



MYOB
Certified Consultant

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UCAP MYOB AccountRight 2011 Windows upgrade procedure

The new MYOB AccountRight 2011 is a total re-write of the MYOB software. It has taken the features of the existing system and rewritten them for the latest PC operating system, SQL and .NET.

Owing to this rewrite things are different. As a result, we recommend that you set aside time outside of your normal business hours to complete the upgrade tasks. Depending on how you currently use your software and on the capacity of your computer's performance, allow more than one hour to complete all the upgrade tasks.

Some of these steps may require the assistance of a person with reasonable IT knowledge and experience. If you find these steps difficult, please find someone to assist.

It is assumed that the user has a working knowledge of Windows Explorer and how to find, create, rename, copy, move folders and forms in their Windows operating software.

Support

Reasonable phone & email support is sponsored by Uniting Resources UCA NSW Synod. If you need assistance, please contact us on 1300 138 627 or email hello@benkorp.com

BenCorp also provides onsite & remote assistance. This is chargeable as per the standard fees on the UCAP website: www.benkorp.com/ucap.

The Process

There are several steps to install & upgrade the MYOB AccountRight software and company file/s.

We strongly advise that you **read this document completely before** you start. In summary, the process is:

1. **Prepare to install** the new MYOB AccountRight software
2. **Prepare to upgrade** your company file
3. **Install** the new MYOB AccountRight software
4. **Upgrade** your company file/s
5. **Additional Upgrade Tasks**

NB: references throughout the process to "company file" or "datafile" are MYOB-speak for the file containing your Congregation's financial data.

MYOB AccountRight 2011 Windows upgrade procedure cont'd

1. PREPARE TO INSTALL

1. Check that your computer can run the new MYOB AccountRight

Operating System	<ul style="list-style-type: none">• Microsoft Windows 7 (32-bit or 64-bit)• Microsoft Windows Vista Ultimate (SP1, 32-bit or 64-bit)• Microsoft Windows XP Professional (SP3, 32-bit only) For specific requirements for server installations, see the system requirements page at myob.com.au/minimum specs .
Hardware	<ul style="list-style-type: none">• Pentium processor at 1GHz or faster• 2 GB RAM minimum• 2 GB free hard disk space• Screen with resolution of at least 1024x768, 32-bit colour
Software	<ul style="list-style-type: none">• Adobe Reader (minimum v7)• Internet Explorer (minimum v7)
Microsoft Office	<ul style="list-style-type: none">• Microsoft Word 2003 to 2010• Microsoft Excel 2003 to 2010• Microsoft Outlook 2003 to 2010 (for card synchronisation)
Internet	Broadband connection for receiving automatic software updates and accessing help over the internet.

2. Third Party add-on solutions – if you are using any Third Party software to enhance your MYOB program, you should check with the Third Party developers to ensure that their software is already compatible for the new MYOB AccountRight 2011 program. If they are not yet compatible, and this extra functionality is important to you, we recommend that you delay upgrading your MYOB program until they are ready.

3. M-Powered Services – if you are using MYOB's M-Powered Services, check that this is already compatible with the new versions of MYOB. If they are not yet compatible, we recommend that you delay upgrading your MYOB program until they are ready.

4. If possible, log into your computer as the Administrator.

- a. If, when you start your computer, it **does not** ask for a User or password, then you can assume that you are logging in as the Administrator
- b. If, when you start your computer, it **does** ask for a User or password, and you do not know what the Administrator password, ask someone who is responsible for the computers in your organisation.
- c. If **no one knows about Administrator passwords**, log in as you usually do.

5. If possible, turn off your Virus protection software – the method to do this varies depending on the Virus protection software program that you use. Please ask your local IT person to assist with this. If this is not possible, continue with the next step.

