



MYOB EXO BUSINESS 8.8

Release Notes



MYOB ENTERPRISE SOLUTIONS



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Contents

Introduction	1
What's New in this Release?	1
Installation	2
Pre-Install Requirements	2
Database Server	2
Client Workstation	3
Other Requirements	3
Installing MYOB EXO Business	4
Post-Installation	11
Logging in to EXO Business	11
Installing EXO Business Services	12
Setting up the Services	15
New Features	17
Important Upgrade Notice	17
CRM Advantage	17
Geolocation	20
Bulk Loading Location Details	21
New Search Template	22
Improvements to Data Verification	22
Business Alert Email Parameters	23
Work in Progress Changes	24
Updates to the Ledger Reconciliation Widget	24
Job Costing Timesheets	25
New Business Alerts	25
Education Centre URL Profile Setting	25
Search Templates	26

Resolved Issues	28
EXO Business Core.....	28
EXO Job Costing.....	29
EXO CRM	29
Known Issues	30
Appendix 1: Profile Settings	31

Introduction

What's New in this Release?

The focus of the 8.8 release is on addressing issues identified in the 8.7 and previous releases of EXO Business.

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 [Minimum System Requirements page on the MYOB website](#).

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® 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
 - Microsoft SQL Server 2012/SQL 2012 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/ms165672.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® 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® 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 8.8 requires **ExonetLib.dll** version 8.8.0 or later. Version 8.8.0 is included with this release.

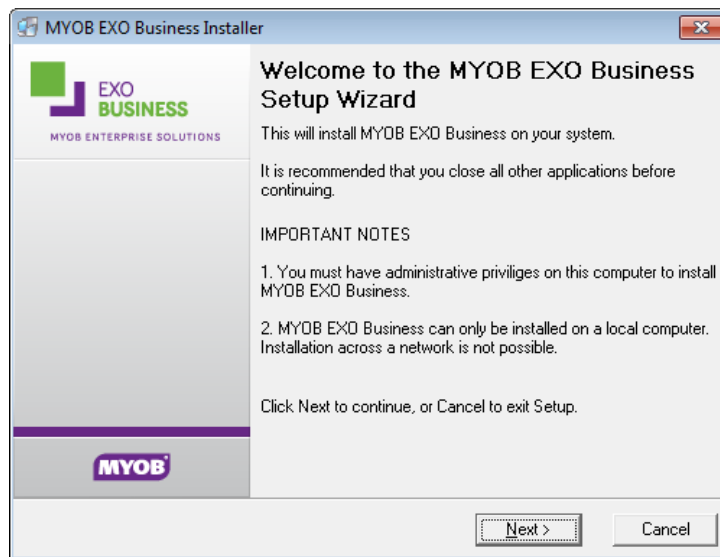
When installing manually on 64-bit operating systems, the file **RwEasyMAPI64.exe** must be copied from the **Supporting Files\RapWare** folder of the EXO Business DVD to the install directory. Register this file by running `RwEasyMAPI64.exe /regserver` from a command prompt.

Installing MYOB EXO Business

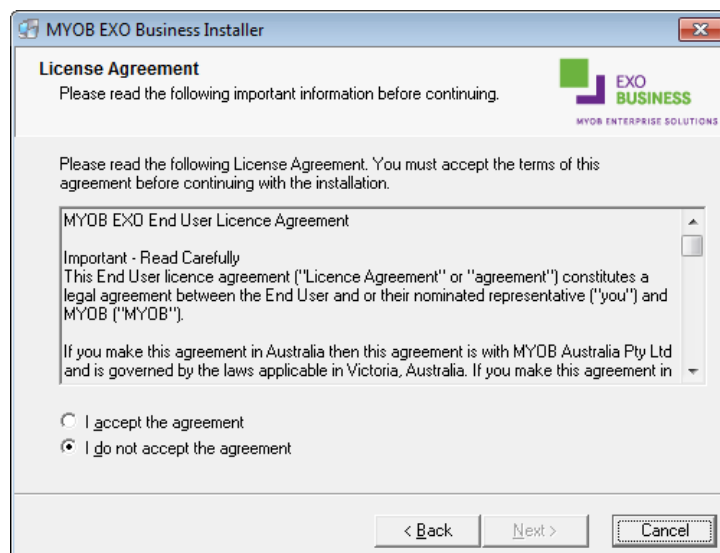
Note: Before you install this release, we recommend you take the precaution of backing up your data. Ensure there are no EXO Business modules running, locally or on your network.

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**.



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

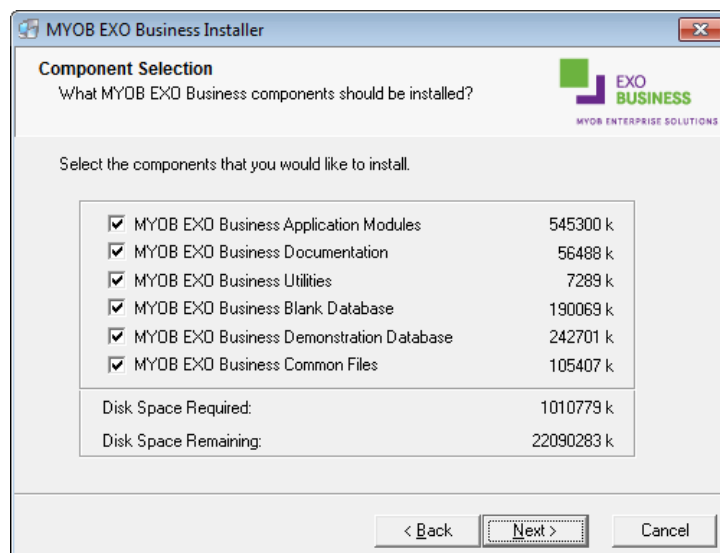


Note: Your selection here affects certain country-specific default settings that are set up during the install, e.g. tax rates and banks.

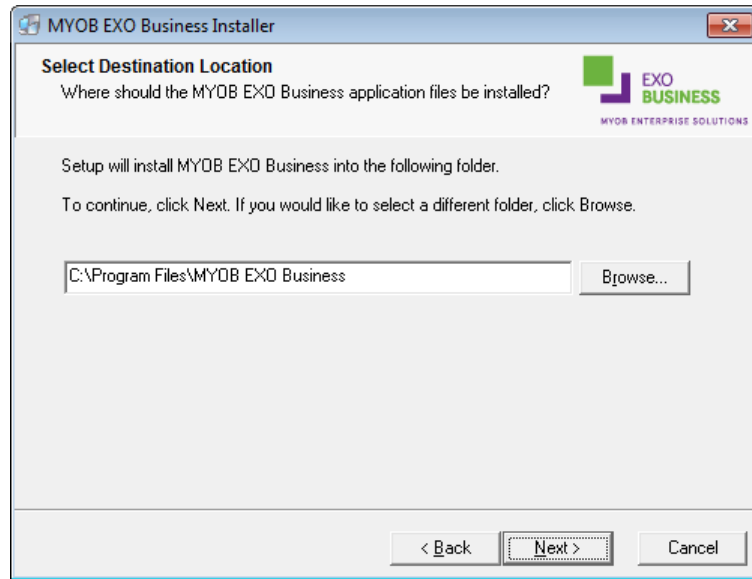
5. Select the components to install. Choose from:

