# MYOB Exo Business

## Release Notes

version 2024.1

myob

# Contents

# Introduction

## What's New in this Release?

The version 2024.1 release makes security improvements and, for Australian companies, helps ensure accurate reporting under the Payment Times Report Scheme (PTRS).

We've also resolved 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 **Resolved Issues** section describes all issues that have been addressed by 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.
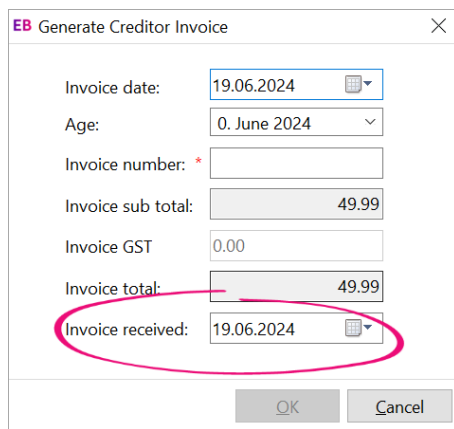
> **Note:** Prior to updating to Exo Business 2020.3, you <u>must</u> backup the database. The changes that the update makes to the database schema <u>cannot be undone</u>.

# New Features

## More accurate PTRS invoices created from purchase orders (Australia)

To ensure accurate reporting under the Payment Times Reporting Scheme (PTRS), you can now enter an invoice received date when generating a creditor invoice from a purchase order for a PTRS small business.

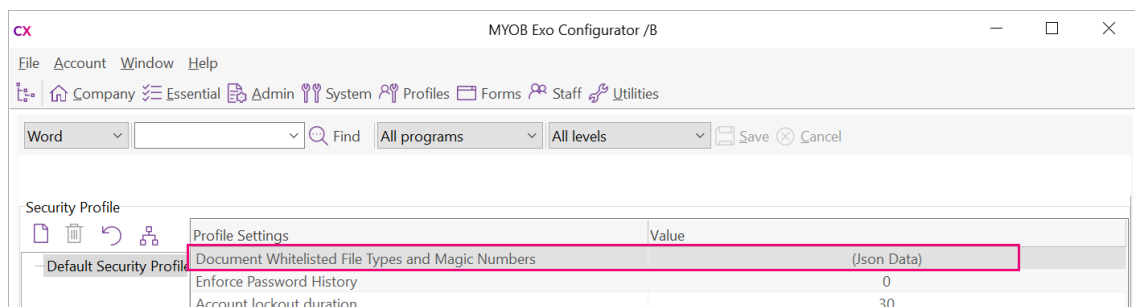In the **Generate Creditor Invoice** window, use the new **Invoice received** field.



## Security improvements

### File type whitelist for attaching documents

To prevent users from accidentally attaching malicious files using the Document Manager, the new **Document Whitelisted File Types and Magic Numbers** security profile lets you choose which file types they can attach.

