

Upgrade task - migrating personalised forms

Known issue AccountRight 2019.2. We're aware that some clients who've upgraded to AccountRight 2019.2 can't migrate their customised forms or save changes to their forms. This has been raised as a high priority issue with our product development teams to investigate and resolve ASAP.

Workaround: Restart AccountRight. If the issue persists, clear your AccountRight cache file. For more information, see this community forum post.

We apologise for the inconvenience this issue is causing and are working on providing a permanent solution at the earliest.

This information applies only if you're upgrading from AccountRight Classic (v19). If you're looking for help about sharing forms currently being used by an AccountRight 2018 company file with another AccountRight 2018 company file, see [Sharing forms with other company files](#).

If you personalised forms in AccountRight v19 which you want to continue using after you upgrade, they need to be migrated into your upgraded company file. This is a once-off task.

What you can't migrate

You can't migrate personalised:

- pay slips
- cheques
- reports.

Instead, you'll need to personalise these again. The good news is that we've improved the forms and reports customisation tools, making this easier. See:

- [Personalising pay slips](#)
- [Personalising cheques](#)
- [Customising reports](#).

How to migrate forms

See form migration in action:

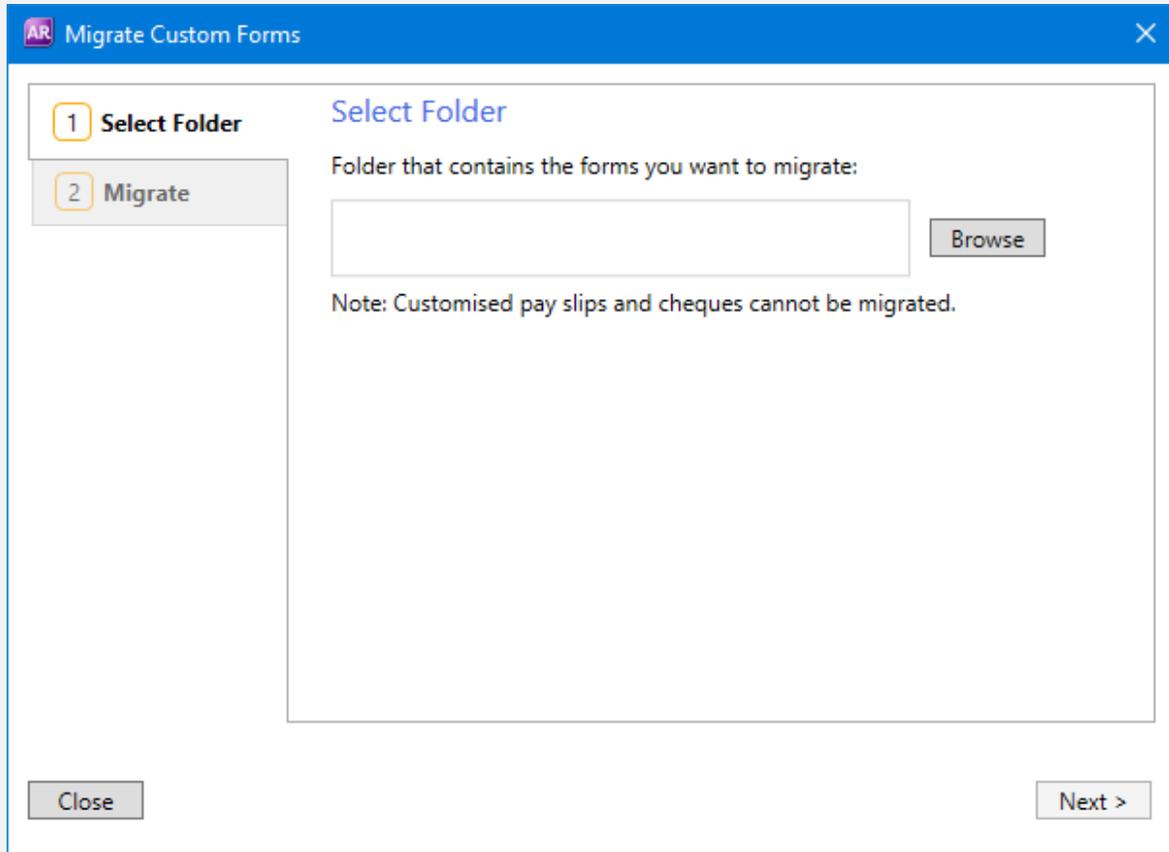
Note these changes to how custom forms work in the new AccountRight, compared to the old AccountRight:

Previously (AccountRight Classic)	Now (New AccountRight)
Your custom forms were stored in a folder on your computer.	Custom forms are now stored within the company file. This means everyone can access the new forms, no matter where they are - online or on another computer. You don't need to copy the forms onto each computer.
Custom forms needed to be upgraded from time to time	You don't need to upgrade custom forms when you update your new software. Your custom forms are automatically upgraded when you open your company file in a new version.
Custom forms were available to all company files on your computer.	Custom forms are no longer automatically shared between company files. If you want to use the custom forms in another company file, you need to export them from one file and import them into the other.

