MYOB Exo Business

Release Notes

version 2023.2

myob

Contents

Introduction

What's New in this Release?

The version 2023.2 release improves password security, lets you add extra fields to the **Bill of Materials** and **Works Orders** screens, and adds more display names for fields for Exo Job Costing.

This release also includes 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

Improved password security

Administrators can now prevent users from reusing old passwords when setting a new password.

You can do this by using the new **Enforce Password History** security profile in MYOB Exo Configurator. You have three options when setting the profile's **Value**:

- **-1** – Users can never reuse passwords.
- **0** – Users can reuse any password.
- **1–24 –** Users can only reuse a password if its older than the value you set. For example, if you set the value to **1**, then users can use any old password, except for their most recent one.
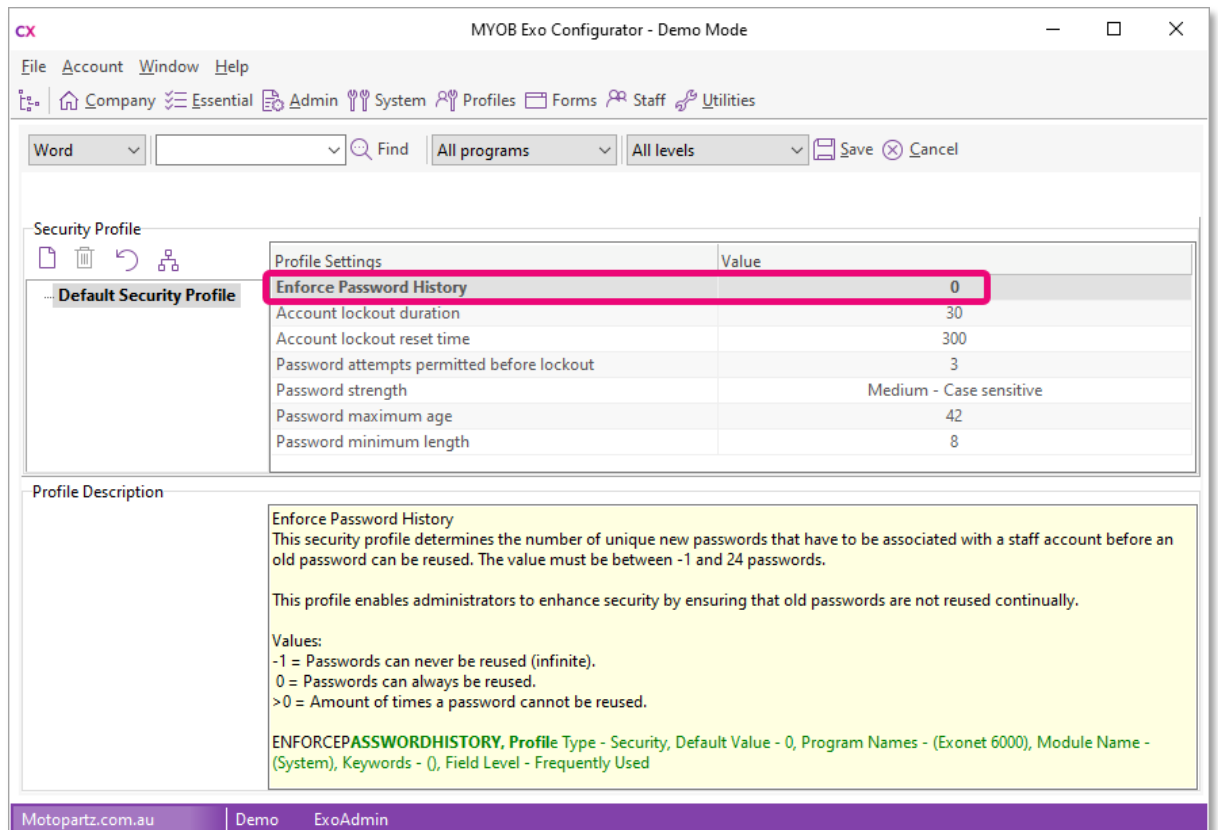
Extra fields for more screens

On the **Components** tab of the **Bill of Materials** screen, you can now add extra fields to lines. Use the new **BILLOMAT_LINES** table.

On the **Works Orders** screen, you can now add extra fields to both lines and headers. Use the new **WORKSORD_HDR** and **WORKSORD_LINES** tables in MYOB Exo Configurator.