6. Quit all other programs, except Window operating system (of course!!)

MYOB AccountRight 2011 Windows upgrade procedure cont'd

2. PREPARE TO UPGRADE THE COMPANY FILE

1. Make sure that you have the company file Administrator Password

- a. Only the Administrator is able to upgrade the company file to the new AccountRight 2011 software.
- b. This means when you access your MYOB company file you must enter Administrator as the User and then enter the Administrator Password.
- c. If you have not yet set up passwords in your company files, then enter Administrator as the Username and leave the password field blank
- d. If you do not know the Administrator password, please ask other people in your organisation
- e. If know one knows or remembers the company file administrator password, you will have to send your company file to MYOB to have the password removed and returned to you with a temporary password.
- f. If you have problems with this please contact us on 1300 138 627 or email us on hello@benkorp.com and we will email you the form and procedures to send your company file to remove your password.

2. Verify your existing company file

- a. To do this, select **File → Verify Company File** and select **OK**
- b. A company file with errors cannot be upgraded to MYOB AccountRight 2011.
- c. If MYOB displays an error message, you will need to send your company file to MYOB for repair.
- d. If you have problems with this please contact us on 1300 138 627 or email us on hello@benkorp.com and we will email you the form and procedures to send your company file to MYOB for repair.
- e. Unfortunately, not all errors can be fixed by MYOB. If MYOB says that they cannot repair your company file, you will need to open an old backup that does not have any errors.

3. Optimise your existing company file

- a. To do this, select **File → Optimise Company File** and select **OK**
- b. If MYOB displays an error message, you will need to send your company file to MYOB for repair.
- c. If you have problems with this please contact us on 1300 138 627 or email us on hello@benkorp.com and we will email you the form and procedures to send your company file to MYOB for repair.
- d. Unfortunately, not all errors can be fixed by MYOB. If MYOB says that they cannot repair your company file, you will need to open an old backup that does not have any errors.

MYOB AccountRight 2011 Windows upgrade procedure cont'd

4. Make sure you have your serial number

- a. To find this, go to **Setup → Company Information**
- b. Your Serial number is at the top of the screen
- c. Write it down

5. Create a new folder on your Desktop to store files you will need during the upgrade process

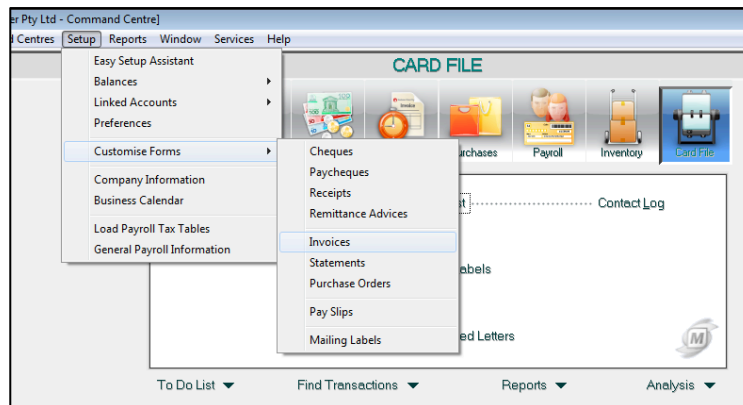
- a. Create a new folder on your desktop
- b. Name the folder: **AR Files to Upgrade**

6. Identify the customized forms that you use.

MISS THIS STEP if you DO NOT use the Sales or Purchases Function or you DO NOT print cheques directly from MYOB

If you do use customized Forms, Letters, Reports in MYOB continue

- a. Select **Setup → Customise Forms**



- i. Select one function that you use eg Invoices, Statements, Purchase Orders
 - ii. Find the Form you use – it should be displayed
 - iii. Select **Customise**, then select **Save As** and rename the form by **adding 2011** to the **beginning** of the customized form name.
 - iv. Repeat from i. above until you have renamed all the forms that you use
- b. **Copy the renamed Forms to the AR Files to Upgrade folder on your desktop**
 - i. **Right Click** on the **START** button and **left click** on **Explore**
 - ii. Find the directory of your previous version of MYOB
 - iii. Select the Forms folder and see the 2011 forms that have been renamed on the right hand side
 - iv. **Select & copy** the forms that begin with 2011
 - v. Paste the forms files into the AR Files to Upgrade folder on the Desktop

