Release Notes

MYOB AccountEdge Pro v15
MYOB AccountEdge Network Edition v15

AccountEdge has all the features you are familiar with, as well as new additional functions to make managing your business easier.

In order to start using AccountEdge, you'll need to upgrade your current software. See 'What is upgrading?' on page 2.

What's in this guide?

These Release Notes cover all the tasks you need to complete to start using AccountEdge and AccountEdge Network Edition software. This includes:

Note that this guide is intended for users upgrading from AccountEdge v14.5 or earlier.

For simplicity, the term 'AccountEdge' is used to collectively refer to AccountEdge Pro and AccountEdge Network Edition. When necessary, specific references are made to a single product, for example, AccountEdge Network Edition.

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What is upgrading?

Upgrading is a two-part process that involves first installing AccountEdge v15, then upgrading your company file to use with it. When you upgrade your company file, the records and transactions within your file are copied into a format that will work with the new version.

What if I need more help?

Apart from this document, there are also a number of other support and assistance options.

- **Technical support**—including phone and live chat support (Cover customers only). See myob.com.au/support.
- **Community Forum**—View topics and discussions related to this upgrade on the MYOB Community Forum at community.myob.com.
- **Online Help**—You can access the online help by choosing AccountEdge Help from the Help menu.
- **Video**—Watch videos demonstrating the features in AccountEdge from help.myob.com.au/showme.

What should I do before I upgrade?

We recommend you set aside time outside of your normal business hours to complete the upgrade tasks.

Do the following before you upgrade:

- Check that your computer can run AccountEdge v15.

	System Requirements
Operating system	• Mac OSX 10.8 to 10.11
Hardware	• Intel Based Mac with 2 GB RAM or more • 250 MB available hard disk space for program installation • **Minimum** of 35 MB available hard disk space for each company file • 1152 x 720 screen resolution with thousands of colours
OfficeLink	• Microsoft Office 2008 or 2016
	Additional Requirements for Network Edition
Network Hardware	• 100BaseT or faster Ethernet network For more information about network system requirements, download the AccountEdge Network Edition Implementation Guide.
For Better Network Performance	• Intel Dual Core i5 or faster processor with 8 GB RAM and SSD drive for hosting company files • 1000BaseT/Gigabit Ethernet Wired Network • Mac OS X 10.10 to 10.11

NOTE: Hardware and software requirements may differ, depending on your operating system and office environment. For more detailed information about compatible hardware and software, see myob.com.au/minimum_specs.

- Back up your company file data in your current software version—See your user documents or the online help for information about how to do this.
- Know your software serial number—You can find your serial number on the email confirmation from MYOB when you purchased AccountEdge.
- Make sure you are connected to the internet.

How do I upgrade?

You need to do the following to begin using AccountEdge.

Task		See
1	Install	page 6
2	Upgrade	page 7

Upgrading from version 3 or earlier If you are upgrading from AccountEdge v3 or earlier, you need to activate your company file and upgrade your user accounts.

Upgrading from MYOB AccountRight MYOB AccountEdge is no longer compatible with MYOB AccountRight. Company files created in or upgraded for use with AccountRight, will no longer be compatible with AccountEdge equivalent programs.

Install

1: Do these things first

- If your computer only allows users with administrator privileges to install programs, log in as administrator.
- Save any open documents and close all programs.

2: Find the installer file

1. Locate the downloaded zip file and double click on it to unzip it.
2. Double-click the **AccountEdge Pro v15.dmg** file to open the file.
3. Drag and drop the **AccountEdge Pro v15** icon into the **Applications** folder icon.
4. Double-click the **Applications** folder icon to view your applications.
5. Double-click the **AccountEdge Pro v15** application. The **Welcome to AccountEdge Pro** window appears.

3: Start the installation

1. **[Network Edition users only]** Double-click the **Setup** icon. An Installation window appears.

   NOTE: In the installation window, follow the on-screen instructions. [Network Edition users] Do not customise the installation If you are installing AccountEdge Network Edition on the host computer for the first time, do not customise the installation. This ensures that all critical components are installed.

2. When installation is complete, click **Finish**. The **What's New in this version** help topic appears.
3. **[Network Edition users only]** Repeat instructions for each workstation in the network.

For more information about setting up and using AccountEdge Network Edition across your network, see the *Network Implementation Guide*.

Upgrade

1: Do these things first

Do the following before upgrading your company files:

- Back up the company files you use.
- **[AccountEdge Network Edition only]** If users access company files from a shared location, you need to upgrade your company files on the host computer.

2: Choose the file to upgrade

1. Double-click the **AccountEdge v15** application. The **Welcome to AccountEdge Pro** window appears.
2. Click **Company File Maintenance** then select **Upgrade Company File** from the drop down menu. The **Welcome to the AccountEdge Upgrade Assistant** 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 to be upgraded, and then click **Open**. The **Find File to Upgrade** window reappears.

   The path and filename of the selected company file appears below the **Find File** button. The proposed path and name of the upgraded company file appears below the **Save As** button.
6. Click **Next**. The **Confirm** window appears.

