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## Red Office Consultant Checklist: Upgrade for Networked System

**Client:**  
**New MYOB Version:**

**Consultant:**  
**Pre-upgrade MYOB Version:**

**Date:**



1.  Load software on **MAIN** computer (Log on as administrator if required)
  - Save & close all applications
  - Right click on anti-virus icon bottom right and disable (disabling options will vary depending on programme)
  - Install MYOB Program
  - Install Quicktime MYOB CD/Resources
  - Enable anti-virus software
  
2.  Upgrade company files on **MAIN** computer  
**NB: If upgrading from Accounting V10 or earlier file (or equivalent Premier file) contact the office or MYOB 0800 696 227 option 2 for the correct procedure. These programs need to be upgraded using a specific process.**

	Company File 1	Company File 2	Company File 3
<b>Company Files to be upgraded:</b>			
Open pre-upgrade files, verify & backup (name back-up `company file name pre-upgrade`)			
Optimise company file (in MYOB - file/optimize)			
Create folder for upgraded MYOB files as appropriate to clients network <b>or</b> If network accesses C drive of main computer & company files are saved in the MYOB program folder ensure sharing properties are enabled – eg right click program folder / click properties / sharing / share this folder on network and allow users to change files Note all networks operate differently, this is just an example.			
Upgrade MYOB files (start/programs/MYOB 'new-version'/tools/upgrade assistant – and follow prompts.)			
Open upgraded file & Verify			
Back-up upgraded company file			
Set-up desktop shortcuts as required			
Upgrade templates (start/programs/MYOB 'new-version'/tools/upgrade templates assistant - and follow prompts)			
Check templates are printing / emailing (ensure formatting is not distorting – open emailed example) / and customisations work correctly (invoices/statements/purchase orders/remittance/extra reports & customised letters)			



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## Red Office Consultant Checklist: Upgrade for Networked System P.2



3.  Load software on **other** computers requiring software (log-on as administrator if required)

	Computer 2	Computer 3	Computer 4
<b>Other Computers with MYOB required:</b>			
Save and close all applications			
Disable Anti-virus software			
Un-install previous version of MYOB OBDC software (control panel add/remove software)			
Install MYOB programme			
Install Quicktime MYOB CD/Resources			
Upgrade templates (start/programs/MYOB 'new-version'/tools/upgrade templates assistant - and follow prompts)			
Open company files & check they work correctly – including user names For Premier files check users can access MYOB file at the same time If user licenses need activating in MYOB click set-up / company information / license button and follow prompts. Company file 1: Company file 2: Company file 3:			
Check templates are printing / emailing (ensure formatting is not distorting – open emailed example) / and customisations work correctly (invoices / statements / purchase orders / remittance / extra reports & customised letters)			

4.  Demonstrate where back-ups now save – complete back-up with client
5.  Demonstrate latest features of new MYOB version that would benefit clients.
6.  **Upgrade of network now completed, leave copy of upgrade checklist in clients MYOB info file and take a copy for RO records.**



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## Red Office Consultant Checklist: Upgrade for Networked System P.3

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7.  Other notes relevant to visit.