MYOB AccountRight 2011 Windows upgrade procedure cont'd

7. Ensure that graphics are stored correctly

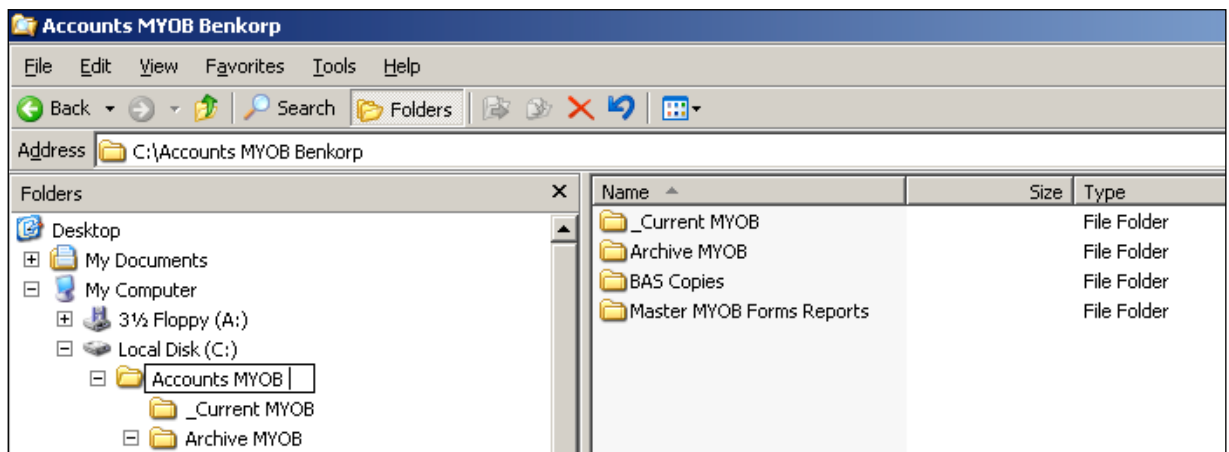
MISS THIS STEP if you DO NOT use graphics. If you use graphics in Cards (eg photos of your Employees) or in Items (photos of your items), make sure that these pictures are stored in the Graphics subfolder in the same location as the company file you are upgrading. NB: Images over 200KB in size will not successfully upgrade.

To do this:

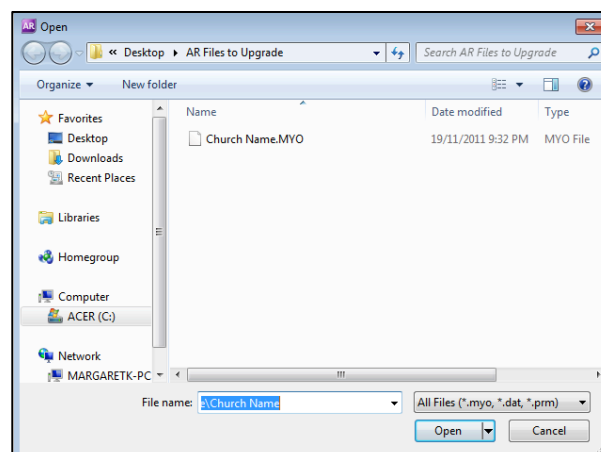
- a. **Right Click** on the **START** button and **left click** on **Explore**
- b. Find the directory of your previous version of MYOB
- c. **Right Click** on the Graphics folder
- d. Select **Copy**
- e. Find your new folder on the Desktop AR Files to Upgrade. Right Click and select **Paste**

8. Copy your current company file into the AR Files to Upgrade folder

- i. Find your current company file ChurchName.myo. If you have followed the UCAP manual closely your data-file will be in the following location: C:\Accounts MYOB_Current MYOB



- ii. **Right Click** on the company file ChurchName.myo
- iii. Select **Copy**
- iv. **Paste** your company file into the AR Files to Upgrade.



MYOB AccountRight 2011 Windows upgrade procedure cont'd

3. INSTALL THE MYOB ACCOUNTRIGHT PROGRAM

1. Find the installer file

a. If you downloaded AccountRight from the MYOB website:

- i. Locate the file you downloaded. This will be an '.exe' file called, for example, MYOB AccountRight Plus 2011.1.exe
- ii. Double-click it to start the installation. An installation window appears.

b. If you are installing from a CD.

