

Upgrade your company files

AccountEdge Pro

AccountEdge Network Edition

AccountEdge Pro for Windows



Upgrade your files (existing users only)

Company files created with a previous version of your AccountEdge or Premier Accounting 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.

If you want to...	See
Upgrade AccountEdge for Mac files	page 3
Upgrade AccountEdge or Premier for Windows files	page 6

Upgrade AccountEdge for Mac files

Do the following for each company file:

Task	Action	See
1	Upgrade your company file	below
2	Upgrade your customized templates	page 4

NOTE: Upgrading from AccountEdge to AccountEdge Network Edition If you are upgrading from AccountEdge to AccountEdge Network Edition , 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 **Find 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 **Find 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 users

The upgraded file must be saved to Library>Application Support>AccountEdge NE>Databases folder found on the hard drive.

- 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 on page 3](#).
- 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 1: Upgrade your customized templates

If you customized reports, forms, letters, graphics, or spreadsheets using a previous version of AccountEdge, you need to upgrade these templates to continue using them in your new software version.

NOTE: Important notice for Pre-2011 users A number of enhancements have been made to the way images and fonts are handled on customized forms. To take advantage of these enhancements, you will need to re-attach the graphic(s) on your customized forms.

- 1 In the Finder, locate the installation folder of your previous version of AccountEdge (for example, the **AccountEdge 2011** folder) and open it. The installation folder contains these template folders:

Folder	Description
Custom	Standard and user-customized report templates
Forms	Standard and user-customized form templates
Letters	Standard and user-customized Microsoft Word document templates

Folder	Description
Spreadsheet	Standard and user-customized Microsoft Excel spreadsheets
Graphics	Any graphics such as company logo, employee or item photos, etc.

- 2 Find the **AccountEdge Pro 2012 US** support folder located in your **Documents** folder and open it.
- 3 In the installation folder of the previous version, open a folder containing customized templates, for example the **Forms** folder.
- 4 Command-click only your custom template files.

NOTE: Avoid overwriting the latest standard templates The standard templates included with AccountEdge may have improved features. Make sure you select only the templates that you created, ignoring the old standard templates, so that you do not accidentally overwrite the new templates.

- 5 Press and hold the **OPTION** key and drag-and-drop the selected template files over the corresponding folder (for example, **Custom Forms**) in the **AccountEdge Pro 2012 US** support folder.
- 6 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.

Upgrade AccountEdge for Windows files

Do the following for each company file:

Task	Action	See
1	Upgrade your company file	below
2	Upgrade your customized templates	page 7

Task 1: Upgrade your company files

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*.

To upgrade your company files

- 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 **Find 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 **Find 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**.
- 6 Click **Next**. The **Confirm** window appears.
- 7 Click **Next** to start the upgrade. When the file has been upgraded, the **Complete** window appears.

- 8 If you want to upgrade another company file, click **Next** or click **Finish** to close the Upgrade Assistant.

If you customized any reports, forms or letters in your previous version of Premier Accounting, 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 Windows version.

You can automatically upgrade your custom templates using an upgrade assistant (see [page 8](#)), or upgrade them manually by copying the templates to the installation folder (see [page 9](#)).

NOTE: Important notice for Pre-2011 users A number of enhancements have been made to the way images and fonts are handled on customized forms. To take advantage of these enhancements, you will need to re-attach the graphic(s) on your customized forms.

To automatically upgrade your customized templates

NOTE: Customized spreadsheets need to be upgraded manually If you have customized spreadsheets that you want to upgrade, you will need to follow the procedure [‘To manually upgrade your customized templates’ on page 9](#).

- 1 In the **Welcome to AccountEdge Pro** window, click **Company File Maintenance** and select **Templates Upgrader** from the menu. The **Templates Upgrade Assistant** welcome window appears.

- 2 Click **Next**. The **Copying Templates** window appears.

The path to your previous **Forms** folder is displayed in the **Source** field and the path to your current **Custom Forms** folder is displayed in the **Destination** field.

NOTE: If the previous version cannot be found If your previous software was not installed in the default location, a message will appear stating that the previous version could not be found. To manually locate it, 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 **Source** field.

- 3 Click **Start**. The upgrade process begins.

NOTE: Old templates folder The upgrade assistant moves the default templates for the latest version (for example, My Documents>AccountEdge Pro 2012 US \Custom Forms) into a folder with the prefix ‘Old’ (for example, My Documents>AccountEdge Pro 2012 US \Old Forms). You can find any new forms that were not available in the previous version in this folder.

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

- 4 Click **Finish** to close the Templates Upgrade Assistant.

If you were unable to upgrade the templates using the Templates Upgrade Assistant or if you use customized spreadsheets, complete the procedure [‘To manually upgrade your customized templates’ on page 9](#).

To manually upgrade your customized templates

- 1 In Windows Explorer, locate the installation folder of the previous version [For example, **AccountEdge 2011**]. The installation folder contains these template folders:

Folder	File extension	Description
Custom	*.rpt	Standard and 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.

- 2 Open the folder containing customized template files (for example, if you have customized invoice templates, open the **Forms** folder).
- 3 Select only the template files that you created. To select multiple files, hold down the CTRL key and click each template.

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 Go to the **Edit** menu and choose **Copy**.
- 5 Locate the **AccountEdge Pro 2012 US** support folder in the user's **Documents** folder and open it. The default location for this folder is Documents.
- 6 Open the **Custom Forms** folder and paste the selected forms.
- 7 Repeat from [step 2 above](#) for each folder containing customized templates to be upgraded.

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.