MYOB Exo Business

Release Notes

version 2022.3

Contents

Introduction

What's new?

The version 2022.3 release adds the ability to add default CC and BCC addresses when emailing debtor invoices.

For Australian companies, TPAR submissions now comply with the ATO's new requirements for SBR2 (this update was originally included in the 2022.1.2 hotfix).

Search templates are now available for MYOB Exo Job Costing and for Opportunities in MYOB Exo CRM.

This release also includes other minor improvements and resolutions for issues identified in previous releases.

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

- The **Installation** section provides an overview of the installation process, including pre-installation requirements and post installation steps.
- The **New Features** section describes all new features introduced in this release.
- The **Resolved Issues** section describes all issues that have been addressed by this release.
- The **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. See the Minimum System Requirements page on the Exo Business Education Centre for details about the requirements and supported operating systems for MYOB Exo Business.

The performance of the Exo Business system is not assured if these requirements are not met. MYOB cannot assure performance 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 an organization's volume of data.

Other Requirements

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

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

Microsoft Office connection requires Microsoft Word/Excel 2016.

Contact synchronisation requires Microsoft Outlook 2016.

This release of MYOB Exo Business requires **ExonetLib.dll** version 2020.2, which is installed with the application.

When installing manually with 64-bit Outlook integration, you must copy the file **RwEasyMAPI64.exe** from the **Supporting Files\RapWare** folder of the Exo Business DVD to the install directory. Register this file by running the following from a command prompt:

```
RwEasyMAPI64.exe /regserver
```

> **Note:** The client installer does this automatically.

Installing MYOB Exo Business

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

- Installing Exo Business
- Installing Exo Business Services

Post-Installation

Once you've installed MYOB Exo Business, you must configure it for use. You can optionally migrate data into Exo Business 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, but login names aren't.

Updating the Exo Business Database

If you are upgrading from 2020.2 or later, the database upgrade process is trivial as nearly all of the changes are to the user interface.

If however, you are upgrading from a version of MYOB Exo Business before release 2019.4.1, the database conversion process makes extensive changes to align with new database technologies. In Exo Business 2019.4.1, we added Unicode support to the Exo Business user interface which involved changing the database to support Unicode.

You'll need to run the database update utility to apply the changes. While the process to update Exo Business hasn't changed, there is an additional step to convert columns in the database to their Unicode equivalents.

Before updating client databases, partners **must** read the MYOB Exo Business 2019.4.1 Upgrade - Unicode Database Conversion whitepaper. The whitepaper details steps that you must carry out before performing the update.

> **Note:** Prior to updating to Exo Business 2020.3, you <u>must</u> backup the database. The changes that the update makes to the database schema <u>cannot be undone</u>.

New Features

Debtor invoice email CC and BCC

When emailing a debtor invoice, you can now automatically CC and BCC people by adding them to the new **Invoice Email CC** or **Invoice Email BCC** fields on the **Details 2** tab of the **Debtor Account Details** screen.

There are three ways to add people to the new fields:

- Manually entering an email address.

    Note: You can enter multiple addresses in each field – make sure to separate them by a semicolon.

- Entering a dynamic email address.
- Selecting a contact or staff member from the new **Select Invoice Email** screen.

To remove all the contacts in one of the new fields, click the **Clear** icon ().

Dynamic email addresses

In the new **Invoice Email CC** and **Invoice Email BCC** fields, you don't always need to add a specific email address. Instead, you can add a user's role. That way, you don't have to manually update the CC and BCC fields if email recipients change frequently.

For example, if you enter **@JobContact** in the **Invoice Email CC** field, then emailing an invoice will CC the relevant job contact for that invoice.

Here are the roles you can add:

- **@JobManager**
- **@JobContact**
- **@InvoiceSalesPerson**
- **@SalesPerson**
- **@PrimaryContact**

> **Note:** Dynamic email addresses are only available when sending a single email. Also, you can't send emails to dynamic email addresses using MailShot.

Selecting a contact or staff member

By clicking the ellipsis icons (**...**) next to **Invoice Email CC** and **Invoice Email BCC** fields, you can open the **Select Invoice Email CC** or **Select Invoice BCC** screens.


These screens group email users by staff and contacts. Select the checkbox next to the person or people you want to CC or BCC, then click the **Select & Close**.

