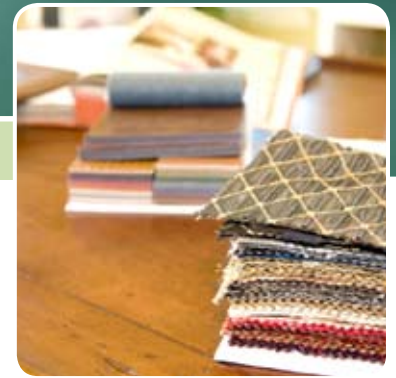




## CUSTOMER SUCCESS



# Design Associates Feels Right at Home with Peachtree by Sage

Design Associates is a highly regarded interior design firm serving the New York City metropolitan area. The company is engaged with both commercial and residential projects, and provides turnkey design services including space planning, lighting, furniture, and window treatments. Design Associates has earned and maintained its fine reputation over the course of 42 years. For the past twenty years, Design Associates has relied on Peachtree by Sage Complete Accounting.

Gloria Rothfeld, CEO of Design Associates, was introduced to Peachtree years ago by a friend who is an accountant. "Honestly, I had trouble balancing my checkbook," Rothfeld recalls. "My friend insisted that I invest in accounting software for my business. At first, she operated it for me, but now I do all the accounting work myself."

### Timely Billing

Rothfeld and her team enter every new project into Peachtree Complete Accounting so that they can track all expenses incurred on a client's behalf. "I enter an invoice for the initial design fee, and then send periodic invoices for purchases we make on behalf of our clients," Rothfeld says.

Invoices are printed and mailed or e-mailed to clients, depending on their preference. "We worked for a client who was in Europe during the project," Rothfeld recalls. "I simply sent the invoices to them by e-mail. They appreciated the convenience and it allowed us to get paid more quickly."

### Track Expenses Carefully

Most of the company's expenses are directly related to design projects, such as a furniture purchase, so there is a close association between a vendor invoice and a customer invoice. Vendor invoices are recorded in Peachtree, and Rothfeld is able to note on the invoice the name of the associated client. This helps ensure that each client-related expense is properly billed. "As a small business, I have to watch my cash flow carefully," Rothfeld says. "Peachtree Complete Accounting makes that easy to do."

Rothfeld's employees are independent contractors, so they receive 1099 forms at the end of the year. "I print them right from the software," she says.

### Customer:

**Design Associates**

### Industry:

Interior Design

### Location:

West Haven, Connecticut

**Number of Locations:** 1

**Number of Employees:** 3

### System:

**Peachtree by Sage Complete Accounting**

## CHALLENGE

As a non-accountant, the CEO at Design Associates needed an easy-to-use accounting solution to help manage the billing and receivable functions of her successful business.

## SOLUTION

Design Associates selected Peachtree more than 20 years ago and has used it successfully ever since.

## RESULTS

The bank reconciliation function is intuitive and straightforward. Excellent record keeping within Peachtree helped Design Associates sail through a sales tax audit.

### Well-Designed Reports

The reporting capabilities within Peachtree Complete Accounting serve Rothfeld well. At the end of each month, she prints a group of reports including the Trial Balance, Cash Receipts, Invoice Register, Sales Journal, General Journal, and Account Reconciliation, staples them together with a copy of the bank statement and delivers the package to her accountant for tax filing purposes.

"I'm not an accountant, but Peachtree Complete Accounting is intuitive and easy to use," Rothfeld says. "I know there are other accounting software packages out there, but none of them will work as well for me as Peachtree Complete Accounting."

### Survive the Audit

The company recently went through a state sales tax audit where Peachtree Complete Accounting saved the day. "I was able to access every tax payment we have made and show the auditor the taxes we collected, from whom and for what," Rothfeld explains. "It was invaluable during the audit—I can't imagine trying to compile those records manually."

### Stay in Balance

Rothfeld appreciates that she can use Peachtree Complete Accounting for her banking needs. "There is no question in my mind that Peachtree saves me time and money in my business," Rothfeld says.

The bank account reconciliation function within Peachtree Complete Accounting speeds and simplifies a potentially tedious process. "Peachtree gives me a screen with the uncleared checks on it," explains Rothfeld. "I check off those that are on the statement, confirm the deposits, add in any bank charges, enter the ending balance the bank statement shows and I'm done. Now it's easy to balance my checkbook!"

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*"There is no question in my mind that Peachtree Complete Accounting saves me time and money in my business."*

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### A Professional Image

What Rothfeld says she appreciates most about Peachtree Complete Accounting is the fact that it allows her to keep excellent records and produce clean, professional correspondence for her clientele. "My reputation is important to me. Peachtree Complete Accounting helps me portray the professional image that my clients have come to expect."

If you would like to learn more about Peachtree by Sage, please visit [www.peachtree.com](http://www.peachtree.com) or call 1-877-495-9904 to speak with a product specialist today.



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