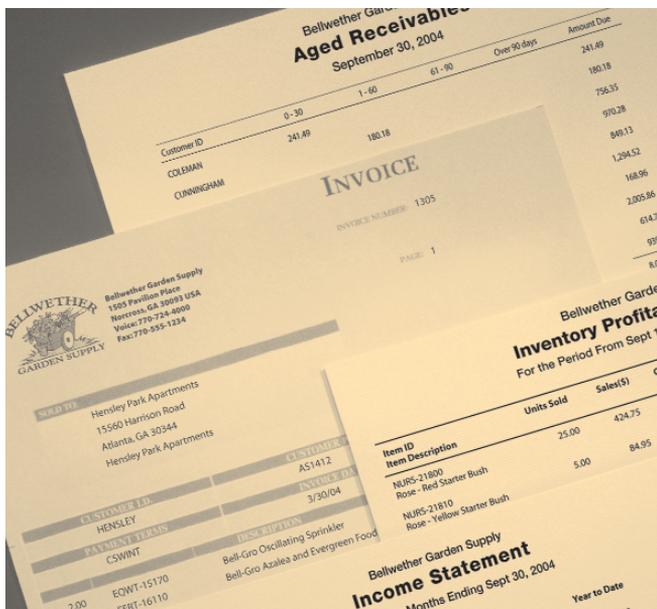


# Getting Started Guide



Peachtree First Accounting® 2004

Peachtree® Accounting 2004

Peachtree Complete® Accounting 2004

Peachtree Premium™ Accounting 2004

Peachtree Premium™ Accounting 2004 — Accountants' Edition



**best**  
software

insights for the life of your business™



# **Peachtree<sup>®</sup>**

## **Getting Started Guide**

*Peachtree First Accounting<sup>®</sup> 2004*

*Peachtree<sup>®</sup> Accounting 2004*

*Peachtree Complete<sup>®</sup> Accounting 2004*

*Peachtree Premium<sup>™</sup> Accounting 2004*



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View Peachtree Products and Services [www.peachtree.com](http://www.peachtree.com)  
Register Peachtree Products: [www.peachtree.com/register](http://www.peachtree.com/register) 1-800-388-4697  
Outside United States: [www.peachtree.com/register](http://www.peachtree.com/register) 770-492-6333  
Purchase Customer Support Plans: [www.peachtree.com/support](http://www.peachtree.com/support) 1-800-336-1420

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Getting Started Guide for Peachtree First Accounting 2004, Peachtree Accounting 2004, Peachtree Complete Accounting 2004, and Peachtree Premium Accounting 2004

First Edition, April 2003

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# Introducing and Installing Peachtree

# 1

## **Introducing Peachtree**

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# • Introducing and Installing Peachtree •

## Introducing Peachtree



For more information and a complete comparisons of all Peachtree products, look up “**compare, Product Comparison Chart**” in the Peachtree Help index or go to Peachtree’s Web site at [www.peachtree.com](http://www.peachtree.com).

Welcome to Peachtree. For over 25 years, we have been producing award-winning accounting and business management software products and services. Ideal for those small businesses that look to their accounting for the insight behind their numbers, Peachtree products and services provide not only essential financial information, but also valuable knowledge to help small businesses make better decisions for their future growth and success. For more information about Peachtree, visit the Web site at [www.peachtree.com](http://www.peachtree.com), or call 1-800-228-0068.

This *Getting Started Guide* covers installing and starting Peachtree First, Accounting, Peachtree Accounting, Peachtree Complete Accounting, and Peachtree Premium Accounting.

### **Peachtree First Accounting® 2004**

Ideal for small businesses who are switching to an automated software solution from a manual or personal finance system, Peachtree First Accounting provides fast startup, easy invoicing, convenient check writing, plus over 35 customizable reports. First Accounting provides the insight vital to a small business’s growth and success.

### **Peachtree® Accounting 2004**

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### **Peachtree Complete® Accounting 2004**

Peachtree Complete Accounting includes the robust, network-ready accounting features you want and provides you with the valuable insight you need. More effectively manage your accounting, business and Internet presence with such advanced features as job costing, time and billing, the Financial Manager, and more! Peachtree Complete gives you the insight behind your numbers.

## **Peachtree Premium™ Accounting 2004**

Peachtree Premium Accounting provides the most comprehensive business management solution Peachtree provides. Not only is it packed with all the powerful accounting features in Peachtree Complete Accounting, Peachtree Premium provides more complex functions to meet the needs of a growing business. Advanced features such as expanded budgeting and forecasting, company consolidation of financial statements, and compensation tracking provide a powerful, insightful solution for small businesses. It's the software solution small businesses can count on to gain the insight they need to succeed.

## **About This Guide**

This guide and the *User's Guide* refer to Peachtree First Accounting, Peachtree Accounting, Peachtree Complete Accounting, and Peachtree Premium Accounting as simply Peachtree. In specific cases, First Accounting, Peachtree Accounting, Peachtree Complete, and Peachtree Premium features or differences are noted.

Before you begin using Peachtree, be sure to read this guide for installation instructions, conversion instructions (if you have existing data), and other important issues. This guide includes the following information:

- System requirements for installation
- Instructions for installing Peachtree, Microsoft Internet Explorer, Adobe Acrobat, and FAS™ for Peachtree®
- Installation troubleshooting tips
- Instructions for setting up a new company
- Information about converting existing company data

## **System Requirements**

To install Peachtree, you need the following basic requirements:

- Customer registration and acceptance of the Peachtree Software License Agreement required
- IBM Compatible 233 MHz Pentium computer minimum; IBM Compatible 350 MHz Pentium II or higher recommended
- Windows XP, Windows 2000, Windows Me, Windows 98 or Windows NT 4.0 with Service Pack 6. Product will not operate in a Windows Terminal Server Environment using Windows Terminal Services
- 64 MB (megabytes) of RAM (random access memory) minimum; 128 MB recommended

# 1 *Introducing and Installing Peachtree* *Getting Started Guide*

- Display settings of at least High Color (16bit). SVGA video. 800 x 600 resolution with small fonts.
- CD-ROM Drive
- Mouse or compatible pointing device
- 80-140 MB free hard disk space
- Printers supported by Windows XP/2000/ME/98/NT 4.0
- Internet Explorer 5.x or 6.0 required. Microsoft Internet Explorer 6.0 is included on the Peachtree CD. Requires 70 MB (or higher) for installation.
- Online Services require Internet Access. Minimum connection speed depends on service.

Additional system requirements for *Peachtree Accounting*, *Peachtree Complete Accounting*, *Peachtree Premium Accounting* or *Peachtree Premium Accounting - Accountants' Edition*:

- To use Microsoft Excel with Peachtree products, Excel 97, Excel 2000, or Excel 2002 is required. Please refer to Microsoft Excel for hardware and memory system requirements.

Additional system requirements for *Peachtree Complete Accounting*, *Peachtree Premium Accounting* and *Peachtree Premium Accounting - Accountants' Edition*:

- Multi-user optimized for Windows XP/2000/98/NT 4.0 (peer-to-peer network), Windows NT 4.0 server or Novell NetWare Network 5.1. No more than 5 concurrent users.
- To run FAS for Peachtree a additional minimum 64 MB RAM is required. To run FAS for Peachtree with NT 4.0, Service Pack 6a is required.

Additional system requirements to install the multimedia tutorial and online documentation:

- 60-70 MB Additional free hard disk space

Additional system requirements to install Crystal Reports for Peachtree

- Peachtree Accounting, Peachtree Complete Accounting, Peachtree Premium Accounting, or Peachtree Premium Accountants' Edition 2004
- Pentium or higher processor

- Windows XP Professional, Windows 2000 Professional, Windows 2000 Server, Windows 2000 Advanced Server, Windows Me, Windows 98 (Second Edition) or Windows NT Workstation 4.0 with Service Pack 6a, Windows NT Server 4.0 with Service Pack 6a. If you are installing Crystal Reports for Peachtree on a computer running Windows NT, Windows 2000, or Windows XP, you must have Administrator privileges.
- 32 MB RAM minimum (64 MB for Windows NT), 64 MB RAM recommended
- 60 MB free hard disk space; 235 MB for full installation
- CD-ROM Drive

## Contents of the Peachtree Package

The Peachtree software package includes the following items:

- **Peachtree Compact Disc**

For a complete description of the Peachtree compact disc contents, see the following section. *Note:* Diskettes are not available with this version of Peachtree.

