

Upgrade your company files

AccountEdge Pro

AccountEdge Network Edition

AccountEdge Pro for Windows

priority _____

Upgrade your files (existing users only)

Company files created with a previous version of your AccountEdge or AccountEdge Pro software need to be upgraded. You also need to upgrade all customized reports, forms, letters, and spreadsheets that you used with your previous version of the software.

It is best to optimize and verify your company file first, then if there are no errors found you can make a back up copy of your company file before you upgrade it. Once you upgrade your company file, you can open it only in AccountEdge or AccountEdge Network Edition, depending which software you use. However, the backup file can still be opened in your previous software version.

Upgrade AccountEdge company files

Do the following for each company file:

Task	Action	See
1	Upgrade your company file	page 2
2	Upgrade your customized templates	page 3

NOTE: Upgrading from AccountEdge(Mac) to AccountEdge Network Edition (Mac) If you are upgrading from AccountEdge to AccountEdge Network Edition on the Mac, you do not need to upgrade your files.

Task 1: Upgrade your company files

If you are using AccountEdge Network Edition, and users access company files from a shared location, you need to upgrade your company files on the host computer.

NOTE: Before you upgrade We recommend you optimize, verify and backup your company file before you begin the upgrade process. For more details, see the *Backing up and restoring company files* and *Servicing your company file* sections of the *Online Help*.

- 1 In the **Welcome to AccountEdge Pro** window, click **Company File Maintenance** and select **Upgrade Company File** from the menu. A welcome window appears.
- 2 Click **Next**. The **Select File to Upgrade** window appears.
- 3 Click **Find File**. The **Open** window appears.
- 4 Select the company file you want to upgrade and click **Open**. The **Select File to Upgrade** window reappears.

The current path and file name of the selected company file appears below the **Find File** button. The default path and name for the upgraded company file appear below the **Save As** button.

- 5 If you want to change the location or name of the company file:
 - a Click **Save As**. The **Save As** window appears.
 - b Specify a new location or type a new name and click **Save**.

NOTE: Save As location for AccountEdge Network Edition (Mac)

users The upgraded file must be saved to Library>Application Support>AccountEdge NE>Databases folder found on the computer serving as the Host computer.

- 6 Click **Next**. The **Confirm** window appears.
- 7 Click **Next** to start the upgrade. When the upgrade is finished, the **Complete** window appears.
- 8 If you want to upgrade another company file, click **Next** and repeat from [step 2 above](#).
- 9 Click **Finish** to close the Upgrade Assistant.

If you customized any reports, forms or letters in your previous version of AccountEdge, proceed to [Upgrade your customized templates, below](#).

Task 2: Upgrade your customized templates

NOTE: Before upgrading your customized templates It is necessary to upgrade your company file before you upgrade your customized templates.

If you use customized reports, forms, letters, graphics, or spreadsheets, you need to upgrade these templates to use with the AccountEdge version.

You can automatically upgrade your custom templates using a migration assistant (see [‘To automatically upgrade your customized templates’ on](#)

page 4), or upgrade them manually by copying the templates to the application support folder (see 'To manually upgrade your customized templates' on page 5).

To automatically upgrade your customized templates

- 1 In the **Welcome to AccountEdge Pro** window, click **Company File Maintenance** and select **Migrate previous version** from the menu. The **Migration Assistant** window appears.
- 2 The path to the previous application is displayed.

NOTE: If 'Please select your previous AccountEdge application' is displayed If your software was not able to locate a previous version, **Please select your previous AccountEdge application** will appear in the previous application field. Click **Browse** and select the location. Select the application file (for example, AccountEdge) and then click **Open**. The correct path should now be displayed in the **Previous Application** field.

- 3 Select **Copy Spreadsheets** if you have customized spreadsheets in your previous version.
- 4 Click **Start**. The upgrade process begins.

When the process is complete, the **Finished** window appears.

NOTE: Network users If you are using the software in a network environment, repeat the above steps for upgrading your custom templates on each computer.

To manually upgrade your customized templates

- 1 Find the **AccountEdge Pro 2020 US** support folder located in your **Documents** folder and open it.

NOTE: Pre-2012 users The customized forms folders can be found in the installation folder, (for example **AccountEdge 2011**).

- 2 Open a folder containing the customized templates.

Folder	File extension (Win)	Description
Custom	*.rpt	User-customized report templates
Forms	*.frm	Standard and user-customized form templates
Letters	*.dot	Standard and user-customized Microsoft Word document templates
Spreadsheet	*.xlt	Standard and user-customized Microsoft Excel spreadsheets
Graphics	*.bmp, *.gif, *.jpg, *.tif, *.png	Any graphics such as company logo, employee or item photos, etc.

- 3 Select only your custom template files and copy them.

NOTE: Avoid overwriting standard templates The standard templates included with the latest version of your software have improved features. To avoid overwriting the new templates with old versions, select only the template files that you created.

- 4 Paste the template files in each corresponding folder (for example, Forms) in the **AccountEdge Pro 2020 US** support folder.
- 5 Repeat from [step 2 above](#) for each folder containing customized templates.

NOTE: Network users If you are using the software in a network environment, repeat the above steps for upgrading your custom templates on each computer.