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School's Almost Out: Teach Yourself Better Reporting

Have you graded yourself lately on your company's reporting output? If you're simply changing the date when you run a report, you're missing out on a whole world of insight.

Peachtree's reporting tools do more than provide a recap of past and current activity. They can give you exceptionally specialized looks at filtered slices of your data, so you can get a better handle on what's happening and make better business decisions. And when you need a polished version of reports to present to customers, financial professionals, etc., Peachtree can help dress up your output.

All versions of Peachtree software let you create customizable reports; differences lie in areas like multiple-company report copying and the number of reports available.

Deep customization

Peachtree has named its reports well, but it provides brief explanations of each to help you select the correct one. Click the **Reports & Forms** menu, then **Accounts Receivable.** You'll see the screen shown in **Figure 1**:

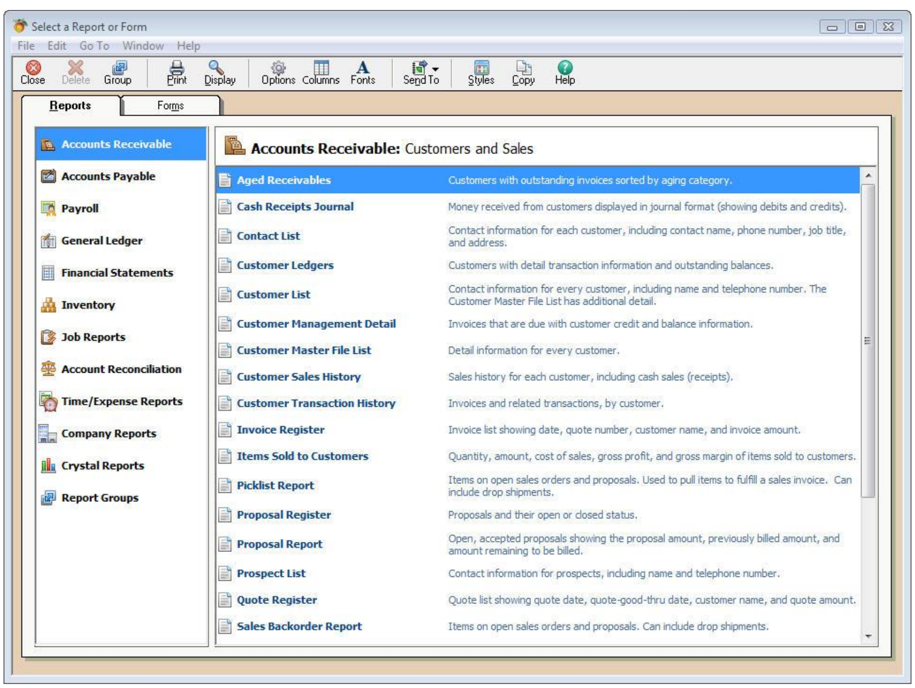


Figure 1: It's easy to find the right report because of Peachtree's descriptions of each. Toolbar icons provide access to other tools you'll use to work with your filtered financial output.

Toolbar icons take you to related tools. Click on **Columns**. The window that opens displays an easy path to modifying the content of your report. In the Aged Receivables report example shown in **Figure 2**, you can delete or add fields by checking or unchecking the boxes next to **Show**. Click the box next to **Title** if you want the field's title (like **Customer ID**) to display in the report. Reorder columns by clicking on one, and then on **Move Up** or **Move Down**. Leave **Column Break** unchecked if you want multiple fields in the same column.