- 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

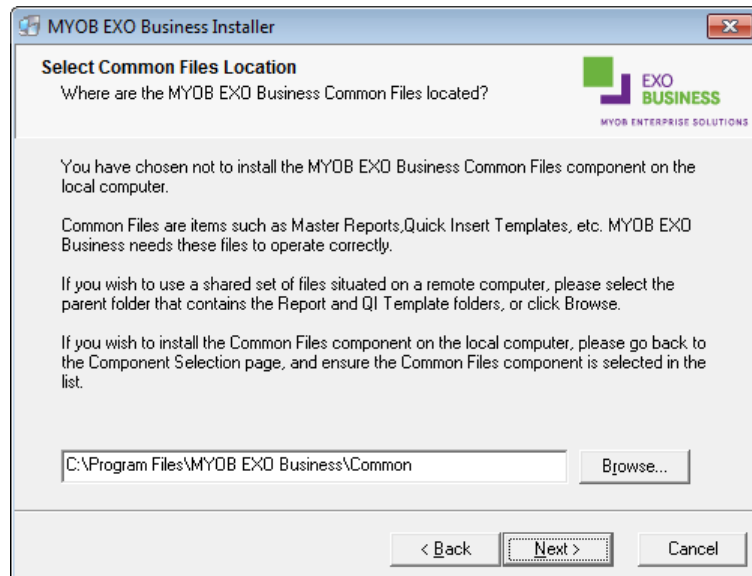
Click **Next** to continue.



6. 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**.



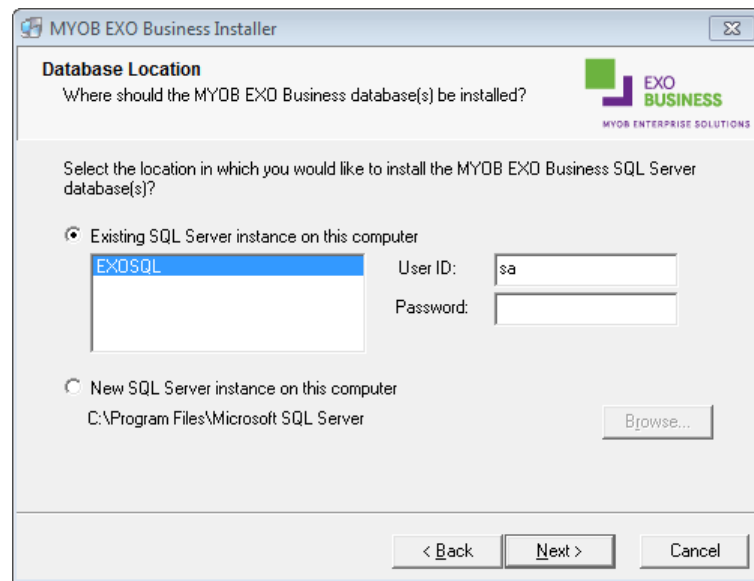
7. If the MYOB EXO Business Common Files are not installed on this PC, click **Browse** to choose the directory where the Common Files are located, then click **Next**.



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 R2 SP1 Express Edition.

Note: See the Known Issues section on page 30 for information on the install prerequisites for SQL Server 2008 R2 SP1.

Click **Next**.



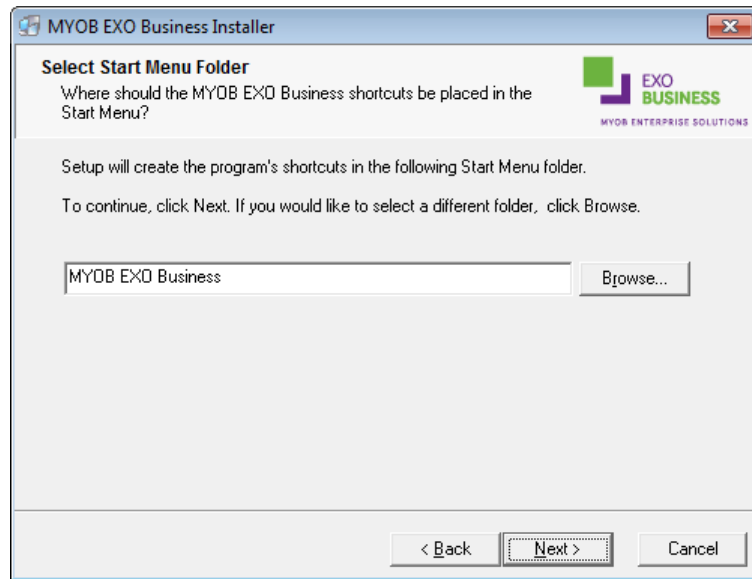
Note: The installer may appear unresponsive while it tries to detect SQL Server instances on the PC (this process may take a minute or more). Do not cancel the installer; simply wait until the detection operation is complete.

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

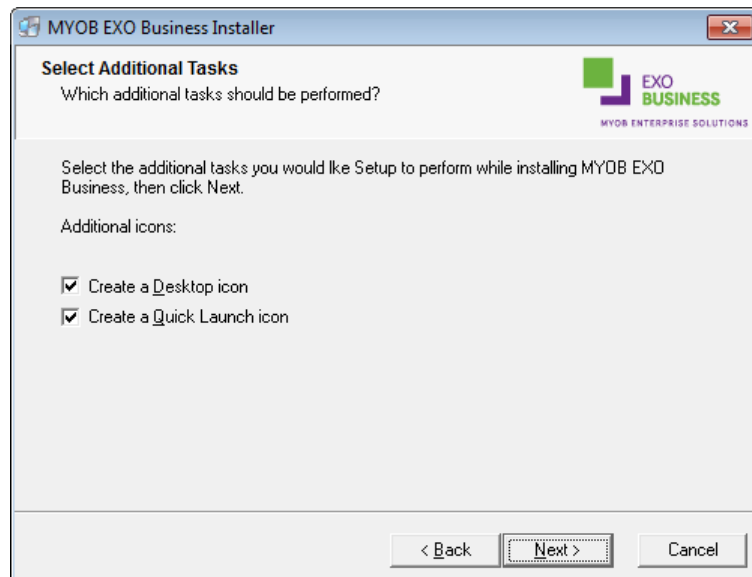
- Username: **sa**
- Password: **\$ExoAdmin7000**

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.

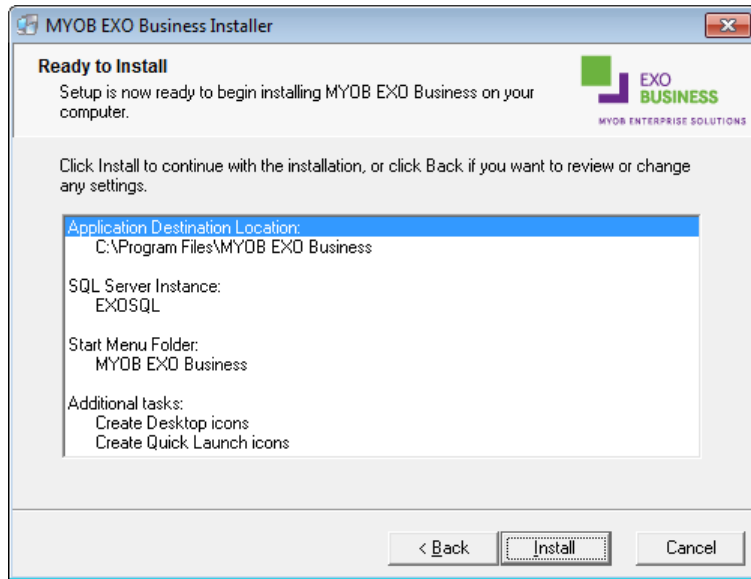
9. Click **Browse** to choose where the MYOB EXO Business shortcuts should be located in the Windows Start menu, then click **Next**.