- **Peachtree Getting Started Guide**
- **Peachtree User's Guide**
- **Peachtree Products and Services Brochure** (including information about Customer Support options, Payroll Tax Update Service, Peachtree Training services, Web Services, and additional products)
- **Peachtree Business Checks & Forms Catalog**

## Contents of the Peachtree Compact Disc

The Peachtree compact disc includes the following items:

- **Peachtree First Accounting 2004, Peachtree Accounting 2004, Peachtree Complete Accounting 2004, or Peachtree Premium Accounting 2004** (depending on which product you purchased)

This includes the Peachtree setup program, the Peachtree program, Peachtree Help and online manuals, standard Peachtree forms, online tutorial, and sample company data, as well as Stamps.com 3.0. It's an online postage utility from the United States Postal Service that lets you print postage for your customer sales invoices and vendor/customer checks in Peachtree.

- **Adobe Acrobat Reader 5**

This program allows you to open electronic documents in Portable Document Format (PDF). You must have Adobe Acrobat Reader installed before viewing the online versions of the Peachtree manuals or viewing hands-on lessons in the Peachtree tutorials.

The following is available only on the Peachtree Accounting, Peachtree Complete, and Peachtree Premium CD:

- **Crystal Reports® for Peachtree®**

Crystal Reports for Peachtree is a special version of the popular Crystal Solutions report writer designed to work with Peachtree. Powerful yet flexible, the program lets you customize reports using virtually any of the information available in your Peachtree company database.

If you are installing Peachtree Accounting or Peachtree Complete, the Peachtree installation CD includes an evaluation version of Crystal Reports. However, if you are installing Peachtree Premium, the CD contains the full version of Crystal Reports for Peachtree software.

The following is available only on the Peachtree Complete and Peachtree Premium CD:

- **FAS for Peachtree**

FAS for Peachtree is a special Peachtree-compatible version of Best Software's FAS™ Fixed Asset Management Software. FAS for Peachtree organizes fixed asset data in an easy-to-view format and performs complex depreciation calculations quickly and easily. You can link to Peachtree Accounting's general ledger to post depreciation amounts. In addition, FAS for Peachtree offers predefined reports for reliable financial and tax reporting of your company's assets.

FAS for Peachtree gives you the ability to manage up to 200 assets. As your company grows, FAS can grow with you. Now available from Best Software is FAS FirstStep™ for Peachtree®, a Peachtree-compatible version of FAS FirstStep, designed for companies managing up to 1,000 assets. For more information about FAS FirstStep for Peachtree, point your Internet browser to [www.bestsoftware.com/ffpupgrade](http://www.bestsoftware.com/ffpupgrade), or call 1-800-368-2405.

- **FAS for Peachtree Conversion**

This lets you convert your existing Peachtree Fixed Assets data to the new FAS for Peachtree format.

## Installing Peachtree

The following instructions explain how to perform a standard, upgrade, or custom installation of Peachtree. If you are using a network, refer to [“Installing Peachtree on a Network” on page 13.](#)

- 1 Turn on your computer and start Windows.
- 2 Exit all programs and disable virus-protection and screen saver programs on your computer.

This frees up memory and avoids interference with the Peachtree setup process.

- 3 Insert the Peachtree compact disc in your CD-ROM drive.

The Peachtree Autorun window automatically appears; it has a menu of options, including the installation of Peachtree and its components.

**Note:** If the Autorun window does not automatically appear, do the following: From the Windows **Start** menu, select **Run**. Type **D:SETUP** and click **OK**. (Substitute the appropriate drive letter for your CD-ROM drive.)

- 4 Click the **Peachtree Accounting** install option.

Next, the Peachtree Accounting Setup - Welcome window appears. It tells you what to expect when you run the Setup program.

- 5 Read the information and instructions on the window, and then select **Next**.

**Note:** To stop and exit setup at any time, select the **Cancel** button. For help on any window in the Peachtree Setup program, select the **Help** button.

- 6 Read the Licensing Agreement, and if you accept the terms, select the **I accept** option. Select **Next**. (If you select **I do not accept**, you will exit the setup program when you click **Next**.)

- 7 The Setup Options window appears, offering different setup choices depending on if you are a new or previous user. Read about and then select a setup option. When finished, click **Next** to continue.

- **Standard Setup:** Installs everything you need to begin running Peachtree.
- **Upgrade:** This option upgrades you from a previous version of Peachtree, maintaining your existing setup paths and options.

- **Advanced Setup:** You can set a different path for the program or data files using this option or choose which components of Peachtree you want to install.
- **Network Setup:** This option allows you to install Peachtree program and data files in a network environment. (*Note:* First Accounting and Peachtree Accounting are not multiuser applications. However, you can install these versions on a network for single-user access.) For detailed instructions on setting up Peachtree Complete in a multiuser environment, see [“Installing Peachtree on a Network” on page 13](#).

8 Depending on your choice of setup option, one of the following occurs:

- If you choose **Standard Setup** or **Upgrade**, the Setup program will automatically install Peachtree without your needing to make further choices.

**Note:** If Microsoft Internet Explorer 5.01 (or higher) is not installed on your computer, Peachtree Setup will display a message that asks to install the latest version of Microsoft Internet Explorer for you (at the time Peachtree was released). After Microsoft Internet Explorer is installed, Peachtree Setup will automatically start installing the Peachtree program files.

Please skip to step 11 below.

- If you choose **Advanced Setup**, the Select Folder window appears. This lets you choose the folder where Peachtree 2004 will be installed and optionally choose where Peachtree data (company) files will be installed. Follow the onscreen instructions, and when finished, select **Next** to continue.



When you enter program and data paths in either the Destination or Company Folder fields, *do not* include leading or trailing spaces in the path. Including leading or trailing spaces in either the program or data path may cause Peachtree to install in the wrong directory. For example, if your data path is C:\Program Files\\_Peachtree, where \_ equals a space; you would need to delete the extra spaces.

- If you choose **Network Setup**, the Set Location window appears. Here you can choose the folder where Peachtree 2004 program and data (company files) will be installed. You'll want to make Peachtree available locally, on your computer, so you should choose a folder location somewhere on your computer's hard drive. However, you should install the Peachtree company files on the network server so that other network users can access them; for more information, see [“Network Considerations” on page 14](#). Follow the onscreen instructions, and when finished, select **Next** to continue.

- 9 If you chose either **Advanced Setup** or **Network Setup**, the Components window appears. It lets you select the exact Peachtree components you want to install. Follow the onscreen instructions, and when finished, select **Next** to continue.
- 10 Next, you see the Program Folder window, where you select the name of the folder that will contain icons representing Peachtree Accounting and its components. The folder will appear, under the name you choose, on the **Programs** menu available from the **Windows Start** button. Follow the onscreen instructions, and when finished, select **Next** to continue.

**Note:** If Microsoft Internet Explorer 5.01 (or higher) is not installed on your computer, Peachtree Setup will display a message that asks to install the latest version of Microsoft Internet Explorer for you (at the time Peachtree was released). After Microsoft Internet Explorer is installed, Peachtree Setup will automatically start installing the Peachtree program files.

- 11 Once installation is complete, the Finish window appears. How the window looks depends on the choice you made in Setup Options.
  - If you've installed Peachtree for the first time, the Finish window asks you to remove the Setup CD from the drive and select the **Finish** button, which will restart the Windows program. Following this, Peachtree will be ready to use.
  - If you've installed Peachtree 2004 as an upgrade to an earlier release, the Finish window offers two check boxes. Check one, and then select the **Finish** button:
    - **Yes, I would like to start Peachtree:** Check this box if you want Peachtree to start as soon as you click the **Finish** button.
    - **Yes, I would like to view the Release Notes:** Check this box if you want to see notes about new features in Peachtree 2004. The notes will appear as soon as you click the **Finish** button.

Now you can set up a new Peachtree company, explore sample company data, or convert existing company data from a previous version of Peachtree. For more information on what to do after installing Peachtree, see ["What's Next?" on page 22](#).



Note

For information on installing Crystal Reports for Peachtree, refer to the *Crystal Reports for Peachtree Getting Started Guide*. It is available on your Peachtree installation compact disc. Insert the compact disc in your CD-Rom drive; then browse to the \Doc folder on the CD. Look for the file named "CrystalGettingStarted.pdf." Double-click it to open the document in Adobe Acrobat Reader.