> **Note:** If a contact or staff member is selected that has no email address or where the contact is invalid, these will display in red.

CC and BCC with MailShot

When using MailShot to email multiple debtor invoices or job costing invoices, new **Email CC** and **Email BCC** columns are included on the **MailShot** screen.
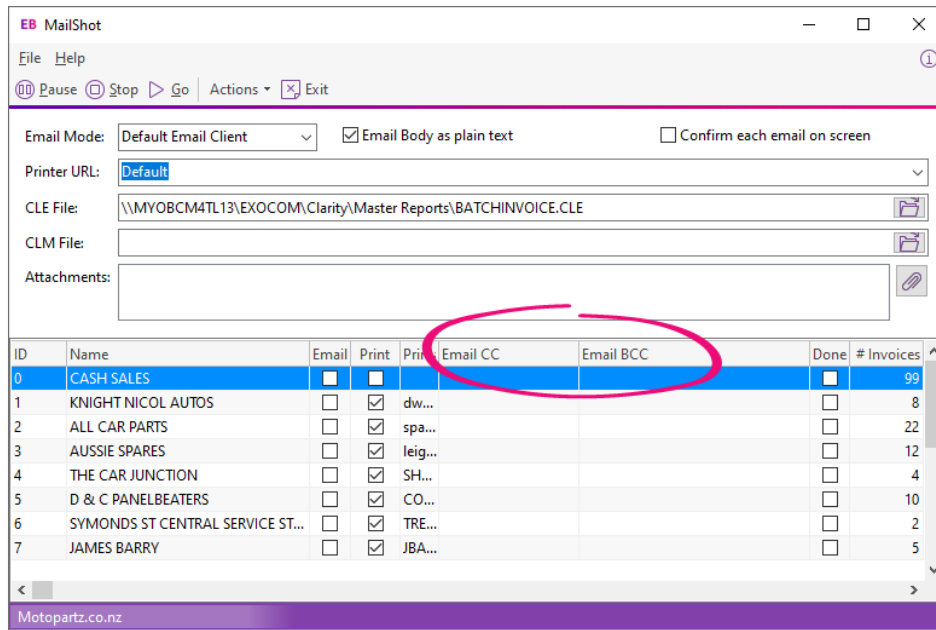
By default, these columns list the CC and BCC email addresses added on the **Details 2** tab of the **Debtor Account Details** screen, but you can manually edit the columns as well.

Dashboard and graphical menus update

This release updates the component that runs dashboards and graphical menus.

The updated component requires stricter compliance to whitespace to successfully display widgets. Otherwise, you might get an error: "Required white space was missing."

> **Note:** If you want to fix this for a previous version, you can use the following SQL update included in the 2022.3 database update, which addresses all default **Analysis** that experienced the problem.

```
update PROFILE_FORMS
set layoutdata = REPLACE(layoutdata, 'size="364"dsize="0.34"',
'size="364" dsize="0.34"')
where LAYOUTDATA like '%size="364"dsize="0.34"%'
```

Automatic widget caption updates

When you change a widget's name in MYOB Exo Configurator, the widget's menu item caption in MYOB Exo Business now automatically matches the new name.
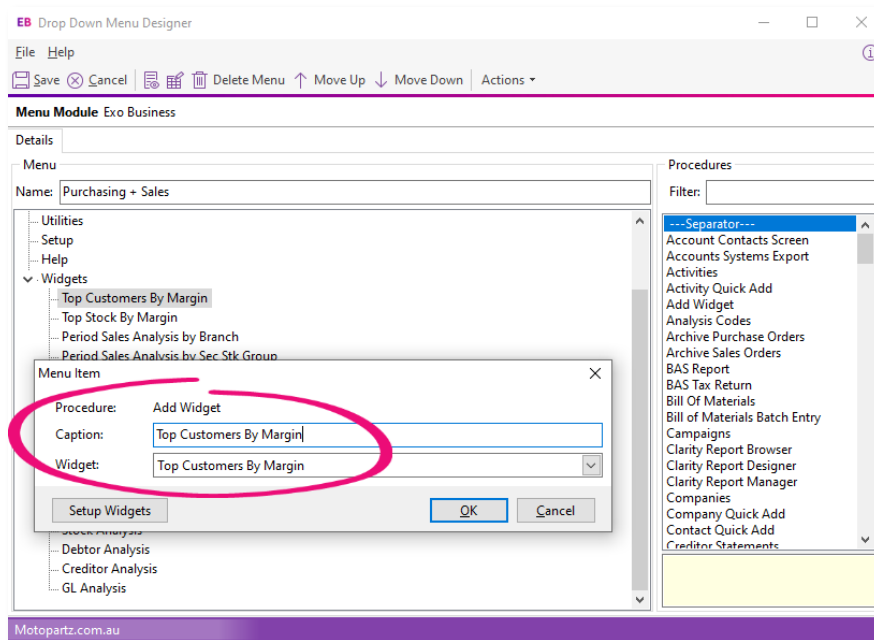
Search templates for more forms

