MYOB Exo Business

Release Notes

2018.2

Contents

Introduction

What's New in this Release?

The 2018.2 release addresses more than 50 user requests prioritised by Exo Business implementer partners, spread across the entire suite. Because the changes are spread out and relatively low-impact, the overhead of installing this release from a re-training perspective is low and it might be considered an attractive incremental improvement, even for users already on 2018.1.

The most extensive area of change is that we have redeveloped the stock movements entry screen to improve the experience and allow much more flexibility. A key feature is the ability to handle batches of transactions from an external source such as spreadsheets or formatted text files—simply dragging and dropping will validate the file and allow you to correct errors on the fly before submitting the transactions. It also incorporates much more effective Average Cost revaluation functionality.

2018.2.1 Service Pack

This release includes the 2018.2.1 Service Pack, which address issues identified in previous releases.

The purpose of this document is to provide essential information on the installation and use of this release:

- The **Installation** section provides an overview of the installation process, including pre-installation requirements and post installation steps.
- The **New Features** section describes all new features introduced in this release.
- The **Resolved Issues** section describes all issues that have been addressed by this release.
- The **Known Issues** section details any issues in this release that have been identified as requiring attention.
- The **New Profile Settings** appendix at the end of this document summarises all changes to Exo Business profile settings included in this release.

Copyright 2018 MYOB Technology Pty Ltd.

Installation

Pre-Install Requirements

Minimum system requirements for PCs running MYOB Exo Business components are detailed below. Full details of requirements and supported operating systems for MYOB Exo Business are available on the Minimum System Requirements page on the Exo Business Education Centre.

The performance of the Exo Business system is not assured if these requirements are not met. Similarly, performance cannot be assured if the Exo Business system is installed on a server that is already under load from other processes, or a RDBMS that is not suitable for the organization's volume of data.

Other Requirements

Certain features of MYOB Exo Business require one or more of the following:

- Internet access
- Microsoft Internet Explorer 7.0 or later
- Adobe® Acrobat Reader 7.0 or later

Microsoft Office connection requires Microsoft Word/Excel 2010 to 2016.

Contact synchronisation requires Microsoft Outlook 2010 to 2016.

MYOB Exo Business 2018.2 requires **ExonetLib.dll** version 2017.2.0 or later. Version 2017.2.0 is included with this release.

When installing manually on 64-bit operating systems, the file **RwEasyMAPI64.exe** must be copied from the **Supporting Files\RapWare** folder of the Exo Business DVD to the install directory. Register this file by running the following from a command prompt:

```
RwEasyMAPI64.exe /regserver
```

Installing MYOB Exo Business

Information on installing and upgrading MYOB Exo Business is available on the MYOB Exo Business Education Centre—see the following pages:

- Installing Exo Business
- Installing Exo Business Services

Copyright 2018 MYOB Technology Pty Ltd.

Post-Installation

Once MYOB Exo Business software is installed, it must be configured for use. Optionally, data can be migrated into the Exo Business system from another MYOB product. The configuration and migration processes are detailed in the *MYOB Exo Business Implementation Guide*.

Logging in to Exo Business

New MYOB Exo Business databases are installed with one or more default user accounts. When logging in to Exo Business for the first time, you must supply the following login details.

For a new blank database (EXO_LIVE):

- Default admin user = ExoAdmin
- Default admin password = ExoAdmin

For the demonstration database (EXO_DEMO):

- Default admin user = ExoAdmin
- Default admin password = ExoAdmin
- Default demo user = demo
- Default demo password = DEMO

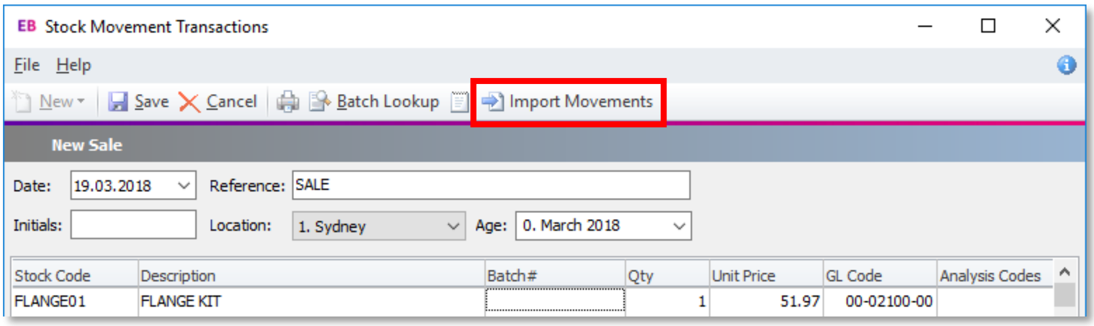
Note: Passwords are case-sensitive.

Copyright 2018 MYOB Technology Pty Ltd.