## Installing Microsoft Internet Explorer

Peachtree *requires* that Microsoft Internet Explorer 5.01 (or higher) be installed on your computer. Before you can start Peachtree, you must install Microsoft Internet Explorer. Peachtree uses components of the Microsoft Internet Explorer Web browser in its application (for example, Peachtree Today and Peachtree Online Update). Peachtree's HTML Help viewer also uses Microsoft Internet Explorer components.



**Peachtree does not require that Microsoft Internet Explorer be your default Web browser.** However, Peachtree does require that Microsoft Internet Explorer be installed on your computer. Also, an Internet connection is *not required* to run Peachtree. However, an Internet connection is recommended to take advantage of Peachtree's online and Internet-related features.

The latest version of Microsoft Internet Explorer (at the time the software was released) is included on the Peachtree compact disc.

To install Microsoft Internet Explorer, do one of the following:

- **Install (or reinstall) Peachtree.** Peachtree Setup will automatically determine if Microsoft Internet Explorer 5.01 (or higher) is installed on your computer. If it is not, Peachtree Setup will install the latest version of Microsoft Internet Explorer (at the time Peachtree was released) for you.
- **To install Microsoft Internet Explorer separately,** point to the **IE60** folder on the Peachtree compact disc, and double-click the **IE6Setup.exe** file.
- **To download the latest version of Microsoft Internet Explorer,** go to Microsoft's Web site at [www.microsoft.com](http://www.microsoft.com).

To set up an Internet connection in Peachtree, refer to the "Peachtree Today and Web Services" chapter in the *User's Guide*. If you are having problems setting up Internet access or an e-mail account, please contact your Internet service provider or system administrator.

## Installing Adobe Acrobat Reader

Electronic versions of the Peachtree manuals are automatically installed during the standard Peachtree setup process. To display or use these documents, you must have Adobe Acrobat 5 (or higher) installed on your computer.

Adobe Acrobat Reader can be installed from the Peachtree compact disc or downloaded for free at [www.adobe.com](http://www.adobe.com).

Use the following procedure to install Adobe Acrobat Reader from the Peachtree compact disc.

- 1 Insert the Peachtree compact disc in your CD-ROM drive.

The Peachtree Autorun window automatically appears. It has a menu of options for installing Peachtree and its components.

- 2 Click the **Adobe Acrobat Reader** install option.

If the Peachtree Autorun window does not automatically appear, do the following: From the Windows Explorer, browse to the **Acrobat** folder on the Peachtree compact disc. Then double-click the Acrobat Reader setup file.

- 3 Follow the prompts to install Adobe Acrobat Reader.

You can also start Adobe Acrobat Reader manually and open the files above. For complete information on using Adobe Acrobat Reader, refer to the Online Guides installed with the Acrobat Reader program.

## Installing FAS for Peachtree

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Note

This option is available only with Peachtree Complete Accounting and Peachtree Premium Accounting.

FAS for Peachtree is a special Peachtree-compatible version of Best Software's FAS Fixed Asset Management Software. FAS for Peachtree organizes fixed asset data in an easy-to-view format and performs complex depreciation calculations quickly and easily. In addition, FAS for Peachtree offers predefined reports for reliable financial and tax reporting of your company's assets. FAS for Peachtree gives you the ability to manage up to 200 assets.

Use the following procedure to install FAS for Peachtree from the Peachtree compact disc.

- 1 Insert the Peachtree compact disc in your CD-ROM drive.

The Peachtree Autorun window automatically appears.

- 2 Click the **FAS for Peachtree** install option.

If the Peachtree Autorun window does not automatically appear, do the following: From the Windows **Start** menu, select **Run**. Type **f:autorun** and press **Enter** (where F: is your CD-ROM drive designation).

- 3 Follow the prompts to install FAS for Peachtree.

---

## Displaying the Peachtree Online Manuals

Once Peachtree Accounting is installed, the **Peachtree Resources & Help** folder, available from the Windows **Start** menu, will contain the following online manuals:

- *Getting Started Guide* (file name PAWGS.PDF)
  - *Peachtree User's Guide* (file name PAWUG.PDF for all products except Peachtree First Accounting; for First Accounting, the file name is PFAUG.PDF)
  - *One-Write Plus Conversion Guide* (file name OWP2PAW.PDF, only for Peachtree Accounting, Peachtree Complete, and Peachtree Premium Accounting)
  - *Peachtree Direct Deposit Getting Started Guide* (file name PDD.PDF, available only for Peachtree Accounting, Peachtree Complete, and Peachtree Premium Accounting)
- 1 From the Windows **Start** menu, select **Programs**, and then point to the Peachtree folder (or the name of the folder you chose during Peachtree Setup).
  - 2 Point to the **Peachtree Resources & Help** subfolder.
  - 3 In this folder, select the manual you want to read.

In addition, the *FAS for Peachtree User's Guide* (file name PEACHGD.PDF) is available if you have installed all components of Peachtree Complete and Peachtree Premium Accounting. It is available from the Windows **Start** menu.

- 1 Select **Programs**, and then point to the **FAS** folder.
- 2 Select the *User's Guide* from the menu that appears.



If you are installing the Peachtree Premium Accounting Accountants' Edition, there is also an online manual geared to working with this program. Its name is *Using Peachtree Premium Accounting Accountants' Edition* (accounting.PDF), and you can display it as described above.

## Installing Peachtree on a Network

A network connects all types of computers and computer-related devices—such as hard drives, printers, and CD-ROM drives—together. Computers that share devices with other computers are called servers.

**Peachtree First Accounting and Peachtree Accounting do not include multiuser functionality.** This means that two or more users cannot access the same company data at the same time over a network. However, two or more users with different serial numbers are welcome to open separate companies.

**Peachtree Complete Accounting and Peachtree Premium Accounting do provide multiuser functionality.** If you need two or more licenses for Peachtree Complete or Peachtree Premium, we recommend—for the greatest value—that you purchase the site license Value Pack. Additional licenses for Peachtree or the Peachtree Complete Site License Value Pack can be purchased from nearby Peachtree resellers or directly from Peachtree Software. For more information, visit the Peachtree Software Web site at [www.peachtree.com](http://www.peachtree.com) or call Peachtree Software at 1-800-336-1420 Monday through Friday, 8:30 A.M. to 5:30 P.M. eastern time.

## Multiuser Licenses

### Single-User Licenses

If you purchased a single-user license of Peachtree, your license is for use of the program by one individual at a time. As stated in the Peachtree Software License Agreement, you must purchase a Value Pack license if two or more users are to be accessing a company's data concurrently.

### Value Pack Licenses (Peachtree Complete and Peachtree Premium Accounting only)

A Peachtree Value Pack is available for Peachtree Complete and Peachtree Premium Accounting. If you need two or more licenses for Peachtree (for up to five users), we recommend—for the greatest value—that you purchase the Value Pack. The program may then be placed on a local network system, which connects multiple workstations located at a single site. Use of the program at additional sites requires the purchase of additional licenses.

For more information on purchasing additional licenses, visit the Peachtree Web site at [www.peachtree.com](http://www.peachtree.com) or call Best Software at 1-800-336-1420 Monday through Friday, 8:30 A.M. to 5:30 P.M. eastern time.

## Network Considerations

Peachtree will run on two basic types of networks: *peer-to-peer* and *client/server*. Before you install Peachtree on your network, you must know what type of network software is installed.

- **Peer-to-Peer:** This is a network that allows each connected computer to act as a server and/or a workstation. Each computer can share its hard drive, printers, or other devices with all other computers in the network. This makes each computer on the network equal to the other computers, or a “peer.” However, when you are sharing data (such as accounting information), you want to designate one computer as the primary server for the data. In other words, you don’t want the data on everyone’s computer, only the primary server (such as the administrator’s computer). Examples of peer-to-peer networks Peachtree is compatible with include: Novell Personal Netware, Microsoft Windows NT, Microsoft Windows 98/2000 Network, and Invisible LAN.
- **Client/Server:** This is a network with a traditional server acting as a central unit (the primary server) with several workstations connecting to it. The server is where you store the data that will be shared by the workstations. Examples of client/server networks compatible with Peachtree include Windows NT Server and Novell NetWare 5.1 (or higher).

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### **Peachtree Complete and Peachtree Premium Accounting**

Peachtree Complete and Peachtree Premium Accounting can operate on any peer-to-peer network that supports Microsoft Windows 98, Windows XP, Windows 2000, or Windows NT 4 (with Service pack 6 or higher applied). Peachtree can also operate on client/server networks such as Windows NT Server and Novell NetWare 5.1 (or higher).