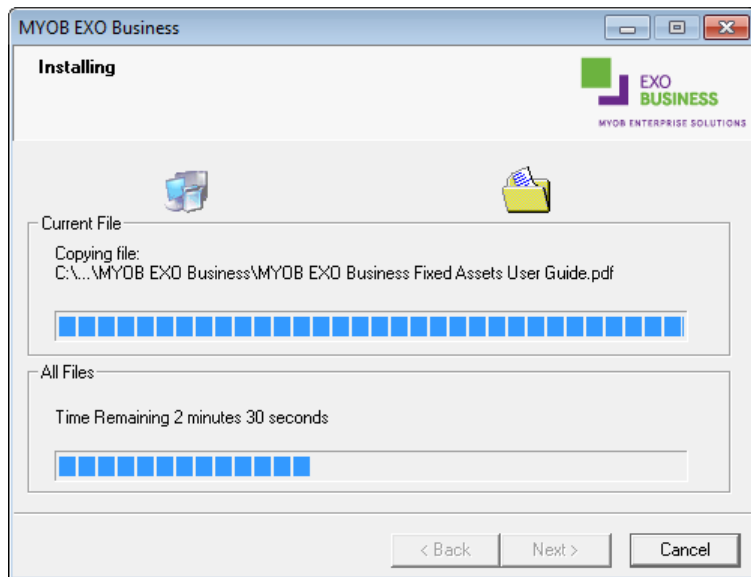
10. If you want to create a desktop icon or Quick Launch icon for MYOB EXO Business, tick the relevant box(es), then click Next.



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.



12. The installation progress is displayed.



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

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 should be connected to?

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Enter the details of the SQL Server database to which you want MYOB EXO Business

SQL Server computer name: NZAKL005401W

SQL Server instance name: EXO\$SQL

Database name: EXO_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.

MYOB EXO Business Installation Wizard

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Completing the MYOB EXO Business Setup Wizard

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.

I want to explore the MYOB EXO Business demonstration database (Run MYOB EXO Business)

I want to configure a new clean MYOB EXO Business database (Run Configuration Assistant)

I'm done for now, return to Windows

MYOB

Finish

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

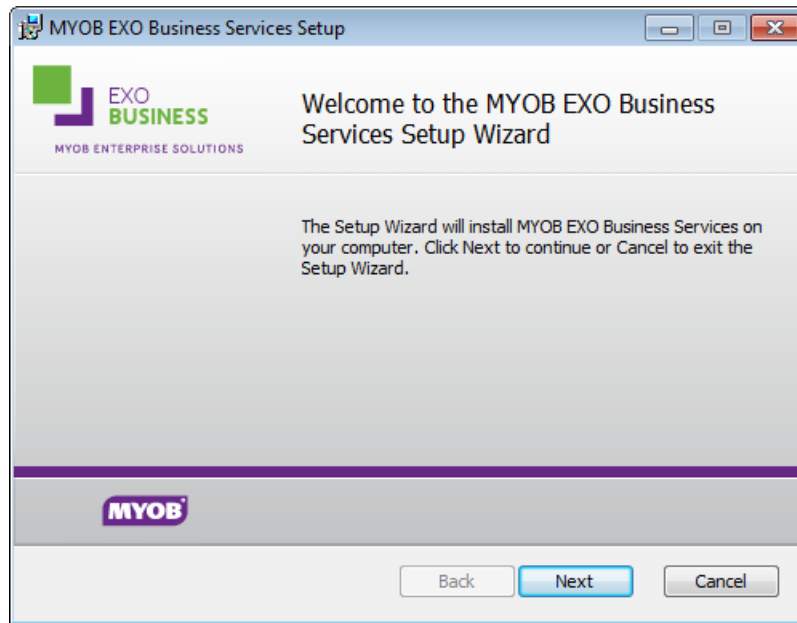
Note: Passwords are case-sensitive.

Installing EXO Business Services

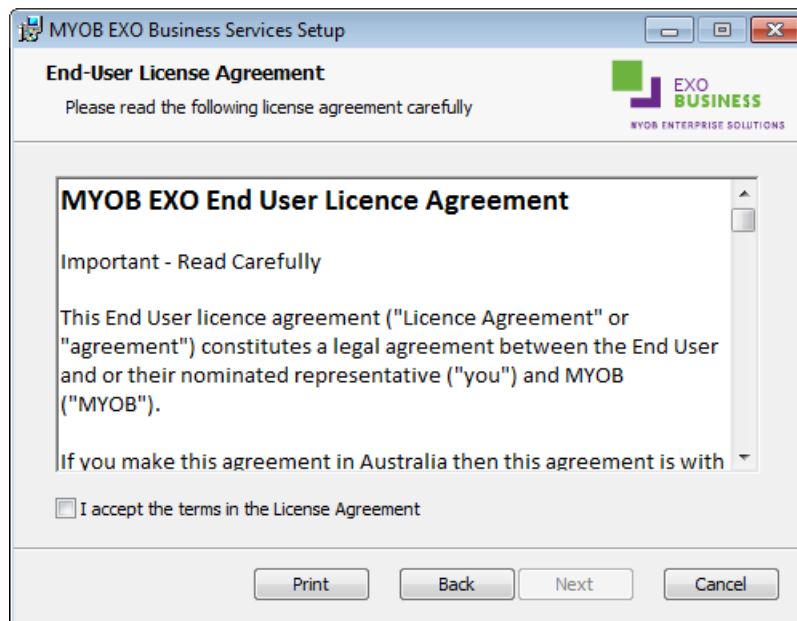
Once the EXO Business system is set up, you can install supporting services for the EXO API and EXO Email Service using the EXO Business Service Setup Wizard, **EXO Business Services Installer.msi**. This installer is supplied with the main EXO Business installer. It must be run on a server that already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

To perform the installation:

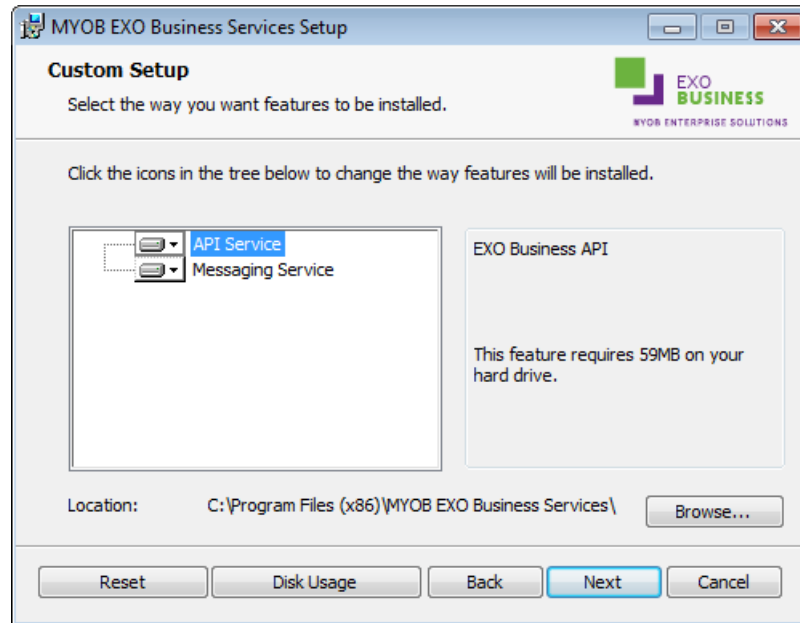
1. Double-click on the installer to run it. The welcome screen appears:



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.