New Features

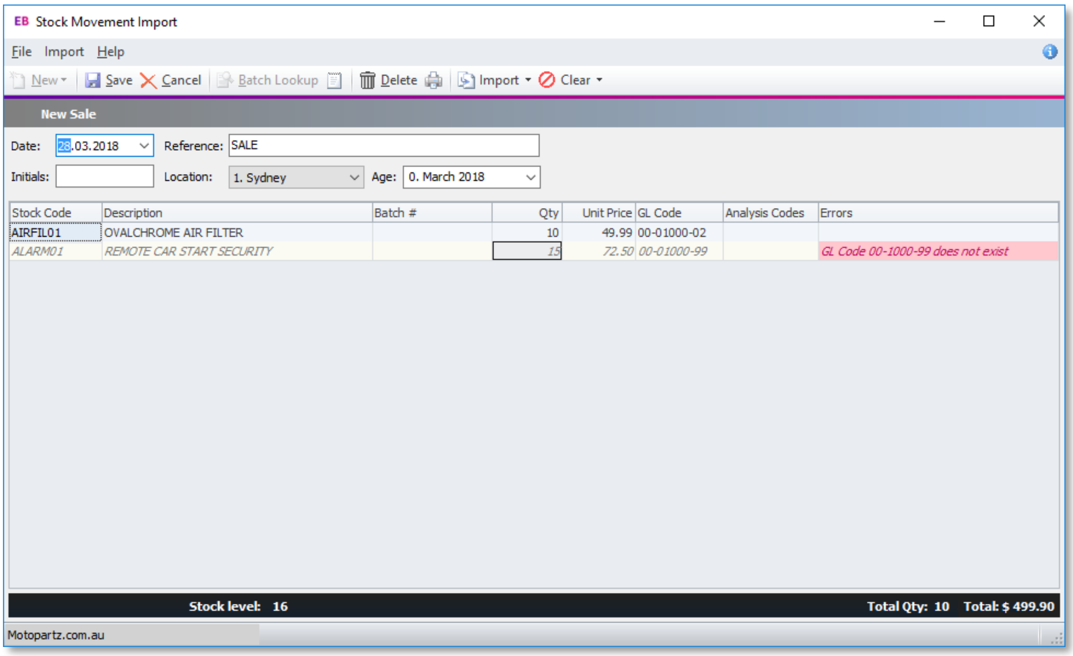
New Stock Movements Window

This release adds a new Stock Movements window, which includes the ability to import stock movements into the system in bulk. The new window can be launched from the existing window, by clicking the new **Import Movements** button:



Note: If the new profile setting **Use old manual stock movement screen** is unticked, the new window will appear by default whenever the Stock Movements window is invoked.

The new window contains all functionality of the old window, along with new import and error management functions:



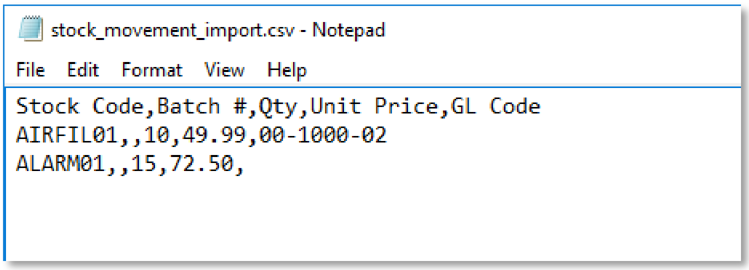
Copyright 2018 MYOB Technology Pty Ltd.

Importing Stock Movements

Click the **New** button on the new Stock Movements window to create a new batch of stock movements, then click one of the options from the **Import** dropdown:

- **Import from the clipboard** – Pastes the contents of the clipboard into the main grid. This allows you to cut and paste stock movements from another document, e.g. a spreadsheet.
- **Import from a file** – Copies stock movements from a selected comma-separated or tab-delimited file.

Import files should contain a header row with heading names that match the column names of the window, for example:


stock_movement_import.csv - Notepad

File Edit Format View Help

```
Stock Code,Batch #,Qty,Unit Price,GL Code
AIRFIL01,,10,49.99,00-1000-02
ALARM01,,15,72.50,
```

Provided a header row is included, you do not need to include every column from the Stock Movements window. If there is no header row, the import function will attempt to import data into columns on the window from left to right.

Note: The import function does not import the item description—if you include a Description column in the import file, the data in it will be ignored.

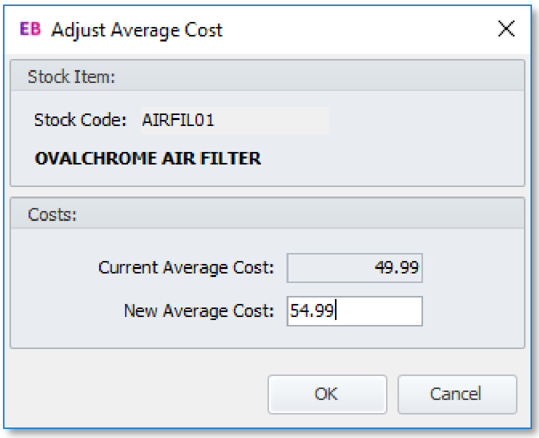
Click **Save** to save all stock movement transactions in one operation. Any errors in the imported data are highlighted in the **Errors** column; the batch cannot be saved if any errors are present. The **Clear** dropdown lets you remove all rows from the window, or remove only those rows that contain errors.