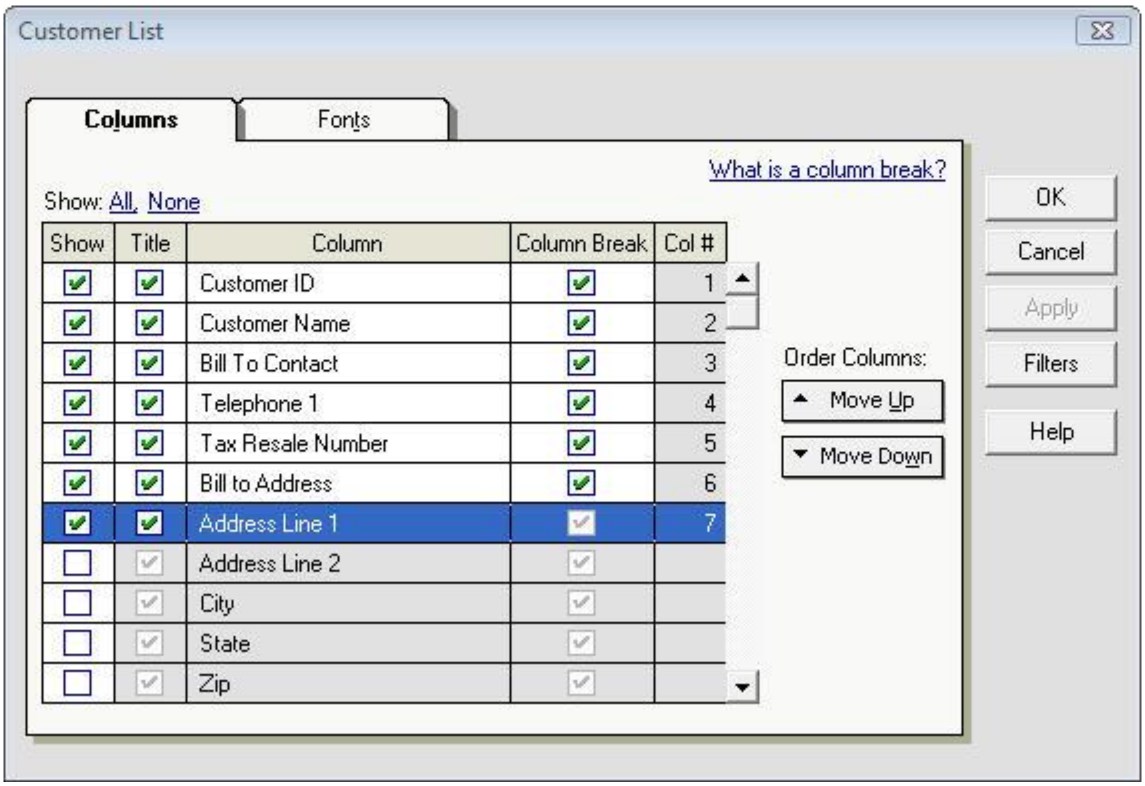


Figure 2: Indicating which columns should appear in your reports—and in what order—is simply a matter of checking and unchecking boxes.

Fonts and styles

Changing fonts is also easy. Click on the **Fonts** tab, highlight a line, and click the **A** to the right. A font toolbox opens. Format your font and click **OK**.

Peachtree comes with a variety of report styles that you can change to fit your audience: Classic, Contemporary, Elegant, and Professional. With the **Fonts** tab open, click the arrow next to the drop-down **Style** box and select one. When you're satisfied, click **OK** and **OK.**

Back at the **Select a Report or Form** window, click **Style | Style Defaults**. Here, you can select default formats for each report class by clicking on the line and choosing from the drop-down list.

Filtering your report

Here's one of the areas where Peachtree really displays its depth. Click **Reports & Forms | Accounts Receivable.** With the **Aged Receivables** report highlighted, click the **Options** icon. You'll see a screen like the one in **Figure 3**:

