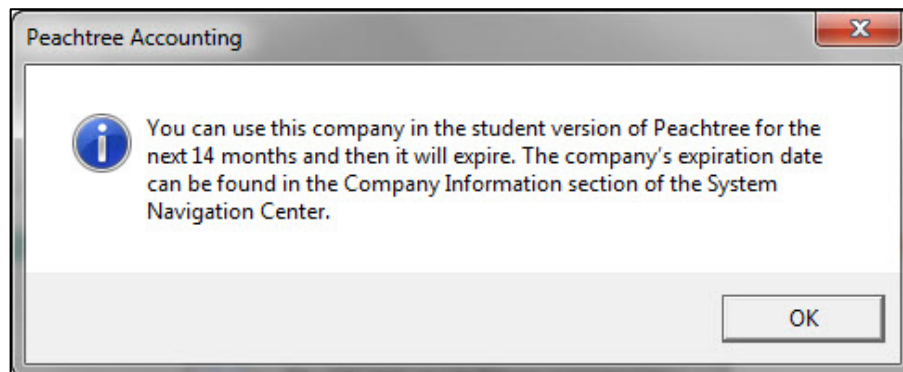
Step 21: If Bellwether Garden Supply is highlighted, go to step 22. Or, Select Explore a sample company. Bellwether Garden Supply is the default.

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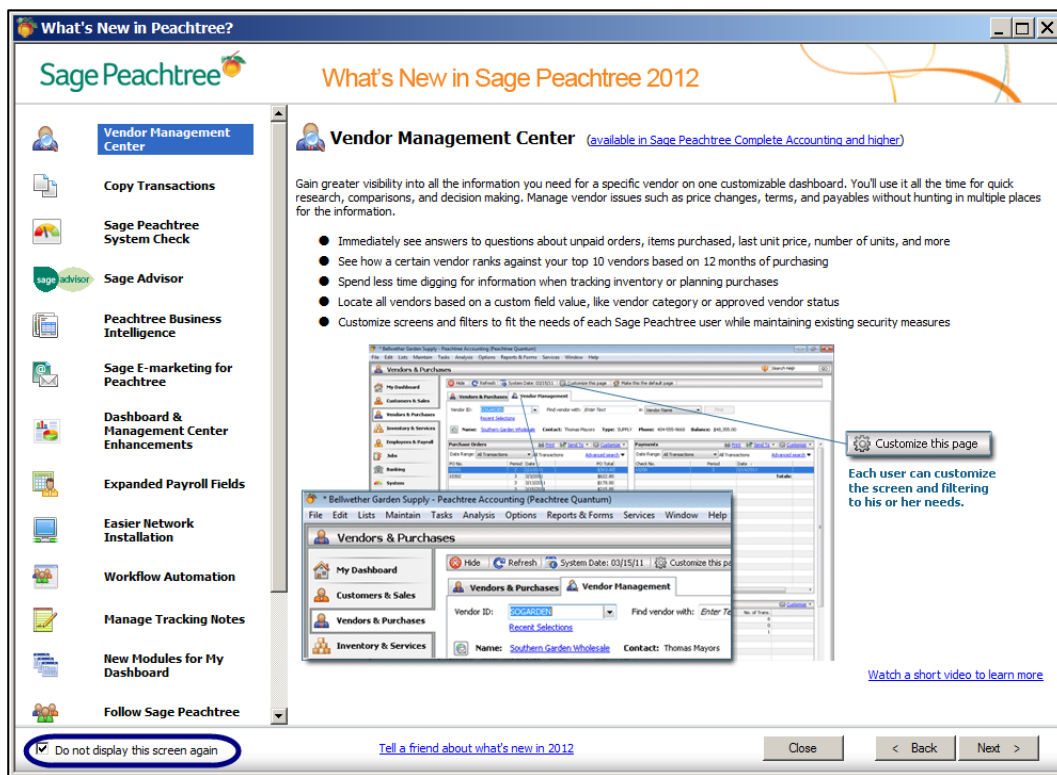


Step 22: Click  (or, press <Enter>). If you installed the Student Version included with the textbook, a Peachtree Accounting window appears that says "You can use this company in the student version of Peachtree for the next 14 months and then it will expire. The company's expiration date can be found in the Company Information section of the System Navigation Center." For more information about the expiration date, refer to page xv-xvi.