Copyright 2018 MYOB Technology Pty Ltd.

Adjusting Average Costs

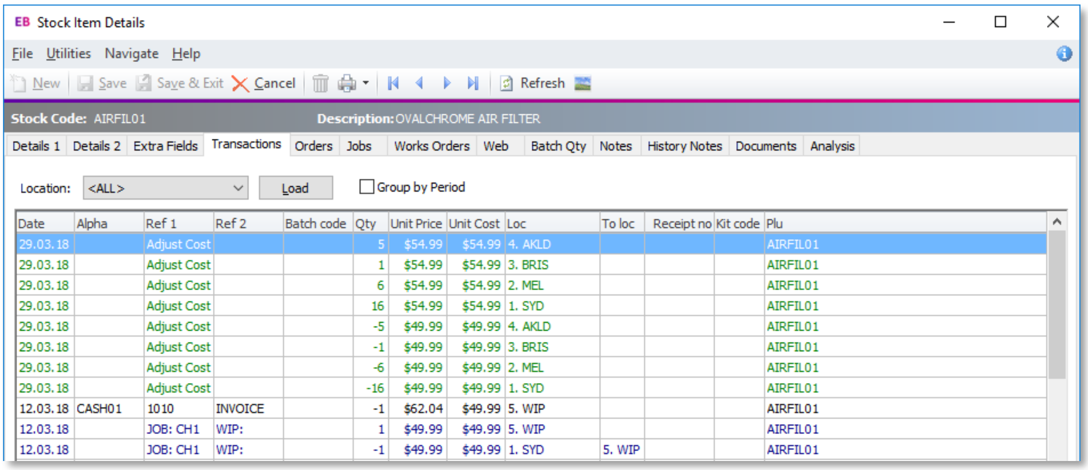
Average cost adjustments are now performed by the new AdjustAverageCost stored procedure. As a stored procedure, the function can now be customised if necessary, or run directly from SQL Server.

The new Stored Procedure is used when adjusting the average cost for a single stock item, by selecting **Utilities > Change Average Cost** from the menu of the Stock Item Details window:



Average cost adjustments can also be made in bulk from Stock Movements window (see page 4) by selecting **Average Cost Adjustment** from the **New** dropdown.

The function results in an Adjust Out transaction at the current cost and an Adjust In transaction at the new cost. The function affects all locations—viewing a stock item's transactions after the adjustment shows a pair of transactions for each location:



The average cost adjustment function is not available for lookup items.

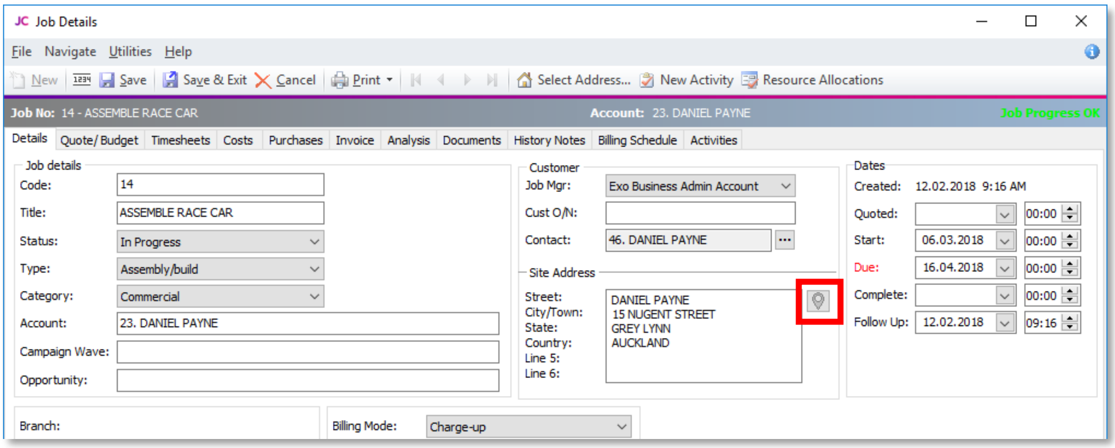
Access to the function is controlled by two existing User-level profile settings:

- **Hide stock costs** – if this setting is enabled, the function will not be available.
- **Visible stock movement transaction types** – if this setting does not give access to the "Adjust Cost" transaction type, the function will not be available.

Copyright 2018 MYOB Technology Pty Ltd.

Geolocation Features in Exo Job Costing

This release adds the ability to retrieve geolocation information for a job's address, which can be different from the address of the Debtor associated with the job. Fields have been added to the JOBCOST_HDR table to hold the geolocation information, and the standard geolocation button that appears next to Debtor and Creditor addresses now appears on the Details tab of the Job Details window:



As with Debtors and Creditors, you can click this button to retrieve or refresh geolocation information for the address.

> **Note:** As is the case with Debtors and Creditors, this button is not available if the profile setting **Prompt for unset map coordinates on saving delivery addresses** is set to "Disable map locating features".

