# MYOB EXO Business Release Notes 2015.1



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# Introduction

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# Introduction

# What's New in this Release?

The focus of the 2015.1 release is on providing enhancements to Sales Orders and updating the Analysis tabs of Debtors, Creditors, Stock items and General Ledger accounts. This release also builds on the search templates feature that was introduced in a previous version.

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.

# 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 <u>Minimum System Requirements page on the MYOB website</u>.

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 (see "SQL Express" on page 3).

### Database Server

Any server where an MYOB EXO Business database is installed should meet the following minimum requirements:

- Windows Server 2008, Windows Server 2012
- The latest Service Pack for the Windows operating system
- Intel Pentium<sup>®</sup> 4 2.4Ghz processor (or equivalent)
- 2 GB RAM
- 20 GB of hard disk space + 10 MB per user
- Microsoft Data Access Components (MDAC) 2.8 or later
- A supported version of Microsoft SQL Server:
  - Microsoft SQL Server 2008 R2/SQL 2008 R2 Express Edition
  - o Microsoft SQL Server 2012/SQL 2012 Express Edition
  - o Microsoft SQL Server 2014/SQL 2014 Express Edition
- The latest Service Pack for the version of SQL Server you are using

#### SQL Server

Microsoft SQL Server must be present on the EXO Business Database Server. If you want to use a specific edition of SQL Server, make sure it is installed before running the Installation Wizard. If SQL Server is not installed, the EXO Business Installation Wizard can install SQL Server 2008 R2 SP1 Express Edition (SQL Express) as part of the installation process (see page 7). Whichever version of SQL Server you use, it must be set up to use Mixed Mode authentication.

The blank and demo databases supplied with EXO Business have their compatibility levels set to "SQL Server 2008 (100)". When upgrading from a previous version of EXO Business, database compatibility levels are updated automatically as follows:

- SQL Server 2008 and later databases are set to compatibility level 100.
- Older versions of SQL Server are not updated.

See the following web page for information on compatibility levels:

http://msdn.microsoft.com/en-us/library/bb510680.aspx

#### SQL Express

SQL Express may not be suitable for businesses with many users. SQL Express has limits on the amount of RAM and number of processors it can use, which affects the number of concurrent users that the EXO Business database can support. See the following MSDN article for more information:

http://msdn.microsoft.com/en-us/library/cc645993.aspx

### Client Workstation

Any client workstation running the MYOB EXO Business application modules should meet the following minimum requirements:

- Windows 7 Enterprise, Windows 7 Professional, Windows 7 Ultimate, Windows 8
- The latest Service Pack for the Windows operating system
- Intel Pentium<sup>®</sup> 4 1.3 GHz processor (or equivalent)
- Hard disk space as required for the operating system
- 16-bit colour, 1024×768 screen resolution

#### 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<sup>®</sup> Acrobat Reader 7.0 or later

Microsoft Office connection requires Microsoft Word/Excel 2010 to 2013.

Contact synchronisation requires Microsoft Outlook 2010 to 2013.

MYOB EXO Business 2015.1 requires **ExonetLib.dll** version 8.8.0 or later. Version 8.8.0 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 RwEasyMAPI64.exe /regserver from a command prompt.

# Installing MYOB EXO Business

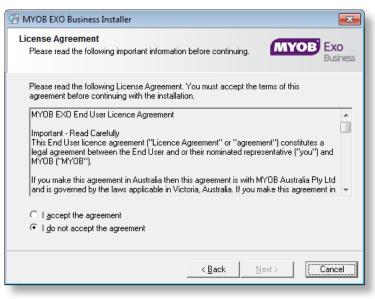
**Note:** Before you install this release, we recommend you take the precaution of backing up your data. Ensure there are no EXO Business modules running, locally or on your network.

#### To perform the installation:

- 1. Insert the MYOB EXO Business CD and select **Install MYOB EXO Business** on the Install tab. If the install menu does not run automatically, run the **ExoBusinessInstaller.exe** program in the **Supporting Files** directory of the CD.
- 2. Click **Next** on the Welcome screen.



3. Read the licence agreement, then select I accept the agreement and click Next.



## Installation

4. Select the country you are based in and click **Next**.

G MYOB EXO Business Installer	×	
Country Selection What country is the organisation operating in?	<b>Exo</b> Business	
Select the country in which the business using MYOB EXO Business will be operating. It is important to ensure that the correct country is selected to ensure that the system configuration is appropriate for e.g. your country's taxation rules.		
< <u>B</u> ack	ancel	

**Note:** Your selection here affects certain country-specific default settings that are set up during the install, e.g. tax rates and banks.

- 5. Select the components to install. Choose from:
  - MYOB EXO Business Application Modules
  - Documentation files
  - EXO Business utilities
  - A blank "live" MYOB EXO Business Database
  - A pre-configured demonstration database
  - EXO Business Common Files

#### Click **Next** to continue.

🖅 MYOB EXO E	Business Installer			<b></b>
Component ! What MYOE	<b>Selection</b> 3 EXO Business components should b	e installed?	Муов	Exo Business
Select the c	components that you would like to insta	ıll.		
<b>▼</b> N	YOB EXO Business Application Modu	iles	545300 k	
1 N	IYOB EXO Business Documentation		56488 k	
1 N	IYOB EXO Business Utilities		7289 k	
▼ N	/YOB EXO Business Blank Database		190069 k	
▼ N	IYOB EXO Business Demonstration D	atabase	242701 k	
<b>▼</b> N	IYOB EXO Business Common Files		105407 k	
Disk S	Space Required:		1010779 k	
Disk S	Space Remaining:		22090283 k	
-				
		< <u>B</u> ack	<u>N</u> ext >	Cancel

# Installation

 If you chose to install the MYOB EXO Business Application Modules, click Browse to choose the directory where you want to install the program files, then click Next.

🖅 MYOB EXO Business Installer	×
Select Destination Location Where should the MYOB EXO Business application files be installed?	<b>XO</b> Jsiness
Setup will install MYOB EXO Business into the following folder. To continue, click Next. If you would like to select a different folder, click Browse.	
C:\Program Files\MYOB EXO Business Browse	
<u>≺B</u> ack <mark>[Next&gt;</mark> Car	icel

7. If the MYOB EXO Business Common Files are not installed on this PC, click Browse to choose the directory where the Common Files are located, then click **Next**.

G MYOB EXO Business Installer			
Select Common Files Location Where are the MYOB EXO Business Common Files located?			
You have chosen not to install the MYOB EXO Business Common Files component on the local computer.			
Common Files are items such as Master Reports,Quick Insert Templates, etc. MYOB EXO Business needs these files to operate correctly.			
If you wish to use a shared set of files situated on a remote computer, please select the parent folder that contains the Report and QI Template folders, or click Browse.			
If you wish to install the Common Files component on the local computer, please go back to the Component Selection page, and ensure the Common Files component is selected in the list.			
C:\Program Files\MYOB EXO Business\Common			
< <u>B</u> ack Cancel			

- 8. If you chose to install the MYOB EXO Business Database components, you must specify where to install the database:
  - To install on an existing SQL Server instance, select the instance and enter a user ID and password for that instance.
  - To create a new instance for the installation, select **New SQL Server instance on this computer**, then click **Browse** to choose the location of the new instance. This will install SQL Server 2008 Express Edition.