However, there are certain multiuser considerations:

- Your data must reside on a network drive (either on the server or the administrator's machine for a peer-to-peer network).
- Installing Peachtree program files on each workstation enhances performance. Make sure you have *full access* (administrative rights) to both the network and local hard drives where you are installing Peachtree.

- When you receive an update to Peachtree Complete or Peachtree Premium, you must install the update *the same way* that you installed the original program.
- Real-time posting is recommended for better performance and fewer conflicts.

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### **First Accounting and Peachtree Accounting**

Peachtree First Accounting and Peachtree Accounting can be installed on any network that supports Microsoft Windows 98 (or later) or Windows NT 4 (with Service Pack 6 or higher applied).

However, there are certain considerations:

- Multiple users cannot open and access Peachtree company data at the same time.
- If you choose to install Peachtree on a network, installing Peachtree program files (“Program Path”) on your workstation enhances performance (for example, C:\PROGRAM FILES\PEACHTREE). You can install data files on a network drive (“Data Path”—for example, F:\PEACHTREE).
- Make sure you have *full access* (administrative rights) to both the network and local hard drives where you are installing Peachtree.
- When you receive an update to Peachtree First Accounting or Peachtree Accounting, you must install the update *the same way* as you installed the original program.
- Real-time posting is recommended for better performance and fewer conflicts.

## Installing Peachtree Complete or Peachtree Premium Accounting on a Client/Server Network

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Note

Because *Peachtree First Accounting* and *Peachtree Accounting* are not multiuser-compatible, these instructions are intended solely for *Peachtree Complete* and *Peachtree Premium* users.

Use the following instructions to install Peachtree Complete or Peachtree Premium on a client/server network, such as Windows NT Server or Novell 5.1 (or above). Use the same instructions to install Peachtree *on each workstation*, specifying the server as the location for data files and the local hard drive as the location for program files. Installing the Peachtree program files to each workstation's local hard drive (for example, C:\PROGRAM FILES\PEACHTREE) improves performance and speed.

Before beginning this procedure, it is assumed that you have a shared network drive established and that workstations are mapped to this network drive.

- 1 Follow instructions on page [Z](#) to begin installing Peachtree.  
The Setup Options window offers up to four different setup choices depending on if you are a new or previous user.
- 2 In the Setup Options window, click the **Network Setup** option.
- 3 The Set Location window appears. Enter a program and data path; then click **Next**.

The default location or path for the Peachtree Complete or Peachtree Premium program files is C:\PROGRAM FILES\PEACHTREE. We recommend leaving this path as the default to increase speed and performance. Select **Browse** next to the **Program Path** field to change the path for the files. If you know the name of the path, you may type the path into the field.

Make sure the Data Path is set to the proper network drive (for example, **F:\PEACHTREE**). Do not set the data path to a network root directory (for example, **F:\**). Change the location of the data files by selecting **Browse** next to the **Data Path** field.

- 4 A window appears for you to select which Peachtree components you want to install. Choose the components to install, and click **Next** to continue.

- 5 In the Program Folder window, change the name of the Peachtree Accounting program folder, if necessary. Click **Next** to begin installing.

If Microsoft Internet Explorer 5.01 (or higher) is not installed on your computer, Peachtree Setup will display a message that asks to install the latest version of Microsoft Internet Explorer for you (at the time Peachtree was released). After Microsoft Internet Explorer is installed, Peachtree Setup will automatically start installing the Peachtree program files.

A final Setup window appears, indicating the completion of installation.

- 6 Depending on whether or not you are installing Peachtree for the first time, you may be prompted to reboot your computer and restart Windows.

When installation is complete, see [“What’s Next?” on page 22](#).

## Installing Peachtree Complete or Peachtree Premium Accounting on a Peer-to-Peer Network

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Note

Because *Peachtree First Accounting* and *Peachtree Accounting* are not multiuser-compatible, these instructions are intended solely for *Peachtree Complete* and *Peachtree Premium* users.

You must first install the software on the computer where data files will be located. This is probably the *network administrator’s computer* (the primary server). Then install Peachtree Accounting on *each workstation*, specifying the network administrator’s computer as the location for data files and a local drive (usually C:) for the program files.

Before beginning this procedure, it is assumed that you have at least one shared drive established (possibly on an administrator’s computer) and that workstations are mapped to this drive.

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### Installing on the Network Administrator’s Machine

Follow these steps to install Peachtree Complete or Peachtree Premium on the network administrator’s computer, or the primary server, *before* installing on any workstations. The network administrator’s computer is where the data files will be located.

- 1 Follow instructions on page [7](#) to begin installing Peachtree Accounting.

The window offers up to four setup choices depending on if you are a new or previous user.

- 2 In the Setup Options window, click the **Network Setup** option.

# 1 *Introducing and Installing Peachtree* *Getting Started Guide*

- 3 The Set Location window appears. Enter a program and data path; then click **Next**.

Install the program and data files to the same path—the network administrator’s (or primary server’s) hard drive. The default location or path for the program and data files is C:\PROGRAM FILES\PEACHTREE.

- 4 A window appears for you to select which Peachtree components you want to install. Choose the components to install, and click **Next** to continue.
- 5 In the Program Folder window, change the name of the Peachtree Accounting program folder, if necessary. You’ll want it to match the product you are installing: either Peachtree Complete Accounting 2004 or Peachtree Premium Accounting 2004. Click **Next** to begin installing.

If Microsoft Internet Explorer 5.01 (or higher) is not installed on your computer, Peachtree Setup will display a message that asks to install the latest version of Microsoft Internet Explorer for you (at the time Peachtree was released). After Microsoft Internet Explorer is installed, Peachtree Setup will automatically start installing the Peachtree program files.

A final Setup window appears, indicating the completion of installation.

- 6 Depending on your system configuration, you may be prompted to reboot your computer and restart Windows.
- 7 Next, continue with the following section “Installing on a Workstation.”

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## **Installing on a Workstation**

First, install Peachtree Complete on the network administrator’s computer. Then, follow these steps to install Peachtree Complete on each workstation. Make sure you know the drive and directory of the data files located on the network administrator’s computer before you begin installation.

- 1 Follow instructions on page 7 to begin installing Peachtree Complete Accounting.
- 2 Follow instructions on page 7 to begin installing Peachtree.

The Setup Options window offers up to four different setup choices depending on if you are a new or previous user.

- 3 In the Setup Options window, click the **Network Setup** option.

- 4 The Set Location window appears. Enter a program and data path; then click **Next**.

The default location or path for the program files is C:\PROGRAM FILES\PEACHTREE. We recommend installing the program files to the local hard drive to increase speed performance. If the workstation does not have a hard drive, change the location of the program files to the network. To change the location of the program path, select **Browse** next to the **Program Path** field.



When you enter program and data paths in either the Destination or Company Folder fields, *do not* include leading or trailing spaces in the path. Including leading or trailing spaces in either the program or data path may cause Peachtree to install in the wrong directory. For example, if your data path is C:\Program Files\\_Peachtree, where \_ equals a space; you would need to delete the extra spaces.

Make sure the data path is set to the proper network drive (for example, F:\PEACHTREE). Do not set the data path to a network root directory (for example, F:\). Change the location of the data files by selecting **Browse** next to the **Data Path** field.

- 5 A window appears for you to select which Peachtree components you want to install. Choose the components to install, and click **Next** to continue.
- 6 In the Program Folder window, change the name of the Peachtree Accounting program folder, if necessary. You'll want it to match the product you are installing: either Peachtree Complete Accounting 2004 or Peachtree Premium Accounting 2004. Click **Next** to begin installing.

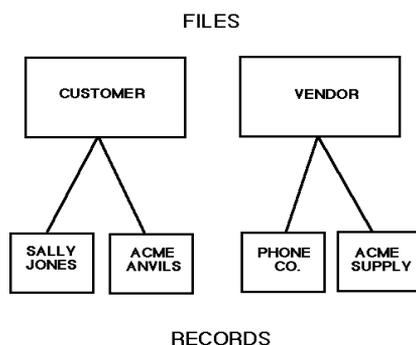
If Microsoft Internet Explorer 5.01 (or higher) is not installed on your computer, Peachtree Setup will display a message that asks to install the latest version of Microsoft Internet Explorer for you (at the time Peachtree was released). After Microsoft Internet Explorer is installed, Peachtree Setup will automatically start installing the Peachtree program files.

A final Setup window appears, indicating the completion of installation.

- 7 Depending on your system configuration, you may be prompted to reboot your computer and restart Windows.
- 8 Repeat these instructions for each workstation.