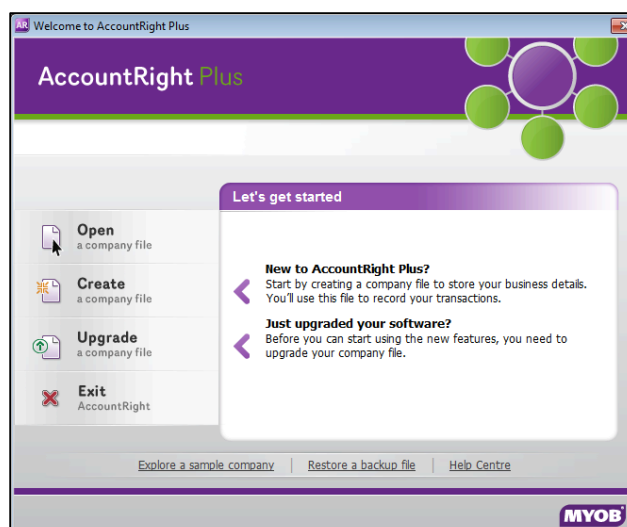
- i. Insert the software CD in your computer's CD drive. A welcome window appears. NOTE: If the window does not appear, open the CD drive—usually the D:\drive—in Windows Explorer and double-click the autorun.exe icon.
- ii. Click Install AccountRight [Standard/Plus]. An installation window appears.

2. Start the installation

- a. In the installation window, follow the on-screen instructions. This may include a few steps and restart etc.
- b. When installation is complete, select if you want to launch AccountRight and the Help Centre, and then click Finish. The Software Manager window appears. If an update is available in this window, install it now. To install an update, select it in the Software Manager window and click Install.
- c. NOTE: If you have issues while installing AccountRight, try disabling your antivirus software until the installation is complete.

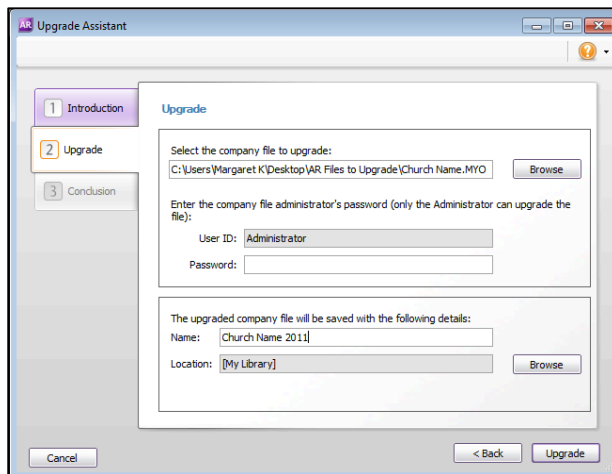
4. UPGRADE THE COMPANY FILE

1. **Open MYOB** - Double Click on the AccountRight Plus 2011 shortcut on your desktop
2. The **Welcome to AccountRight Plus/Standard** screen will be displayed

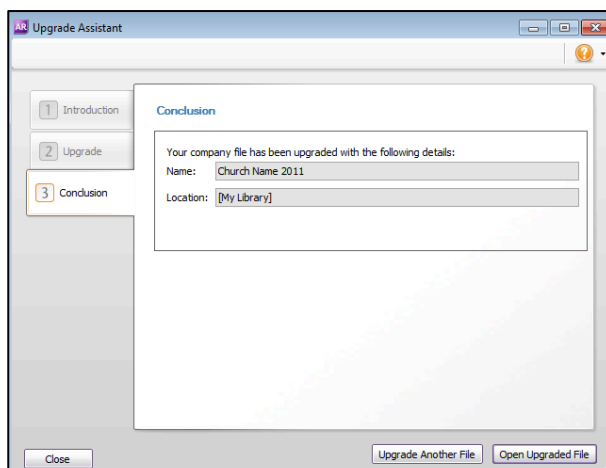


MYOB AccountRight 2011 Windows upgrade procedure cont'd

3. Select **Upgrade a Company File**, select **Continue**
4. Select **Browse** and locate your existing company file in the **AR Files to Upgrade folder** on your desktop