#### **Note:** See the Known Issues section on page 33 for information on the install prerequisites for SQL Server 2008 R2 SP1.

#### Click Next.

HYOB EXO Business Installer		×
Database Location Where should the MYOB EXO Business dat	abase(s) be insl	talled?
Select the location in which you would like t database(s)?	o install the MY	OB EXO Business SQL Server
<ul> <li>Existing SQL Server instance on this col</li> </ul>	mputer	
EXOSQL	User ID:	sa
	Password:	
New SQL Server instance on this comp	uter	
C:\Program Files\Microsoft SQL Server		Browse
	< <u>B</u> ack	Next > Cancel

**Note:** The installer may appear unresponsive while it tries to detect SQL Server instances on the PC (this process may take a minute or more). Do not cancel the installer; simply wait until the detection operation is complete.

If you select to install a new instance of SQL Express, the logon details for the new instance will be:

- Username: sa
- Password: \$ExoAdmin7000

You will need to supply these details when migrating data, or if you want to connect to the SQL Express instance for any other reason.

9. Click **Browse** to choose where the MYOB EXO Business shortcuts should be located in the Windows Start menu, then click **Next**.

🖅 MYOB EXO Business Installer 🛛 💌
Select Start Menu Folder Where should the MYOB EXO Business shortcuts be placed in the Start Menu?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
MYOB EXO Business Browse
< <u>B</u> ack <u>Next&gt;</u> Cancel

10. If you want to create a desktop icon or Quick Launch icon for MYOB EXO Business, tick the relevant box(es), then click **Next**.

HYOB EXO Business Installer	<b>—</b>
Select Additional Tasks Which additional tasks should be performed?	MYOB Exo Business
Select the additional tasks you would like Setup to perform wh Business, then click Next. Additional icons:	iile installing MYOB EXO
<ul> <li>✓ Create a <u>D</u>esktop icon</li> <li>✓ Create a <u>D</u>uick Launch icon</li> </ul>	
< <u>B</u> ack	Cancel

# Installation

11. The installation is ready to begin. Review the details and click **Install** to proceed. If you need to change any details, click **Back** to return to the previous screen and change your selections.

🖅 MYOB EXO Business Installer 🛛 💽
Ready to Install Setup is now ready to begin installing MYOB EXO Business on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Application Destination Location: C:\Program Files\MYOB EXO Business
SQL Server Instance: EXOSQL
Start Menu Folder: MYOB EXO Business
Additional tasks: Create Desktop icons Create Quick Launch icons
< <u>B</u> ack [

12. The installation progress is displayed.

MYOB EXO Business	
Installing	MYOB Exo Business
Current File	<u></u>
Copying file: C:\\MYOB EXO Business\MYOB EXO Bu	usiness Fixed Assets User Guide.pdf
All Files	
Time Remaining 2 minutes 30 seconds	
	< Back Next > Cancel

**Note:** During installation, other windows may appear if SQL Express is being installed.

## Installation

13. If you chose to install the application modules but not the database components on this PC, you must enter the details of the database once the installation has completed. Click **Test Connection** to check that the details you have entered work. If the test passes, click **Next**.

🕑 DB Connection page		×			
Database Connection What SQL Server database s	hould be connected to?	MYOB Exo Business			
Enter the details of the SQL S	Enter the details of the SQL Server database to which you want MYOB EXO Business				
SQL Server computer name:	NZAKL005401W				
SQL Server instance name:	EXOSQL				
Database name:	EX0_LIVE				
Database username:	sa				
Database password:					
Company name:					
	Test Connection				
		Next > Cancel	]		

**Note:** Once a computer successfully connects to the database, a Computer profile is created for it in EXO Business Config.

14. The installation is now complete. Choose what to do next and click Finish:

- Run MYOB EXO Business to explore the demonstration database.
  - Run the Configuration Assistant to set up your new MYOB EXO Business database.
  - Return to Windows.

G MYOB EXO Business Installation Wizard					
	Completing the MYOB EXO Business Setup Wizard				
MYOB Exo Business	Setup has finished installing MYOB EXO Business on your computer. The application may be launched by selecting the installed icons.				
	Select an option from those below,and click Finish to exit Setup.				
	<ul> <li>I want to explore the MYOB EXO Business demonstration database (Run MYOB EXO Business)</li> </ul>				
	C I want to configure a new clean MYOB EXO Business database (Run Configuration Assistant)				
	C I'm done for now, return to Windows				
	<b>E</b> inish				

# 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.

# Installing EXO Business Services

Once the EXO Business system is set up, you can install supporting services for the EXO API and EXO Email Service using the EXO Business Service Setup Wizard, **EXO Business Services Installer.msi**. This installer is supplied with the main EXO Business installer. It must be run on a server that already has EXO Business installed on it, and must be run from an account with administrative permissions.

#### To perform the installation:

1. Double-click on the installer to run it. The welcome screen appears:

🛃 мүс	OB EXO Busi	iness Services	: Setup
M	YOB	<b>Exo</b> Business	Welcome to the MYOB EXO Business Services Setup Wizard
			The Setup Wizard will install MYOB EXO Business Services on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
			Back Next Cancel

2. Click Next. The MYOB EXO End User Licence Agreement is displayed:



3. Tick I accept the terms in the Licence Agreement and click Next to continue.

HYOB EXO Business Services Setup	- • 💌
Custom Setup Select the way you want features to be installed.	MYOB Exo Business
Click the icons in the tree below to change the wa	ay features will be installed.
API Service Messaging Service	EXO Business API
	This feature frees up 130KB on your hard drive.
Location: C:\Program Files (x86)\MYOB E	XO Business Services Browse
Reset Disk Usage	Back Next Cancel

- 4. Select which components to install. Choose from:
  - The EXO API Service
  - The EXO Messaging Service

**Note:** The API configuration utilities are always installed (see "Setting up the Services" on page 15).

- 5. The install location is displayed at the bottom of the window. Click **Browse** to choose a different location if necessary.
- 6. Click **Next**. You are now ready to install the EXO Business services.

😸 MYOB EXO Business Services Setup	
Ready to install MYOB EXO Business Services	MYOB Exo Business
Click Install to begin the installation. Click Back to review or change installation settings. Click Cancel to exit the wizard.	any of your
Back	sil Cancel

7. Click **Install** to being the installation. The progress of the installation is displayed:



8. Once the installation is complete, click **Finish** to close the wizard. You can choose to open the EXO Business Service Configuration utility to set up details of the EXO API services.