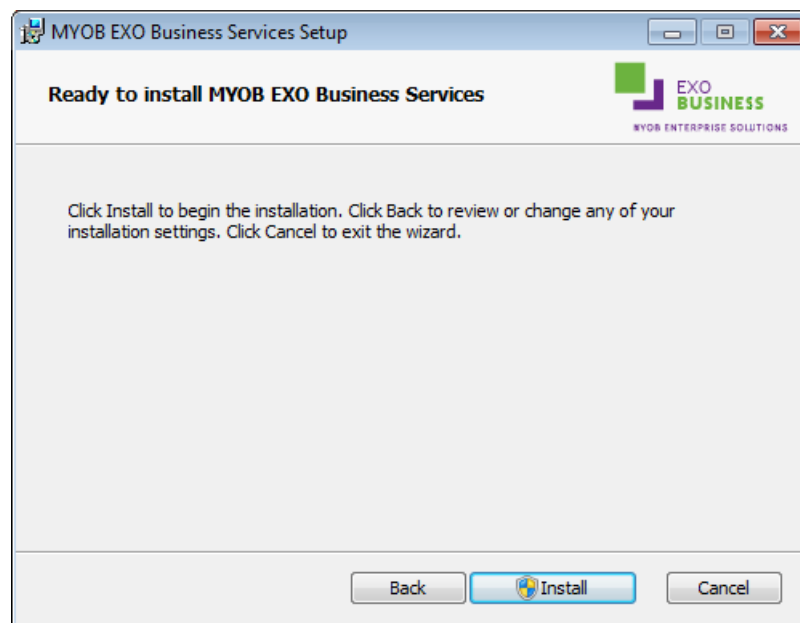


4. Select which components to install. Choose from:

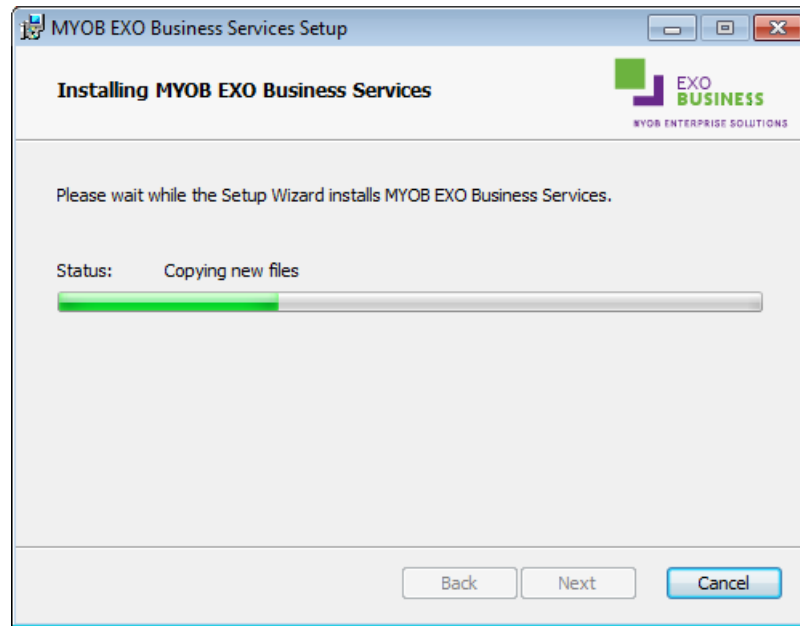
- The EXO API Service
- The EXO Messaging Service

Note: The API configuration utilities are always installed (see “Error! Reference source not found.” on page Error! Bookmark not defined.).

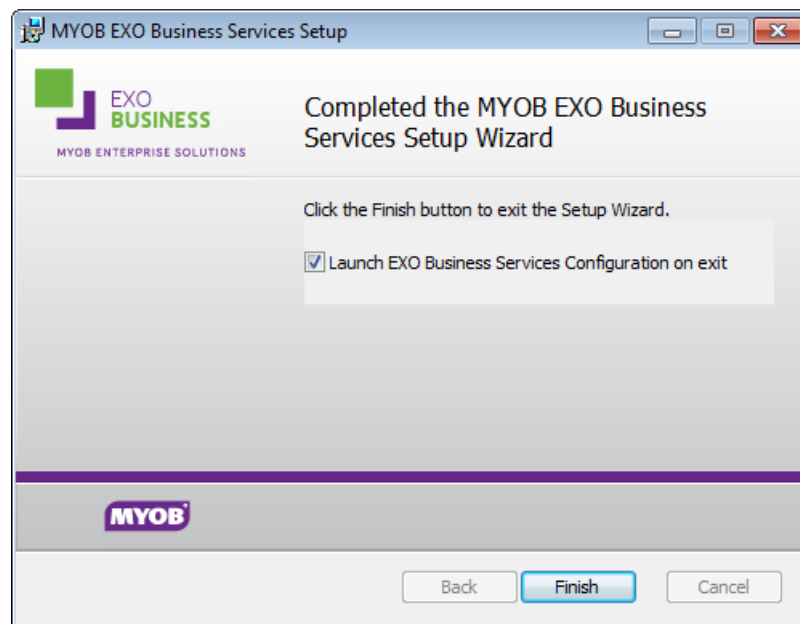
5. The install location is displayed at the bottom of the window. Click **Browse** to choose a different location if necessary.
6. Click **Next**. You are now ready to install the EXO Business services.



7. Click **Install** to begin 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.

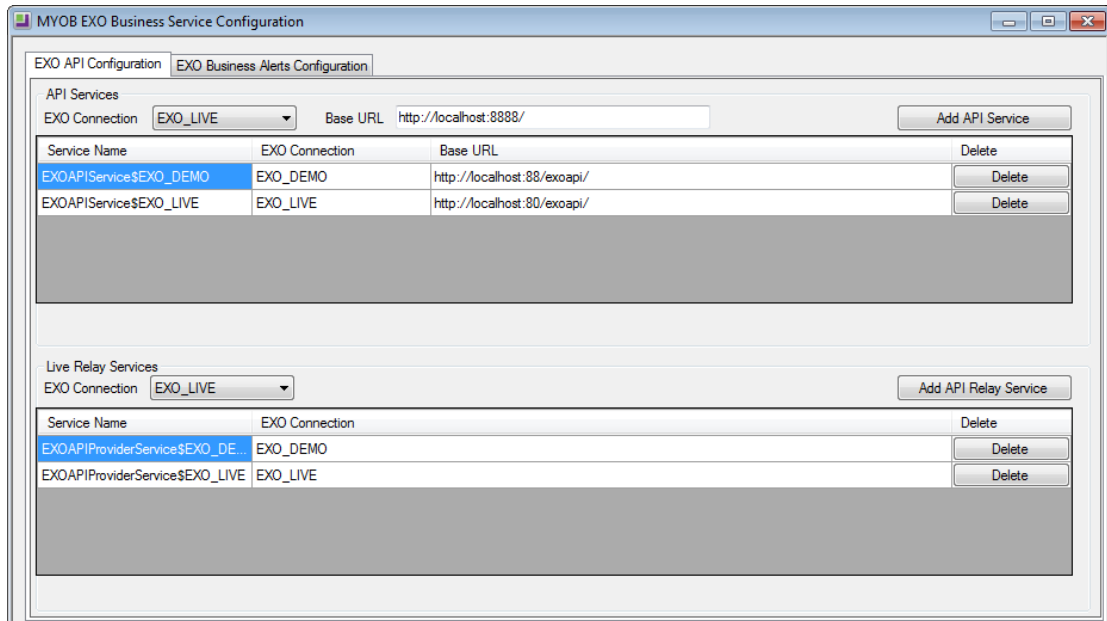


Note: The EXO Business Service Configuration utility is installed in the same location as the EXO API services. You can run the utility (`MYOB.ED.EXO.Cloud.ServiceConfig.exe`) from this location at any time.

