

# MYOB FirstEdge v3

## Upgrade Instructions

### MYOB License Agreement

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## Upgrading to MYOB FirstEdge v3

Complete these steps to upgrade your software:

Step	Action	See
1	Install MYOB FirstEdge	<a href="#">page 2</a>
2	Upgrade files in MYOB FirstEdge	<a href="#">page 2</a>

**NOTE: MYOB Technical Support** If you require technical assistance with MYOB FirstEdge, see [‘Technical support’ on page 5](#).

**Additional resources on the installation CD** To access resources on your MYOB FirstEdge installation CD, see [‘Accessing resources on the installation CD’ on page 4](#).

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## Install MYOB FirstEdge

- 1 If your computer only allows users with administrator privileges to install programs, log in as an administrator.
- 2 If a virus scanner is enabled, disable it.
- 3 If you have any open documents you want to keep, save them and then close all programs.
- 4 Insert your installation CD into the drive.
- 5 Open the contents of the MYOB FirstEdge CD on your desktop and double-click the **autostart** icon. An installation window appears.
- 6 Follow the on-screen instructions.
- 7 When the installation is complete, click **Finish**. Your default web browser displays the **What's New in This Version** topic from MYOB Help.

**NOTE: Help topic did not appear?** You can view this topic when you start your software by clicking the **What's New in this version** button in the **Welcome to MYOB FirstEdge** window.

- 8 If you disabled a virus scanner at [step 2](#), enable it.

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## Upgrade files in MYOB FirstEdge

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

Do the following for each company file:

Step	Action	See
1	Upgrade your company file	<a href="#">page 3</a>
2	Upgrade your customized templates	<a href="#">page 3</a>

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## Step 1: Upgrade your company files

- 1 Back up any company files that you use.
- 2 In the Finder, go to the **MYOB FirstEdge v3** installation folder and double-click **Upgrade Assistant**. A **Welcome** window appears.
- 3 Click **Next**. The **Find File to Upgrade** window appears.
- 4 Click **Find File**. The **Save** window appears.
- 5 Select a 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 new path and name of the upgraded company file appear below the **Save As** button.

- 6 If you want to change the location or name of the upgraded company file:
  - a Click **Save As**. The **Save As** window appears.
  - b Select a new location or type a new name and click **Save**.
- 7 Click **Next**. The **Confirm** window appears.
- 8 Click **Next** to begin the upgrade. When the upgrade is complete, the **Complete** window appears.
- 9 To upgrade another company file, click **Next**.
- 10 To close the upgrade assistant, click **Finish**.

## Step 2: Upgrade your customized templates

If you created customized reports or forms using a previous version of MYOB FirstEdge, you need to upgrade these templates to continue using them in FirstEdge v3.

- 1 In the Finder, locate and open the folder containing your previous version of MYOB FirstEdge (for example, the **MYOB FirstEdge v2** folder). The installation folder contains these folders:

Folder	Type of file
Custom	User-customized report templates
Forms	Standard and user-customized form templates

- 2 In the folder containing your previous version of MYOB FirstEdge, open one of the folders containing customized templates that you wish to upgrade (for example, the **Forms** folder).
- 3 Open the corresponding MYOB FirstEdge v3 installation folder.
- 4 Press and hold **Command** and click to select only your custom template files.  
**NOTE: Avoid overwriting the latest standard templates** The standard templates included with MYOB FirstEdge v3 may have improved features. Make sure you select only the templates that you created so that you do not accidentally overwrite the new standard templates.
- 5 Drag the selected template files to the corresponding folder in the MYOB FirstEdge v3 installation folder (for example, **Forms**) and release the mouse button.
- 6 Repeat from [step 2](#) for each folder containing customized templates.

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## Accessing resources on the installation CD

The MYOB FirstEdge v3 CD contains resources such as PDF versions the *Getting Started* guide and the *User Guide*.

### To access additional resources

- 1 Insert your installation CD into the drive.
- 2 Open the contents of the MYOB FirstEdge CD on your desktop and double-click the **autostart** icon. An installation window appears.
- 3 Follow the on-screen instructions.
- 4 Click **Resources**.

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## Checking for updates

To make sure you are using the current version of MYOB FirstEdge, you should check every so often to see if any updates or upgrades are available. To check for updates, open FirstEdge, then go to the **Help** menu and click **Check for Product Updates**.

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## Technical support

Technical support is limited to installation, upgrade assistance, basic usability and basic functionality, as described in MYOB product documentation. MYOB cannot resolve connectivity issues caused by third-party services, service providers, hardware or software, or networking problems. MYOB phone support does not cover inquiries on general accounting or taxation issues, nor does it include application consulting or training.

### Support options

**Introductory Support** When you register MYOB FirstEdge, you receive 30 days of introductory support. During this period, our Technical Support team will offer assistance with installing MYOB FirstEdge and setting up your company file.

You can call MYOB Introductory Support between 9 a.m. and 6 p.m. (Eastern Time) Monday to Friday on 973 586 2325.

**MYOB Priority Support** When your introductory support period expires, you can subscribe to MYOB Priority Support. This plan includes access to technical support by phone, password reset services, software, and access to the MYOB support library, including podcasts and feature videos. For more information, visit [www.myob-us.com/service](http://www.myob-us.com/service) or call MYOB Customer Service on 800 322 6962.

**Pay Per Call** If you need technical assistance other than installation help, and do not want to purchase MYOB Priority Support, you can use Pay Per Call Support. For Pay Per Call Support, call 800 662 3788 between 9 a.m. and 6 p.m. (Eastern Time) Monday to Friday. Calls cost \$50. Please have your credit card handy before calling.

## MYOB websites

**Support Notes** Visit [myob-us.com/service](https://myob-us.com/service) to find answers to common questions about installing, setting up, and customizing your MYOB software.

**MYOB website** Visit [myob-us.com](https://myob-us.com) for news and links to many useful resources.

## Face-to-face assistance

**MYOB Certified Consultants** MYOB Certified Consultants are independent consultants whose knowledge, skill, and experience are endorsed by MYOB. Certified Consultants can assist you with installing, setting up, and using your MYOB software. They can also provide product demonstrations and one-to-one training. To locate an MYOB Certified Consultant, visit [myob-us.com/service/consultants](https://myob-us.com/service/consultants).

**MYOB Training** MYOB Training provides courses designed and written by educational, technical and accounting experts, and delivered by professional trainers. There are courses for beginners and for experienced MYOB business management software users. To find out more about MYOB Training, visit [myob-us.com/training\\_seminars](https://myob-us.com/training_seminars).