HYOB EXO Business Services	Setup
MYOB Exo Business	Completed the MYOB EXO Business Services Setup Wizard
	Click the Finish button to exit the Setup Wizard.
	Back Finish Cancel

Note: The EXO Business Service Configuration utility is installed in the same location as the EXO API services. You can run the utility (MYOB.ED.EXO.Cloud.ServiceConfig.exe) from this location at any time.

## Setting up the Services

The EXO Business services must be set up for each EXO Business database connection, using the MYOB EXO Business Service Configuration utility. This utility,

**MYOB.ED.EXO.Cloud.ServiceConfig.exe**, can be run immediately after installation, or you can open it from the EXO services install directory at any time.

Note: All setup must be performed on the server that the EXO Business service	es
are installed on, using an account with administrator privileges.	

MYOB EXO Business Service Confi	iguration		
EXO API Configuration EXO Busines	Alada Castinuation		
	ss Alerts Configuration		]
API Services EXO Connection EXO_LIVE	Base URL http:/	/localhost:8888/	Add API Service
Service Name	EXO Connection	Base URL	Delete
EXOAPIService\$EXO_DEMO	EXO_DEMO	http://localhost:88/exoapi/	Delete
EXOAPIService\$EXO_LIVE	EXO_LIVE	http://localhost:80/exoapi/	Delete
Live Relay Services			
EXO Connection EXO_LIVE	•		Add API Relay Service
Service Name	EXO Connection		Delete
EXOAPIProviderService\$EXO_DE	EXO_DEMO		Delete
EXOAPIProviderService\$EXO_LIVE	EXO_LIVE		Delete

The utility displays configuration settings for the following services:

- EXO API Configuration
  - API Services this is the main EXO API service.
  - API Provider Services this service connects the EXO API to the online relay. This service is only needed this if you want to communicate with the EXO API remotely.
- EXO Business Alerts Configuration
  - Message Services this is the EXO Business messaging (email) service.

To configure an API service, select an EXO Business database connection, then click the relevant **Add Service** button. For the API Service, you must also enter a **Base URL**, which is the location and port the API is accessible on (the default should be suitable in most cases, unless you want to use a different directory and/or port).

**Note:** For local API access, ensure that your firewall is configured to allow the relevant ports, services and/or applications.

To validate that the EXO API has been successfully installed and set up, navigate to the Base URL in a web browser or REST client to see a list of available endpoints.

## Installation

The configuration process for the messaging service is slightly different; where the API services create a separate instance for each EXO Business database connection, the messaging service has a single instance, which can have multiple connections to it.

VYOB EXO Business Service Configuration	
XO API Configuration EXO Business Alerts Configuration	
Message Services EXO Connection EXO_DEMO	Add Connection Un-Install Message Service
EXO Connection	Delete
EX0_LIVE	Delete
EXO_DEMO	Delete

To install the messaging service instance, select a database connection and click **Add Connection**. This adds the service and sets up a connection to the selected database. To add new connections, select them from the **EXO Connection** dropdown and click **Add Connection**.

# New Features

# Support for SQL Server

This release adds support for SQL Server 2012 Service Pack 2 and SQL Server 2014; EXO Business 2015.1 has been tested and verified to work on these database platforms.

**Note:** Microsoft SQL Server 2012 features behaviour that causes the table identities to jump on restart of the server; this will result in sequence number gaps in EXO Business. MYOB recommends consideration of this issue when choosing your database application system.

# Changes to Sales Orders

Sales Orders can now be associated with activities, history notes, transactions and documents. These relationships are now displayed on new tabs on the Sales Orders window.

#### History Notes

History notes can now be added to Sales Orders. Any notes associated with a Sales Order are displayed on the new History Notes tab on the Sales Order window.

le Utilities Help								(
] <u>N</u> ew   🛃 <u>S</u> ave 🛃 S	Sa <u>v</u> e & Exit 🗙 <u>C</u> ancel 🛛 😂	🤉 Print 👻 📃 Narra	itive 🏼 🍠 New Activity	Addresses	More Actions •			
Order #: 10021 Sta	itus: Fully Processed Peri	od: September 2014	Phone: 09-476 1430					
tails Activities History Not	tes Transactions Documents							
Doc # Type	Date	Subject		Sales Person	Staff Name	Branch	Link	
1 Invoice	11.09.2014 5:21:10 PM							
1 Release	11.09.2014 5:21:10 PM							
1 Delivery	11.09.2014 5:21:10 PM							
								:

As on other History Notes tabs, toolbar buttons are available to add and delete notes.

#### Activities

Activities can now be associated with Sales Orders. All activities related to an order are displayed on the new Activities tab on the Sales Orders window:

Sales Orders							
File Utilities Help							6
🛅 New 🛛 🛃 Save 📑 Save & Exit 🗙 Ca	ancel 🔄 🌦 Print	👻 🔄 Narrative	🄰 New Activity	Addresses 🛛 🕈 More	Actions 👻		
Order #: 10004 Status: Standing Order	Period: Sept	ember 2014 Pho	ne: 09-476 1430				
Details Activities History Notes Transactions D	ocuments						
Subject	Priority	Туре	Status	Contact Name	Start Date	End Date	Assigned 🔺
Meeting	Normal	Contact Call	Not Started	Murray Shackland	09.09.2014 10:00:0	09.09.2014 11:30:0	EXO BUS
Conference call	Normal	Contact Call	Not Started	Don Bailey	10.09.2014 2:00:00	10.09.2014 2:30:00	EXO BUS

A new **Order** field on the Activity window shows the Sales Order that an activity is associated with, and allows you to associate an existing activity with a Sales Order.

📕 Activity					
File					
😭 Save & Exit	Save & New 🛛 🗙 <u>C</u> ancel 🧃	<u>]</u> Delete   🏖 <u>R</u> ecu	rrence 🧹 Mark Com	nplete	
Details					
Activity Type:	Appointment 👻	Type:		•	Sync with Outlook
Subject:					
Company:				Phone:	
Contact:			Phone:	Mobile:	
Job Code:			Order:		
Opportunity:					
Campaign Wave:					
La <u>b</u> el:	None	▼ Status	Not Started	• t	
Accie		Priorit	v: Normal	•	

### Transactions

The new Transactions on the Sales Orders window displays any transactions associated with the Sales Order:

Sales Orders										- • ×
File Utilities Help										<b>()</b>
🞦 New 🛛 🛃 Save	🛃 Sa <u>v</u> e & Exit 💦	<mark>≺ C</mark> ancel	🛛 🌦 Print 🕠	Narrative	e 🄰 New	Activity	삼 Addresses	More Actions	-	
Order #: 10021	Status: Fully Proce		Period: Septer		<b>hone:</b> 09-47					
Details Activities History	y Notes Transaction	ns Docume	ents							
Trans. # Date	Transaction	InvNo	Ref1	Ref2	Amount	Outstanding	Deposit Status			
375 12.04.2014	Invoice	1006	10021		\$182.70	\$182.70				

#### Documents

The new Documents tab on the Sales Orders window behaves the same as the existing Documents tabs on other windows. Document files can be associated with a Sales Order using the standard Documents tab toolbar buttons.