In MYOB Exo Business Configurator, you can now enable search templates for MYOB Exo Job Costing and for Opportunities in MYOB Exo CRM.
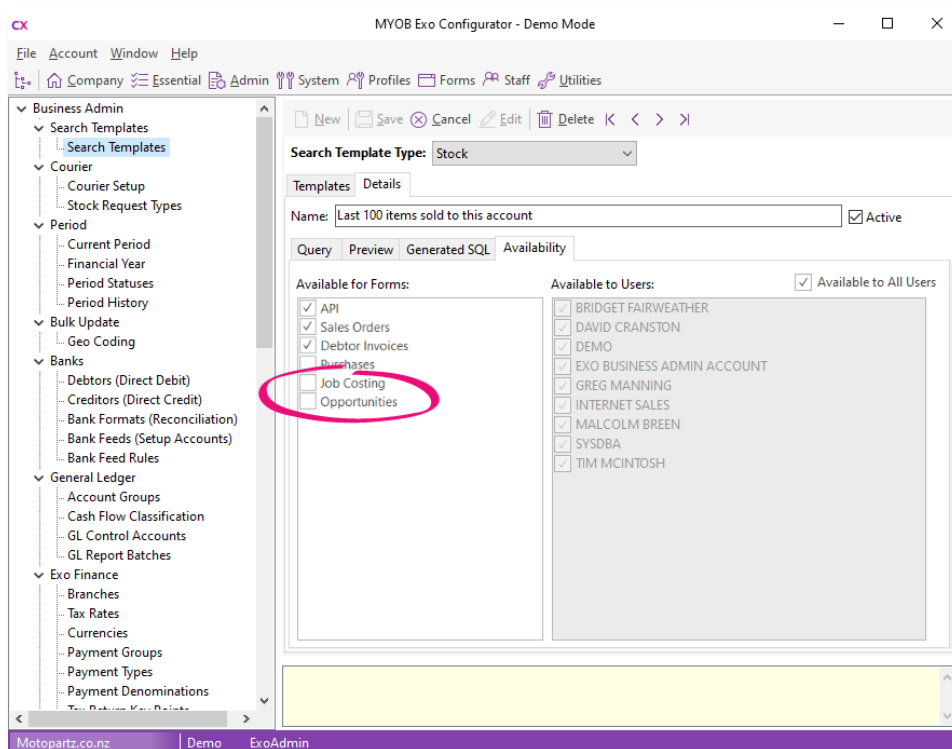
TPAR updates

TPAR declaration

When submitting a taxable payments annual report (TPAR), you now need to confirm that the information in the report is complete and correct. You can do so by selecting the new declaration checkbox on the confirmation message:

Until you select the checkbox, you won't be able to click **Yes** to submit TPAR.

TPAR submission requirements

In earlier versions of MYOB Exo Business, per the ATO's requirements for SBR1, submitting a taxable payments annual report (TPAR) created a file for each supplier.
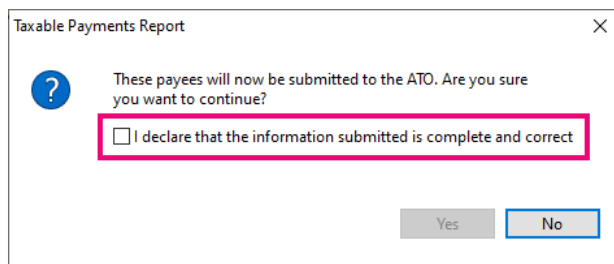
To comply with the ATO's new requirements for SBR2, MYOB Exo Business now submits a single file that contains all suppliers.

