

How to Install and Register Tax

Below are instructions on how to register and install your Peachtree Tax Solution. Complete these steps before starting your year-end processes.

Note: these steps are only required if you subscribe to one of the Payroll Tax Solutions.

- How to register the latest payroll solution updates

It is vital that your payroll solution for 2010 is registered prior to printing or e-filing the 2009 year-end tax forms or starting payroll in 2010 to ensure you have access to the most current tax tables and forms.

To verify the Payroll Tax Service registration status

To determine if your Payroll Tax Solution is registered for 2010, follow these steps.

1. From the main menu, click Help and select About Peachtree Accounting. The About Peachtree Accounting window opens.
2. On the lower half of the About Peachtree Accounting window, locate the line for Serial Number.
3. If the Serial Number is listed as "NOT REGISTERED", you must first register the product before registering tax.
4. Now locate the Registered Tax Service line.
5. If the Registered Tax Service is 2010 (or greater) then you are already registered.
6. If the Registered Tax Service is Not Registered or earlier than 2010, continue to the next section.

To register your Payroll Tax Service:

1. From the main menu at the top of the window, click Help.
2. Select Tax Service Registration to open the Register Tax Service window.
3. The Serial Number displayed should match the number on your Peachtree Accounting product CD case.
4. If you have already received a Tax Registration Number from calling into Customer Support or Customer Service, enter that number into the Tax Registration Number box and then click OK.

Your Peachtree Simple Payroll or Peachtree Select Payroll will now be registered.

5. If you do not have a Tax Registration Number, click the website link in the center of this window. This will open the Product and Tax Registration webpage at www.peachtree.com/register in a new window.
6. Select either the Peachtree Simple Payroll Plan or the Peachtree Select Payroll Plan, and click the Continue button at the bottom of the window.
Note: If you have Peachtree Preferred Business Care, choose Peachtree Simple Payroll Plan. If you have Peachtree Preferred Business Care with e-Filing select Peachtree Select Payroll
7. The next window will ask you to log in with your Peachtree Passport account. Enter the e-mail address associated with your Peachtree Customer ID, enter your password, and click Log On.

Note: Peachtree Passport accounts are automatically created by the Sage Software system when purchasing your Peachtree Accounting products. The e-mail address associated with our records for your company can be used to log on to Passport. If you have forgotten your password, or have never created a password, click "Forgot your password?" and follow the instructions on screen to change or reset your password, then return to this page.

8. After logging on, you will be asked to enter the Serial Number and verify your company information. Once all the information is correct, click Continue.
9. The following page asks you to review the information entered for accuracy. If any changes need to be made, click the Back button in your browser prior to continuing. If the information is correct, click Continue.
10. The next page will display your Tax Registration Number and Customer ID. Write down these numbers in a secure location for your records. The Peachtree Accounting CD case has an area where these numbers can be recorded next to the Serial Number.
11. On the Register Tax Service window, enter your Tax Registration Number in the space provided, and then click OK. A window will appear confirming that your Peachtree Simple Payroll or Peachtree Select Payroll plan is now registered.
12. Click OK to complete the tax registration process.

- How to install the latest payroll tax solution updates

If you have a Peachtree payroll tax solution for 2010 AND your tax solution is registered for 2010 follow the steps below to download the latest update.

Tax Update Install Instructions – Online Delivery

In order for you to be notified that the payroll solutions service update is available, you need to Activate Peachtree's Online Update by following the instructions listed below.

Note: If you have subscribed to CD delivery for the Peachtree Payroll Solutions, see the next section for how to install the updates.

How to set up your software to automatically check for Online Tax Updates:

1. Open your company in Peachtree.
2. From Peachtree's Services menu, select Check for Updates.
3. In the Peachtree Online Update window that appears, enter a checkmark for Remind me to check for updates and enter 5 for the day(s) field.

During the month of December and January we recommend that you check for updates at least every 5 days to make sure you are notified promptly of the January and February Tax Updates.
4. When the tax update is available, select "Check Now". The new update will be listed in the Peachtree Online Update window.
5. Place a checkmark next to the Tax Service Update and select Download.
6. Once the download is complete, select OK.
7. Close Peachtree and all applications.

8. The Peachtree Tax Update Service installation program will start.
9. Follow the steps prompted by the installation program to complete the Payroll Tax Update Service Installation.
10. On the Setup Complete window, make sure you check the box that allows you to view information about this update, and then click Finish.
11. The Peachtree Tax Bulletin appears. Review the Tax Bulletin to get detailed information about the tax and program changes included in this Payroll Tax Update Service.

Note: If the Tax Update does not start automatically after being downloaded from within Peachtree, you can browse to the location of the downloaded file and execute it manually.

1. Close Peachtree and all other applications.
2. Browse to the Updates folder located in your data path directory.
3. Double-click the latest Tax Update.
4. Once the update is completed, open your Peachtree Company and go to Help ->About Peachtree Accounting to verify that the update installed.

Note: You may have multiple Tax Updates located in your Updates folder. You should always install the latest Tax Update available for your product.

Tax Update Install Instructions – CD Delivery

Note: Be sure to install this CD on each Peachtree workstation, and follow directions for any notifications regarding your firewall or anti-virus programs. Certain Peachtree files may trigger an alert message from these types of programs; you must allow these Peachtree files to run for a successful installation.

1. Close Peachtree and all other applications.
2. Insert the payroll tax solution CD into your CD-ROM drive. The Peachtree Payroll Tax Service window appears.

If this window does not automatically appear, do the following:

- On Windows XP, select **Start/Run**. On the command line, type **D:Autorun** (substitute the appropriate drive letter for your CD-ROM drive), and then click **OK**.
 - On Windows Vista or Windows 7, select **Start** and type **D:Autorun** in the search box (substitute the appropriate drive letter for your CD-ROM drive), and then hit **Enter** on the keyboard.
3. On the Peachtree Payroll Tax Service window, select to install the Peachtree Tax Table Update.
 4. Follow the steps prompted by the installation program to complete the installation.
 5. On the Setup Complete window, check the box that allows you to view information about this Update, and then click Finish.
 6. The payroll tax solution bulletin appears. Review the Tax Bulletin to get the detailed information about the tax and program changes included in this Update.