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 services are installed on, using an account with administrator privileges.



The utility displays configuration settings for the following services:

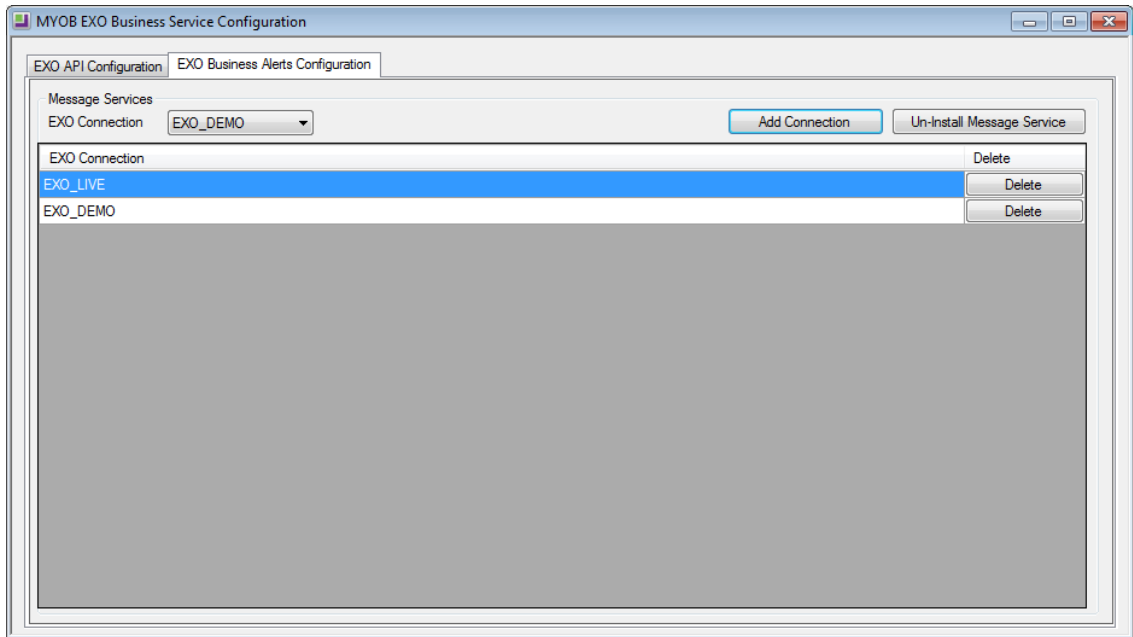
- EXO API Configuration
 - API Services – this is the main EXO API service.
 - API Provider Services – this service connects the EXO API to the online relay. This service is only needed this if you want to communicate with the EXO API remotely.
- EXO Business Alerts Configuration
 - Message Services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

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.



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

Important Upgrade Notice

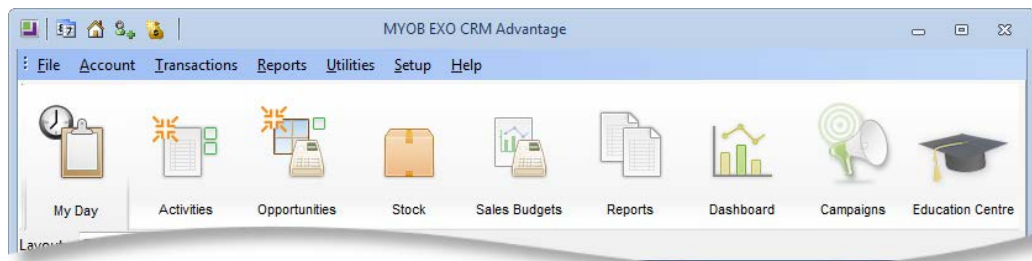
The **Exonetlib.dll** DLL has been updated in this release. When upgrading manually, make sure to install and register the upgraded DLL—its version number should be **8.8.0.xxx** or later.

CRM Advantage

This release introduces EXO CRM Advantage: an enhancement to the EXO CRM module that extends its existing feature set with additional functions commonly required by sales reps and account managers.

EXO CRM Advantage is a separately licensable module of MYOB EXO Business, and replaces the EXO CRM module. To use it, you must purchase CRM Advantage licences for all of your current CRM users—it is not possible to have a mixture of CRM and CRM Advantage licences. Once the new “EXO CRM Advantage” licence module is added and configured in the EXO Configurator, all CRM users are given access to the new CRM Advantage functions.

When EXO CRM Advantage is licensed, the title bar of the EXO CRM module displays “MYOB EXO CRM Advantage”, and the module’s dropdown menus are updated to provide access to the new functions:



Adding CRM Advantage to a system adds the following features to the EXO CRM module:

- Users can set up pricing and discounting details from within EXO CRM. This includes access to the Discounts/Prices tab on the Debtor Account Details window and access to the Price Change Scheduler, Price Update Utility and Setup Price Policies functions.
- Users can create a Sales Order directly from EXO CRM, without first having to save it as a quote.
- Users can edit Sales Orders from within EXO CRM, provided they have the status “Not Processed”, “Quotation”, “Standing Order” or “Layby”.

- Users can access the **Generate POs** button on the Sales Order window to create “back-to-back” Purchase Orders (but cannot create Purchase Orders in any other way).
- Users can create and edit stock items from within EXO CRM, including One-Off Stock items.
- Users can create and edit Bills of Materials in EXO CRM.
- Serial number and batch number searching and tracking functionality is available in EXO CRM. This includes access to the Setup Stock Serial Numbers, Serial Number Tracking and Setup Stock Batch Code functions.

Note: Users cannot process Sales Orders, supply stock or raise invoices from EXO CRM. Similarly, users cannot process Bills of Materials.