Prospects Custom Filter

This release adds a new User-level profile setting: **Prospects Custom Filter SQL**. This setting functions in the same way as the existing **Debtor Custom Filter SQL** and **Creditor Custom Filter SQL** profile settings—it allows prospects (Non Accounts) to be pre-filtered on Company and Opportunity search windows. Prospects can be filtered by any field on the PROSPECTS table, e.g. entering:

```
PROSPECTS.SALESNO = 2
```

will display only prospects assigned to staff member 2.

By using all three custom filter profile settings together, it is now possible to pre-filter the Companies search window in Exo CRM.

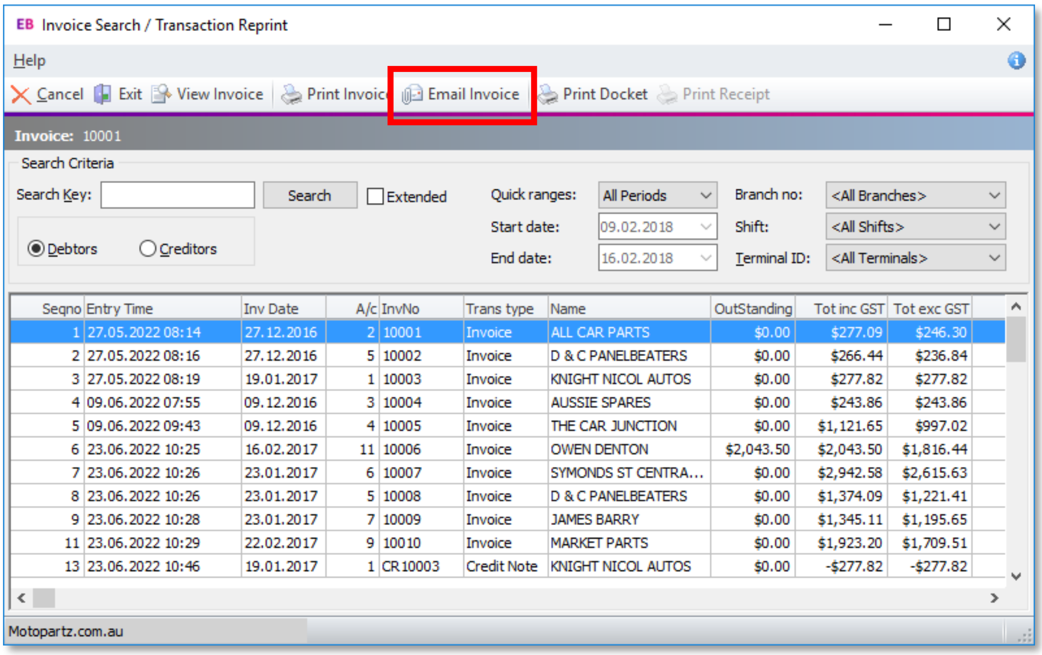
Copyright 2018 MYOB Technology Pty Ltd.

Interface Updates

This release includes updates to the Exo Business user interface to improve workflows and make the system easier to use.

Email Button on Invoice Search

An Email Invoice button is now available on the Invoice Search / Transaction Reprint window:



Clicking this button sends the selected invoice to the email address of its associated Debtor account.

New Serviceable Unit Menu Procedures

The following new menu procedures are available to open the setup windows for Exo Serviceable Units:

- Setup Serviceable Units Class
- Setup Serviceable Units Make
- Setup Serviceable Units Model

These procedures can be added to dropdown menus and business flow menus for Exo Job Costing and for the core Exo Business module.

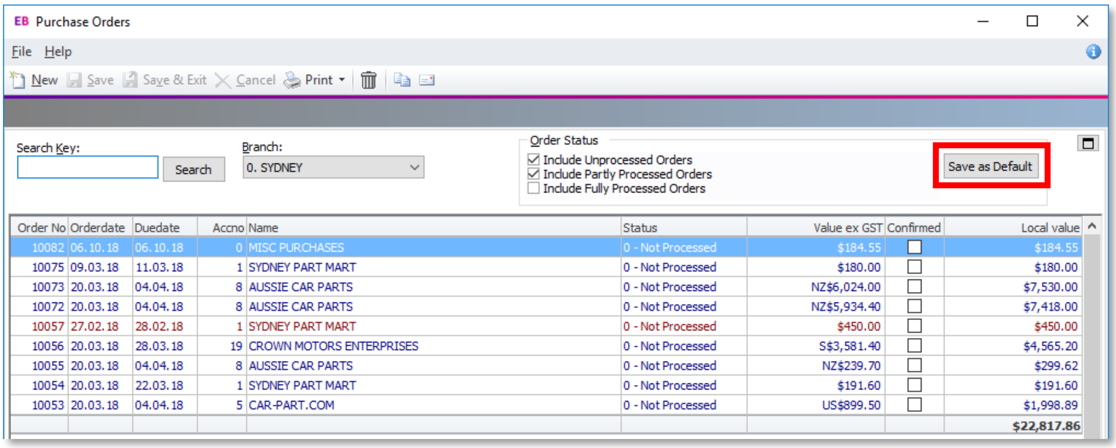
Note: You can change the label for “Class”, “Make” and “Model” on the **System > Display Names** screen in Exo Business Config. On an upgrade to 2018.2, the new menu procedures use whatever has been set for these display names, e.g. if you had set the SU_CLASS display name to “Type”, the new menu procedure would be named “Setup Serviceable Units Type” instead of “Setup Serviceable Units Class”. Changing the display names after upgrading will not affect the names of the new menu procedures.