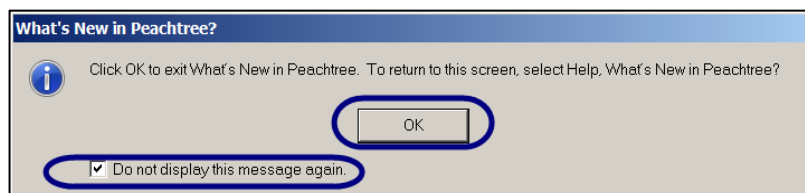


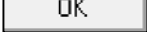
Step 23: Click .

Step 24: If the What's new in Peachtree window appears. Read the information. To read more, select <Next>. Click on the box next to Do not display this screen again. If you selected <Next> your window will differ.




Step 25: To close the What's New in Sage Peachtree 2012 window, click <Close>. When the window prompts Click OK to exit What's New in Peachtree, click on the box next to Do not display this window again.

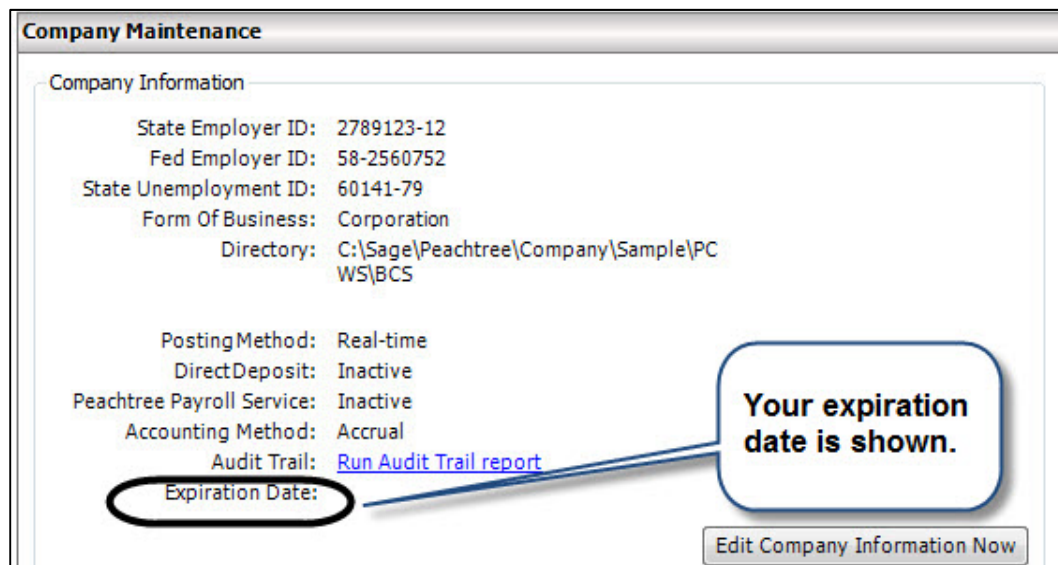


Step 26: Click . The Bellwether Garden Supply - Peachtree Accounting window appears.

## Expiration Date, Student Version, PCA 2012

To see when the Student Version of Peachtree 2012 expires, follow the steps shown on the next page.

1. From the Navigation Bar, select  **System**.
2. The Company Maintenance area includes an Expiration Date field. The expiration date is 14 months after the day you installed the software; for example if you installed the software on August 12, 2012, the expiration date is October 12, 2013.



The screenshot shows the 'Company Maintenance' window with the following details:

- Company Information**
  - State Employer ID: 2789123-12
  - Fed Employer ID: 58-2560752
  - State Unemployment ID: 60141-79
  - Form Of Business: Corporation
  - Directory: C:\Sage\Peachtree\Company\Sample\PC WS\BCS
- Posting Method: Real-time
- Direct Deposit: Inactive
- Peachtree Payroll Service: Inactive
- Accounting Method: Accrual
- Audit Trail: [Run Audit Trail report](#)
- Expiration Date: (highlighted with a red circle)

A callout box points to the 'Expiration Date' field with the text: **Your expiration date is shown.**

At the bottom right, there is a button labeled 'Edit Company Information Now'.

## Setting Global Options

Follow these steps to set Peachtree's Global Options. These options will be in effect for all Peachtree companies.