Sales Orders File Utilities He	elp						
🎦 <u>N</u> ew 🛛 🛃 S	ave 🛛 🛃 Sa <u>v</u> e & Exit	<mark>≻</mark> <u>C</u> ancel	😂 Print 🔹 📃 Narrative	🌛 New Activity 🛛 🚮 Address	es 💠 <u>M</u> ore Actions 👻	1 🗅 🗿 🖄 💲 🏅	
Order #: 10021	Status: Fully F		Period: September 2014 Ph	one: 09-476 1430 Fax:			
Details Activities	History Notes Transa	ctions Documen	its				
Doc. Date F	Ref. Code Doc. Code	Description		File Name	Linked		<u>^</u>
09.09.2014		PDF COPY OF IN	ITAL QUOTE	Quote.pdf			
09.09.2014		PDF COPY OF IN	WOICE	Invoice.pdf	Y		
							-

As with other windows, you can drag an email from Microsoft Outlook onto the Sales Order window and it will be added to the Documents tab automatically.

#### Print Pick Slips Option on Sales Orders

A new **Picking Slip** option is available on the Supply Details tab of the Sales Orders window:

Invoice as Supplied  Check Stock Levels  Stock Details	Print Packing Slip 🛛 Generate Invoice	Pa <u>y</u> ment to Fully Proces			voice Date : .10.2014 🔻	Age : 0. Octobe	r 2014 🗸	Save	as Default	
# Stockcode	Description	Ordered	Supplied	Outstanding	Back Order	Pick Now	Supply Now	Invoice	Now Uninvoiced	Invo 🔺
1 LENGTHITEM		5	0	5	1	0	0		0 0	=
2 SQUAREITEM		4	4	0	0	0	0		0 0	
3 CUBEITEM		24	0	24	1	0	0		0 0	
NGTHITEM -										+
	Physical Qty:									
nit of Sale: (1)	Free Qty:		Base Price:		0.00	Total W			Sub Total:	9.0
/eight: 0.0000 ubic: 0.0000	This Order Qty Committed Qty		Discounted L Pre-tax line		0.00 0.00	Total Cu Item Co			GST Total: Order Total:	1.3 10.3

If this option is ticked, a picking slip will be printed when the order is supplied (this option is similar to the existing **Picking slip** option on the Quick Supply Order window).

The default setting of this option is determined by the new **Sales orders process action 'Picking Slip' switch** User-level profile setting.

### Bin Code on Sales Orders

The Sales Order window now displays the bin code for the highlighted stock item at the bottom of the window:

Sales Orders								
File Utilities Help				(				
New Save Save & Exit 🗙 Cancel	🈂 Print 👻 🗐 Narrative 🛛 🖓 New	Activity 🛛 🚰 Quick Su	upply 💀 Supply 🔥 Addre	esses 💠 More Actions 🕞				
. Status: Not Processed Pe	eriod: September 2014 Phone: 612-9	827 1099 Fax: 6	612-9827 1096					
Details								
Account: 1. KNIGHT NICOL AUTOS Campaign Wave:								
Salesperson: 4. GREG MANNING								
Opportunity:				đ				
Delivery Address								
Line 1: 94 CLARKE ST Line 2: PENRITH	Order date: 24.09.2014	AUD:	0.86					
Line 3: SYDNEY Line 4: AUSTRALIA	Due date: 24.09.2014	Reference:		]				
Line 5:	Default Loc #: 1. Auckland	<ul> <li>GST:</li> </ul>	Exclusive -					
Line 6:	On Hold:	Branch:	0. AUCKLAND					
Extra Fields								
Cust o/n:								
Order Details								
Stock Code Description			Discount (%) Total	Batch Code Location Analysis				
AIRFIL01 OVALCHROME AIR F UNIEXH01 UNIVERSAL EXHAUST		1 54.59 1 72.47		1. AK				
CAMADJ01 ADJUSTABLE CAM SH	HAFT	1 172.77	0.0 172.77	1. AK				
<								
FILTER								
Bin Code: 1 Physica		)	54.59 Total Weight:	112 Sub Total: 299.83				
Weight: 1.0000 This Or	der Qty: 1(1) Discou	inted Unit Price: 5	54.59 Total Cubic:	112 GST Total: 0.00				
Cubic: 1.0000 Commit	tted Qty: 1 Pre-ta	x line Total: 5	54.59 Item Count:	3 Order Total: 299.83				
Motopartz.co.nz								

**Note:** The bin code is taken from the Stock Location Information window that is opened from the Details 2 tab of the Stock Item Details window; it is not the default **Bin Code** value that can be entered directly onto the Details 2 tab.

#### Narratives on Supply

This release adds the ability to view and edit line narratives on the Supply Details tab when supplying an individual Sales Order:

Invoice as Supplied Print F Check Stock Levels Stock Details	Packing Slip 🛛 Generate Invoice 📝 Print Invoice	Enter Pay Force to F				voice Date : 8.10.2014 🔻	Age : 0. Octobe	r 2014 🔹	Save a	s Default	
# Stockcode	Description		Ordered	Supplied	Outstanding	Back Order	Pick Now	Supply Now	Invoice No	w Uninvoiced	Invo 🔺
1 LENGTHITEM			5	0	5	1	0	0		0 0	E
2 SQUAREITEM			4	4	0	0	0	0		0 0	
2 SQUAREITEM 3 CUBEITEM			24	0	24	1	0	0		0 0	
<											F.
ENGTHITEM -											
nit of Sale: (1)	Physical Qty:			Base Price:		0.00	Tracha			ub Total:	9.0
nit of Sale: (1) /eight: 0.0000	Free Qty: This Order Qty:			Discounted U	Init Price	0.00	Total W Total C			ub Total: ST Total:	9.0
Cubic: 0.0000	Committed Qty:			Pre-tax line 1		0.00	Item Co			rder Total:	10.3

# Bulk Sales Order Supply Enhancements

This release contains a variety of improvements that make the Sales Order batch supply process more robust.

The following additional checks have been added to the batch supply process:

- Check for object locks on each order.
- Check that the order can be processed (only orders set to "Not Processed" or "Partly Processed" will be processed in the batch).
- Check that the order will not exceed the Debtor's credit limit.
- Check that the order isn't on hold.

If any of these conditions are met, the order is skipped. For other conditions that mean that the order cannot be supplied, e.g. if the order's account is on stop credit or if the order will result in negative stock, the order will open and the user will need to skip the order manually. (In the case of negative stock, depending on profile settings, the user may be given the option of skipping the order or allowing it to proceed.)

To improves the its robustness, the batch supply process checks each order as it is loaded, so that, for example, if an order is opened and supplied by another user while the batch is processing, this will be detected and the order will be skipped in the batch.