Copyright 2018 MYOB Technology Pty Ltd.

Purchase Order Search Defaults

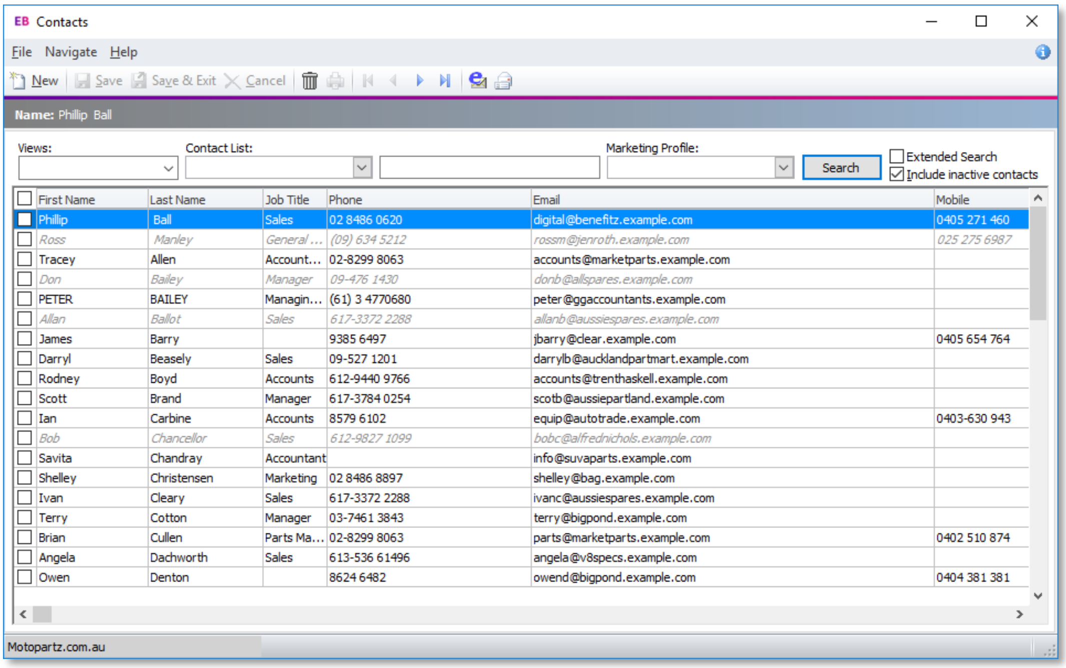
The Purchase Orders search window now remembers the **Branch** setting and uses this as the default the next time the window is opened. (In previous versions, opening a Purchase Order would set that order's branch as the default branch, overriding the branch selected on the search window.)

A new **Save as Defaults** button is also available on the Purchase Orders search window. Clicking this button saves the currently selected **Order Status** settings as the defaults, which will be applied the next time the window is opened.



Highlighting Inactive Contacts

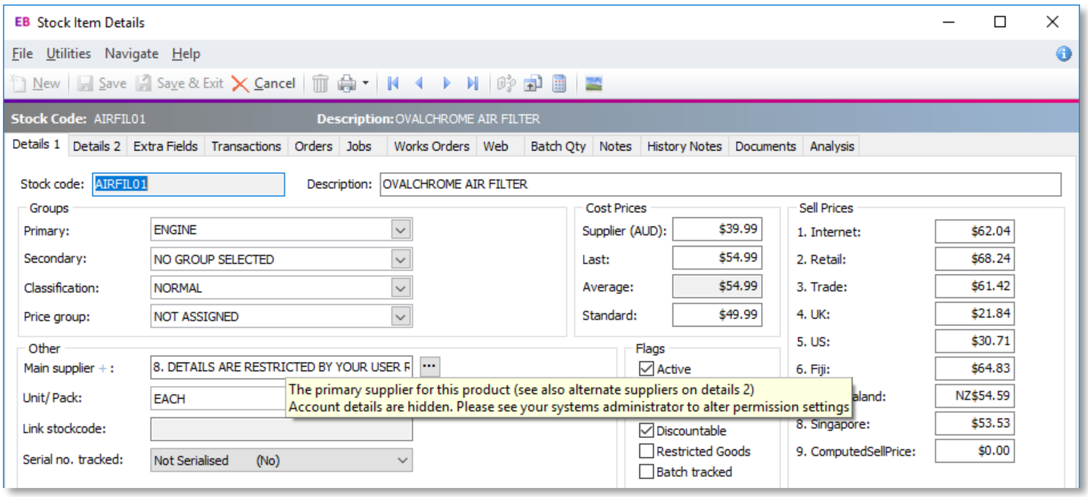
Inactive contacts are now shown in grey italics on the Contacts search window and on all account windows that have a Contacts tab, e.g. Debtors, Creditors, Serviceable Units.



