



CUSTOMER SUCCESS



Peachtree by Sage Premium Accounting is Successful Development for Battelle Financial Group

Terry Battelle started buying foreclosure properties back in the 1970's. With a keen eye for promising properties and plenty of business sense, he began making a profit almost immediately. Today his company, Battelle Financial Group, owns dozens of commercial and industrial properties throughout Southern California. With the help of property managers and real estate agents, Battelle Financial Group holds and leases these properties. The company relies on Peachtree by Sage Premium Accounting to successfully manage its business accounting tasks.

"I've used Peachtree since back in the DOS days," Battelle says. "I like the product and I like the strong support of the company behind it."

Stick with a Winner

Several years ago, a colleague convinced Battelle to give QuickBooks a try. "He talked about how great it was, so I decided to check it out," Battelle recalls. "I ran both programs simultaneously for six months. By then I was completely convinced that Peachtree Premium Accounting is the better product. QuickBooks let me make errors like using the same check number twice. I like the safeguards built into Peachtree Premium Accounting — they keep me from making mistakes."

Save on Accountant's Fees

The safe and secure accounting functionality of Peachtree Premium Accounting also saves Battelle Financial Group money it might otherwise pay to an accountant. "I don't call my accountant very often any more," Battelle says. "Peachtree Premium Accounting gives us a bulletproof audit trail. I simply send my reports to the accountant at the end of the year and they rarely have questions."

Automated Functions Save Time and Money

Peachtree Premium Accounting supports recurring invoices. This allows the Battelle Financial Group to set up a customer's monthly rental invoice one time, and then automatically generate that invoice each month. "I send out a couple hundred invoices. It would take me hours to key in those invoices every month, but the entire invoicing process now takes me just a few moments," says Battelle.

Customer:

Battelle Financial Group

Industry:

Property Rental

Location:

Huntington Beach, California

Number of Locations: 1

Number of Employees: 1

System:

Peachtree by Sage Premium Accounting

CHALLENGE

Battelle Financial Group is a long-time user of Peachtree by Sage. The company once tried QuickBooks but stayed with the strong accounting controls of Peachtree by Sage Premium Accounting.

SOLUTION

Peachtree Premium Accounting has proven to be a reliable accounting solution for Battelle Financial Group for more than a decade.

RESULTS

The company saves more than \$100 a month by e-mailing auto-generated invoices and receipts to its customers. Accounting fees are minimized thanks to detailed audit trails and reports. The ability to generate recurring monthly rent invoices results in additional time savings.

Peachtree Premium Accounting also includes the ability to e-mail customer invoices. “There’s a check box in the customer’s record to indicate if they want to receive their invoices by e-mail. I check that box and Peachtree Premium Accounting generates the e-mail messages for me automatically.”

Not only does e-mailing invoices save Battelle Financial Group the time spent folding and stuffing invoices for mailing, and a trip to the post office, it saves the company money as well. “I’m saving more than \$100 each month in postage and invoicing costs. It didn’t take long for the program to pay for itself at that rate,” Battelle notes.

As customer payments arrive, Battelle records the payment in Peachtree Premium Accounting and generates a receipt that is e-mailed to the customer in recognition of their payment. “That saves me another round of stamps,” he adds.

The company sends its customers a quarterly statement, also by e-mail. “The statements are a tremendous tool; they show all the detail of billings and payments” explains Battelle. “It helps avoid customer confusion because they’re able to see where we’ve applied their payments.”

Powerful Reports

Peachtree Premium Accounting includes financial reporting features one might expect to find in more complex programs. For example, Battelle Financial Group was able to structure its chart of accounts so that the company’s properties are represented by a segment of the general ledger account code. This structure allows Battelle to generate one financial statement for all company income and expenditures and individual statements for each property.

“I print a consolidated balance sheet plus individual balance sheets for each building,” explains Battelle. “This shows me what we’ve spent on electricity for all properties and specifically what

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electricity expense a particular building incurred. This is handy because our accountant must break down that data on our tax return.”

Battelle has become skilled in customizing reports within Peachtree Premium Accounting. “It’s really very easy,” he says. “I use many reports as-is, but for others I’ve used the Design feature to customize them by changing the font and removing data that doesn’t apply to this business.”

Dynamic Product

The company likes to keep its Peachtree Premium Accounting software current to take advantage of the many new features offered in new releases. Battelle Financial Group recently upgraded to the most current version of Peachtree Premium Accounting. “I’m very pleased with the new feature that allows us to open up past years of history,” says Battelle. “I have about 20 years of business history and it’s great to be able to access that should I need to.”

He concludes, “I’ve always enjoyed Peachtree Premium Accounting. It saves me time and money every day.”

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



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