## About Record and File Locking (Peachtree Complete and Peachtree Premium only)

If you install Peachtree Complete or Peachtree Premium Accounting on a network to share data, you could have more than one person entering invoices, payments, orders, and so on for the same company at the same time. Peachtree uses record and file locking to ensure that data is properly protected and updated. A record is one group of information composed of related fields. For example, the fields in one customer's window—Name, Address, Phone, etc.—go together to form that customer's record. Likewise, all customer records go together to form the customer file.



If two people were making changes to the same customer without record and file locking, two things could happen:

- The information could get jumbled, combining each person's changes.
- Person #1, working on the same customer information as Person #2, saves his changes first. Person #2 finishes her changes and saves the record a few minutes later. Person #2's changes will be the only changes saved, since Person #2 was the *last* person to save the record.

To eliminate either possibility from occurring, Peachtree uses “locks” to prevent a particular record or file from being saved by more than one person at a time. In the example above, when the second person attempts to change the customer record the first person is using, Peachtree will wait for the first person to finish, then allow the second user to begin. In special cases when Peachtree cannot wait, it will display a message, reading “The record in file ‘Customer.DAT’ is currently in use. Please try again when it is available.”

Peachtree uses two different types of locks: *Record Locks* and *Exclusive File Locks*.

## **Record Locks**

A record lock prevents more than one user from saving the same data record, such as customer information, at the same time. This ensures that record information does not become jumbled and that changes are processed correctly. Two or more users can access the same records and make updates. They just cannot save the record changes at the same point in time. In these special cases, you may receive a message indicating that the record is currently locked. Once the first user has successfully saved changes, Peachtree removes the lock, allowing other users to save the record. Other users will still be able to perform functions such as entering invoices and printing reports, but no one else will be able to update the customer information until the first user has finished saving the record.

## **Exclusive File Locks**

An exclusive file lock prevents more than one user from accessing the same file at the same time. During critical processes, an exclusive file lock is placed on all of your company's files. These processes include the following:

- Backing up or restoring company data (from Peachtree's **File** menu)
- Changing accounting periods
- Changing posting method in Maintain Company Information
- Changing a record ID
- Working in Maintain Users
- Working in Maintain Item Prices
- Closing the payroll (calendar) year or fiscal year
- Posting (From **Tasks** menu, **System, Post** only)
- Unposting (From **Tasks** menu, **System, Unpost** only)
- Purging data
- Opening a company (while another user is doing one of these single-user processes)

When you attempt to perform any of these processes, if another user has the company open, even if only at the main window, Peachtree displays the following message:

“You are attempting to access an area that another user is also using, or you are attempting to perform a process that requires single-user access. Please try again when no other users are attempting the same operation or accessing Peachtree Accounting.”

When this message appears, select **RETRY** to attempt the process again, or select **CANCEL** to abort the process.

## What's Next?

Now that you have successfully installed Peachtree, you're ready to get started using the program. One of the best ways to get familiar with Peachtree is to open the program and look around.

If you need assistance starting the program or navigating within Peachtree, refer to the "Basics" chapter of the *User's Guide*.

## Registering Peachtree

Please register your copy of Peachtree as soon as possible after installing the program. Registration is very important because it ensures you of timely program updates and upgrade offers, exciting new product information, payroll tax update service information, customer support options, and a variety of other benefits. (The Payroll Tax Update Service is not available with First Accounting.)



You can use the software only a limited number of times before you must register. **If you purchased single-user licenses, you must register each copy of Peachtree that is installed.** If you purchased a multiuser Value Pack license, for up to five users, only one registration is required. For more information on multiuser licensing, open Peachtree Help, and search for "multiuser" in the online index.

1 Do one of the following:

- After five initial sessions working with Peachtree, when you start the program, the Register Peachtree Accounting window appears. Select **Register Now**.

Or

- If Peachtree is already running, select **Peachtree Registration** from the **Help** menu.

2 In the Register Peachtree window, enter your organization name.

This identifies your business name to Best Software during the registration process. If you are operating more than one company in Peachtree, consider an organization name that indicates your group of businesses. The **Organization Name** field is required in order to register your products. You can enter up to 30 characters.

3 Enter your Peachtree serial number.

Your serial number is located on the Peachtree CD holder.

- 4 Enter your customer ID and product registration number.

To obtain a customer ID and registration number, do one of the following:

- Call Best Software toll free at **1-800-388-4697**. If you are located outside the United States, please call 770-492-6333. Please have your serial number as well as your name, company address, and telephone number available before speaking with a Peachtree Customer Service representative. The Customer Service representative will then give you a registration number.

This service is available Monday through Friday 8:30 A.M. to 8:30 P.M. eastern time.

- Visit the Peachtree Web site at [www.peachtree.com/register/](http://www.peachtree.com/register/). After completing a short questionnaire, you will be provided a registration number.

This service is available only after business hours.

- 5 When finished entering your registration information, click **OK** to start using Peachtree.

If you select the **Register Later** button, you can use Peachtree a limited number of times before you need to register. A message will display the remaining number of uses. If you have no remaining uses left and choose not to register, Peachtree will shut down. If you start Peachtree again, you will be prompted to register again.



*Important:* Write down your Peachtree serial number, customer ID, and registration number and keep them in a safe place in case you ever need to reinstall the product.

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## Updating Your Existing Peachtree Registration Information

If you have recently purchased a new Peachtree Accounting license, you can update the Peachtree registration information linked to your computer's workstation.



Note

**As stated in the Peachtree License Agreement, you must purchase and register separate, licensed copies of Peachtree for each computer on which the program will be installed.** If you purchased and registered a Peachtree Complete multiuser license (Value Pack), you are not required to update your Peachtree Registration information for each new user. For information on purchasing multiuser solutions, open Peachtree Help, and search for “**multiuser**” in the online index.

### To update Peachtree registration information

1 Start Peachtree.

2 Select **Peachtree Registration** from the **Help** menu.

If you purchased and registered a Peachtree Complete multiuser license (Value Pack), **Peachtree Registration** will not appear on the **Help** menu.

3 Enter your new organization name if it is different from your original name.

This identifies your business name to Best Software during the registration process. If you are operating more than one company in Peachtree, consider an organization name that indicates your group of businesses. The **Organization Name** field is required in order to register your products. You can enter up to 30 characters.

4 Enter your new Peachtree serial number.

Your serial number is located on the Peachtree CD holder. Or, enter the serial number provided with your new multiuser license.

5 Enter your new customer ID and registration number.

To obtain a customer ID and registration number, do one of the following:

- Call Best Software toll free at **1-800-388-4697**. If you are located outside the United States, please call 770-492-6333. Please have your serial number, as well as your name, company address, and telephone number available before speaking with a Peachtree Customer Service representative. The Customer Service representative will then give you a registration number.

This service is available Monday through Friday 8:30 A.M to 8:30 P.M. eastern time.

- Visit the Peachtree Web site at [www.peachtree.com/register/](http://www.peachtree.com/register/). After completing a short questionnaire, you will be provided a registration number.

This service is only available after business hours.

- 6 When finished entering your registration information, click **OK** to start using Peachtree.



*Important:* Write down your Peachtree serial number, customer ID, and registration number(s) and keep them in a safe place in case you ever need to reinstall the product.

## Practicing with Sample Data and Tutorials

Before you begin setting up your company in Peachtree, it is highly recommended that you explore the sample company data installed with Peachtree. You can practice adding records or transactions without using your own data.

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### Exploring Sample Company Data

Peachtree includes the following sample company data:

- **Vintage Holdings, Inc.:** Available in Peachtree Premium Accounting only, this company demonstrates Peachtree Premium's consolidated companies feature. Vintage Holdings embraces two subsidiary companies you can also work with: **Painted Post Catering, Inc.**, and **Painted Post Grill, Inc.**
- **Bellwether Garden Supply:** Available in First Accounting, Peachtree Accounting, and Peachtree Complete, this is a retail and service company that demonstrates Peachtree's extensive inventory and job-tracking capabilities.
- **Pavilion Design Group:** Available in Peachtree Complete only, this is a graphic service company that demonstrates Peachtree's Time & Billing features.

If you do not have sample company data installed, reinstall Peachtree, select the **Custom** setup option, and choose to install sample company data only.

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## Following the Peachtree Tutorial

If you are new to Peachtree or would like to learn more about new features, a Peachtree tutorial is available. Called *The Guided Tour*, it leads you through basic transactions in Peachtree. It also provides overviews of new features in the current release.