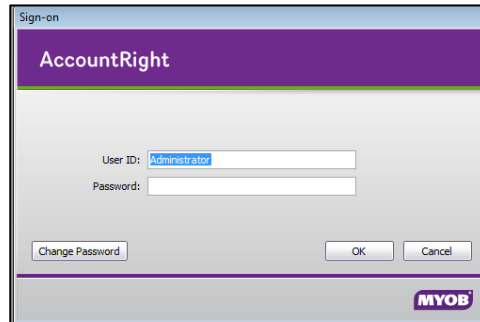


5. Select it and then click **Open**
6. If an Administrator password was used to protect the company file you've selected, type the **password** in the Password field
7. Rename the file to ChurchName2011. If you want, change the name of the company file in the Name field. (Special characters in existing company file names If your existing company file contains characters that are not allowed in the new file format, such as an ampersand (&), an asterisk (*) or a period (.), these characters will be replaced by an underscore (_) when you upgrade the file.)
8. **Do not change the Location.** The new MYOB must be saved into the Library/s area of your computer.
9. Click **Upgrade** to start the Upgrade process

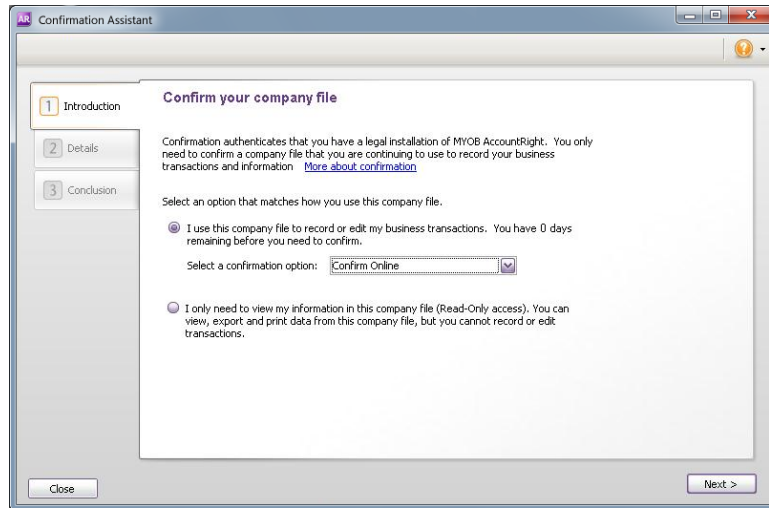


10. When upgrading is complete, click **Open Upgraded File**
11. The Sign-on window appears. Click **OK** to open the company file.