Once the process is complete, a summary window is displayed, listing all orders that were not processed and the reasons why:

File       Help         Copy Order Numbers       Order No         Reason       0022         10022       Order skipped manually while processing         10021       Order status is not unprocessed or partly processed         10020       Order status is not unprocessed or partly processed         10010       Order status is not unprocessed or partly processed         10017       Order status is not unprocessed or partly processed         10018       Order locked by another user         10016       Order locked by another user         10015       Order status is not unprocessed or partly processed         10016       Order status is not unprocessed or partly processed         10017       Order status is not unprocessed or partly processed         10018       Order status is not unprocessed or partly processed         10019       Order status is not unprocessed or partly processed					
10022       Order skipped manually while processing         10021       Order status is not unprocessed or partly processed         10020       Order status is not unprocessed or partly processed         10019       Order status is not unprocessed or partly processed         10017       Order locked by another user         10016       Order locked by another user         10015       Order status is not unprocessed or partly processed					
10021       Order status is not unprocessed or partly processed         10020       Order status is not unprocessed or partly processed         10019       Order status is not unprocessed or partly processed         10017       Order locked by another user         10016       Order locked by another user         10015       Order status is not unprocessed or partly processed	-				
10020       Order status is not unprocessed or partly processed         10019       Order status is not unprocessed or partly processed         10017       Order locked by another user         10016       Order locked by another user         10015       Order status is not unprocessed or partly processed					
10019       Order status is not unprocessed or partly processed         10017       Order locked by another user         10016       Order locked by another user         10015       Order status is not unprocessed or partly processed					
10017       Order locked by another user         10016       Order locked by another user         10015       Order status is not unprocessed or partly processed					
10016 Order locked by another user 10015 Order status is not unprocessed or partly processed					
10015 Order status is not unprocessed or partly processed					
	10016 Order locked by another user				
10014 Order status is not unprocessed or partly processed					
10013 Order status is not unprocessed or partly processed					
10012 Order status is not unprocessed or partly processed					
10011 Order status is not unprocessed or partly processed					
<	E.				

Clicking **Copy Order Numbers** copies a comma-separated list of the skipped orders to the clipboard. This list can then be pasted into the **Order # List** field of the Sales Orders - Extra Filter Options window to display only the skipped orders in the main Sales Order search grid.

# Search Templates

Search templates are pre-defined SQL filters that can be applied to stock and company record searches in the EXO Business system. Search templates can take in parameters such as a Debtor account number, so that they can return results specific to one record. Search templates were introduced in EXO Business 8.7 SP2; initially they were only available for use via the EXO API.

#### Setting up Search Templates

This release adds the ability to create and edit search templates using the EXO Business Configurator, in the new **Business Admin > Search Templates** section:

ile <u>A</u> ccount <u>H</u> elp		1.00					
🚦 🚮 Company 🖏 Essential 📷	Admi	n 🚽 Syst	em 🕺 Profiles 🖃 Forms 🐔 Staff 🔆 Utilities			_	
Business Admin	*	New 1	🛛 🚽 Save 🗙 Cancel 🛛 🖬 Delete 🚺 🔌 🕨	1			
<ul> <li>Search Templates</li> </ul>				-1 -11			
<ul> <li>Search Templates</li> <li>Courier</li> </ul>		Search Te	mplate Type: All 🔹 🗌	Show All			
Courier Setup		Templates	Details				
Stock Request Types			I	1	1		-
4 Period		Id	Name	Active	Туре		
Current Period     Financial Year     Period Statuses		1	Last 100 items sold to this account	Y	Stock		
			2 Available stock	Y	Stock		
	=	3	Previous invoices to this account	Y	Stock		
- Period History		4	Top 10 items sold to this account by value	Y	Stock		
▲ Bulk Update			5 Sell down items	Y	Stock		
Geo Coding		6	5 Customers that owe me money	Y	Geolocation		
# Banks		7	Customers with current orders	Y	Geolocation		
Debtors (Direct Debit)     Creditors (Direct Credit)     Bank Formats (Reconciliation)		8	Customers active in last 30 days	Y	Geolocation		
		9	Prospects active in last 30 days	Y	Geolocation		
		10	My active companies	Y	Geolocation		
4 General Ledger		11	All active companies	Y	Geolocation		
- Account Groups		15	2 Bill of materials	Y	Stock		

The Search Templates screen lists all existing templates. You can filter the list by type (currently available types are Stock and Geolocation).

#### New Features

Click **New** to create a new search template or double-click on an existing template to edit it. You can enter and edit the SQL statement that defines the search template on the Query sub-tab:

<b>H</b>	MYOB EXO Configurator - Demo Mode 👝 🔳	23
: <u>F</u> ile <u>A</u> ccount <u>H</u> elp		
፤ ሮዬ 🛛 🚮 Company 🖓 Essential  🗃 🗛	dmin 🞐 System 🕺 Profiles 🖃 Forms 🕰 Staff 🔆 <u>U</u> tilities	
Business Admin     Search Templates     Search Templates     Courier     Courier Setup     Stock Request Types     Period     Current Period     Financial Year	New       Save       Cancel       Delete       Name:         Search Template Type:       Stock       Show All         Templates       Details       Show All         Parameter list       Ølation       Ølation         DECLARE       @Accive       Ølation         DECLARE       @Accivo       Image: Construction         Outry       Preview       Generated SQL         Availability       Parameter       Image: Construction of the second state second sta	

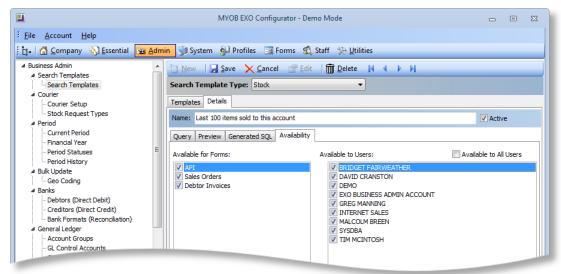
You can use the **Parameters list** dropdown to enter parameters into the statement.

**Note:** See the *Search Templates* white paper on the EXO Business Education Centre for information on how to create SQL statements for search templates.

The **Active** check box lets you mark a template as active or inactive. Inactive templates are not available for selection on interfaces that support search templates.

The Preview sub-tab displays the results of a search using the entered SQL statement, while the Generated SQL sub-tab displays the SQL statement that will be generated from the query on the Query sub-tab—if any problems are detected with the query, this can be used to debug them.

The Availability sub-tab lets you control where and to whom each template will be available:



The **Available for Forms** section lets you specify which EXO Business forms the search template will be available on, and whether or not it should be available via the EXO API. The **Available to Users** section lets you specify which users the template should be available to; an **Available to All Users** option is also available.

## Suggested Quantities

Stock search templates can return suggested quantities for stock items. When searching for a stock item on the Stock Search window (see page 24), stock quantities will default to the suggested quantity if one is present.

To use suggested quantities, a field named SUGGEST\_QTY must be included in the search template query; the value of this field can be calculated however you want.

#### Using Search Templates

Search templates can now be used to filter stock searches when selecting a stock item for a transaction line, e.g. on a Sales Order or Debtor Invoice.