Empty lines on the Purchase Orders screen

You can now add empty lines to the Purchase Orders screen by enabling the new **Allow empty lines in purchase orders** profile setting. See Appendix 1: Profile Settings for more information.

Previously, this feature was only available if you used the old purchase order screen by enabling the **Use old purchase order screen** profile setting.

Longer delivery addresses

You can now enter longer addresses in delivery address fields. The maximum character limit for addresses has been increased from 30 to 50. If you copy and paste an address that's longer than 50 characters into a delivery address field, any characters after the first 50 will be ~~cut off and not included in the field.~~ truncated.

Longer job notes

You can now enter longer notes for a job. The maximum number of characters allowed for a job note has been increased to 4000.

Resolved Issues

Exo Business Core

Service Request ID	Description
CE00007154 CE00001057	When you edited a creditor or debtor without changing their delivery address, the geolocation address check was always prompted. This has been resolved
CE00019712 CE00019179	Two issues could occur when creating a new GL budget by copying a previous budget: • The new budget's year is the same as the copied budget's year. • Negative values in the copied budget were turned into positive values for the new budget. These issues have been resolved.
CE00029831 CE00029729 CE00030018 CE00030278	When previewing a report, the **Email Attachment** icon was disabled. This has been resolved.
CE00029608 CE00029419	If a user confirmed all lines on a purchase order, they would be asked multiple times to confirm and unconfirm the lines, even if the **Confirmed** checkbox was selected. This has been resolved.
CE00014644 CE00014121	This release improves performance when processing ~~works orders~~ sales order. As part of this improvement, a new company profile was added to automatically maintain the STOCK_TRANS.NEW_SEQORDER field.
CE00029601 CE00029517 CE00030197	On the **Debtors Banking Batches** screen, clicking **Refresh** could cause an error: "Access violation at address 0040D720 in module 'exonet.exe. Read of address 0000000D." This has been resolved.
-	When previewing a report, changing the size of the **Print Preview** screen made the **Email** icon unresponsive. This has been resolved.
CE00030476 CE00030474	If the **Post to Past Periods** user profile was enabled, costing an inwards goods receipt caused issues with transaction periods. This has been resolved.
CE00028145 CE00022521 CE00027625 CE00028109	Creating an extra field that exposed a default field caused an access violation error. This has been resolved. You can now add default fields to sales order lines, purchase order lines and job costing.
CE00028801 CE00028484	When supplying a sales order, if an inventory item had one physical and one committed stock, no stock shortage warning appeared. This has been resolved.
CE00007607 CE00001935 CE00030395	If a date extra field was added to the **Works Orders** and **Edit Transaction Reference** screens, the field always displayed the current date, instead of the user-selected date. Closing the screen and reopening it reverted the extra field to the current date. This has been resolved.

Service Request ID	Description
CE00030956 CE00030722	On the **Stock Item Details** screen, if a user went to the **Actions** menu and chose **Manufactured**, the **Bill of Materials** screen opened, where they could see stock costs even if the **HIDESTOCKCOSTS** profile was enabled. This has been resolved.
-	When creating a new sales order, the **Deposit (%)** value incorrectly displayed as **NAN**, rather than **0.00**. This has been resolved.
CE00030822 CE00030092 CE00030739	On the **GL Batch Review** screen, right-clicking a posted transaction and choosing **Reverse** could cause an error: "Invalid object name 'ASSET_TRANS_BOOK', This issue happened only for non-asset database. — This has been resolved.
CE00028018 CE00027857	To make sure the new purchase order screen has the same functionality as the old one, this release adds a new profile setting that lets you add empty lines.
CE00029842 CE00029440	An inactive bill of materials could be added to a works order without warning the user. This has been resolved. You can still add an inactive bill of materials, and now a warning message appears.
CE00023406 CE00023112	If a purchase order was created through the Distribution Advantage module, the price of a stock item could come from the standard cost instead of the supplier cost. This has been resolved.
CE00018356 CE00018175	If a purchase order for a foreign currency supplier had multiple invoices, then the foreign exchange variance posted to the general ledger could be incorrect. This has been resolved.
-	This release updates the component that runs dashboards and graphical menus.
	To successfully display widgets, you need comply with white space requirements. Otherwise, you might get an error: "Required white space was missing."
	To address all default **Analysis** tabs and widgets that we know experience the problem, the 2022.3 database includes the following update:
	update PROFILE_FORMS
	set layoutdata = REPLACE(layoutdata, 'size="364"dsize="0.34"', 'size="364" dsize="0.34"')
	where LAYOUTDATA like '%size="364"dsize="0.34"%'a

