

Upgrading your company files

AccountEdge Basic

Upgrade your files (existing AccountEdge Basic, FirstEdge or Business Basics users only)

Company files created with a previous version of AccountEdge Basic, FirstEdge or Business Basics 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 your company 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 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 on page 2](#).
- 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 AccountEdge Basic, FirstEdge or BusinessBasics, proceed to [Upgrade your customized templates, below](#).

Task 2: Upgrade your customized templates

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

NOTE: Before upgrading your customized templates 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.

If you use customized reports, forms, letters, graphics, or spreadsheets you need to upgrade these templates to use with the AccountEdge Basic version. You can automatically upgrade your custom templates using a migration assistant (see [below](#)), or upgrade them manually by copying the templates to the application support folder (see [page 4](#)).

To automatically upgrade your customized templates

- 1 In the Welcome to **AccountEdge Basic** 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. Click **Browse** and select

the location. Select the application file (for example, AccountEdge Basic, First Edge or Business Basics) and click **Open**. The correct path should now be displayed in the **Previous Application** field.

- 3 Select **Copy Spreadsheets** if you have customized 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 customized templates

- 1 Find the **AccountEdge Basic v3 US** support folder located in your **Documents** folder and open it.
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NOTE: FirstEdge and Business Basics users The customized forms folders can be found in the installation folder, (for example, FirstEdge v?)

- 2 Open a folder containing the customized templates.

Folder	File extension (Win)	Description
Custom	*.rpt	Standard and user-customized report templates
Forms	*.frm	Standard and user-customized form templates
Letters	*.dot	Standard and user-customized Microsoft Word document templates
Spreadsheet	*.xlt	Standard and user-customized Microsoft Excel spreadsheets
Graphics	*.bmp, *.gif, *.jpg, *.tif, *.png	Any graphics such as company logo, employee or item photos, etc.

- 3 Select only your custom template files and copy them.
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NOTE: Avoid overwriting the latest standard templates The standard templates included with the latest version of your software

may have improved features. To avoid overwriting the new templates with old versions, select only the template files that you created.

- 4 Paste the template files in each corresponding folder (for example, Custom Forms) in the **AccountEdge Basic v4 US** support folder.
- 5 Repeat from step 2 above for each folder containing customized templates.