The Stock Search window contains a new dropdown, which displays all of the search templates that have been defined for Stock searches:

_	ock Search										
File	Navigate H	elp									0
1	Vew 🔄 Co	py item 🛛 🍸 <u>F</u> ilter	<u>√ S</u>	elect & Close 🔹	🗙 <u>C</u> ancel	🚞 View I	mage 🛛 🙀	4			
Desc	ription:										
		mplate: None									
	Search key: Eilter by Stock Group:										
			5	Search 🚽	exact phra		) Stock group		- <b>F</b> -		
-					a all words		g block group	(Coar			
Include inactive items				None				(Coar			
	Code	Description	ription Last 100 items so			count		ine)	Stock Group (	Coar	
	@		Available stock 0. NO GROUP SEL							Ξ	
	AIRFIL01	OVALCHROME AIR FI	Previous invoices to this account 0. NO GROUP SEL.						SEL	1	
	AIRFIL012PK	OVALCHROME AIR FI		Top 10 items sold to this account by value 0.1						SEL	
	AIRFIL05	PRO-STLYE AIR FILTE		Sell down items		ouncey ru	u.c		0. NO GROUP	SEL	1
	AIRPRE01	AIR PRESSURE GAUG		Sen donn herrs					0. NO GROUP SEL		
	AIRSUS01	AIR SUSPENSION		Bill of materials				k SU	0. NO GROUP	SEL	
	ALARM01	REMOTE CAR START	SECU	RITY	22		8. CAR CARE	& AC	0. NO GROUP	SEL	
	ALARM05	SECURITY ALARM			20		8. CAR CARE	& AC	0. NO GROUP	SEL	
	ALLOY1011	ALLOY WHEELS STYLE	101	14X6.0	10		6. WHEELS &	TYRES	0. NO GROUP	SEL	
	ALLOY16	1991-1993 STYLE GT	PONY	WHEEL	1		3. STEERING	& SU	0. NO GROUP	SEL	
	ALLOY5SET	ALLOY WHEELS STYLE	101	14X6.0	0		6. WHEELS &	TYRES	0. NO GROUP	SEL	
	ALTNTR001	65AMP NOMINAL ALT	ERNA	TOR	8		2. ELECTRICA	L	0. NO GROUP	SEL	
	AMPEQL01	MOBILE TMG AUDIO	AMPLI	FIER/EQUALISER	0		14. AUDIO		0. NO GROUP	SEL	
	ANTROL01	ANTIROLL BARS			4		3. STEERING	& SU	0. NO GROUP	SEL	Ŧ

Selecting a search template immediately filters the Stock Search window according to the selected template. The currently selected template is displayed at the top of the window. The new **Filter** button on the Stock Search window's toolbar can be used to toggle the filtering on and off.

When a stock item is selected, the **Sel Qty** amount defaults to the item's suggested quantity, as calculated by the search template. (The quantity defaults to 1 if the template does no defined a suggested quantity.)

**Note:** This release adds further enhancements to the Stock Search window—see "Stock Search Enhancements" below.

# Stock Search Enhancements

Several enhancements have been made to the Stock Search window, in addition to the introduction of search templates (see page 24).

File	Navigate H	elp					¢			
۱ 🖒	New 🔄 Co	py item 🛛 🍸 <u>F</u> ilter 🧹 <u>S</u> elect & Close	X Cancel	🔛 View	Image 🛛 🚺 🖣	▶ M				
Description: PRO-STLYE AIR FILTER Current Search Template: None										
	h <u>k</u> ey: dude inactive ite	Search 🗸	Method: exact ph all words at least of	;	<ul> <li>Filter by Stock Gro</li> <li>Stock group (Fine)</li> <li>Stock Group (Coar</li> </ul>					
	Code	Description	Qty	Sel Qty	Stock group (Fine)	Stock Group (Coar	Ι			
	@		0		0. MISC ITEMS	0. NO GROUP SEL	1			
	AIRFIL01	OVALCHROME AIR FILTER	14		1. ENGINE	0. NO GROUP SEL	1			
	AIRFIL012PK	OVALCHROME AIR FILTER	0		1. ENGINE	0. NO GROUP SEL	1			
1	AIRFIL05	PRO-STLYE AIR FILTER								
	AIRPRE01	AIR PRESSURE GAUGE	9		9. TOOLS	0. NO GROUP SEL	1			
1	AIRSUS01	AIR SUSPENSION	2	1	3. STEERING & SU	0. NO GROUP SEL				
1	ALARM01	REMOTE CAR START SECURITY	22	1	8. CAR CARE & AC	0. NO GROUP SEL				
	ALARM05	SECURITY ALARM	20		8. CAR CARE & AC	0. NO GROUP SEL	1			
1	ALLOY1011	ALLOY WHEELS STYLE 101 14X6.0	10	4	6. WHEELS & TYRES	0. NO GROUP SEL				
	ALLOY16	1991-1993 STYLE GT PONY WHEEL	1		3. STEERING & SU	0. NO GROUP SEL				
	ALLOY5SET	ALLOY WHEELS STYLE 101 14X6.0	0		6. WHEELS & TYRES	0. NO GROUP SEL				
	ALTNTR001	65AMP NOMINAL ALTERNATOR	8		2. ELECTRICAL	0. NO GROUP SEL				
	AMPEQL01	MOBILE TMG AUDIO AMPLIFIER/EQUALISER	0		14. AUDIO	0. NO GROUP SEL				
	ANTROL01	ANTIROLL BARS	4		2 STEEDING & CU	0. NO GROUP SEL				

The window now supports multi-select; users can tick the checkboxes next to multiple stock items, and when **Select & Close** is clicked, all selected stock items will be added as lines to the parent document (Sales Order, Debtor Invoice, etc.) Ticking the checkbox in the column header selects all displayed stock items.

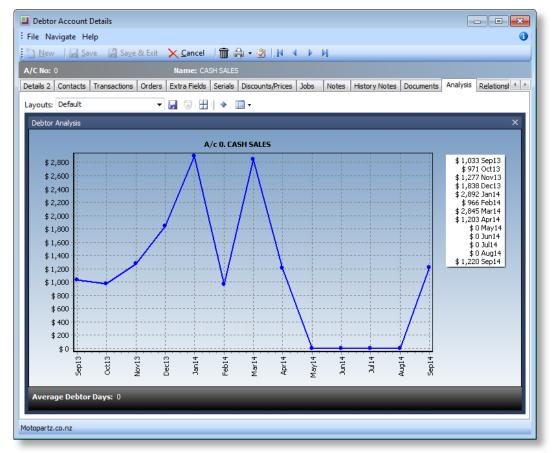
A new **Sel Qty** column lets users enter a quantity for each stock item before adding them (entering a quantity automatically ticks the item's check box if it isn't already ticked). When a stock item's check box is ticked, the **Sel Qty** amount defaults to the item's suggested quantity, as calculated by the selected search template. (The quantity defaults to 1 if the template does not define a suggested quantity.)

