AccountEdge®

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Premier is now AccountEdge

Accountedge 2010 for Windows still has the same features and functionality plus more.

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Web Store Setup and Details

Will become available February 2010

Create a Web Store from AccountEdge and choose which items to sell online. A store can be created and live within minutes.

This hosted Web Store service, provided by EnStore, is an easy and affordable way to sell your product online. Access Enstore through AccountEdge to begin the process of designing your online store simply choosing a store template that best suits your business, create setup menus for easy navigation, and easily add your company logo.

To create a your web store

1. Go to the Setup menu and select Web Store.
2. Under the Store Details window click Learn More for access to the Enstore website.
3. After you sign up for this service you will receive a confirmation email with your Store Handle and Password. Enter this information in the Web Store Details window.

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Web Store Selling Details

The **Web Store Setup - Selling Details** window will allow you to sync your items that you sell via your web store as well as import your web customers as new cards.

Another option available to you is the ability to assign one card to your web orders.

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Web Store Sync Options

The **Web Store Setup - Sync Options** window give you the option to sync your items Manually or Automatically. If you choose to sync automatically you are then given the option to sync upon opening or closing your company file.

Click the **Sync** button to sync your items and any changes that have been made since the last sync.

Click the **Force Sync** button if you want to sync all item information to your web store, not just the changes that were made to your items since your last sync.

To select which items to sync with your web store , go to the **Item Information - Selling Details** window and select the new option “I Sell This Item In My Web Store”.

The following information will be synced with the web store for each selected item:

- Item Name
- Product Images
- Brand
- Weight
- Tags

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Tax Codes on Web Orders

The tax code from a web order will be compared to the Tax Code list in your company file. If the tax code used on the web order does not match the tax code in your company file AccountEdge will automatically create the tax code needed.

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Brands

Each item can have a specific brand associated with it. Brands can be used to identify an item in a report and can be used to filter item reports.

To create a brand

1. Go to the Lists menu and select Brands.
2. Click the New button to enter a list of Brands you wish to use to associate with your items.
3. Click OK to close the window.

To assign a brand to your items

1. Go to the Inventory Command Center and click Items List.
2. Click on the zoom arrow to access the Item Information - Profile window.
3. Click Item Details to select the Brand that will be associated to each item.

If you are using the Web Store service, assigning a Brand to your items will make it easier for your customers to search for items on your Web Store.

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Tags

User defined tags can be used for filtering reports. Youca ndefine a tag to be sued like a category for each item and have the ability to add multiple tags per item.

To create tags

1. Go to the Lists menu and select Tags.
2. Click the New button to enter a list of Tags you wish to use for your items.
3. Click OK to close the window.

To assign a tag to your items

1. Go to the Inventory Command Center and click Items List.
2. Click on the zoom arrow to access the Item Information - Profile window.
3. Click Item Details to select the Tags that are applicable to that item.

If you are using the Web Store service, assigning Tags to your items will aid in the setup of your Web Store navigation abilities.

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Weight

A new Weight field has been added to the Item Information - Item Details window, located below the Brand field. You can track the weight of an item by entering the weight and select either Kilograms, Grams, Ounce or Pound.

To assign a brand to your items

1. Go to the Inventory Command Center and click Items List.
2. Click on the zoom arrow to access the Item Information - Profile window.
3. Click Item Details to select the Brand that will be associated to each item.

If you are using the Web Store service, assigning a Brand to your items will make it easier for your customers to search for items on your Web Store.

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Multiple Product Images

you will now be able to add multiple images to each item. These images are located under the Item Information - Item Details window for each item. You can enter 3 different images for each item.

To enter an image for an item, double click the desired area for each image then link the image. The main image will display the name of the image below it.

NOTE: **Web Store users** IThe main image will be the default image that will sync with your web store.

To assign a brand to your items

1. Go to the Inventory Command Center and click Items List.
2. Click on the zoom arrow to access the Item Information - Profile window.
3. Click Item Details to select the Brand that will be associated to each item.

If you are using the Web Store service, assigning a Brand to your items will make it easier for your customers to search for items on your Web Store.

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Additional Price Level

A new Web Store price level has been added to the Item Information - Selling Details window. This new price level will be used to sync to your web store.

If you wish to rename this price level, go to the Lists menu and select Custom Lists & Field Names then select Price Levels.

To assign a brand to your items

1. Go to the Inventory Command Center and click Items List.
2. Click on the zoom arrow to access the Item Information - Profile window.
3. Click Item Details to select the Brand that will be associated to each item.

If you are using the Web Store service, assigning a Brand to your items will make it easier for your customers to search for items on your Web Store.