1. From Peachtree's menu bar, select Options; Global. The Accounting tab is selected.
  - In the **Decimal Entry** area, Manual and 2 decimal places should be selected in each field.
  - In the **Hide General Ledger Accounts** area, the boxes *must* be unchecked.
  - In the **Other Options** area, Warn if a record was changed but not saved and Recalculate cash balance automatically in Receipts, Payments, and Payroll Entry should be checked.

Compare your Maintain Global Options/Accounting window to the one shown below.

**Maintain Global Options**

**Accounting** | General | Peachtree Partners | Spelling

**Decimal Entry**

☐ Automatic

☒ **Manual**

**Number of Decimal Places**

Quantity fields:  Unit Price fields:

Standard fields:  [What fields are standard fields?](#)

**Hide General Ledger Accounts**

☐ Accounts Receivable (Quotes, Sales Orders, Invoicing, Credit Memos, Receipts)

☐ **Accounts Payable** (Purchase Orders, Purchases, Credit Memos, Payments)

☐ Payroll Entry

**Other Options**

☒ Warn if a record was changed but not saved

☐ Hide inactive records

☒ Recalculate cash balance automatically in Receipts, Payments, and Payroll Entry

☐ Use Timeslips by Sage Accounting Link

When sorting transactions by date in most lists and reports, secondary sort should be by:

☒ Reference Number ☐ Posting Order

OK Cancel Help

**Make sure your selections match the ones shown.**

- Click the General tab. Make sure your screen matches the one shown below.

**Maintain Global Options**

Accounting | **General** | Peachtree Partners | Spelling

**Improve Performance**

☒ Do not print total page length of reports in report headers

☐ Do not show quantity on hand in inventory item lookup lists

☐ Update the Business Status and Navigation Centers only when the Refresh button is clicked

☐ Update reports automatically when records are saved

**Line Item Entry Display**

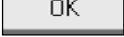
☐ 1 Line ☒ **2 Line**

**Smart Data Entry**

☒ Automatic field completion ☒ Automatically create IDs on maintenance windows

☒ Drop-down list displays automatically

OK Cancel Help

- Click . The selections made in global options are now set for all companies.

4. From Peachtree's menu bar, click File, Exit.
5. Remove the DVD. Observe that four icons have been set up on the desktop for Peachtree: Peachtree Accounting 2012, Peachtree Accounting 2012 Automatic Backup Configuration, Peachtree Knowledge Center, and Peachtree Business Checks and Forms.

## COMPUTER LAB INSTALLATION

Before computer lab installation, make sure all former versions of Peachtree are deleted. Refer to Deleting Peachtree, page xxi-xxii.

For multi-user installations, complete the Academic Site License from Sage at [www.mhhe.com/yacht2012](http://www.mhhe.com/yacht2012).

1. Peachtree Complete Accounting 2012 should be installed locally. Do *not* put on server.
2. Install software on local workstation then ghost (replicate) install. You can put the software on a standard lab image.

## FILE MANAGEMENT

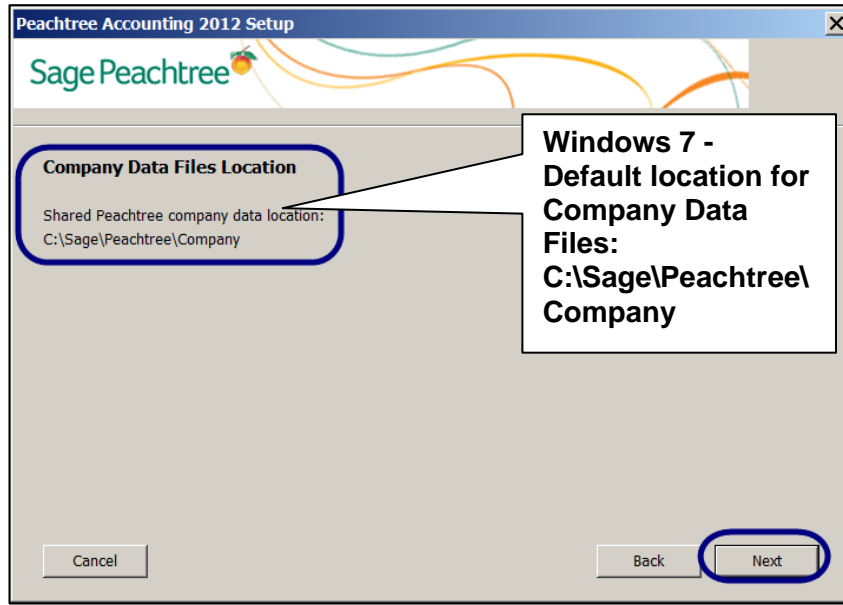
When Peachtree was installed two directories were set up (refer to steps 14-16, pages x-xi).