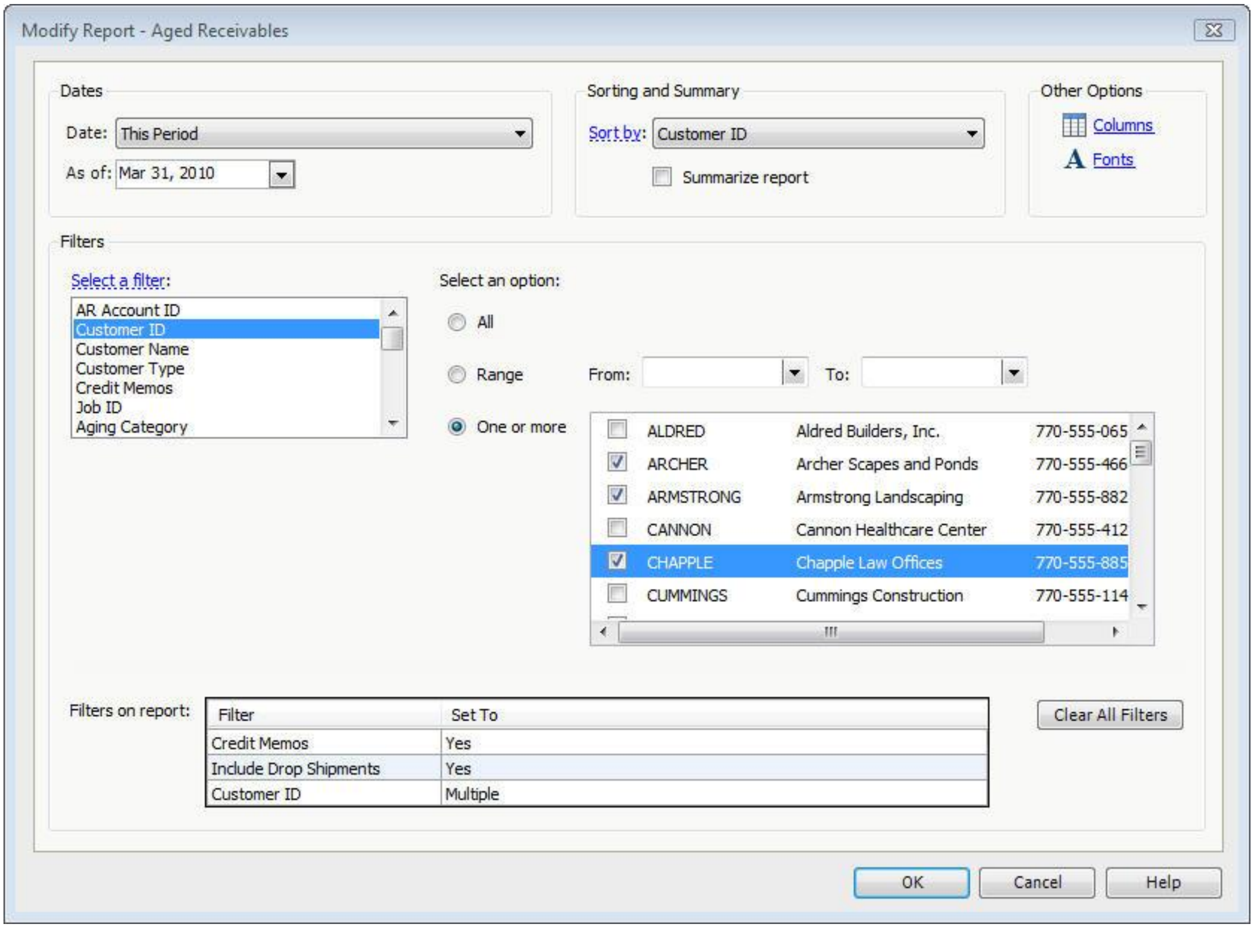


Figure 3: To make the best use of Peachtree's reporting capabilities, you should take advantage of the filtering options offered for each.

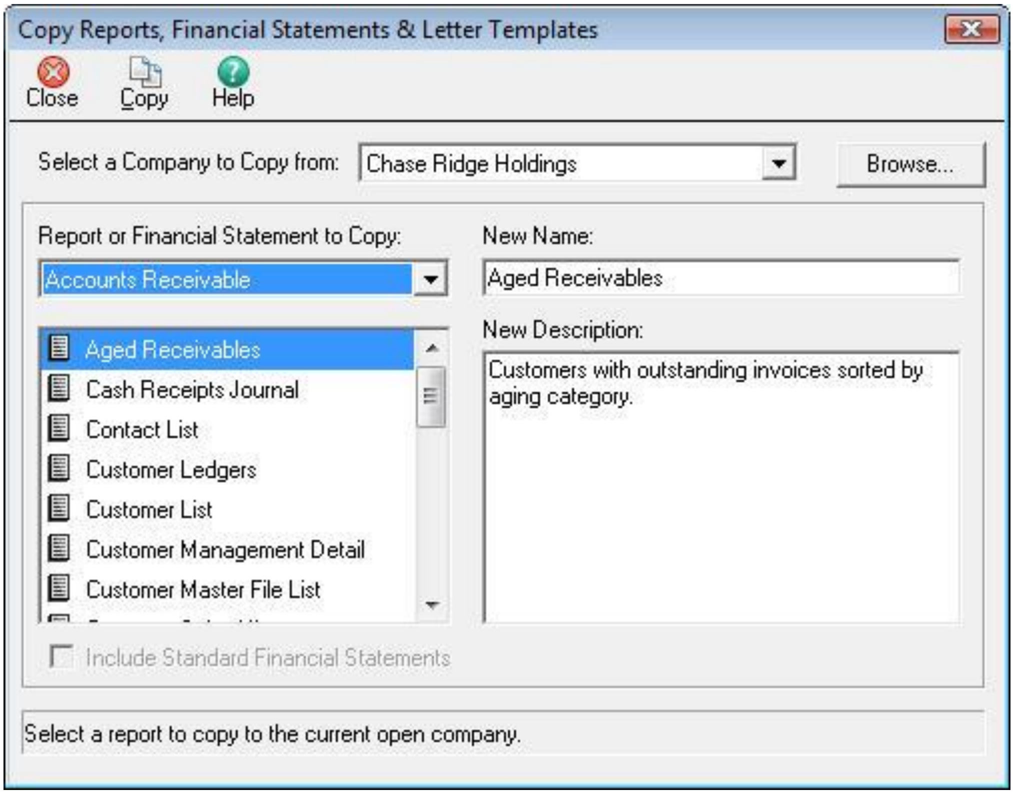
Here, you can select a date or date range; designate a sorting field (for example, display customers in alphabetical order); and choose to pull out either all or a subset of the highlighted field. For **Customer ID**, you can specify all, a range of customers, or a hand-picked group. Options vary from field to field, and additional filters at the bottom of the window can be accepted or cleared.

More possibilities

There's a lot more you can do with reports in Peachtree. You can:

- Email reports and convert them to PDF and Excel files. With a report open, click the appropriate icon.

- Copy report formats from other Peachtree companies. Open the **Reports & Forms** menu and select a report category. Highlight the desired report, and click **Copy.** You'll see the window shown in **Figure 4**:



Got a report format that you slaved over in another Peachtree company? You can copy it over to the current company.

Finally, if you use Peachtree Premium Accounting or Quantum, and your version is 2009 or above, you have access to Crystal Reports 2008, an extraordinarily flexible, powerful reporting solution.

Peachtree makes reporting simple, but sometimes it's difficult to know which report(s) would be most effective for your purposes. If you're stumped about where to start, we can provide helpful tips here. The right report can make the difference between simply knowing how much you sold this month to gleaning a deep understanding of your overall accounts receivable function.