



Peachtree Streamlines Operations for CFSA

The Casket and Funeral Supply Association of America (CFSA) represents the interests of its members, the suppliers to licensed funeral homes and licensed funeral directors. The Association's objective is to provide useful information and perspectives on the funeral and the funeral supply industries to support manufacturers and suppliers of funeral goods and services. CFSA also provides proprietary industry information to individual members through its sales statistics program. CFSA relies on Peachtree by Sage Complete Accounting as its business accounting solution because of its ease of use and rich feature set.

The Right Fit for Small Businesses

When Mark Allen joined CFSA as the association's executive director, CFSA had already been using Peachtree for five years. "We're a small organization, but we require accurate and complete accounting," says Allen. "Peachtree fits our business well."

Enjoy Fabulous Service

In a small organization, staff must wear many hats, and Allen handles the majority of accounting tasks for CFSA. "I don't have an accounting background, but I find Peachtree very intuitive to use—my learning curve was very short," he explains. "The menus are easy to navigate and the Help function in the software is great."

CFSA renews its annual Peachtree support agreement each year, giving Allen the peace of mind of knowing help is a phone call away. He appreciates that the customer support technicians are helpful, professional, and responsive. "They quickly adapt to my knowledge level and offer explanations that are easy to understand," he says. "The customer service for Peachtree is first rate. Whenever I've contacted the Peachtree support department I have received fabulous service—it's should be a model for other support centers."

Better Budgeting

Budgeting is a necessary task within any successful business, and CFSA relies on Peachtree to streamline its budget process. "We can analyze last year's data and use it as the basis for the next year's budget," says Allen. "For example, I look at what we spent to attend various trade shows last year to help me set a realistic budget for this year's expenses in that category."

Customer:

Casket and Funeral Supply Association of America

Industry:

Membership Association

Location:

Lake Bluff, Illinois

Number of Locations: 1

Number of Employees: 3

System:

Peachtree by Sage Complete Accounting

Peachtree Payroll Solutions

CHALLENGE

Casket and Funeral Supply Association of America requires a complete, yet easy-to-use accounting solution.

SOLUTION

Peachtree by Sage delivers ease-of-use and the complete functionality CFSA needs to run its operations.

RESULTS

Payroll in Peachtree is simple, even for a non-accountant. Direct deposit streamlines employee payment. Financial reports are comprehensive and allow CFSA to demonstrate its accountability to its Board of Directors.

Streamline Invoicing

As a membership organization, CFSA bills its members annually for dues. Generating 200-plus individual invoices would be a time-consuming task, but Peachtree simplifies the process with a recurring invoice function. “We can generate all the invoices for our members at once, making any necessary adjustments before sending them out,” Allen explains.

Easy In-House Payroll

Payroll is a vital, time-sensitive, and somewhat intimidating business function. “Not being an accountant, I was a bit nervous to take on the responsibility of payroll,” Allen says. “But Peachtree Simple Payroll is very easy to use. It won’t let me make a mistake.”

An annual subscription through Sage Software ensures that the tax tables are always correct and up-to-date. Signature-ready tax forms allow Allen to prepare tax filings in less time. Peachtree compiles the basic payroll information and carries the data directly into the federal and state forms Allen prints on plain paper.

Employees at CFSA all take advantage of the direct deposit functionality built into Peachtree. “If an employee is out on vacation, they know their check will be deposited,” says Allen. “Similarly if I plan to be out on payday, I can schedule the payments in advance, and the deposit takes place on the date I indicate.”

Informative reports detail the employer taxes due to state and federal agencies, simplifying the remittance process.

Ensure Accountability

CFSA sends monthly financial reports to its Board of Directors, and Peachtree makes short work of the task. “I simply pick the Income Statement and Balance Sheet reports from the menu, print them and I’m done,” he says. “Our treasurer gets another report detailing our monthly disbursements.”

“Not being an accountant, I was a bit nervous to take on the responsibility of payroll, but Peachtree Simple Payroll is very easy to use; it won’t let me make a mistake.”

As a nonprofit association, CFSA is cognizant of the need for accuracy, accountability, and transparency in its accounting software—needs Peachtree is meeting every day. “Peachtree helps us demonstrate our accountability to members and to our board of directors,” Allen concludes.

If you would like to learn more about Peachtree by Sage or other products in the Peachtree family, please visit www.peachtree.com or call 1-877-495-9904 to speak with a product specialist today.



End-to-end solutions. Expert advice.
Ongoing support. That's Sage 360®.

Sage Software supports the needs, challenges, and dreams of 2.8 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

sage
software

Your business in mind.

©2008 Sage Software, Inc. All rights reserved. The Sage Software logo, Peachtree, the Peachtree logo, [any other PT trademarks used] “Your business in mind” are the registered trademarks or trademarks of Sage Software, Inc. or its affiliated entities. [Any 3rd party language required.] All other trademarks are the property of their respective owners.

5PCH016 MKT-2008-11343