

AccountEdge®



How to Upgrade

Upgrade your files

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.

Make sure you back up 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 for Windows files	page 5

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.

- 1 Back up any company files that you use.
- 2 In the Finder, go to the AccountEdge installation folder and double-click the **Upgrade Assistant** icon. A welcome window appears.
- 3 Click **Next**. The **Find File to Upgrade** window appears.
- 4 Click **Find File**. The **Open** window appears.
- 5 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.

- 6 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**.
- 7 Click **Next**. The **Confirm** window appears.
- 8 Click **Next** to start the upgrade. When the upgrade is finished, the **Complete** window appears.
- 9 If you want to upgrade another company file, click **Next** and repeat from [step 3 above](#).
- 10 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.

- 1 In the Finder, locate the installation folder of your previous version of AccountEdge (for example, the **MYOB AccountEdge 2009** folder) and open it. 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 **AccountEdge** installation folder.
- 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, **Forms**) in the AccountEdge installation folder.

- Repeat from [step 2 on page 4](#) for each folder containing customized templates.

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 6

Task 1: Upgrade your company files

To upgrade your company files

- Open the upgrade assistant.
Go to the **start** menu > **All Programs** > **AccountEdge** > **Tools** > **AccountEdge Upgrade Assistant**. The Upgrade Assistant welcome window appears.
- Click **Next**. The **Find File to Upgrade** window appears.
- Click **Find File**. The **Select Company File to Upgrade** window appears.
- Select the company file you want to upgrade and click **Open**.
The **Find File to Upgrade** window appears. The file path and name of the company file appear in the field below the **Find File** button. The proposed path and name of the company file, as it will be after upgrading, appear in the field below the **Save As** button.
- If you want to change the location or name of the upgraded company file:
 - Click **Save As**. The **Save As** window appears.
 - Select the file location, type a new file name, and click **Save**.

NOTE: Restricted access to the Program Files folder in Windows Vista User Account Control (UAC) is a security feature in Windows Vista. If UAC is active, files saved in the **Program Files** folder can only be opened by the Windows user who saved the files. If other users need to access your company file, do not save it in this folder. For more information about User Account Control, see Windows Vista Help.

- 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

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 [below](#)), or upgrade them manually by copying the templates to the installation folder (see [page 7](#)).

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 7](#).

- 1 Open the templates upgrade assistant.

Go to the **Start** menu > **All Programs** > **AccountEdge** > **Tools** > **AccountEdge Templates Upgrade Assistant**. The Templates Upgrade Assistant welcome window appears.

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

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

.exe file (for example, myobp.exe) 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, AccountEdge 2010\Forms) into a folder with the prefix 'Old' (for example, AccountEdge 2010\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 [below](#).

To manually upgrade your customized templates

- 1 In Windows Explorer, locate the installation folder of the previous version [For example, Premier2009 or AccountEdge2009]. 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 Open the **Forms** folder in the **AccountEdge 2010** program folder and paste the selected forms.
- 6 Repeat from [step 2 on page 7](#) for each folder containing customized templates to be upgraded.