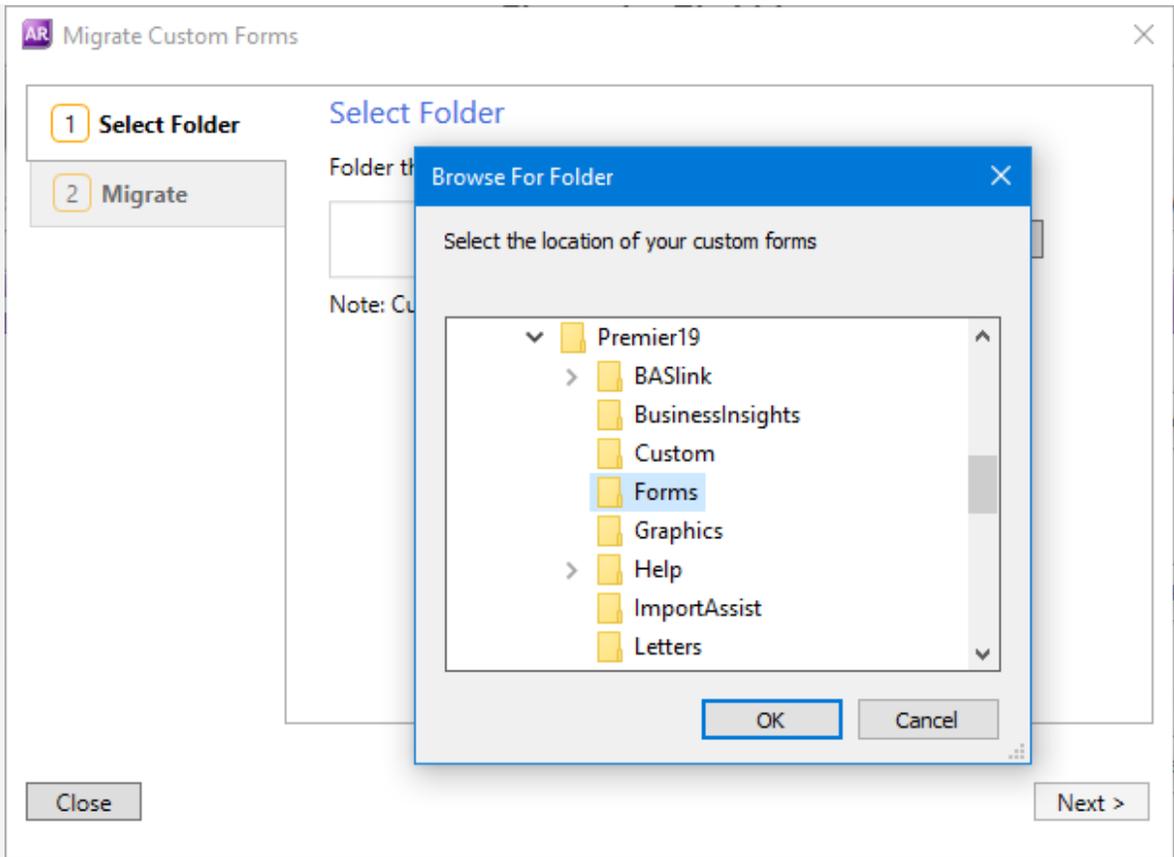
Migrate personalised forms

Migrate personalised forms

1. Open the company file into which you want to migrate custom forms.
2. Go to the **File** menu and choose **Migrate Custom Forms**. The **Migrate Custom Forms** window appears.