MYOB AccountRight 2011 Windows upgrade procedure cont'd



12. Confirm your company file. The Confirmation Assistant appears.



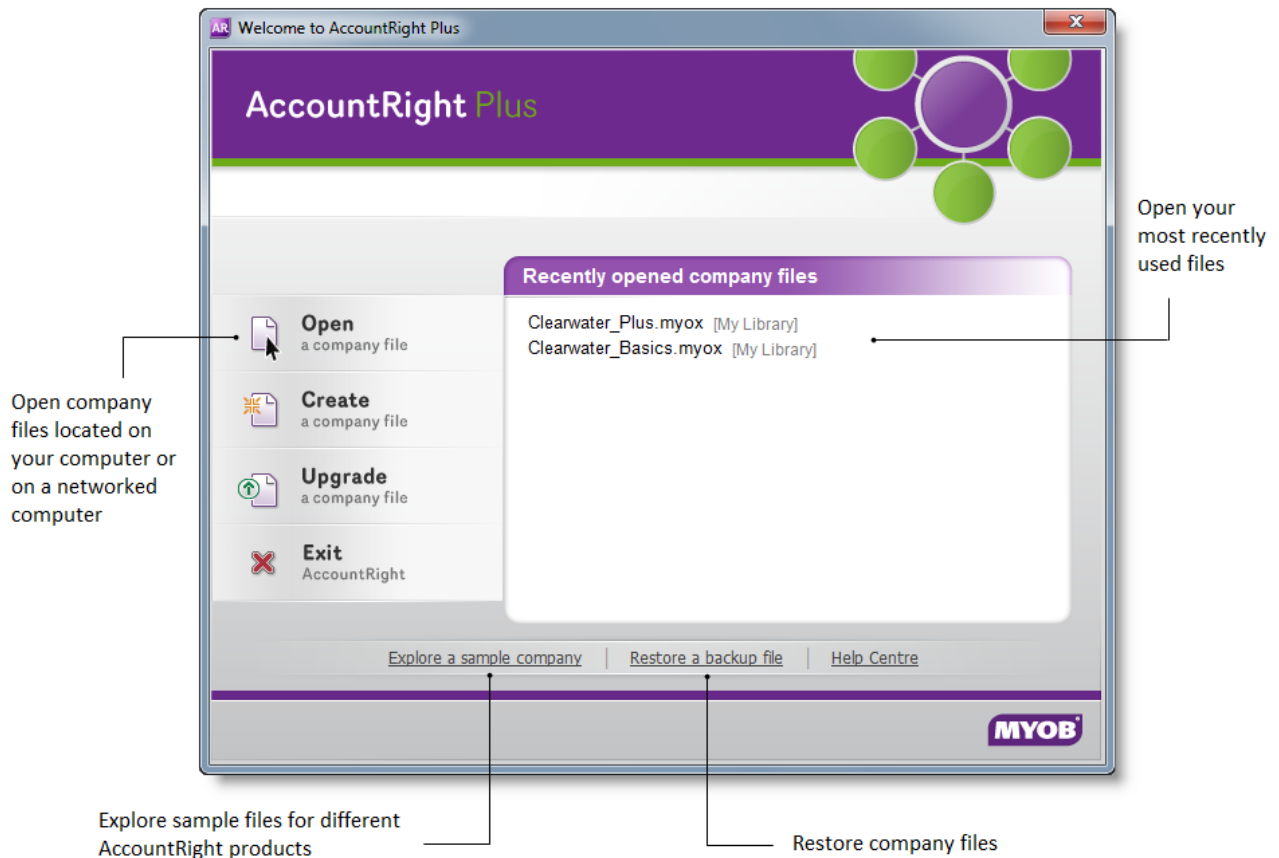
Select how you want to Confirm your company file.

- * Online (the quickest and easiest way to confirm). Ensure you are connected to the internet. Choose Confirm Online and then click Next.
- * By phone (Business hours only—Recommended only if you cannot connect to the internet from the computer you are working on.)
 - a. Select the Confirm by Phone option and click Next.
 - b. Call MYOB on the phone number displayed above the Serial Number field and request a license file to be emailed to you.
 - c. Once you have received the email, detach your license file and save it to your computer (for example, your desktop).
 - d. In the Confirmation Assistant, click Browse next to the Select the license file to load field, to locate the license file.
 - e. Select the file and click Open and then click Confirm.
 - f. Click Close. The company file has been confirmed.

MYOB AccountRight 2011 Windows upgrade procedure cont'd

Easier access to your company files

When you start AccountRight, you'll notice the new Welcome window. This window makes it easier for you to manage and access your company files.



