Release Notes

MYOB AccountEdge Pro v16
MYOB AccountEdge Network Edition v16

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:

- What you need to do first—'What should I do before I upgrade?' on page 3
- Installing AccountEdge v16—'Install' on page 6
- Upgrading your current company file—'Upgrade' on page 7
- Find out about some of the new features—'What's new' on page 11.

Note that this guide is intended for users upgrading from AccountEdge v15.5 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 v16, 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.co.nz/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.co.nz/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 v16.

	System Requirements
Operating system	• Mac OSX 10.9 to 10.12
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 10.11 to 10.12

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.co.nz/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 v16.dmg** file to open the file.
3. Drag and drop the **AccountEdge Pro v16** icon into the **Applications** folder icon.
4. Double-click the **Applications** folder icon to view your applications.
5. Double-click the **AccountEdge Pro v16** 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 v16** 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_v16').

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.

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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 v16 AU** folder.

3 Open the previous version software installation folder (for example, the **AccountEdge v15 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 v16 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 v16 AU** support folder.

6 Repeat above procedures for any Reports, Letters, Spreadsheets and Graphics you have customised.

What’s new

AccountEdge v16 contains many new features that will help you manage your business more easily and efficiently. Some of these features include:

Features	
Email Templates	Create email templates with merge tags to insert contact, sale, purchase, etc. data on emails.
Sending Email to Groups of Contacts	From the Card File you can now send emails to a group of contacts as well as use custom email templates to merge in contact fields and other data including custom fields.
Emailing of Payment Receipts	You can now email Payment Receipts from the Sales Command Centre.
Shopify Image Sync	A new Sync Images option was added to the Web Store Setup window that will allow you to only sync images that have changed for your items without needing to sync all of your items details.
Department added to Bank Statement Import	Assigning a department when importing transactions from your bank statement is now available. You can split or assign a partial amount of the transaction to both a job and a department. If you are creating a rule for specific transactions you can also assign the job and the department when creating rules.
Check Number Field	The Cheque number fields is now available on Receive Money and Customer Payments windows without having to drill into the payment details window.
Notes added to Transactions	All transaction types now include the ability to add Notes to your transactions.

Features	
Paid Today enhancements	When you are recording a payment directly from a sale you can choose the account you would like to deposit the payment to, including grouping with undeposited funds. When recording a payment directly on the purchase bill you can now easily enter the account from which the payment will be drawn. You are also now given the option to assign the cheque number or payment number in the Applied Payment Details window.
Viewing and applying credits & debits in sales and purchases	When entering an invoice or purchase, if the contact you have entered has credits or debits on file the total amount of the credits or debits will appear in the upper right hand corner of the window. You can access the credits or debits by clicking on the zoom arrow before the amount. If the preference is set to Warn about open credits or debits, you will have the opportunity to apply an open credit or debit to your transaction upon recording.

Features	
Forecasting with Recurring Sales	The Cash Flow report now includes recurring sales in forecasting cash, which provides a more accurate estimation of your financial situation at a point in time. In addition, recurring sales and purchases will no longer show on the To-Do List if they don't have a set frequency, and only relevant fields are displayed when you use the radio buttons.
Enhanced GST Reports	The GST Summary and Detail reports have been redesigned to make it easier to view your GST collected and paid as well as displaying tax exclusive and inclusive amounts. Sales and purchases have been broken out into separate sections on the reports and will display in each section Total Exclusive Sales/Purchases Amounts, Total Tax Collected/Paid and Total Inclusive Sales/Purchase amounts.

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.