The following table details the differences in functionality between EXO CRM and EXO CRM Advantage:

Module	Functionality	EXO CRM	EXO CRM Advantage
CRM	Opportunities	Full	Full
	Campaign Management	Full	Full
	Sales Budgets	Full	Full
Sales & Customers	Debtors, Prospects & Contacts Master Data	Partial	Full
	Sales Quotation	Full	Full
	Sales Order Entry	Quote only, no edit	Full entry & edit
	Back-to-Back Purchase Order Creation		Full
	Sales Order Supply		
	A/R Invoices & Credits	View	View
	A/R Payments, Deposits & Refunds		
Purchasing & Suppliers	Creditor Master Data	View	View
	Purchase Order		Back-to-back only
	Purchase Receipt		
	Landed Costs		
	A/P Invoices & Credits	View	View
	A/P Payments & Refunds		

Marketing	Contacts	Full	Full
	Marketing Lists	Full	Full
	Activities and Tasks	Full	Full
	Bulk Email	Full	Full
Inventory	Inventory	View	Full
	One-Off Stock Items		Full
	Serial Numbers & Batches		View
	Stock Transfer		
	Stock Take		
	Price Policies and Discounts	Partial	Full
	Bill of Materials		Full
	Works Orders / BOM Processing		
General	Calendar	Full	Full
	Dashboards	Full	Full
	Reporting	Full	Full
	Business Alerts	Full	Full

Geolocation

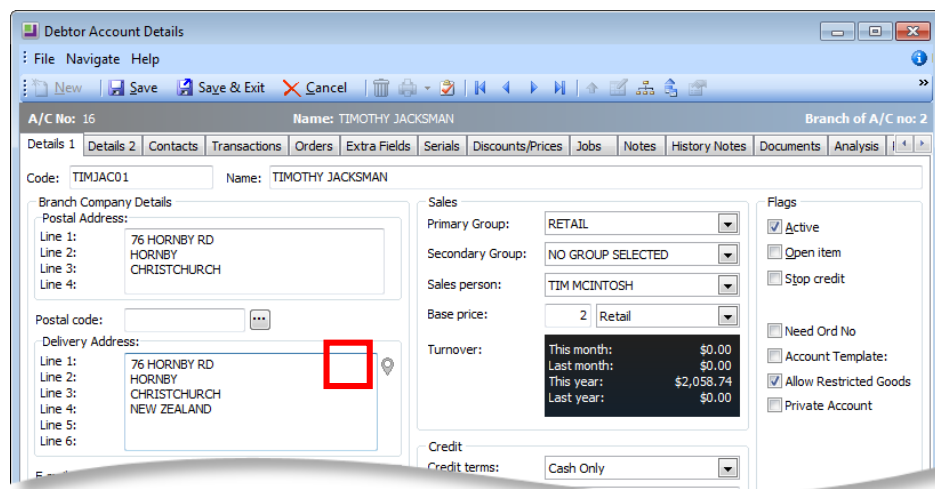
Geolocation information (latitude and longitude) can now be saved for Debtors, Creditors, Non Accounts and Contacts, based on their addresses. This information can be used by the EXO API and the EXO OnTheGo mobile app—search templates are available to return accounts that are located near the user, for example.

Geolocation features are turned off by default, and can be activated using the new profile setting **Prompt for unset map coordinates on saving delivery addresses**, which has the following options:




- Disable map locating features – geolocation details are never retrieved for records. Geolocation information will not be returned when querying accounts via the EXO API and the `geolocationtemplate` endpoint will be unavailable.
- Always prompt for un-mapped delivery addresses – when a delivery address is entered or changed a dialog box appears, asking the user if they want to retrieve new details.
- Never prompt for un-mapped delivery addresses – the system will automatically retrieve geolocation details whenever a delivery address is entered or changed.

Note: By enabling geolocation features you consent to send information to MYOB and for us to relay part of this information to Microsoft in accordance with the Microsoft Online Privacy Statement (see <http://go.microsoft.com/fwlink/p/?LinkId=253457>) in order to retrieve mapping coordinates and confirmation of the existence of a physical address. See the new “Geolocation Features” white paper for more information. This white paper is available on the EXO Business Education Centre.

Geolocation information is based on the account’s delivery address. The system uses Microsoft’s Bing API to query Bing Maps for latitude and longitude details when the new Location button next to the address is clicked:



The icon on this button indicates the status of the query:

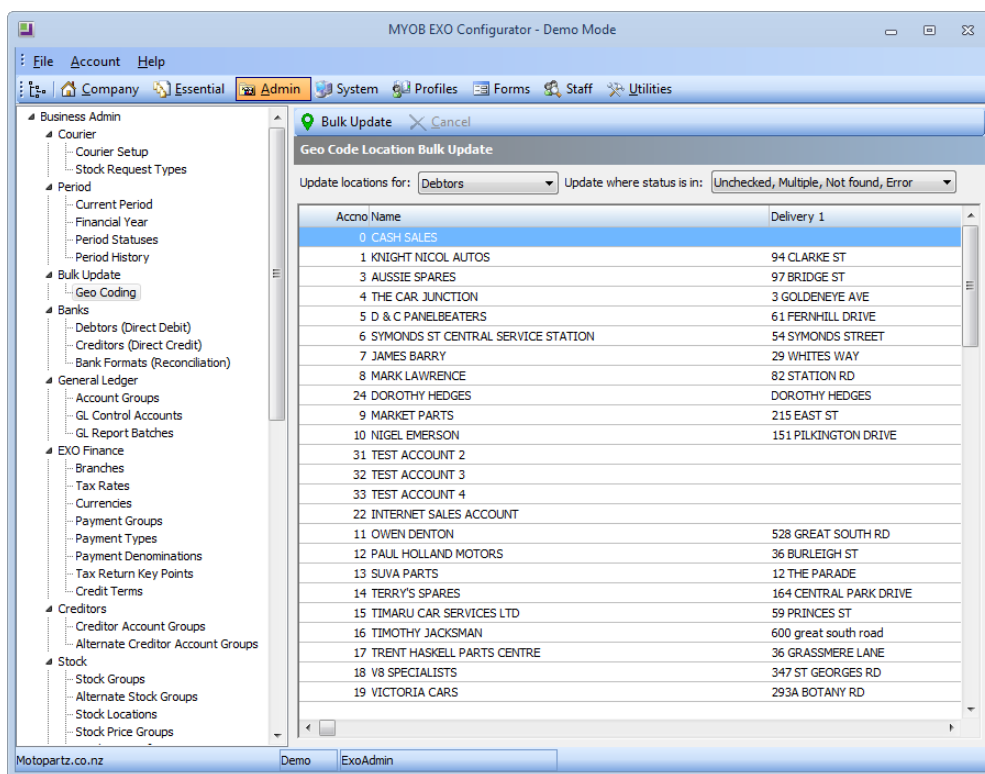
-  - location has not been queried yet.
-  - location successfully retrieved. Clicking the button again will open your default browser, showing the location on Bing Maps. SHIFT+clicking the button will attempt to retrieve location details again. Right-clicking on the button gives options to retrieve the details again and to confirm the details by displaying them next to a map on a new window.
-  - location could not be retrieved. Hovering the mouse over the button will display a popup message indicating why the query failed.

A Location button is also available for the EXO Business company's street address in EXO Configurator at Company > Company Details. Storing geolocation information for this address allows you to write custom reports or dashboard widgets that show records' locations relative to the company.

All Location buttons are hidden if the **Prompt for unset map coordinates on saving delivery addresses** profile setting is set to "Disable map locating features".

Bulk Loading Location Details

Location details for accounts can be loaded in bulk from the EXO Configurator at **Admin > Bulk Update > Geocoding**:



Note: This screen is also available from the main toolbar of the EXO OnTheGo Configurator.