Copyright 2018 MYOB Technology Pty Ltd.

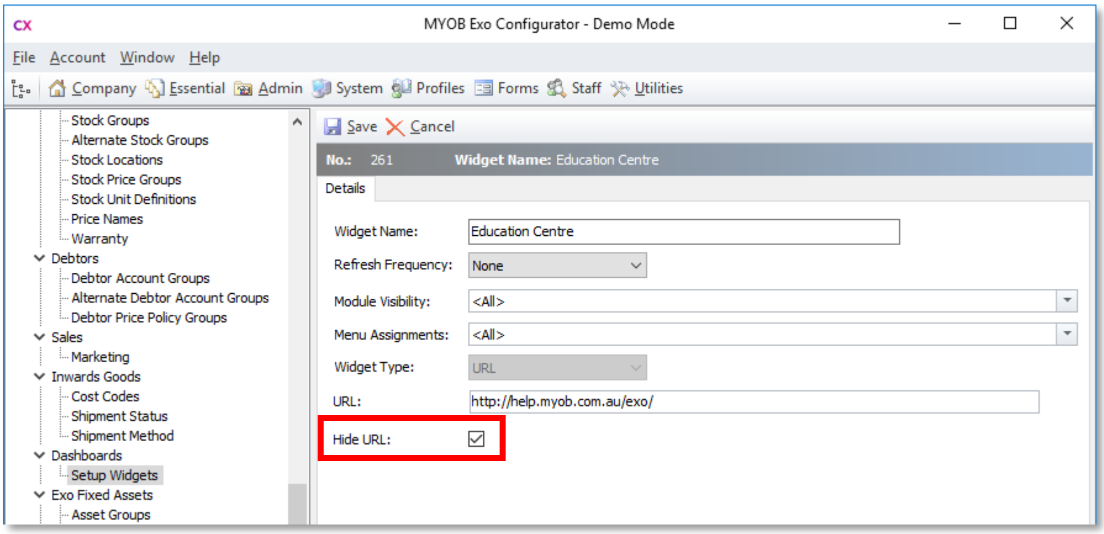
Hiding Supplier Names

This release adds the ability to hide the name of the main supplier on the Stock Item Details window. This function is controlled by the existing **Creditor account access level** profile setting. When this User-level setting is set to “Prevent Access”, the creditor account name in the **Main supplier** field is hidden. The field’s tooltip provides more information:



Hiding URLs on URL Widgets

A new **Hide URL** option is available when editing a widget:



When this option is ticked, the URL will not be visible at the top of the widget.

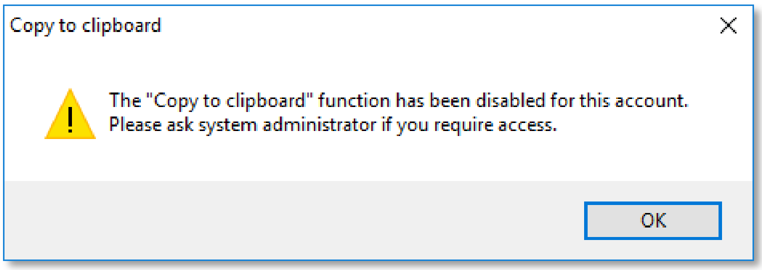
Scrollbar on Activity Notes

The notes pane at the bottom of the Activity window now has a scrollbar control, making it easier to navigate and more obvious when there is more text below the bottom of the visible pane. In addition, the mouse wheel can now be used to scroll the notes pane.

Copyright 2018 MYOB Technology Pty Ltd.

Controlling Access to "Copy to Clipboard"

The **Copy to clipboard** option available when right-clicking on grid column headers is now controlled by a new profile setting. When the User-level setting **Allow copying from Grids** is unticked, selecting the **Copy to clipboard** option displays the following message to the user:



Updates to CRM Search Windows

The Company, Contact and Opportunity search windows in Exo CRM have been updated to make them consistent with each other and the rest of the Exo Business system:

- The field for search terms is now labelled **Find:**
- The **Find:** field has focus when a search window opens

Stock Searches Unrestricted by Default

This release updates the default value of the **Stock search only shows default location info** profile setting (STOCKSEARCHUSEDEFAULTLOCATION). In previous releases, this setting would be ticked by default, which meant that all stock searches were restricted to showing only stock levels from the default stock location. As of this release, the setting is unticked by default, so that searches will be unrestricted unless you choose to restrict them.

Copyright 2018 MYOB Technology Pty Ltd.