Right-clicking on the grid header and selecting **Save column settings** now saves the grid layout separately for each search template; you can have a different layout for each search template and swap between them.

### New Features

## Updated Analysis Tabs

The graphs on the Analysis tabs of the Debtors, Creditors, Stock and General Ledger windows have been replaced with dashboard widgets:



As dashboards, the Analysis tabs can now be customised with whatever layout of widgets you require. Grid, Pivot and Report widgets placed on the new Analysis dashboard tabs can use the relevant parameters (Current Debtor Account, Current Stock Code, etc.) to show the current record.

# Sales Order Print and Email Options

This release includes changes that simplify the system for users who commonly email Sales Orders without printing them. A new **Email** button is available on the Sales Order window toolbar:

📕 Sales Orders										) <b>x</b>
File Utilities Help										6
🐚 <u>N</u> ew 🛛 🛃 <u>S</u> ave	😭 Sa <u>v</u> e & Exit	X Cancel	le 😓 😓	🔹 🧾 Narrative	🄰 New Activity	🗿 Quick Supply	🔛 Supply	🖃 🏅 Addresses	More Actions	•
Order #: 10021	Status: Fully Pro		Period: Octo	ber 2014 Ph	ione: 09-476 1430		1431			
Details Activities Histor	y Notes Transac	tions Docum	ents							
Account: 2. ALL CAR	PARTS					Campaign	Wave:			
Salesperson:										

This button is always available (unlike the existing **Email** button on the Sales Order search window, which is controlled by the **Sales order form email option** profile setting as in previous versions).

A new profile setting is available to prevent the system from prompting users to print Sales Orders whenever they are closed or processed. When the **Suppress Sales Order print prompt** setting is enabled, no print prompts will be supplied to users. The setting is disabled by default.

## Custom Search Fields on Non Accounts

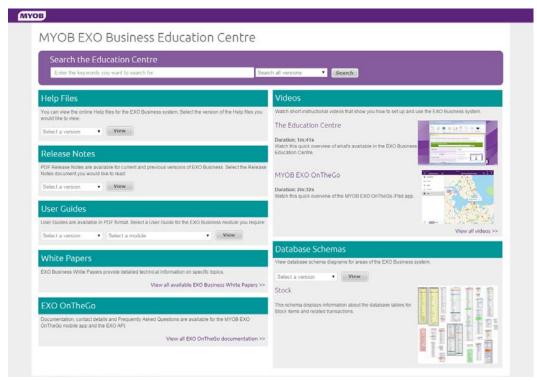
This release adds the ability to set up extra search fields for the Non Account search window. Extra fields are added by editing the new **Extra Prospect Search Fields** profile setting (EXTRA\_PROSPECTS\_SEARCHFIELDS). This setting works in the same way as the existing settings for adding fields to other search window; documentation is included in the setting's description.

# Updated Sales Order Report

This release includes an updated version of the Sales Order Listing report (**SOHOrderListing.CLR**), which adds the ability to include or exclude lost quotes from the report. (Lost quotes are excluded by default.)

# Updated Education Centre

The EXO Business Education Centre has been updated with a new look and feel:



The Education Centre now has a more flexible layout, so that it will better suit displaying in a browser window or in an EXO Business URL widget.

# EXO Business Core

Service Request ID	Description
<b>12269359479</b> 110401523781 110253363641 19836639221 110133679281 19819910592 17729857611 17259671671 17141598651 17106602621 15468308776 15468308764 15468308752 15468308740 15468308728 15468308724 15468308711 14674244951 14373474701 14209210701 13517992521 13030789621 12995696008 12745916401 12700642471 12676495111 12549608244 12446914031 12435050101 12335936521 12266146968	When using the Copy Order function to copy a fully processed Purchase Order, the new order did not appear on the Orders tab of the related stock items and incoming stock levels for the stock items were incorrect. This has been resolved.
<b>11238581848</b> 12700864687 19985606451 15379896851 14918927951 13517133371 12739937331 12277282271 11928516282 11877405411 11860169048 11506563381 11329567891 11099859306	Sales Orders could process stock into negative levels even though the profile settings to prevent this were turned on, if a Sales Order had multiple lines of the same stock item, e.g. if an item had three stock remaining and a Sales Order had two lines of this item, each with a quantity of three, the order would be allowed to process, and would result in negative stock. This has been resolved; quantities are accumulated across lines when checking the order prior to processing it.
<b>12247309566</b> 18829373311 17150482642 15249229314 13857829511 13242440701 12596471041 12580139061 12320410101 12304858062 12240270668 12228971131 12233807922	When processing them via Quick Supply, Sales Orders would sometimes have no Invoice Now quantity. This has been resolved as part of the improvements to the Sales Order supply processes—see page 21.
<b>12760630176</b> 18634412556 17650822711 17607116851 15977991039 14116860767 13323184961 12908562461 12888739085 12755820436	On the Transactions tab of the General Ledger Account Details window did not filter transactions correctly when filtering by a date range. This has been resolved.
<b>11055949258</b> 110489300711 13030789401 12739937511 11506563500 11506563487 11506563455 11040689512	Credit Payments from the Payment Processor could cause imbalances during Bank Reconciliation, due to payments that had four decimal places instead of two. This has been resolved; transaction amounts are always rounded to two decimal places before being posted to the GL.

<b>12469344921</b> 12888739075 12446214691 11518111975 11518111932 11518111909 11518111766 11518092400	This release adds the ability to set up extra search fields on the Non Accounts search screen—see page 27.
<b>11156143167</b> 16475406501 13337920591 12379821301 11996316941 11288616701 11144041971	An option to print picking slips when supplying orders has been added to the Sales Orders window—see page 19.
<b>12258506912</b> 18977051581 18863923951 15373733371 14765716324 12244674705	Line narratives were not visible on partly processed Sales Orders. This has been resolved. This has been resolved as part of the improvements to the Sales Order supply processes—see page 21.
<b>12894553700</b> 12860291163 12860291156 12860291149 12860291141	If a Creditor account's <b>Default Invoice Mode</b> was set to "GL" and its <b>Default Code</b> was set to "G", errors would occur when creating a Creditor Invoice for the account. This has been resolved.
<b>11698333413</b> 110084904401 11693599601 11514991389 11514991312	Creditor discounts did not appearing on the Inwards Goods screen when the Allow manual entry/override of discounts on purchase order lines (POLINEDISCS) was enabled; the Allow manual entry of discounts on creditor invoice and purchase order lines (CRLINEDISCS) setting also had to be enabled. This has been resolved; the POLINEDISCS setting is no longer used and all references to it in the product have been replaced with references to CRLINEDISCS.
<b>11353682653</b> 11353682717 11353682683 11353682659 11353682642	When using a Perpetual Inventory system, reversing a transaction from the Transactions tab of the Stock Item Details window resulted in incorrect GL journals to the On Cost Variance Account. This has been resolved.
<b>11782254067</b> 11869132861 11770969631 11745070271	Items added to the Sales Order Supply screen did not pick up pricing, discounting or narratives defined for the Debtor, always defaulting to the base price. This has been resolved.
<b>11139360720</b> 12149993051 11133474681 11068037490	When using the <b>Supply All</b> button to supply a Sales Order where multiple lines were out of stock, and selecting to place some items on back order but not others, the resulting Supply Now and Back Order quantities were sometimes incorrect. This has been resolved.
<b>19913209253</b> 111528118014 110101767671 19723277461	Right-clicking on a Debtors Invoice GL code line resulted in the GL account's ACCNO being saved in the STOCKCODE column of DR_INVLINES instead of "@". This has been resolved.
<b>11786717591</b> 16370563442 11775313511	This release includes changes that simply the system for users who commonly email Sales Orders—see page 27.
<b>18796267052</b> 18559383106 18559383091	When running a remote session on Windows 8 or Windows Server 2012, EXO Business would freeze if the remote session disconnected and then reconnected or if the Switch User option was selected from the CTRL+ALT+DEL screen. This was due to the Activity Search dashboard widget freezing. This issue has been resolved; in these situations, the Activity Search widget now closes automatically.