1. **Program Files Location:** The Windows 7 default directory where Peachtree is installed is C:\Program Files (x86)\Sage\Peachtree (step 14, page x). To see the Properties window, right-click on the Peachtree Accounting 2012 desktop icon; left-click Properties, select the Shortcut tab.

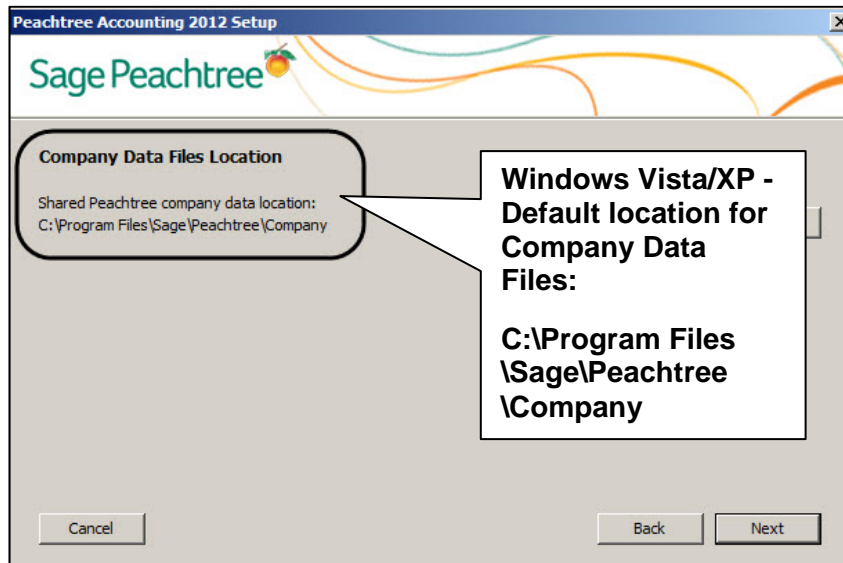




2. **Company Data Files Location:** On Windows 7, the default location for company data files is C:\Sage\Peachtree\Company (step 16, page xi).



On Windows Vista and XP, the default location for company data is C:\Program Files\Sage\Peachtree\Company. The directory field on the Maintain Company Information window shows where company data is stored (refer to Chapter 1, Comment box on page 23).



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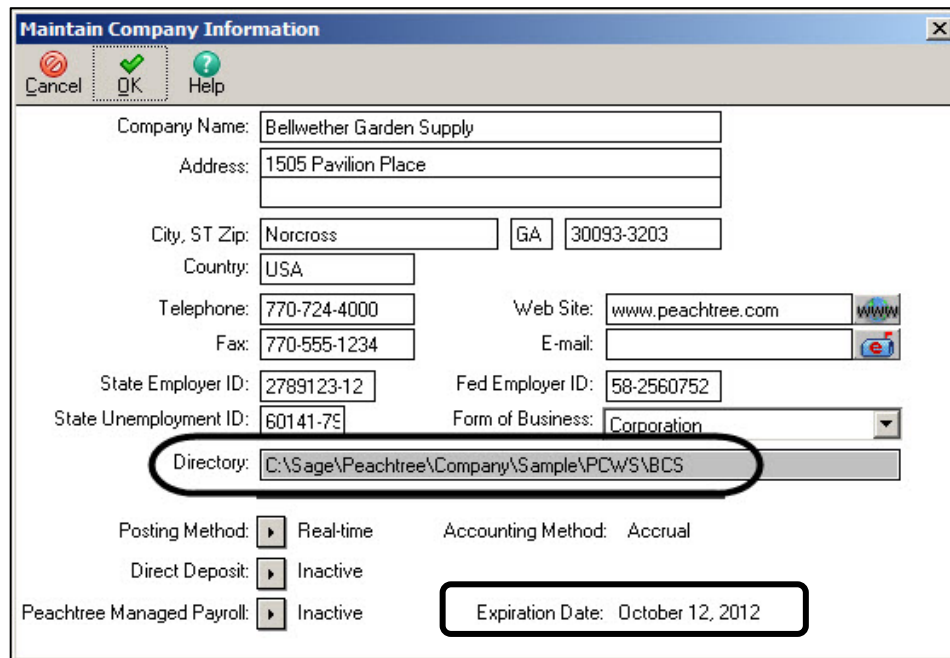
Peachtree files can be backed up (saved) to various locations: the company data files default location, a USB drive, external media, or other location. Detailed steps for backing up are on pages 22-25.