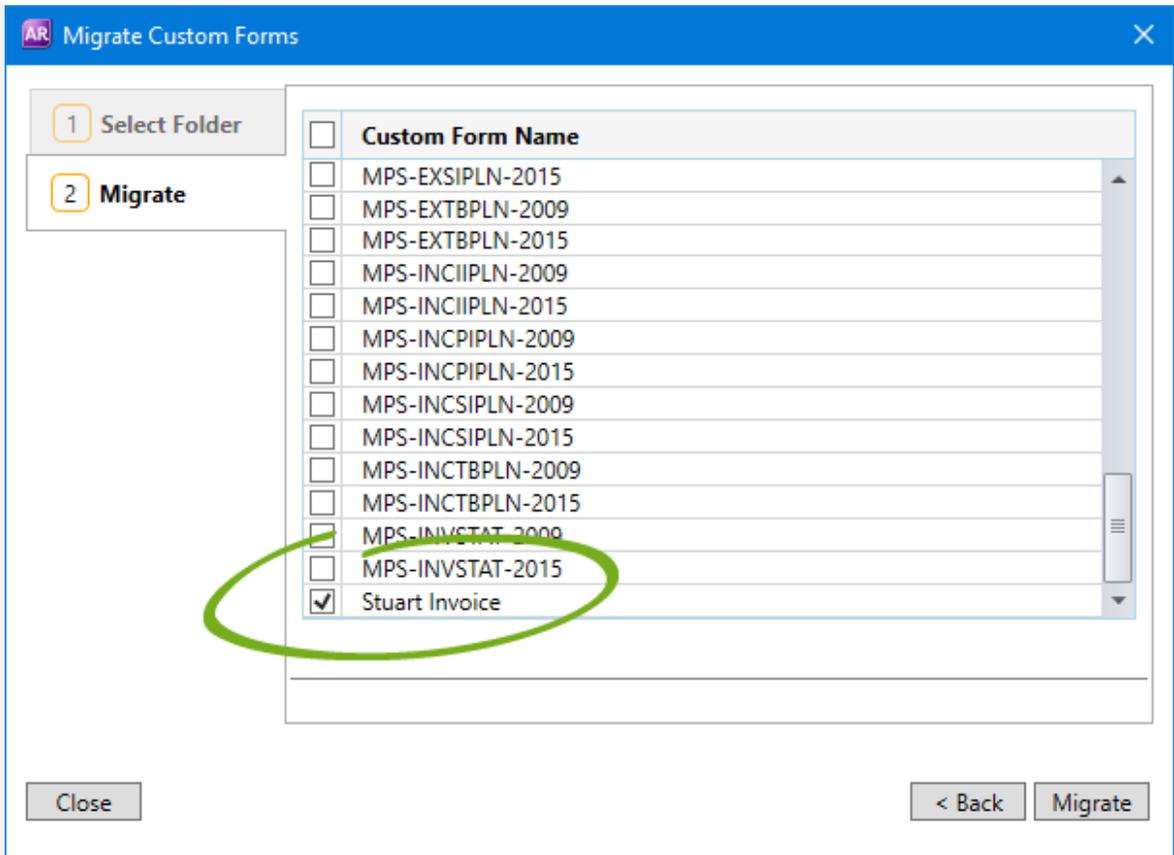
3. Click **Browse** and locate the **Forms** folder in your previous software version. For example, at `C:\Plus19\Forms` or `C:\PlusClassic\Forms`.



4. Click **Next**. All the customised forms from the previous software version appear in the list.

If the **Next** button is inactive, check if there are any customised forms in the folder you've selected. Note that **you can't upgrade default forms** from a previous version, but only the ones you have personalised.

5. Select only the custom forms you want to migrate.



6. Click **Migrate**. The selected forms are migrated into your company file.

Now anyone accessing your company file has access to the customised forms. You don't need to repeat this process on other computers.

If the **Migrate** button is inactive, make sure there's a tick in the box next to the forms you want to migrate.

We recommend you print or preview your migrated forms. If they need any tweaking, see [Personalising forms](#). If you're happy with your forms, you can then [Set the default forms to use when emailing or printing](#).

Migrating forms FAQs

Why didn't my form migrate successfully?

Why am I getting the message "There are no forms in the selected folder"?

Why can't I see my form after migrating it?

Related topics

[Upgrade to the new AccountRight](#)

[Personalising forms](#)

[Personalising invoices](#)

[Complete your upgrade tasks](#)

[Sharing forms with other company files](#)

[Set the default forms to use when emailing or printing](#)

From the community

[**AccountingRight v2019.2-Unable to migrate invoice format from V19, unable to save new customisation in v2019.2 either**](#)

[**Upgrading a large file to Account Right Live - I've lived through it! \(and survived\)**](#)

[**Import customized forms**](#)

[**Migrating Cheques**](#)

[**AccountRight 2017.2 Customised Forms**](#)

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