<b>11767888854</b> 11760464271	The Analysis tab on the Stock Item Details window did not remember which options were selected between sessions. This has been resolved; the new Analysis tab dashboard widget (see page 26) remembers all settings.
12222066214 12212010661	Bin codes on the stock items added to a Sales Order were not updated if the location specified in the Sales Order's header was updated. This has been resolved.
<b>14549545875</b> 14548906941	Pressing CTRL+D on the Supply Details tab of a Sales Order opened the Qty Dimensions window, but did not copy in any dimensions that had already been entered for the line. This has been resolved as part of the improvements to the Sales Order supply processes—see page 21.
<b>15662336366</b> 15659941848	When a user went to the Supply Details tab of a Sales Order that had not yet been saved, no object lock was created for the order. This has been resolved.
<b>16594606295</b> 16355521601	When a Sales Orders was copied, the new order would have the same creation date as the original. This has been resolved; creation date, activation date and finalisation date are not copied to new orders.
<b>15011732284</b> 14995586371	The EXO Business Help did not mention the @COMPANYEMAIL parameter available for Business Alerts (this parameter is replaced with the email address of the associated Debtor account). This has been resolved; the documentation has been updated.
<b>12414587172</b> 11514712302	On the Debtors Payment/Receipt Batch Entry window clicking or tabbing onto the <b>Batch No</b> field reverted any changes made to the payment group. This has been resolved.
19032572571	The system performed slowly when many Analysis Codes had been set up. This release includes performance improvements that significantly speed up the operation of screens where Analysis Codes can be viewed or selected.
-	The labels and GL account links in the <b>Ledger Posting Profile</b> section of the Stock Item Details > Details 2 tab were incorrect for periodic stock users. This has been resolved.
-	It was not possible to update Extra Fields on activities. This has been resolved.

# Clarity Reports

Service Request ID	Description
<b>11734190211</b> 13216972236 12700642661 12247574432 12247574231 12228615764 12047256811 11990950031 11799353081 11793109931 11730075451 11674251091 11600565677	The General Ledger Detail by Branch report ( <b>GLMDetailbyBranch.CLR</b> ) repeated multiple lines for each transaction. This has been resolved.
<b>11379931024</b> 18782023911 12983572001 11380838246 11380838233 11380838218 11379931172 11379930634	The Stocktake Count Sheet report ( <b>STKCountsheet.CLF</b> ) did not respect the Sort Order options selected by the user. This has been resolved.
<b>14642415625</b> 14397322312	The Inventory Value Reconciliation Exceptions report (GLInvReconciliationException.CLR) incorrectly included WIP locations in the summary totals. This has been resolved.

# EXO Job Costing

Service Request ID	Description
<b>12954419700</b> 19684004622 19592791141 17035870061 12947497851	This release adds the ability to sort the Job Overview tab of the Job Details window by Due Date.
-	The ALINENO field (which determines the ordering of job and job transaction lines) was not populated correctly when entering time on the Direct Time Entry window. This has been resolved.

# EXO CRM

Service Request ID	Description
<b>19522197935</b> 19336687491	After upgrading to CRM Advantage, it was no longer possible to edit business flow menus for the EXO CRM application, as the "EXO Business CRM" option disappeared from the <b>Program</b> dropdown on the Business Flow Menu screen in the EXO Business Configurator. This has been resolved.
-	It was not possible to add Extra Fields to the OPPORTUNITY or OPPORTUNITY_QUOTE tables in the EXO Business Configurator if CRM Advantage was enabled; these tables were not present in the <b>Table name</b> dropdown on the Extra Fields screen. This has been resolved.
-	The Sales Team tab on the Staff screen in the EXO Business Configurator was not available if CRM Advantage was enabled. This has been resolved.

# EXO Intercompany

Service Request ID	Description				
<b>110475631669</b> 17582658601	When consolidating records, the PERIOD_SEQNO in the target database was recorded as that of the source database, which was likely to be invalid. This has been resolved; the system now behaves as follows:				
	<ul> <li>If a period does not exist in the target database and the profile setting Inter-Company ledger period synchronisation is set to "Do not enforce", then transactions for that period are no longer downloaded, but other transactions are.</li> </ul>				
	<ul> <li>If a period does not exist in the target database and the profile setting Inter-Company ledger period synchronisation is set to "Enforce", then the process stops and no transactions are downloaded.</li> </ul>				
-	On some windows, the status bar displayed the wrong company name. This has been resolved.				

# 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: <u>http://go.microsoft.com/fwlink/?LinkId=123422</u>
  - Windows PowerShell 1.0 you can download this from: <u>http://go.microsoft.com/fwlink/?LinkId=120552</u>
- 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 Help files if they have been installed on the local PC. See <u>Microsoft Knowledge</u> <u>Base article 892675</u> for more information on this issue and suggested workarounds.

#### 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.

# Appendix 1: Profile Settings

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

Name	Profile Name	Level	Description	Default	Refer
Allow manual entry/override of discounts on purchase order lines	POLINEDISCS	User	This setting is now hidden; all references to it in the product have been replaced with references to the setting <b>Allow manual entry of discounts on creditor invoice and purchase order lines</b> (CRLINEDISCS).	N/A	page 30
Extra Prospect Search Fields	EXTRA_PROSPECTS_ SEARCHFIELDS	User	This setting lets you add extra search fields to the Non Account search window.	Blank	page 27
Sales orders process action 'Picking Slip' switch	SOPRINTPICKSLIP	User	This setting determines the default status of the new <b>Picking slip</b> option on the Supply Details tab of the Sales Orders window.	Unticked	page 19
Suppress Sales Order print prompt	SO_SUPPRESS_PRINT	User	When this setting is ticked, users will not be prompted to print a Sales Order when it is processed or saved.	Unticked	page 27