Minor improvements

- You can now edit the grid on the **Components** tab of the **Bill of Materials** screen in the same way you'd edit other grids. For more information, see the online help.
- You can now edit more of the default names Exo Job Costing fields and tabs: Status, Type, Category, Entered, Job Mgr, Customer O/N, Contact, Description, Notes.
To edit a field name, go to **System** > **Display Names** in MYOB Exo Configurator.
- On the **Quote/Budget** tab of the **Job Details** screen, entering a supplier's name or number in the **Supplier Name** field now adds the supplier. Previously, this opened a search screen.

Resolved Issues

Exo Business Core

Service Request ID	Description
CE00031393 CE00030350	When using the **Analytics** widget on large databases, an error could occur: "Insufficient memory for this operation". This has been resolved.
CE00035417 CE00035319	Forecast-based purchase orders were ignoring authorisation limits. This has been resolved.
CE00033136 CE00031576	When using forecast-based purchasing to enter a purchase order, the supplier description for an item could be incorrect. This has been resolved.
CE00032841 CE00032698	When setting up a checklist widget, the **OK** and **Cancel** buttons could be missing from the **Checklist Node Edit** window. This has been resolved.
CE00032865 CE00032818	If you tried opening the **Manifest Entry** screen while a different logged-in user was using the screen, then MYOB Exo Business would freeze. This has been resolved. Now, if you try opening the **Manifest Entry** screen while someone else is using it, the **Manifest Entry in use** window opens. This lets you know which user is currently using the screen. It also lets you choose whether to retry opening the screen (which overrides the other user's work) or open a read-only version of the screen.
CE00032406 CE00032274	After inserting adjustments or integrated cashbook entries, the value of the **PHYS_STAFF** column in the **DR_TRANS** table is always 0. This has been resolved.
CE00022449 CE00021265	Access violation errors could occur when using when using Exo Business Analytics.
CE00031847 CE00031752	When changing the contact for a sales order, the delivery address wouldn't always change to match the contact. This has been resolved.
CE00034534 CE00034215	If there was an invalid GL account on a stock item, the stock item would be posted to the 0 GL account instead of the errors GL account. This has been resolved.
CE00033636 CE00033524	If you allocated a refund, payment, invoice and discount to a debtor transaction in a certain order, then aged balances wouldn't balance correctly. The discount would still be shown as a credit that you owed the debtor. This has been resolved. You can now allocate the transactions in any order.
CE00033103 CE00032459	On the **Debtor Account Details** screen, the **Save** and **Save & Exit** buttons weren't clickable if the only change you made was adding someone to the **Invoice Email CC** or **Invoice Email BCC** fields. This has been resolved.

Service Request ID	Description
CE00031957 CE00031327	When using **Quick Supply Order** for a partially invoiced sales order, a **Nothing to invoice** message appeared even though the stock was brought in with enough quantity. This has been resolved.
CE00022447 CE00022312	Sometimes activities in the **Activity Search** window wouldn't respond if you clicked them. This has been resolved.
CE00032221 CE00032048	For GST-inclusive sales orders, the **Total Value (Excl)** field on the **Order List** tab of Exo Business Analytics incorrectly excluded GST in the value. This has been resolved.
CE00033811 CE00033802	If you searched for multiple accounts on the **Debtor Account Details** screen, then edited one of those accounts, the search results changed to only show the account you edited. This has been resolved.
-	If you added a checkbox to a line, you couldn't select or deselect the checkbox. This affected all screens with grids, e.g., the **Opportunity Quote** screen. This has been resolved.
	If you added an extra field checkbox with Unicode char(1) to a grid screen, you couldn't select the checkbox. This affected all grid screens, e.g., the **Opportunity Quote** screen. This has been resolved.
	e.g., the Opportunity Quote screen. This has been resolved.
CE00035675 CE00035410	A negative stock quantities error could occur when adding a lookup item to an invoice, even if the item was in stock. This has been resolved.
CE00036939 CE00036937 CE00036958	Supplying a sales invoice with a linked stock item wouldn't reduce the stock balance for that item. This has been resolved.
CE00037004 CE00035750 CE00036927	When processing a sales order, an error could occur: "There was an error updating the data, so all updates been rolled back". This has been resolved.
CE00036253 CE00035751	On the **Sales Order** screen, a stock shortage warning could appear if you clicked **Supply All**. This occurred if the stock item in the sales order hadn't been set a location. This has been resolved. Now, if you stock item has no location when you save the sales order, a warning reminds you to set a location.
CE00032674 CE00032432	On the **Debtor Account Details** screen, transactions were labelled as overdue if there were aged balances 3 or more months old, even if the due date hadn't passed yet. This has been resolved.
CE00034870 CE00034679	After editing and saving the location of items in an invoice, the location could change to an incorrect location that you didn't select. This has been resolved.
CE00036207 CE00035710	When emailing an invoice from the **Debtor Account Details** screen, an error could occur if you entered a Bcc address: "The operation failed. An object cannot be found." This has been resolved.
-	If you changed the location on a debtor invoice, the available stock wasn't being checked. This has been resolved.