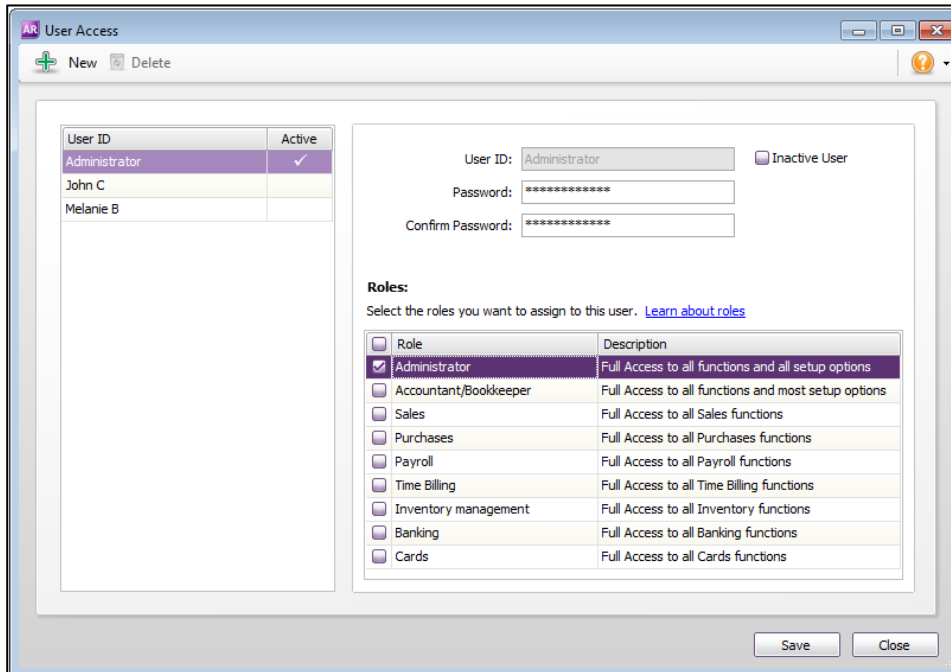
5. ADDITIONAL UPGRADE TASKS

You may need to complete some additional procedures after you upgrade your company file.

1. Assign roles to users

- a. The way user accounts are set up has changed. You now **assign roles to each user account**, and the roles will determine the windows a user can access. If you have existing user accounts set up in your company file, on upgrading, these will be inactive until you assign roles to them. You need to sign on to the upgraded company file with the Administrator user account and make these user accounts active by assigning roles to them. To assign roles to user accounts:
 - b. Sign on to the company file as the Administrator.
 - c. Go to the Setup menu → Users. The User Access window appears.
 - d. Select a user you want to assign roles to from the User ID list.
 - e. In the right pane, deselect the Inactive User option.

MYOB AccountRight 2011 Windows upgrade procedure cont'd

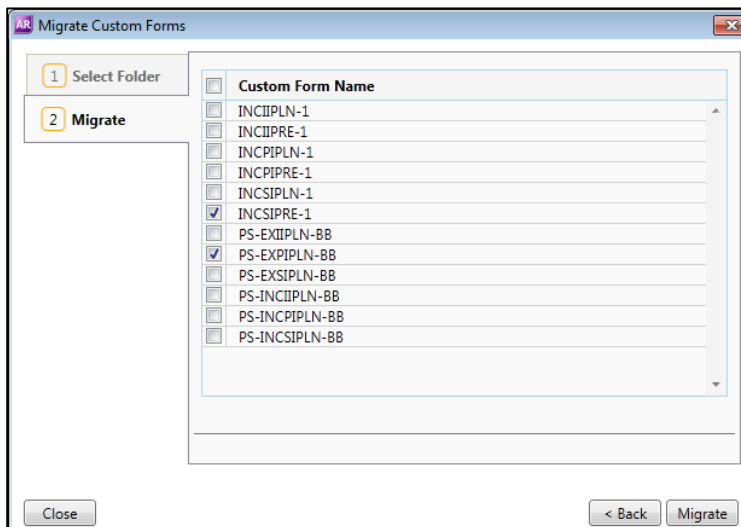


- f. In the list of roles, select the roles you want to assign to the selected user. (For information about roles, click the Learn about roles link in this window.)
- g. Click Save.
- h. Repeat from step 3 above for all user accounts.
- i. Click Close.

