

Upgrade your company files

AccountEdge Basic

Upgrade your files (existing FirstEdge users only)

Company files created with a previous version of FirstEdge software need to be upgraded. You also need to upgrade all customized reports and forms that you used with your previous version of the software.

Make sure you back up your company file before you upgrade it. Once you upgrade your company file, you can open it only in AccountEdge Basic. However, the backup file can still be opened in your previous software version.

Upgrade First Edge files

Do the following for each company file:

Task	Action	See
1	Upgrade your company file	below
2	Upgrade your customized templates	page 3

Task 1: Upgrade your company files

- 1 Back up any company files that you use.
- 2 At the Welcome window, click **Company File Maintenance** and select **Upgrade FirstEdge company file**. A welcome 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 you want to upgrade and click **Open**. The **Find File to Upgrade** window reappears.

The current path and file name of the selected company file appears below the **Find File** button. The default path and name for the upgraded company file appear below the **Save As** button.

- 6 If you want to change the location or name of the company file:
 - a Click **Save As**. The **Save As** window appears.
 - b Specify a new location or type a new name and click **Save**.
- 7 Click **Next**. The **Confirm** window appears.
- 8 Click **Next** to start the upgrade. When the upgrade is finished, the **Complete** window appears.
- 9 If you want to upgrade another company file, click **Next** and repeat from [step 3 above](#).
- 10 Click **Finish** to close the Upgrade Assistant.
- 11 Open your **AccountEdge Basic** company file.
If you customized any reports or forms in your previous version of FirstEdge, proceed to [Upgrade your customized templates, below](#).

Task 2: Upgrade your customized templates

If you customized reports or forms using a previous version of FirstEdge, you need to upgrade these templates to continue using them in your new software version.

NOTE: Important notice for upgraders A number of enhancements have been made to the way images and fonts are handled on customized forms. To take advantage of these enhancements, you will need to re-attach the graphic(s) on your customized forms.

- 1 In the Finder, locate the installation folder of your previous version of FirstEdge (for example, the **FirstEdge v3** folder) and open it. The installation folder contains these template folders:

Folder	File extension	Description
Custom	*.rpt	Standard and user-customized report templates
Forms	*.frm	Standard and user-customized form templates

- 2 Open the Users Library folder and open the Application Support folder. Then open the AccountEdge Basic folder. The AccountEdge Basic v1 folder appears, open this folder.

NOTE: Avoid overwriting the latest standard templates The standard templates included with AccountEdgeBasic may have improved features. Make sure you select only the templates that you created, ignoring the old standard templates, so that you do not accidentally overwrite the new templates.

- 3 Press and hold the OPTION key and drag-and-drop the selected template files over the corresponding folder (for example, **Custom Forms**) located in the **AccountEdge Basic Application Support** folder.
 - 4 Repeat from [step 1 on page 3](#) for each folder containing customized templates (for example, **Custom Reports**).
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