Service Request ID	Description
CE00037774 CE00037769	When upgrading a database and testing the connection to a new client, an error could occur: "Subquery returned more than 1 value. This is not permitted when the subquery follows =, !, <, <= , >, >+ or when the subquery is used as an expression. This has been resolved.
-	If a long-running process was started with a command prompt, this wouldn't be shown on the **Send Message to Users** screen. This has been resolved.
-	Right-clicking on a credit note line could prevent you from selecting the **Generate Credit** menu. This has been resolved.

Distribution Advantage

Service Request ID	Description
CE00036061 CE00034940	If you saved a new transfer request and continued editing it, another user could also simultaneously edit the transfer request. This has been resolved. Now only one user can edit a transfer request at a time.
CE00023284 CE00022486 CE00033090	When releasing all for stock supply on the **Batch Sales Order Line Processing** screen, changing the **Release** quantity didn't affect the available quantity. This has been resolved.

Exo Configurator

Service Request ID	Description
CE00031746 CE00029756	If you modified the query used for the **Calculate Prior Aged Balances** utility, memory errors could occur when running this process. This has been resolved.
CE00038455 CE00038195	Saving Exo Configurator after changing extra field positions caused two errors to repeatedly appear, forcing you to close Exo Configurator: "BaseQryDetails: Field 'SEQNO' not found" and "The following error occurred while trying to Save your changes: Cannot insert duplicate key row in object 'dbo.EXTRA_FIELDS_APPLYTO' with unique index 'IX_EXTRA FIELDS_APPLYTO'." This has been resolved.

Job Costing

Service Request ID	Description
CE00023138 CE00023067 CE00034640	On the **Exo Serviceable Units** screen, the **Contact** column only displayed the contact for the first row in the table. This has been resolved.

Service Request ID	Description
CE00033453 CE00033128	On the **Job Details** screen, allocating timesheets and costs to the **Invoice** tab, then changing the total amount and invoicing the job, could cause the sub-totals to have different values. This has been resolved.
CE00037064 CE00036938 CE00037990	When invoicing a job, a kit's GST was different on the **Invoice Entry** and the **Job Details** screens. This has been resolved.

Fixed Assets

Service Request ID	Description
CE00036175 CE00035469	Depreciation journals from the Fixed Assets module weren't appearing on the **GL Batch Review** screen in MYOB Exo Business. This has been resolved

Exo POS

Service Request ID	Description
-	A maximum of only four decimal places were displayed for prices, quantities and discounts. The maximum has been increased to six decimal places.

Clarity

Service Request ID	Description
CE00037945 CE00037708	Clarity reports that use the **ReportBeforeOpenDataPipelines** table were blank. This has been resolved.

Finance

Service Request ID	Description
CE00014527 CE00013953 CE00032107	Bank feed rules were being applied to all accounts, instead of just the account in the **Apply to Bank Account field**. This has been resolved.
CE00037859 CE00037436	When drilling down on a debtor to view a transaction, all other debtor transactions in a batch would change to 0.00. This has been resolved.

Service Request ID	Description
CE00038470 CE00038295	When posting a Bank Feeds transaction, the creditor subledger account in the Bank Feed rule was ignored. Instead, Bank Feeds transactions were being posted to the default cashbook supplier. 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
Enforce Password History	ENFORCEPASSWORDHISTORY	Security	This security profile determines the number of unique new passwords that have to be associated with a staff account before an old password can be reused.