To bulk update location details:

1. Use the **Update locations for:** dropdown to select the kind of account to update (Debtors, Creditors, Non Accounts or Contacts).
2. Use the **Update where status is in:** dropdown to filter the list of accounts by status. Only accounts that appear on the list will be updated. By default, accounts whose status is already “OK” are filtered out.
3. Click **Bulk Update**.

The system attempts to retrieve details for each account in the list, and updates each account’s status according to whether the attempt succeeds or fails.

New Search Template

This release adds a new search template to the SEARCH_TEMPLATES table. The new Bill of Materials template returns all Bill of Materials items in the system, with stock levels and types (“KitBOM” or “BuildBOM”).

Improvements to Data Verification

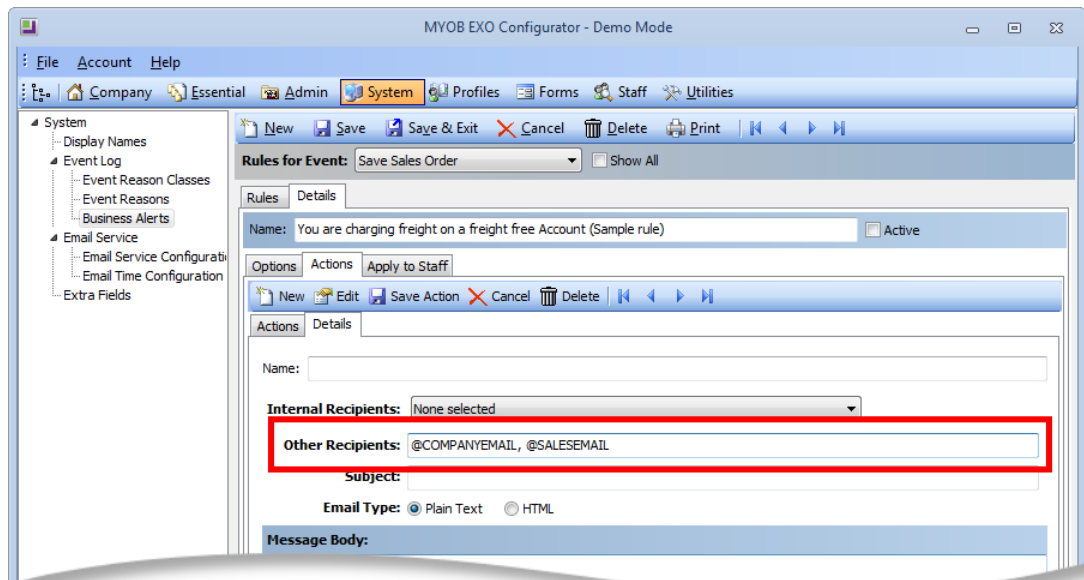
This release includes changes to improve the performance of the stock data verification procedures to on large databases. These changes include:

- New indexes have been added to the CR_ACCS, CR_TRANS, CR_INVLINES, DR_ACCS, DR_TRANS, DR_INVLINES and GLTRANS tables.
- Insignificant rounding imbalances (less than \$0.10) are now hidden.
- A timestamp has been added to lines in the VERIFICATION_LINES table. The “Verification complete” messages that are displayed as the verification process runs include this timestamp; this can be used to determine if any areas are running slowly.

Business Alert Email Parameters

This feature was introduced in EXO Business 8.7 Service Pack 1

Business Alerts can now be sent to an email address associated with the record that generated the alert. New email address parameters can be entered into the **Other Recipients** field when setting up a Business Alert action; when the alert is triggered, the parameter will be replaced with the relevant email address for the record.



The following email parameters are available:

Parameter	Meaning
General	
@COMPANYEMAIL	The email address for the company (Debtor or Creditor) associated with the record.
@DEFAULTCONTACTEMAIL	The email address for the default Contact of the company associated with the record.
@CONTACTEMAIL	The email address for the Contact associated with the record (not available for Purchase Orders or Creditor Invoices).
Sales Orders	
@STATEMENTCONTACTEMAIL	The email address for the Statement Contact of the Debtor associated with the Sales Order.
@SALESEMAIL	The email address for the Salesperson associated with the Sales Order.
Purchase Orders	
@STATEMENTCONTACTEMAIL	The email address for the Remittance Contact of the Creditor associated with the Purchase Order.

Parameter	Meaning
@SALESEMAIL	The email address for the staff member associated with the Purchase Order.
Debtor Invoices	
@STATEMENTCONTACTEMAIL	The email address for the Statement Contact of the Debtor associated with the invoice.
@SALESEMAIL	The email address for the Salesperson associated with the invoice.
Creditor Invoices	
@STATEMENTCONTACTEMAIL	The email address for the Remittance Contact of the Creditor associated with the invoice.
Jobs	
@SOLDBYEMAIL	The email address for the staff member who entered the job (JOBCOST_HDR.STAFFNO).
@ACTIONBYEMAIL	The email address for the staff member who is set as the job's manager (JOBCOST_HDR.ACTIONBY).
Opportunities	
@ASSIGNEDBYEMAIL	The email address for the staff member in the Opportunity's Assigned By field.
@ASSIGNEDTOEMAIL	The email address for the staff member in the Opportunity's Assigned To field.
@CREATEDBYEMAIL	The email address for the staff member who created the Opportunity.

Work in Progress Changes

These features were introduced in EXO Business 8.7 Service Pack 1

This release includes updates to areas of the Job Costing system to further support the new Work in Progress logic introduced in EXO Business 8.7.

Updates to the Ledger Reconciliation Widget

EXO Business 8.7 added a WIP Control section to the Ledger Reconciliation Widget on the Systems Integrity section of the EXO Accountant's Assistant; this version adds new reports that are launched when this section is clicked on:

- Clicking the WIP LEDGER amount launches the **Work in progress – Closing Balance** report (JCTWIPRetro.CLR).
- Clicking the VARIANCE amount launches the **Work in Progress Value Reconciliation Exceptions** report (GLJobReconciliationException.CLR).

In an upgrade to EXO Business 8.7.1, the Ledger Reconciliation widget's configuration is updated to specify these two reports.

Note: The two new reports must be present in the **Common\Clarity\Master Reports** directory.

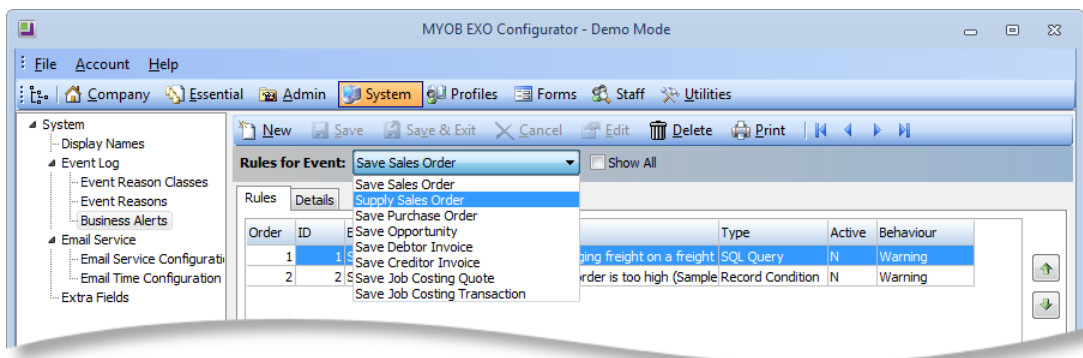
Job Costing Timesheets

The Job Costing Timesheets utility (**Timesheets.exe**) now supports the new Work in Progress logic. When times are approved from this utility, the appropriate transactions are now created in JOB_TRANSACTIONS and STOCK_TRANS, as they would be when times are entered from the main Job Costing module.