To access the Peachtree tutorial, do the following:

- 1 Open Peachtree.
- 2 From the **Help** menu, select **Peachtree Accounting Tutorial**. (Or, click the **Peachtree Accounting Tutorial** icon in the Peachtree program folder from the Windows **Start** menu.)

## Creating a New Company

If you are ready to begin setting up a new company in Peachtree, see the “Creating a New Company” chapter in the *User’s Guide*. This chapter walks you through initial setup decisions using the New Company Setup program included with Peachtree.

## Converting Existing Company Data

If you are upgrading from a previous release of Peachtree, you can convert existing company data to the new format and continue using it.

- **To convert existing Peachtree company data**, see [“Upgrading from Previous Versions of Peachtree” on page 35](#) of this guide.

If you used Quicken or QuickBooks, you can convert existing data to the Peachtree format.

- **To convert existing Quicken or QuickBooks data**, refer to the “Converting Quicken or QuickBooks Data to Peachtree” chapter of the Peachtree *User’s Guide*.



Note

Peachtree First Accounting cannot convert QuickBooks or One-Write Plus data.

The same is true of One-Write Plus; OWP data can be converted to Peachtree format as well.

- **To convert existing One-Write Plus data**, refer to the *One-Write Plus Conversion Guide*, available by searching for PROGRAM FILES/PEACHTREE/DOC/OWP2PAW.PDF. See [“Displaying the Peachtree Online Manuals” on page 12](#).

## Peachtree Release Notes

A Release Notes file (Readme.hlp) is installed with each version of Peachtree. This document contains important last-minute information and issues not included in the *User's Guide*, *Getting Started Guide*, or online Help.

To open the Release Notes file, do the following:

- From the Windows **Start** menu, click **Programs**, and open the Peachtree program folder. Click **Release Notes**.

## Getting Customer Support

Peachtree makes every effort to ensure that its software, online Help, and user manuals are complete and easy-to-use. However, questions sometimes do come up. If you require assistance, take a moment to read about various Customer Support options included in the Peachtree Products and Services brochure that came with your software package.

### We'll Get You Started Off Right

If you are new to Peachtree, you get a free 30-day Customer Support membership when you purchase Peachtree First Accounting, Peachtree Accounting, Peachtree Complete Accounting, or Peachtree Premium Accounting. That's right—to make sure you get up and running quickly on your Peachtree software, we offer 30 days of support available free of charge to new customers. The free support begins the day you register your new Peachtree product. Whenever you have a question, just call the appropriate number provided, and one of Peachtree's support specialists will happily assist you!

If you upgrade a Peachtree product to a new, major release, you are entitled to one free support incident related to conversion/installation within 30 days of registering your new version.

Prior to obtaining Customer Support, we ask you to register your product. After registering your product, you will be provided information on how to receive support. For more information, see ["Registering Peachtree" on page 22](#).

## Continued Customer Support

To ensure uninterrupted support after your 30-day support membership, Peachtree Software offers several methods for getting help. These include

- a searchable database of technical tip documents at our Web site at [www.peachtree.com](http://www.peachtree.com)
  - one-to-one or group training directly from Peachtree or at ExecuTrain® Authorized Training Centers
  - various customer support options that will give you quality care from trained customer support specialists
- **To enroll in a Peachtree Customer Support plan**, visit Peachtree's Web site at [www.peachtree.com/support](http://www.peachtree.com/support), or call 1-800-336-1420 Monday through Friday, 8:30 AM to 5:30 PM eastern time.
- **To locate a Certified Consultant near you**, visit Peachtree's Web site at [www.peachtree.com/support](http://www.peachtree.com/support).



Note

Peachtree support rates and information mentioned in Peachtree manuals, Peachtree Products and Services brochure, and Peachtree Accounting Help are subject to change without notice. Also, Peachtree Software warranties and support plans are not valid at Peachtree Resource Centers. You must contact individual Peachtree Resource Centers for their specific policies and plans.

## Peachtree Web Site (Peachtree.com)

Peachtree Support  
via the Internet

You can always receive help at the Peachtree Web site at [www.peachtree.com](http://www.peachtree.com). This online service is a valuable and convenient resource for learning the answers to frequently asked product questions, displaying the latest product refinements, and communicating with Peachtree Customer Support.

- **To access the Peachtree Customer Support area of Peachtree.com**, visit Peachtree's Web site at [www.peachtree.com/support](http://www.peachtree.com/support).

Peachtree Customer Support Services at Peachtree.com provide the following:

- **Customer Support Options:** Explore and learn about various support membership plans and options that you can purchase.
- **Product Updates:** Search this service for the latest releases of your product. You can also get up-to-date information about add-on products and learn about new services.

- **Frequently Asked Questions:** At the Peachtree Knowledge Center, you can learn the answers to commonly asked product questions that may apply to you. Comprehensive answers are just a mouse click away.
- **E-mail Priority Support Service:** Contact a Peachtree Customer Support specialist by e-mail with specific questions. You will receive a prompt response from a qualified expert via e-mail. Refer to Peachtree's Web site for more information on this service.
- **One-to-One Training:** Search for information about independent, classroom courses offered at ExecuTrain Authorized Training Centers. New centers are being added daily, so one should be available near you.



Note

You must have access to the Internet to visit Peachtree's Web site. If you are using America Online, CompuServe, or other integrated service networks, access their respective Internet browsers to locate our Web site.

## Before Contacting Peachtree Customer Support

There are a couple of options you need to try before contacting Peachtree Software Customer Support:

- Register your Peachtree product if you have not already done so. For more information, see ["Registering Peachtree" on page 22](#).
- Read the section in the manual that documents information about the procedure you are doing, or refer to Peachtree Help.
- Consider searching for an answer or asking a question at the Peachtree Knowledge Center, available at Peachtree's Web site.
- Attempt to duplicate the error using the sample company data provided with your software.

The Peachtree support specialist answering your call will need certain information to assist you. To help the representative provide you with the best service, please do the following:

- 1 Be at your computer, and have your Peachtree manuals available.
- 2 Have your Peachtree customer ID, the telephone number you provided when you registered your product, or your product serial number available.

Your product serial number is located on your Peachtree CD holder.

- 3 Know the name and release number of your program. To determine your product information, select **About Peachtree Accounting** from the **Help** menu.

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- 4 Write down the steps you performed prior to the problem occurring.
- 5 Write down the exact error message(s) displayed on your screen.
- 6 Print the Technical Support Information form by selecting **Help, Customer Support and Service**, and then **Technical Support Information**. This information will assist the Peachtree Customer Support specialist in resolving your problem.

**If you are operating on a network**, you will need to provide the type of network (peer-to-peer or client/server), the name of your network software (Windows NT, Novell NetWare, and so on), the location of the Peachtree program (program path), and the location of your company data (the data path).

**If you are experiencing problems printing a report, form, or financial statement**, you will need to provide the name of your printer and possibly the printer driver used.

**If you are experiencing printing errors**, consider printing to an alternate printer to help isolate the problem. To get a list of alternate printer drivers, contact the manufacturer of your printer. If you designed a custom report, form, or financial statement, try printing the standard (predefined) version. Also, open the sample company, and try printing the same report, form, or financial statement. This helps determine if the problem is specific to your customized design or company data.

## Uninstalling Peachtree

If you need to remove Peachtree, use the Uninstall program included with Peachtree when it was initially installed.



When you uninstall Peachtree, all components (including program files, predefined reports and forms, and sample company data) are removed from your system. Your personal company data will remain on your hard disk.

To delete Peachtree program files, do the following:

- 1 Make a backup of any data files you have created.
- 2 Close Peachtree.
- 3 From the Windows **Start** menu, select **Settings, Control Panel**, then **Add/Remove Programs**.
- 4 Select Peachtree First Accounting, Peachtree Accounting, Peachtree Complete Accounting, or Peachtree Premium Accounting (depending on which version you previously installed) from the program list; then click **Change/Remove**.

- 5** When the Peachtree Setup Option window appears, select the **Remove** option, and then select **Next**.
- 6** The Setup program will ask you to confirm removal of the Peachtree program files; click **OK**.

The Setup Status window shows you the progress of the removal process.

- 7** Once the program has been removed and the process is complete, select the **Finish** button.

## Troubleshooting Installation

Below are frequently asked questions that may help you resolve errors when starting Peachtree.