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Reconcile Account Improvements

While reconciling your accounts, you can now easily search for a specific transaction by using the improved sorting tools.

Click on the Header in each column to sort that column. You can sort by Date, ID#, Payee, Deposits, and Withdrawals.

If you are looking for a specific Payee, click the Header named Payee and the column will sort in either ascending or desending order.

These new sorting tools will allow you to reconcile your accounts in the order in which they appear on your bank statement.

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Profitability on a Sale

While create an Order, Quote, or Invoice you can quickly see the profitability of the sale by clicking Show Profit Analysis.

If you highlight an item, you can see the Gross Profit, Margin and Cost of the Item.

If a line item is not selected you will access the Gross Profit, Margin and Cost for the entire invoice.

To assign a brand to your items

1 Go to the Inventory Command Center and click Items List.
2 Click on the zoom arrow to access the Item Information - Profile window.
3 Click Item Details to select the Brand that will be associated to each item.

If you are using the Web Store service, assigning a Brand to your items will make it easier for your customers to search for items on your Web Store.

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Track Shipping Details

You can enter the Shipping Details for each item invoice you have fulfilled by clicking the zoom arrow to the left of the Shipping Details field on an item invoice.

The Shipping Details window will appear to enable you to track your shipment. Enter the carrier you used, the type of service such as, Ground or Overnight. You can also enter the Tracking Number given to you by the carrier as well as any notes regarding the shipment.

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Advanced list searching

You now have more options for searching list records. You can use filters to search your jobs, categories,cards, activities, items, locations, and recurring transactions lists. Then you can choose whether to identify the results that 'starts with' or 'contains' the search term entered.

These are the new filters you can use:

List	Search by filter	
Jobs	• Job Number • Job Name	• Linked Customer
Categories	• Category ID	• Category Name
Cards	• First Name • Last Name/Co.Name • Card ID • Phone Number • Email	• Address • City • State • ZIP • Country
Activities	• Activity ID • Activity Name	• Description
Items	• Item Number • Item Name • Description	• Primary Vendor • Vendor Item Number
Locations	• Location ID	• Location name
Recurring Transactions	• Transaction Name • Amount	• Next Due

To search in these lists, select a **Search by** filter, select either 'Starts With' or 'Contains' and then press ENTER. The list displays only records that match your search criteria.

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Advanced search on Select from List windows

New pop-up menu's, **'Search by'** and **'Starts With'** or **'Contains'** will appear in the **Select from List** window when selecting **Cards** or **Items**.

The following options are available for search:

Select from List	Search by filter	
Cards	• First Name • Last Name/Co.Name • Card ID • Phone Number • Email	• Address • City • State • ZIP • Country
Items	• Item Number • Item Name • Description	• Primary Vendor • Vendor Item Number

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Card Actions

The **Action** menu is a shortcut menu for accessing tasks associated with card records. The menu is located in the **Cards List** window and in each **Card Information** window. When you click the **Action** menu icon, a list of actions associated with the card type is displayed.

All of the tasks you could previously perform in card windows, such as creating letters and sending emails, can be found in the Action menu. In addition, you can now access transaction tasks, printing tasks, and view the card's primary address location (and get directions to it) through a Google Maps™ link (Internet access required).

The following shows the actions available in a customer card.

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Contact logs are now called Reminder logs

As there are many business tasks you must remember to do, besides keep in touch with contacts, the **Contact Logs** have been replaced with **Reminder Logs**. You can use **Reminder Logs** to remind you of all of your **To Do List** tasks. Choose to view Reminders without a Card selected or link the Reminder to any card from your **Cards List**.

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Print Bank Deposit slips

You can now print Bank Deposit Slips directly from your company file. The new **Prepare Bank Deposit** window has added features to make it easy to record Cash Back on Deposits, Total Cash, Total Checks, and Number of Items deposited.

You can then print the entire transaction on a pre-printed form and take it directly to your bank.

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Gross Wages and Gross Wages YTD on paystubs

Custom fields have been made available for **Gross Wages** and **Gross Wages YTD** that can be added to your **Paycheck Stub** and the plain paper **Pay Stub**.

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Customize the Paycheck Stub

To add these new fields to the **Paycheck Stub**, go to the **Customize Forms** window and select **Paycheck layout**. Click the **Add Fields** icon to access a list of the fields available to add to the **Paycheck** stub. You can also select an option to include headers with each element or column you add to your form. When you are finished selecting the desired fields, click **Add**. The fields will be added to your form.