### Student Version Software

The software DVD included with the textbook is Peachtree Complete Accounting, Student Version. To see the default location where the currently displayed Peachtree company resides, follow these steps.

1. Start Peachtree. Open the sample company, Bellwether Garden Supply.
2. From the menu bar, select Maintain; Company Information. The Directory field shows where the currently displayed Peachtree company resides.

Student version directory:



**Maintain Company Information**

Cancel OK Help

Company Name: Bellwether Garden Supply

Address: 1505 Pavilion Place

City, ST Zip: Norcross GA 30093-3203

Country: USA

Telephone: 770-724-4000 Web Site: www.peachtree.com

Fax: 770-555-1234 E-mail:

State Employer ID: 2789123-12 Fed Employer ID: 58-2560752

State Unemployment ID: 60141-79 Form of Business: Corporation

Directory: C:\Sage\Peachtree\Company\Sample\PCwS\BCS

Posting Method: Real-time Accounting Method: Accrual

Direct Deposit: Inactive

Peachtree Managed Payroll: Inactive

Expiration Date: October 12, 2012

You can use company data in the Student Version of Peachtree for 14 months. After 14 months, the Student Version software expires. Your expiration date will differ from the one shown.

## Educational Version Software

If you are working in the computer lab, the default directory for Educational Version differs slightly when compared to the Student Version.

The Maintain Company Information window's Directory field differs slightly. Observe that the default folder for the Educational Version is \PCWE not \PCWS.

### Educational Version Directory:

The screenshot shows the 'Maintain Company Information' window with the following fields:

- Company Name: Bellwether Garden Supply
- Address: 1505 Pavilion Place
- City, ST Zip: Norcross GA 30093-3203
- Country: USA
- Telephone: 770-724-4000
- Fax: 770-555-1234
- Web Site: www.peachtree.com
- E-mail:
- State Employer ID: 2789123-12
- Fed Employer ID: 58-2560752
- State Unemployment ID: 60141-79
- Form of Business: Corporation
- Directory: C:\Sage\Peachtree\Company\Sample\PCWE\BCS (highlighted with a callout box labeled 'PCWE')
- Posting Method: Real-time
- Accounting Method: Accrual
- Direct Deposit: Inactive
- Peachtree Managed Payroll: Inactive

The features of the Student Version and Educational Version are the same, except for the Student Version's 14-month period of use.

## DELETING PEACHTREE

Follow these steps to delete Peachtree Complete Accounting 2012. (Use similar steps to delete Peachtree 2011.)

1. Insert the Peachtree DVD. Select Run autorun.exe.

2. When the Welcome to Peachtree Accounting window appears, select Remove or Modify Peachtree Accounting. When the User Account Control window appears, select <Yes>.
3. Select Peachtree Complete Accounting 2012. A Preparing to Install window appears. Be patient, this will take a few minutes. When a screen prompts that setup has detected an installation of Peachtree Release 2012 on this computer, click <OK>.
4. Select Remove, then click <Next>. A window prompts, This will remove Peachtree Accounting 2012 (all versions), click <OK>. Removing Peachtree will take a few minutes.
5. When the Select Country window appears, select the country for this installation; for example, United States. Click <Next>.
6. When the Maintenance Complete window appears, click <Finish>. Close the Welcome to Peachtree Accounting window.
7. Remove the DVD.

After removal, you may want to delete these two folders:

1. C:\Sage
2. C:\Program Files (x86)\Sage

Before removing the folders, backup data that you want to keep. Once the Sage folder is deleted, all company data files are removed. (*Hint:* In Windows Vista and XP, the Sage folder is within C:\Program Files.)

After removing the folders, empty the recycle bin.