### Frequently Asked Questions

---

#### **When I attempt to install Peachtree, I received the error, "You must have full administrative rights to your computer." What's wrong?**

This message can appear on Windows NT, Windows XP, and Windows 2000, especially if you are operating in a network environment. In order to install Peachtree on your computer, you must have full access (administrative rights) to your local hard drive. This allows Peachtree Setup to install the program files and make the proper entries to the Windows Registry. Please exit and log into Windows as a user who has full administrative rights and try again. Or, contact your system administrator to change your user rights.

---

#### **What will happen to my existing Peachtree company after I install the upgrade?**

Your data will be converted to the new Peachtree format the first time you open your company. Once you convert your company to the new release, you cannot use your data with any prior releases of Peachtree. For that reason, we strongly suggest that you back up your data to diskettes before converting your company files. For more information, see the next chapter in this guide, "[Upgrading from Previous Versions of Peachtree](#)" on page 35.

---

#### **What will happen to my custom reports, forms, and financial statements?**

They will be converted and available for use in the new Peachtree format. You can no longer use them in prior releases. In most cases, your customer reports, forms, and financial statements will not change. However, you may notice new functionality in design areas.

**I'm not using a network now, but I plan to in the future. How should I install Peachtree?**

Install Peachtree now as a normal stand-alone computer not attached to a network. When it's time to change to a Network Installation, reinstall Peachtree on all machines using the Network setup. If you decide that the data files should reside on a different computer, you will have to copy your company directory to the other computer. For more information, see ["Installing Peachtree on a Network" on page 13.](#)

---

**I get an error message during installation that says it can't read or copy a file. What should I do?**

Your computer is having difficulties installing one of the files from the Peachtree compact disc. Try installing the program on another computer. Turning off screen savers and virus checkers may also help. If you suspect that a compact disc is damaged, please contact Peachtree Customer Support for replacements.

---

**I'm getting a message that says "Setup initialization error due to insufficient memory" or the message "Cannot find Status.dat" and/or "Options.dat." How can I correct it?**

Peachtree either does not have enough memory to load these files or it cannot find the files to load. If Peachtree is on a network, check your network connections. You may have to restart your computer to establish the connection to remote network drives.

Peachtree requires that you have a minimum of 48 MB of physical RAM installed on your computer; 128 MB of RAM is highly recommended. Restarting your computer will also reset your memory.

---

**When starting Peachtree, I receive a Btrieve version error. How can I avoid this error?**

Btrieve is a file-handler engine that loads with Microsoft Windows 95 (or higher) and many communications programs (for example, FAX management software) and utilities (for example, Cheyenne Backup). Peachtree currently uses version 6.15 of Btrieve and cannot start while an application, such as Windows 98, using an earlier or later version of Btrieve is also running. When other programs using an older version of Btrieve (such as version 5.10) or a newer version (such as 7.0) are loaded into memory first, you will get this error when attempting to start Peachtree. To correct these errors, start Peachtree *before* starting other programs using Btrieve.

---

**I'm having problems using Peachtree and my large system fonts.**

Peachtree does not support large system fonts in your Windows display settings. To use Peachtree, please switch your system fonts to the small font typically used in Windows.

---

**I'm starting Peachtree on a workstation across the network, and I'm receiving the message "Cannot open F:\... \STATUS.DAT or OPTIONS.DAT." What do I need to do to correct it?**

Peachtree either does not have enough memory to load these files or it cannot find the files to load. First, check your network connections. You may have to restart your computer to establish the connection to remote network drives. Restarting your computer will also reset your memory. Check to see if these files are actually installed to your data path. If not, reinstall Peachtree. If you are using the following two networks, you may need to update your networking software. For Novell Netware Lite, you may need to acquire two patch files from Novell, L11DO3.exe and L11U05.exe. For Invisible LAN, you need to be running version 3.52 or greater.

---

**I'm installing on a Novell Network version 4.x workstation, and I am getting a "could not remove file" message. Why is Peachtree not installing on my network?**

Peachtree supports only networks that support Windows 98, Windows NT 4 (with Service Pack 6 or higher applied), and Windows 2000. Only Novell Netware 5.1 networks support these operating systems. Therefore, Novell 4.x will not work properly with Peachtree.

# Upgrading from Previous Versions of Peachtree

# 2

## **Converting Existing Company Data**

Before You Begin [37](#)

Starting the Data Conversion [38](#)

Troubleshooting the Conversion [41](#)

## **Converting Data from other Products**

From Peachtree Complete Accounting for DOS [42](#)

From Quicken, Quickbooks, or One-Write Plus [43](#)

# • Upgrading from Previous Versions of Peachtree •

## Installing the Upgrade

If you are upgrading from a previous release of Peachtree First Accounting, Peachtree Accounting, or Peachtree Complete Accounting, install the updated program in the existing Peachtree directory (usually \PEACHW, unless you changed it to a different name during the previous installation). During the installation process, select the **Upgrade** setup option. This option upgrades your program files from a previous version of Peachtree, maintaining your existing installation and registration settings. For more information, see [“Installing Peachtree” on page 7](#).



Note

You *will not* be able to convert existing Peachtree data (even data created in an earlier version of Peachtree First Accounting) to Peachtree First Accounting 2004 format.

The purpose of this chapter is to explain how to convert existing Peachtree company data to the new 2004 format. It will inform you of conversion issues you may encounter when attempting to use existing Peachtree company data.

Before you begin converting Peachtree company data, be sure to *read this chapter completely and carefully*.

## Converting Old Peachtree Data to a New Release Format

After installing a Peachtree upgrade or update, the first time you open your company in Peachtree, the Data Conversion wizard may appear automatically.

Peachtree’s Data Conversion wizard only works for company data established in prior Peachtree Software releases of equal or lesser versions. For example, you cannot convert a Peachtree Complete company (full-featured version) to the Peachtree Accounting format (mid-level version) or the First Accounting format (entry-level version), even if that First Accounting or Peachtree Accounting format is newer.

Also, this process does not convert company data from Peachtree Complete Accounting for DOS (PCA) or Peachtree Classic Accounting. This conversion requires a separate utility available from Peachtree. To order the PCA conversion utility, please call 1-800-336-1420 or visit the Peachtree Web site at [www.peachtree.com](http://www.peachtree.com).

## Before Starting the Data Conversion Wizard...

Before you launch the wizard, there are some precautionary tasks you may want to perform.

- **Read this entire chapter of the Getting Starting Guide.** Included in this guide is a complete list of issues that you might encounter while converting data from previous versions of Peachtree. It is best that you read this information before converting data. Also, listed are new features that may impact your data after conversion.
- **Turn off screen savers, disable anti-virus software, and close all other applications.** This will speed up the conversion process and avoid any errors.
- **Make sure you have ample hard disk space available where your data is located before converting your company.** The conversion may require up to three times the size of your company data to convert successfully, depending on the version you are converting. For example, if your company is 6 MB, make sure 18 MB of hard disk space is free. Peachtree uses the extra space temporarily while converting.

Also, while the wizard requires that you back up your company data during the conversion process, you can do so before launching the wizard if you prefer. In either case, backing up company data is highly recommended. Never overwrite an existing conversion backup. For information about data backup, refer to the “Company Administration” chapter of the *User’s Guide*.



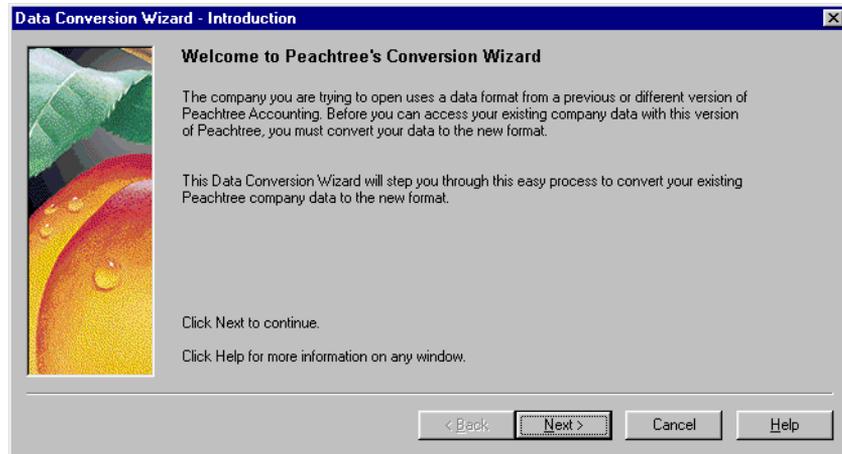
Note

Since the conversion process may take a while to complete, we recommend that you start the process *before lunch* or at the *end of your business day*, making sure you leave the computer running.