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Customize the Pay Stub

If you are choosing to email the Pay Stub and would like to add these new fields to the plain paper **Pay Stub**,go to the Setup menu, select **Customize forms** and **Pay Stubs**. Click **Customize** to display the **Customize Pay Stubs** window. Click the **Add Fields** icon to access a list of the fields available to add to the **Paycheck** stub. You can also select an option to include headers with each element or column you add to your form. When you are finished selecting the desired fields, click **Add**. The fields will be added to your form.

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Updated Sales Tax report

The Sales Tax reports now provide a grand total for sales and purchases across all tax codes making it easier to fill out state sales tax returns.

The Sales Tax Summary reports will show a Total for the Sale Value and Purchase Value columns.

The Sales Tax Detail reports will show a Grand Total for the Sale Value and Purchase Value columns.

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Total Hours on Payroll Activity Detail report

The Payroll Activity Detail report now has Total Wage Hours worked per employee for the specified date range.

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New Welcome Window design

The Welcome Window has a new look and now supports Apple Command key functions.

Select **Open** to open the company file that was opened last. You can also use Crtl-O key combination to open the last company file.

Select **Browse** to access the Open window. You can also use Crtl-B key combination to access the Open window.

Select **Create** to create a new company file for your business. You can also use Crtl-N key combination to create a new company file.

Select **Explore** to explore the AccountEdge sample company file. Youc an also use Crtl-E key combination to explore the sample company.

Use **Crtl-X** to exit the Welcome Window or simply click the red X a tthe top right corner of the window.

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Open the Last Company file

AccountEdge Windows 2010 now remembers the location of your company file for fast and easy access each time you open your company file. After you have opened your company file using AccountEdge Windows 2010, the software will remember the company file you opened last. The name of the company file is displayed under the Open button.

If the name of the company file is not displayed under the Open button,simply select the Browse button.

An Open window will appear for you to locate and select the company file you wish to open.

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Company Data Auditor enhancements

You can now view the location of your application and your company file.

In the **Accounts** command center, click **Company Data Auditor**. The **Company File Overview** window appears.

The location of your application file appears in the **Application Location** field and the location of your company file appears in the **File Location** field.

If you want to navigate to the location in the **Finder**, click the magnifying glass next to the **Application Location** field or the **File Location** field.

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Tax Table loading

The Load Tax Table window now has more information available. You can easily see the date of the current tax tables loaded, click **Check for Updates** to be directed to our website for the latest information available, or click **Load Tax Tables** if you find that the current tables have not been loaded.

If you created a new company file, the tax tables are automatically loaded for you.

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PCI compliance changes

The credit card industry has implemented a series of mandatory standards aimed at merchants who store, process or transmit cardholder data.

As a result, AccountEdge 2010 has changed the way in which creditg card information is stored, processed and transmitted.

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PCI DSS compliance

Payment Card Industry - Data Security Standard (PCI DSS) is a mandatory compliance initative driven by VISA and Mastercard to govern the way merchants store, process or transmit cardholder data. One of their primary objectives is to develop a more secure system.

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AccountEdge Changes

AccountEdge 2010 is a mandatory update for users that process credit cards directly from their company file. This upgrade will provide PCI DSS compliance by providing access to ACH Direct’s secure Payments Gateway.

Credit card information details will now be stored on the secure Payments Gateway provided by ACH Direct. AccountEdge will store a unique ID in the company file to enable you to process future payments using the same credit card.

When you are ready to process a credit card payment transaction from your company file, AccountEdge uses the unique ID to tell the secure gateway to process a payment with the credit card on file for that customer.

NOTE: **During the Upgrade process** lAll credit card information stored in the Card Information - Payment Details window will be removed.

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Automatch import data

When you import records, you can now automatically match imported data fields in your software.

In the **Import Data** window, click **Automatch**. The import field names that exactly match the AccountEdge fields are automatically matched in the **Matching Import Field** column.

If there are any fields that remain unmatched, you can match them manually. To reset the window, click **Unmatch All**.

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Windows 7 compatible

AccountEdge 2010 is Windows 7 compatible. Outlook Sync and other Windows related features are also Windows 7 compatible. Older versions of Premier Accounting are not fully supported. AccountEdge 2010 supports Windows Vista, Windows 7 and Windows XP.

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Crtl+N keyboard shortcut

Using the key commands **Ctrl+N** will create new records, including accounts, sales, invoices, cards, items, and jobs. The results will vary depending on the window you are in. For example, if you are in the **Sales** command center, **Ctrl+N** will open a **New Sales** window.

To see the **Ctrl+N** key command for the current window displayed go to the **File** menu.

To create a new company file the key command has changed to **Ctrl+Shift+N**

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