Resolved Issues

Exo Business Core

Service Request ID	Description
16119860211 145504623931 16057129494 16057129482 16057129470 16057129458 16057129454 16057129442 16057129430 16057129426 16057129414 16057129401	This release includes the following updates to the Purchase Order search window: • The selected **Branch** setting is saved as the default. • The **Order Status** settings can be saved as defaults. See page 9 for more details.
12786933074 131425656761 130990095681 113704377411 110692445016 14209210771 13721546412 13034026481 12783638311 **153436505305** 153526172461 153326009110	When running a batch invoice mailshot, mailshot rows immediately appeared as "Done" if the associated Debtor account had "Email" or "Both" selected for the **Statement Delivery** field. This has been resolved.
11722185493 11262529883 11082319142 11050594726 11755193521 11846012269 12086649610	Zero-value Debtor and Creditor transactions could not be allocated against each other, which made it impossible to allocate them (unless they were allocated with other, non-zero transactions). This has been resolved.
155015299522 154659790721 12676961969 11516275341 11067247894 11067248331	String Truncation errors could occur when using the Creditor Payment Processor for payment entries if the associated company name was more than 25 characters long, or if it contained any of the \ | / " ? * > or < characters. This has been resolved.
154920452195 152316946596 154428171651 **155308923249** 155170035651	When performing a Bank Feed bank reconciliation, if the **Show Reconciled** option was not ticked, the lines on each pane would become mis-aligned. This has been resolved.
18026352578 124498844614 17825794291	After editing or duplicating a Debtors invoice that included a tax rounding amount (i.e. a value in DR_TRANS.TAXROUNDING), the GST amount could be left incorrect, with no warning to override the GST. This has been resolved.
147304816151 154058106111 146825159231	When a partial payment was made when entering an invoice in Point of Sale mode, the transactions did not auto-allocate. This has been resolved; a new Company-level profile setting, **Allocate partial payments in Debtor Invoicing and POS**, has been added. When this setting is ticked, the system will automatically allocate partial payments for Debtors invoices created in Debtor Invoicing and POS.
17979077034 17347628951	When allocating Creditor transactions, the system used the decimal places setting for Debtor Sell prices. This has been resolved; the system now always uses two decimal places for Creditor allocations.
155482279405 155198029341	The error message "Error saving bank reconciliation: Key Violation." Could appear when saving a Bank Feed reconciliation. This has been resolved.

Copyright 2018 MYOB Technology Pty Ltd.

12694562630 12671751754	This release adds the ability to hide the name of the main supplier on the Stock Item Details window—see page 10.
-	The profile setting **Prohibited characters in stock codes** only worked when typing in the code for a new stock item; it did not cause stock codes to be validated when changing an item's stock code, when copying a stock item, when creating a one-off stock item, or when pasting a stock code into a new stock item. This has been resolved; when the profile setting is enabled, stock codes are validated in all of these situations.
-	Sales Order Extra Field events did not run when a Sales Order was created using the Copy Sales Order function. This has been resolved.
-	Sales Order header values were not updated if changes were made during the supply phase. This has been resolved.
-	On some windows, e.g. Purchase Orders and Sales Orders, if no Custom Buttons for the window were defined, i.e. if the Custom Button profile settings relating to the window were left blank, captionless Custom Buttons appeared in the window toolbar (these buttons had no functions attached—clicking them did nothing). This has been resolved.
-	When editing a report column in the GL Report Writer, if the **Type** was set to one of the "BUDGET" options, a **Print** tickbox was available. This box was mis-labelled—it is not related to printing; rather it controls whether to use the primary (ticked) or secondary (unticked) budget. Its label has been changed to **Primary**.
-	When the period was rolled from December to January, auto-reversing journal entries posted in December reversed into January of the previous calendar year. This has been resolved.
-	If an auto-reversing journal entry was posted into a prior period, then another auto-reversing entry was posted into the current period, then when the current period was rolled, a single reversing batch would be produced in the incorrect period. This has been resolved; the system now creates a separate reversing batch for each auto-reversing entry.
-	The text fields on the General Ledger Source Transactions window could overlap if they contained long text strings. This has been resolved.
152196990669 152179180185 152179180171	*This issue was resolved in the Exo Business 2016.3.1 Service Pack* An access violation error could occur when saving a Creditors Invoice as part of the Inwards Goods workflow. This has been resolved.
157261241998 157154156481	*This issue was resolved in the Exo Business 2016.3.1 Service Pack* Any change given in a point of sale transaction would put the balance out by the amount of the change. This has been resolved.
	This issue was resolved in the Exo Business 2016.3.1 Service Pack The Exo Business installers supplied with the 2018.2 release installed the wrong version of **RwEasyMAPI64.exe**, which prevented emails from being sent. This release includes the correct version.
-	*This issue was resolved in the Exo Business 2016.3.1 Service Pack* An access violation error could occur when opening the General Ledger Account window from the Favourites pane. This has been resolved.

Copyright 2018 MYOB Technology Pty Ltd.