## Starting the Data Conversion Wizard

Use this procedure to convert your company data to the new Peachtree format.

- 1 From Peachtree's **File** menu, select **Open Company**. If your company is in a prior Peachtree format, the Data Conversion wizard appears. If it does not, data conversion is not necessary.



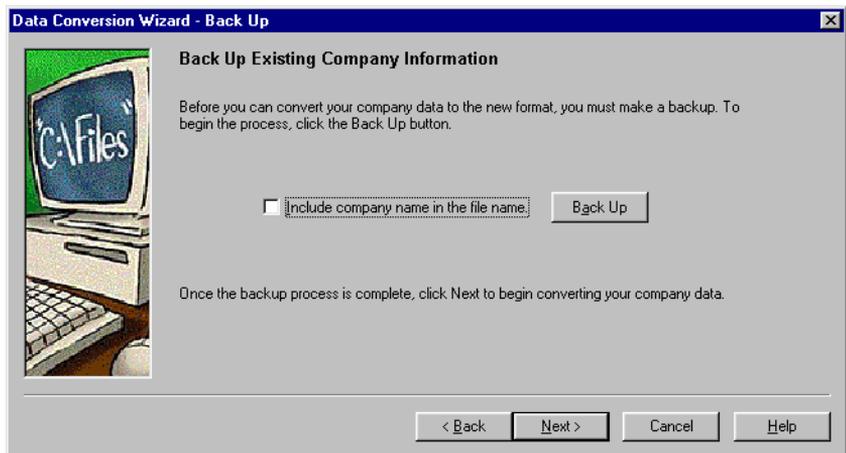
The Data Conversion wizard walks you through the process of converting your Peachtree company data to an updated format. At every point in the process, the wizard makes your options clear and tells you the consequences of every action you might take. The first window, Data Conversion Wizard - Introduction, informs you that your company data needs to be converted.

- 2 Once you've finished reading the introductory text, click the **Next** button to go to the next window in the series, Data Conversion Wizard - Confirm Company.



This window identifies the company you are about to convert, the location of your company data, and which version you are converting.

- 3 After confirming the company you are about to convert, click **Next** to display the Data Conversion Wizard - Back Up window.



Peachtree requires that you make a backup of company data and customized forms before converting to the new format. If something failed or there was a power outage, you could restore the backup and convert again. Also, it's a good idea to back up your old company data to an external media, which can be filed away for audit purposes.

- 4 Select the **Back Up** button to start this process.
- 5 Select a location and file name for the backup.
- 6 After you back up your company, click **Next** to start the conversion process.

Peachtree displays the Data Conversion In Progress window, which shows the progress of the conversion.

*Do not interrupt the conversion or close the Data Conversion wizard! If you do, you may damage your company data. If you run into errors, refer to the data conversion troubleshooting tips.*

Once the data conversion is complete, a congratulations message appears confirming the success of the conversion process.

- 7 Click **Finish** to open your company in the new format.

Complete this procedure for each company you created in a previous version.



Note

If multiple users have access to your company (possible only in Peachtree Complete and Peachtree Premium), all users will have access to the company in the new format. Though each user must install the Peachtree upgrade or product update, the company data is converted only one time.

For last-minute information about the new product version, refer to the Release Notes. For more information, see [“Peachtree Release Notes” on page 27](#).

---

### Employee Name Changes



Starting in Release 2003, Peachtree changed the employee name field from a single name field to three fields for last name, middle initial, and first name. This was done largely to support changes to the federal W-2 form. If you used the product prior to Release 2003, your employee names were converted from one field to three. You should check your employee names to make sure the conversion made the correct assumptions about dividing the names. For more information, look up “employees” in the Peachtree Help index and look for the entry on changes to the employee name field.

## Troubleshooting the Conversion

If you run into errors during the conversion or your computer locks up, Peachtree recommends you reboot your computer. This will free up memory and avoid other errors.

Companies with large amounts of data could take a long time to convert. If you are sure the conversion has stopped before it is complete, but no error message displays, consider the following before contacting Customer Support.



*Do not interrupt the conversion or close the Data Conversion wizard during a conversion process! If you do, you may damage your company data.*

Known reasons for data conversion failures include the following:

- your computer locks up for some reason during a conversion process
- a power outage occurred during a conversion process
- you closed Peachtree during the conversion process
- you turned off your computer during a conversion process

---

### Restore a Data Conversion Backup

Before you try the conversion again, you must restore the backup made prior to the conversion. In most cases data conversions are required when you install a product upgrade; in some cases, a product maintenance update requires data conversion. Rather than uninstall a Peachtree upgrade or product update, you can restore your old company data in a new company folder.



**To learn how to restore a backup after a failed data conversion,** look up **“restore, Restore a Peachtree Company Backup after a Failed Data Conversion from a Previous Version”** in the Peachtree Help index .

---

### Before You Convert Again...

Before you launch the Data Conversion wizard, there are some precautionary tasks you may want to perform. [See “Before Starting the Data Conversion Wizard...” on page 37.](#)

If you get the error message **“This transaction refers to a non-existing invoice for customer/vendor XXX, reference XXXX”** during conversion, please look up Answer ID 7824 in the Peachtree Learning Center database (available at the Peachtree Web site). This document gives detailed instructions for correcting the error.

---

### **Data Conversion on a Network**

If you are operating Peachtree on a Novell network and experience “Lock Table Full” errors, increase the maximum locks per connection on your network, then try the conversion process again. If this does not work or you are on a network experiencing “Lock Table Full” errors on other networks when trying to convert data, copy your company data to a workstation and perform the operation *directly on that workstation*. When the process is complete, copy the data back to the network drive.

If you are unclear as to how to set the number of locks, refer to your network manual or see a network administrator. You can also search for information on correcting the error at the Peachtree Knowledge Center, available at the Peachtree Web site.

If you have an automatic backup routine enabled on your network and run the conversion or purge process overnight, you should disable this routine. It can be re-enabled after the purge or conversion process has completed.

---

### **If the Data Conversion Continues to Fail**

If you have tried all the tips mentioned above and you still run into conversion errors, contact Peachtree Customer Support for further assistance. In rare cases, your company data may have been damaged in a prior release, and thus it cannot convert successfully. Peachtree Customer Support may ask you to reinstall the prior version of Peachtree so that they can help you repair the data, if necessary. As a last resort, you may have to restore an older backup of your company data and try the upgrade and conversion process again.

## **Converting Data from other Products**

### **From Peachtree Complete Accounting for DOS (PCA)**

You should use the default settings when installing Peachtree (for Windows). Do not install Peachtree (for Windows) over your existing Peachtree Complete Accounting for DOS (PCA) directory.

Also, the Peachtree Data Conversion wizard (described on page [38](#)) does not convert company data from Peachtree Complete Accounting for DOS (PCA) or Peachtree Classic Accounting. This conversion requires a separate utility available from Peachtree Software. To order the PCA conversion utility, please call 1-800-336-1420 or visit the Peachtree Software Web site at [www.peachtree.com](http://www.peachtree.com).

## From Quicken, QuickBooks, or One-Write Plus

You can import existing Quicken data into a new company set up in Peachtree Accounting. Due to basic differences between the two programs, some of the Quicken data cannot be imported into Peachtree as it is. Rather, you must redefine how you want the data to be handled as part of the import program. Understanding the basic program differences can help you decide how you want to redefine Quicken data.

If you created a company using QuickBooks or One-Write Plus, you can convert your company data to the Peachtree format. Peachtree will convert most QuickBooks and One-Write Plus lists (such as accounts, customers, vendors, employees, items, and jobs) and current balances.

Peachtree First Accounting cannot convert QuickBooks or One-Write Plus data.



➤ **To convert existing Quicken One-Write Plus, or QuickBooks Pro, Premier, or Enterprise Solutions data**, refer to the “Converting to Peachtree” chapter of the Peachtree *User’s Guide*, or look up “**Quicken**”, “**QuickBooks**”, or “**One-Write Plus**” in the Peachtree online Help index. If you are converting from One-Write Plus, a conversion guide (OWP2PAW.PDF) is available. To view or print the *One-Write Plus Conversion Guide*, follow these steps:

- 1 From the Windows **Start** menu, select **Programs**, and then point to the Peachtree folder (or the name of the folder you chose during Peachtree Setup).
- 2 Point to the **Peachtree Resources & Help** subfolder.
- 3 In this folder, select the *One-Write Plus Conversion Guide*.

## **2** *Upgrading from Previous Versions of Peachtree Getting Started Guide*



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