New Business Alerts

This feature was introduced in EXO Business 8.7 Service Pack 1

Business Alerts can now be activated when a Sales Order is supplied. A new Supply Sales Order event is available in the EXO Configurator:



All parameters available for the Save Sales Order event can be used for Supply Sales Order alerts (see the EXO Business Help for details of all parameters).

Education Centre URL Profile Setting

This feature was introduced in EXO Business 8.7 Service Pack 1

A new profile setting, **MYOB EXO Business Education Centre URL** (EDUCATION_CENTRE_URL), has been added. This setting specifies the URL of the web page that will be opened when the **Education Centre** dropdown menu procedure is clicked.

Search Templates

This feature was introduced in EXO Business 8.7 Service Pack 2

EXO Business now includes search templates, which are pre-defined SQL filters that can be applied to 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. At present, search templates can be used via the EXO API for stock and company searches only—future releases will make them available in the EXO Business user interface and extend their availability to other areas of the system.

Search templates are stored in the new SEARCH_TEMPLATES database table—this table is added in an upgrade to EXO Business 8.8 or later, or when installing the EXO API 1.0 SP1 or later. The SEARCH_TEMPLATES table comes with a set of default search templates:

Name	Description
Last 100 Items Sold to this Account	Takes in a Debtor account number and returns the last 100 stock items sold to that account.
Available Stock	Takes in a location ID number and returns the top 100 stock items that have available stock at that location.
Previous Invoice to this Account	Takes in a Debtor account number and returns the stock lines from the most recent invoice for that account (up to 100).
Top 10 Items Sold to this Account by Value	Takes in a Debtor account number and returns the top 10 highest value stock items sold to that account.
Sell Down Items	Returns the top 100 discontinued stock items (items where STOCK_CLASSIFICATION = 70) that still have stock.
Customers Owe Me Money	Takes in latitude and longitude coordinates and a radius (in km) and returns the top 10 Debtor accounts within the selected radius who have an outstanding balance above \$200.00.
Customers with Current Orders	Takes in latitude and longitude coordinates and a radius (in km) and returns the top 10 Debtor accounts within the selected radius who have current Sales Orders.
Customers Active Last 30 Days	Takes in latitude and longitude coordinates and a radius (in km) and returns the top 10 Debtor accounts within the selected radius who have one or more transactions from the last 30 days.
Prospects Active Last 30 Days	Takes in latitude and longitude coordinates and a radius (in km) and returns the top 10 Non Account records within the selected radius that have been updated in the last 30 days.
My Active Companies	Takes in latitude and longitude coordinates, a radius (in km) and a staff ID and returns the top 10 active Debtor accounts within the selected radius who have that staff member as their salesperson.

Name	Description
All Active Companies	Takes in latitude and longitude coordinates and a radius (in km) and returns the top 10 Debtor accounts within the selected radius whose Active flag is enabled.
Bills of Materials	Returns all Bills of Materials in the system, with stock levels and types (“KitBOM” or “BuildBOM”).

Expert users can create their own search templates by inserting records into this table—see the new “Search Templates” White Paper for details on the required fields and information on how to write the SQL statement that generates the search results. This White Paper is available in the EXO Business Education Centre.

Search templates are currently accessible via the EXO API only. A call to one of the following endpoints returns a list of available templates:

- `searchtemplate` – lists all search templates in the system.
- `geolocationtemplate` – lists only search templates for location-based searches on company accounts (TYPE = G).
- `stocksearchtemplate` – lists only search templates for searches on stock items (TYPE = S).

To use a search template to return search results, call the relevant endpoint with the ID number of the search template you want to use, e.g.

`http://exo.api.myob.com/stocksearchtemplate/1`

Depending on the search template being called, the call may need to pass parameters to filter the search results. Parameters are passed using standard HTTP query parameters, e.g.

`http://exo.api.myob.com/searchtemplate/1?accno=21&q=airfil`

This will return search results using the search template with the ID number 1, passing in the Debtor account number 21 and the search string “airfil” as parameters. Parameters can be passed in any order.

Resolved Issues

EXO Business Core

Service Request ID	Description
17053968487 17520708492 17306107911 17252616031 17252616011 17122479394 17122479451 17035870181 16986989501	A "LIST INDEX OUT OF BOUNDS (-1)" error occurred when trying to save a Creditors Invoice if the Prevent processing to negative stock levels profile setting was turned on and EXO Job Costing was not installed. This has been resolved.
14250973502 15060939863 14674244921 14209210511	When using the Sales Analysis Designer to produce a report that included stock descriptions, any descriptions that included a period (.) would be truncated, showing only the characters after the period. This has been resolved.
110023483580 17664504591 17539277024	The General Ledger posting generated when a Works Order had a lookup (non-Stock) item added incorrect journals to Stock on Hand. This has been resolved.
15140650626 15077007751	In some cases, when sending an email from a window in EXO Business, e.g. from the Contact window, the body of the email would not be sent; only the signature. This has been resolved.
17001288793 16931742131	All locks on a Sales Order would be removed if a user open the order, cancelled out of the object lock warning, created a new order and then cancelled out of the new order. This has been resolved.
-	If the EXO Business database name contained a full stop or started with a numeral, attempts to upgrade the database to version 8.7 SP2 would fail. This has been resolved.
-	The location levels grid at the bottom of the Stock Item Details window (Details 1 tab) did not display locations that had incoming or committed stock. This has been resolved.
-	When processing recoverable journals for non-Job Costing entries, the LOOKUP_RECOVERABLE flag would sometimes be incorrectly set to 'Y' (this should only happen if the location is a WIP location). This has been resolved.
-	Changes introduced to support geolocation features meant that the EXO Business could not be upgraded on SQL Server 2005. This has been resolved: the database can now be upgraded; however, the geolocation features will not work on SQL 2005.

EXO Job Costing

Service Request ID	Description
15339377592 15337993117	The Job Summary and Job Including Sub-Jobs widgets were incorrectly titled; the columns that contained the markup percentages were labelled Margin . This has been resolved; the columns are now labelled Markup % .
17072611398 17035870461	Cancelled job transactions with physical stock did not affect the average cost, which they should, as the stock items are credited to Stock on Hand. This has been resolved; cancelling a transaction from a job has the same effect as receipting the quantity directly into Stock on Hand at actual cost via a stock receipt or Creditors Invoice.
15783133925 15676834201	When creating an invoice from a Billing Schedule, if the Billing Schedule's Due Date had not been set, the Payment Due date on the invoice would not be set correctly. This has been resolved.

EXO CRM

Service Request ID	Description
13652154278 13873870434 13651235666	The addition of the CRM Advantage feature (see page 17) provides the ability to create Sales Orders from the EXO CRM module.

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 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 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.

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
Prompt for unset map coordinates on saving delivery addresses	GEOLOCATION_CONTROL	Company	This setting determines whether or not to retrieve geolocation details when a record's address is changed (with or without prompting the user).	"Disable map locating features"	page 20
MYOB EXO Business Education Centre URL	EDUCATION_CENTRE_URL	Company	This setting specifies the URL of the web page that will be opened when the Education Centre dropdown menu procedure is clicked.		page 25