3: Rename the company file

AccountEdge Network Edition users Because your previous file is stored in the same database location as your upgraded file, you will need to change the name of the upgraded company file.

So that each workstation in the network can easily identify the upgraded file, we recommend you rename it with reference to the AccountEdge version number (for example, 'YourCompanyFile_v15').

This step is optional for AccountEdge users.

❖ If you want to change the name of the company file, type a different name in the **Name** field.

4: (Optional) Move the company file

NOTE: AccountEdge Network Edition users Do not move your company file if you are using AccountEdge Network Edition. Your file must be stored in the **Macintosh HD/Library/Application Support/AccountEdge NE/Databases** folder.

❖ To save the upgraded company file to a different folder or computer, click **Browse** and select the location.

5: Upgrade and open the file

1. Click **Next** to start the upgrading process. The **Complete** window appears when the company file is upgraded.
2. To upgrade another company file, click **Next** and repeat from step 4 above.
3. Click **Finish** to close the **Upgrade Assistant**.

If you have custom forms that you want to continue using after you upgrade, they need to be upgraded into your AccountEdge company file. See 'Migrate customised forms' on page 8.

6: Migrate customised forms

NOTE: [AccountEdge Network Edition only] You need to upgrade the customised templates stored on each workstation.

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

You can automatically upgrade your custom templates using a migration assistant (see page 9), or upgrade them manually by copying the templates to the application support folder (see page 9).

To automatically upgrade your customised templates

1. In the **Welcome to AccountEdge** 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. To display the correct path click Browse and select the location. Select the application file (for example, AccountEdge) and then click Open.

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

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

To manually upgrade your custom templates

1. In the Finder, locate and open the installation folder of your previous software version. The installation folder contains these folders:

Folder	Description
Custom Reports	User-customised report templates
Custom Forms	Standard and user-customised form templates
Letters	Standard and user-customised Microsoft Word document templates
Spreadsheets	Standard and user-customised Microsoft Excel spreadsheet templates
Graphics	Any graphics such as company logo, employee or item photos, etc.

NOTE: AccountEdge v12 or later support folder AccountEdge Pro v12 or later stores customised forms and reports, letters, spreadsheets and graphics in a support folder named AccountEdge Pro v12 (or later) AU and is stored in the users documents folder.

2. Open the new **Custom Forms** folder located in the **Documents**>**AccountEdge v15 AU** folder.
3. Open the previous version software installation folder (for example, the **AccountEdge v14 AU** folder), and then open a folder containing customised templates (for example, the **Forms** folder).
4. Command-click *only* your custom templates.

NOTE: **Avoid copying the latest standard templates**
The Standard templates are included with the AccountEdge v15 installation package. Make sure you select only the templates that you created, ignoring the old standard templates, so that you do not have multiple copies of the standard 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 v15 AU** support folder.
6. Repeat above procedures for any Reports, Letters, Spreadsheets and Graphics you have customised.

What’s new

AccountEdge v15 contains many new features that will help you manage your business more easily and efficiently. Some of these features include:

Features	
Tracking Leads	Create a lead card to begin tracking potential customers
Update AE Date	Easily change the date in AccountEdge. If the date in the program is different than the current date in the system an alert message displays.
Enhanced Filters	• Bank Register • Sales Register • Purchase Register
7 Years of History	View up to 7 years of history on Profit & Loss and Balance Sheet reports
Purging Improvements	A new purge button has been added to the **Cards List** menu to purge lead, customer and supplier cards. This button will take you to the **Purge Sales Quotes and Cards** or the **Purge Purchase Quotes and Cards** assistants.
Departments added	A department field has been added to: • Bank Deposit and Adjustments • Inventory Adjustments If more than one department has been added to a transaction, Split will appear in the Department field.
Previous/Next arrows	Previous and Next arrows have been added to quotes, orders, invoices and bills for easier navigation without having to close the window

Features	
Customer Profitability	See how profitable certain customers are based on the items sold to them and their margin. Also included are a new set of Item Profitability reports to show you your most and least profitable items.
Void Cheque	A seamless way to void any kind of cheque; mark it as reconciled, identify it using Transaction Journal and Recap Transaction, put a 'rubber stamp' on the transaction window and print the cheque.
Reports	• 7 Years Historical Updated Balance Sheet and Profit and Loss reports • New Profit Analysis Profit Analysis - Item Summary report Profit Analysis - Item Sales Summary and Detail reports Profit Analysis - Activity Summary report Profit Analysis - Activity Sales Summary and Detail reports Profit Analysis - Customer Summary report Profit Analysis - Customer Sales Summary and Detail reports • New Leads reports: Lead Quote Summary and Detail reports Lead Sales and Card File Source reports Lead Status report Lead Aging report Lead Conversion report
Auto Populate fields	• Lead Since • Customer/Supplier Since

The online help contains a description of all the new features. You can access the online help by choosing **AccountEdge Help** from the **Help** menu.