Exo Job Costing

Service Request ID	Description
154227051816 154137026661	On the Job Details window, it was possible to allocate an already invoiced line on the Invoice tab against the progress invoice on the Billing Schedule tab—if invoiced lines were shown on the Invoice tab and the check box in the column header was ticked to select all lines, the invoiced line would be included when the user selected **Marked Lines > Allocate to Progress Invoice** from the right-click menu, despite not appearing to be selected. This has been resolved; invoiced lines are always excluded from selections.
153592026225 155377154771 153576060301	When entering a line on the Direct Material Entry window, if focus moved off the line, it was no longer possible to edit it. This has been resolved.
155232917185 154933299571	The error “Cannot focus a disabled or invisible window” could appear when opening Exo Job Costing. This has been resolved.
-	*This issue was resolved in the Exo Business 2016.3.1 Service Pack* When creating a new job for a Debtor, the Site Address field on the Job Details window was not populated with the Debtor’s address. This has been resolved.

Copyright 2018 MYOB Technology Pty Ltd.

Known Issues

The following issues have been identified as requiring end-user attention in this release.

Installation/Upgrade Issues

- If you are using the MYOB Exo Business Installation Wizard to install an instance of SQL Express, the following must be must be present on the PC:
    - .NET Framework 3.5 SP1 – you can download this from: http://go.microsoft.com/fwlink/?LinkId=120550
    - Windows Installer 4.5 – you can download this from: http://go.microsoft.com/fwlink/?LinkId=123422
    - Windows PowerShell 1.0 – you can download this from: http://go.microsoft.com/fwlink/?LinkId=120552
- Due to security settings imposed by Windows, CHM Help files cannot be viewed from a remote location—this means that you can only view the Exo Business CHM Help files if they have been installed on the local PC. See Microsoft Knowledge Base article 892675 for more information on this issue and suggested workarounds. (This issue does not apply if you are viewing online Help files on the Exo Business Education Centre.)

Demo Data Issues

The stored procedure SP_DEMO_DATA_DATE_UPDATER, which updates the data in demo databases to the current date, was updated in Exo Business 8.4. This stored procedure is only available in the EXO_DEMO database, which means that any existing demonstration databases used by partners will not be able roll their demo data forward; these databases will need to be re-created based on the updated EXO_DEMO database in order to use the updated SP_DEMO_DATA_DATE_UPDATER procedure.

Job Costing Resource Issues

When a resource allocation is created, an Activity for the relevant staff member is automatically created in the Exo Business system; however, if the resource is not associated with a staff member, the Activity will not appear on the Activity Search widget on the Task Scheduler tab.

As a workaround, a dummy staff account can be created to associate non-staff Resources with.

Emailing from the Print Preview window

When sending a report by email from the Print Preview window, the system does not determine the email address related to the document being emailed (e.g. the relevant Creditor's email address for Creditor documents). The email address is left blank—you must enter the address manually.

Copyright 2018 MYOB Technology Pty Ltd.

SQL Server 2012 Issues

All versions of SQL server 2012 exhibited a subtle, but now well-known change in default behaviour with regard to identity or auto number sequences. In MYOB Exo Business, this would be experienced as an unexpected anomaly where number sequences could apparently spontaneously jump by increments of 1000 if the SQL server was restarted.

This behaviour was reversed in SQL server 2014, but no known solution exists for completely preventing this behaviour in any versions of SQL server 2012, other than to upgrade to SQL server 2014 to completely eliminate the potential for this issue to occur.

SQL Server 2008 R2 prior to SP3

MYOB Exo Business uses a SQL Server feature called Common Language Runtime Integration. This feature was disabled by default in versions of SQL Server 2008 R2 prior to Service Pack 3. If this feature is not enabled, users may encounter the following error during the upgrade process:

Updating server configuration: 'clr enabled'

Copyright 2018 MYOB Technology Pty Ltd.

Appendix 1: Profile Settings

The following profile settings have been added or modified in this release.

Name	Profile Name	Level	Description	Default	Refer
Allocate partial payments in Debtor Invoicing and POS	DR_ALLOC_PART_PAYMENTS	Company	If this setting is ticked, the system will automatically allocate partial payments for Debtors invoices created in Debtor Invoicing and POS.	unticked	page 12
Allow copying from Grids	ALLOW_COPY_FROM_GRIDS	User	This setting controls access to the **Copy to Clipboard** right-click option on grids.	ticked	page 10
Creditors account access level	CREDITORSREADONLY	User	This existing setting now controls the visibility of the **Main Supplier** field on the Stock Item Details window. When it is set to “Prevent Access”, the supplier name will be hidden.	“Full Access”	page 10
Prompt for unset map coordinates on saving delivery addresses	GEOLOCATION_CONTROL	Company	This existing setting now applies to the new geolocation features on the Job Details window.	“Prompt for unset map coordinates on saving delivery addresses”	page 6
Prospects Custom Filter SQL	PROSPECTS_CUSTOMFILTER	User	This setting lets you pre-filter prospects on Company and Opportunity search windows.		page 7
Use old manual stock movement screen	STOCKMOVE_USE_OLD_FORM	User	This setting controls whether or not the new version of the Stock Movements window will be presented by default.	unticked	page 4
Stock search only shows default location info	STOCKSEARCHUSEDEFAULTLOCATION	Computer	This release updates the default value of this setting to “N” (unticked), meaning that stock searches are unrestricted by default.	unticked	page 11

Copyright 2018 MYOB Technology Pty Ltd.