Exo Finance

Service Request ID	Description
CE00027369 CE00026547 CE00028408	Two user interface issues affected the **Bank Reconciliation** screen: • The **Total** and **Selected** values for the **Transactions appearing on the Bank Statement** table were misaligned. • If the user's computer screen scale was set to something other than 100%, the **Bank Statement Opening Balance** and **Bank Statement Closing Balance** fields weren't displayed.

Service Request ID	Description
CE00021474 CE00021290	*Australia only* If the **Withholding Tax on Creditors Payments** option was enabled in MYOB Exo Configurator, then creditor transactions weren't appearing on the **Transactions** tab of the **Creditors Payment Processor** screen. This has been resolved.

Exo InterCompany

Service Request ID	Description
CE00021351 CE00020234	If an automatic transaction was created on the last day of a month, it wouldn't be included when downloading transactions to the parent company. This affected the following transaction types: • debtor adjustments • creditor adjustment • stocktake • XRV transactions. This has been resolved.

Exo Distribution Advantage

Service Request ID	Description
CE00022604 CE00022587	On the **On-Demand Purchase Orders** screen, entering a sales order number in the **Selected sales order** field caused an error: "Please input a valid integer". This has been resolved.

Exo Job Costing

Service Request ID	Description
CE00027355 CE00027005	Going to the **Reports** menu and clicking **Work In Progress** wouldn't open the **WIP Monitor** screen. This has been resolved.
CE00017596 CE00017570	On the **Costs** tab of the **Job Details** screen, you shouldn't be able to move a kit header line to another job. However, if **Hide Kit Components** was selected, then you could move a kit header line. This caused component items to be in stock when they shouldn't be. This has been resolved. Now, it's not possible to move a kit header line to another job when **Hide Kit Components** is selected.
CE00007677 CE00002030 CE00002031	If a computed extra field was added to job costing lines, then duplicating the job or moving the transaction line to another job caused an error: "Error – Duplicating Job Field 'X_[FIELD NAME]' cannot be modified". This has been resolved.

Exo CRM

Service Request ID	Description
CE00024338 CE00003193 CE00024301	On the **Opportunity Search** panel, entering a seqno in the **Find** field wouldn't display any results. This has been resolved. Now, you can search for opportunities by their seqno.

Exo Clarity Reports

Service Request ID	Description
CE00019084 CE00018900	When previewing a report, transactions weren't listed in the order selected in the report parameters. Refreshing or printing the report preview would then list the transactions in the correct order. This has been resolved.

Exo Business Database Utility

Service Request ID	Description
CE00028539 CE00028494 CE00030127	Going to the **File** menu and choosing **New Connection** caused an error: "Invalid class string, ProgID: "SQLDMO.Application"". This has been resolved.

Exo POS

Service Request ID	Description
CE00030289 CE00030265 CE00030277	When no items had been added to a screen, payment type buttons were unresponsive. For example, the **Cheque**, **Visa**, **M/C** etc. buttons. This has been resolved.

Appendix 1: Profile Settings

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

Name	Profile Name	Level	Description	Default
Maintain PERIOD_TRADED_IN_SEQ and NEW_SEQORDER	USE_STOCK_TRANS_NEW_SEQORDER	Company	If selected, MYOB Exo Business automatically maintains the STOCK_TRANS.NEW_SEQORDER field by automatically calling UPDAtE_STOCKTRANS_NEW_SEQORDER. Custom reports can use this to ensure that post-back transactions appear in the correct order. If necessary, you can manually call UPDATE_STOCKTRANS_NEW_SEQORDER.	Unselected
Allow empty lines in purchase orders	PO_ALLOW_EMPTY_LINES	User	If selected, you can add empty lines to a purchase order. If you leave it unselected, any empty lines are deleted when you save a purchase order.	Unselected