2. Migrate customised forms

- a. If you have custom forms that you want to continue using after you upgrade, they need to be migrated into your upgraded AccountRight company file. Note that custom forms are now stored within the company file (rather than in a folder on your computer). So you only need to migrate them into your company file once, instead of upgrading them on each workstation where they are stored. Also note that **you cannot migrate customised cheque and payslip forms**. To migrate custom forms:
 - b. If it is not already open, open the upgraded company file.
 - c. Go to the File menu and choose Migrate Custom Forms. The Migrate Custom Forms window appears.
 - d. Click Browse and locate the Forms folder in your previous software version. If you have followed the instructions above, these files will be placed in the **AR Files to Upgrade folder** on your Desktop (C:\Desktop\ARFilestoUpgrade). If you have not followed the instructions above, your forms may be in the folder, for example, at C:\Plus19\Forms.
 - e. Click Next. All the forms from the previous software version appear in the list.

MYOB AccountRight 2011 Windows upgrade procedure cont'd



- f. Select only the custom forms you want to migrate and then click Migrate. These forms will migrate into your AccountRight company file.

3. Import BASlink setup

- a. If you previously used BASlink to prepare your BAS, you need to import the BASlink setup file into AccountRight 2011. This is the file that defines the set up links in the BAS form fields. This file is named [yourABN].bas, for example 71123456789.bas. To import the BASlink:
 - b. If it is not already open, open the upgraded company file.
 - c. In the Accounts command centre, click BASlink.
 - d. Select the last month of any BAS period that you would normally prepare a statement for and click Prepare Statement. An information message appears. Click OK.
 - e. If a message appears, stating that a previous BASlink version has been found on your computer and asking if you want to import your setup information, click Yes. The Import Setup & Links window appears.
 - f. If the above message does not appear: Go to the File menu and choose Setup & Links, then choose Import Setup & Links.
 - g. If you are prompted to back up your activity statement, click No. The Import Setup & Links window appears.
 - h. Locate your previous BASlink setup file. This file is located in the Setup folder within the BASlink folder, in your previous software files. For example, at :\\Plus19\\BASlink\\Setup. Click Open. The BASlink setup file is imported. You can check the setup settings of a field by clicking the Setup button next to it.

4. Re-Customise Cheques & Paycheque. Payslip forms (if Applicable)

- a. Please contact Benkorp if you need Payslips etc to be customised.

NB: Some features that were in AccountRight Standard v19 and AccountRight Plus v19.6 **are not in the latest releases**, but will be made available in future software updates. These features include Selected reports, Report Batches, Cash Flow Worksheet & M-Powered Services. For more information, visit help.myob.com.au/links/arsp2011update.htm

Checklist for Installation & Upgrade for MYOB AccountRight 2011

Name of Organisation: _____

Installer/Upgrader: _____ Date: _____

Current MYOB Product & Version: _____ Serial No: _____

Task	Done
1. Prepare to install the new MYOB AccountRight software	
Check that your computer can run the new MYOB AccountRight	
Check that you can log into the computer as Administrator	
Check if Third Party add-on solutions are ready for upgrade (if applic)	
Check if MYOB M-Powered services are ready for upgrade (if applic)	
If possible, turn off your Virus protection software	
Quit all other programs, except Window operating system	
2. Prepare to upgrade the MYOB company datafile	
Make sure you have the company datafile Administrator Password	
Verify existing company file, no problems	
Optimise existing datafile	
Make sure you have your MYOB serial number	
Create a "new folder" on your Desktop to store files you will need during the upgrade process, named "AR Files to Upgrade"	
Identify the customized forms that you use	
Copy the renamed Forms to the "AR Files to Upgrade" folder on your desktop	
Ensure that graphics are stored correctly (if applic)	
Copy your current company datafile into the AR Files to Upgrade folder	
3. Install the new MYOB AccountRight software	
Get the upgrade software – Download or CD	
Find the installer file	
Start the Installation. May include a few steps + restart etc	
4. Upgrade Datafile	
Select & Upgrade Datafile	
Confirm Datafile	
5. Additional Upgrade Tasks	
Assign roles to users	
Migrate Customised Forms	
Import BASlink setup	
Re-customise Cheques & Paycheque/Payslips forms (if Applic)	

Default location for MYOB AccountRight 2011 Company Files

Op System	Folder for MYOB Files
Vista & Windows 7	C:\Users\Public\Public Documents\MYOB\My AccountRight Files
XP	C:\Documents and Settings\All Users\Shared Documents\MYOB\My AccountRight Files