

Upgrade your MYOB company files

MYOB Premier Accounting 2008

MYOB AccountEdge 2008

MYOB AccountEdge Network Edition 2008



Upgrade your files

Company files created with a previous version of your MYOB 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 MYOB Premier Accounting 2008, MYOB AccountEdge 2008 or MYOB AccountEdge Network Edition 2008, depending which software you use. However, the backup file can still be opened in your previous MYOB software version.

Upgrading from a pre-2004 version of MYOB software If you are upgrading from a pre-2004 version of MYOB software, you also need to activate your company file and edit your upgraded user accounts. For more information, contact MYOB support.

Upgrading MYOB Premier Accounting files

Do the following for each company file:

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

Step 1: Upgrade your company files

To upgrade your company files

- 1 Go to the **Start** menu and choose **Programs > MYOB Premier Accounting 2008 > MYOB Tools > MYOB Premier Accounting 2008 Upgrade Assistant**. A welcome window appears.
- 2 Click **Next**. The **Find File to Upgrade** window appears.
- 3 Click **Find File**. The **Select Company File to Upgrade** window appears.

- 4 Select the company file you want to upgrade and click **Open**.
The **Find File to Upgrade** window appears. In the **Find File to Upgrade** window, 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.
- 5 If you want to change the location or name of the upgraded company file:
 - a Click **Save As**. The **Save As** window appears.
 - b 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.

NOTE: Optimize and verify the upgraded company file We recommend that you optimize and verify the company file that you upgrade. Refer to the user guide or MYOB Help for instructions.

Step 2: Upgrading your customized templates

If you created customized reports, forms, spreadsheets or letters using a previous version, you need to upgrade these templates to continue using them. Note that you need to upgrade the customized templates stored on each workstation.

NOTE: If you are upgrading from MYOB Accounting Plus version 7.5 or earlier If you are upgrading from MYOB Accounting Plus version 7.5 or earlier, you can skip this step—the upgrade program will automatically copy your customized templates for you.

To automatically upgrade your customized templates

- 1 Go to the **Start** menu and select **Programs > MYOB Premier Accounting 2008 > MYOB Tools > MYOB Premier Accounting 2008 Templates Upgrade Assistant**. A welcome window appears.
- 2 Click **Next**. The **Copying Files** window appears.

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

NOTE: If the previous version cannot be found If your previous MYOB 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 folders Before your custom templates are upgraded, the templates from the latest software folder (for example, Premier2007\Forms) are copied into a corresponding folder with the prefix 'Old' (for example, Old Forms). These serve as a backup in case you accidentally delete some of the latest templates. Similarly, the folders **Old Custom** and **Old Letters** will be created, and any Premier Accounting 2008 standard reports and letters will be moved to these folders, respectively.

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

- 4 Click **Finish** to close the upgrade assistant.

If, for any reason, you were unable to upgrade the templates using the templates upgrade assistant, you need to upgrade them manually. See '[To manually upgrade your customized templates](#)' on page 5.

To manually upgrade your customized templates

- 1 In Windows Explorer, locate the installation folder of the previous version of MYOB Premier Accounting. The installation folder contains these template folders:

Folder	Type of file
Custom	Standard and user-customized reports
Forms	Standard and user-customized forms
Letters	Standard and user-customized letters
Spredsht	Standard and user-customized spreadsheets

- 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 MYOB Premier Accounting 2008 program folder and paste the selected forms.
- 6 Repeat this procedure for the reports, spreadsheets and letters you customized in the previous version of MYOB Premier Accounting by using the **Custom**, **Spredsht** and **Letters** folders, respectively.

Upgrading MYOB AccountEdge files

Do the following for each company file:

Step	Action	See
1	Upgrade your company file	page 6
2	Upgrade your customized templates	page 7

NOTE: Upgrading from AccountEdge 2008 to AccountEdge Network Edition 2008 If you are upgrading from AccountEdge 2008 to AccountEdge Network Edition 2008, you do not need to upgrade your files.

Step 1: Upgrade your company files

If you are using MYOB AccountEdge Network Edition, we recommend that you upgrade your company files on the host computer.

To upgrade your company files

- 1 Back up any company files that you use.
- 2 In the Finder, go to the MYOB 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 **Select Company File to Upgrade** window appears.
- 5 Select a 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.

- Click **Next** to start the upgrade. When the upgrade is finished, the **Complete** window appears.
- If you want to upgrade another company file, click **Next** and repeat from [step 3 above](#).
- Click **Finish** to close the Upgrade Assistant.

NOTE: Optimize and verify the upgraded company file We recommend that you optimize and verify the company file that you upgrade. Refer to the user guide or MYOB Help for instructions.

Step 2: Upgrade your customized templates

If you created customized reports or forms using a previous version, you need to upgrade these templates to continue using them.

NOTE: If you are upgrading from MYOB Accounting Plus version 7.5 or earlier If you are upgrading from MYOB Accounting Plus version 7.5 or earlier, you can skip this step—the upgrade application will automatically copy your customized templates for you.

To upgrade your customized templates

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

- In the Finder, locate the installation folder of your previous version of MYOB AccountEdge (for example, the **MYOB AccountEdge 2007** 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
Spread sheet	*.xlt	Standard and user-customized Microsoft Excel spreadsheets

- 2 Open the **MYOB AccountEdge 2008** 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 MYOB AccountEdge 2008 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 MYOB AccountEdge 2008 installation folder.
- 6 Repeat from [step 2](#) for each folder containing customized templates.