By default, all file types are currently included in the whitelist. You can edit the whitelist in MYOB Exo Configurator by double-clicking **(Json Data)** in the **Value** column.
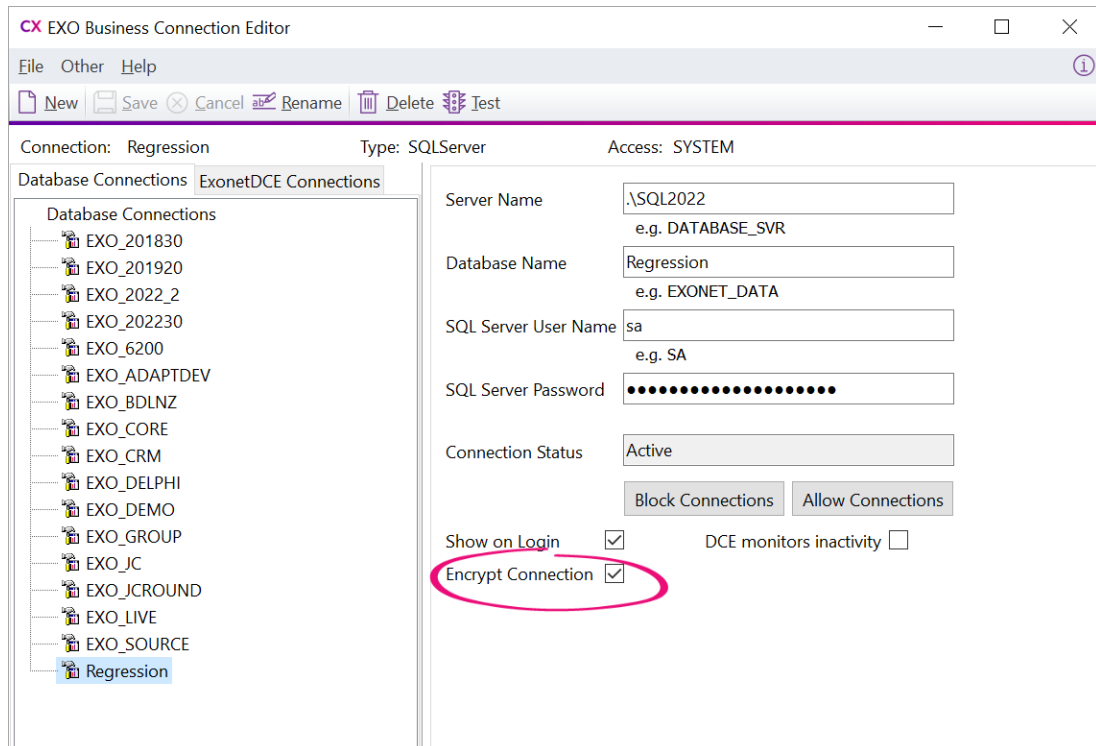
# Encrypting your connection

You can now encrypt your MYOB Exo Business database connections.

In Exo Business Connection Editor, select the new **Encrypt Connection** checkbox. You also need to encrypt the connection in your SQL server manager.

# Resolved Issues

## Exo Business Core

| Service Request ID | Description |
|---|---|
| **CE00037936** CE00037124 | When a sales order was partially processed, changing the branch caused an error: "LinesDBGridQuery: Cannot perform this operation on closed dataset." This has been resolved. |
| **CE00038241** CE00037981 | When a branch account was delinked from head office, the debtors account balance could be incorrect. This has been resolved. |
| **CE00038259** CE00038093 CE00045774 | On the **Sales Orders** screen, you couldn't expand the **Extra Fields** section to display all extra fields. This has been resolved. |
| **CE00038684** CE00038581 | On the **Select Analysis Codes** screen, there were no ticks in the checkboxes, making it hard to know which code was used on the **General Ledger Account Details** screen. This has been resolved. |
| **CE00018031** CE00018010 CE00040054 | Changes to a purchase order's exchange rate weren't saved unless you clicked or tabbed out of the field. This has been resolved. |
| **CE00007594** CE00001910 CE00014394 CE00025980 CE00029368 CE00040762 | Changing from a foreign currency debtor to a local currency debtor was not resetting the exchange rate in a sales order. This has been resolved. |
| **CE00043074** CE00043013 CE00043105 | Components on the **Bill of Materials** screen couldn't have more than two decimal points regardless of settings in ExoConfig. This has been resolved. |
| **CE00022448** CE00021023 CE00039225 | Leaving the Microsoft Outlook window open for a long time when emailing a sales order could cause an error: "Error: System call failed". This has been resolved. |
| **CE00041382** CE00041238 CE00042570 | Pivot table widgets weren't loading properly. This has been resolved. |
| **CE00038976** CE0004941 CE0005407 CE00041036 CE00045390 | For Bill of Materials, the **Build Batches** screen wouldn't prevent you from processing negative stock. This has been resolved. |
| **CE00043645** CE00042967 | When emailing a receipt to a debtor, their email address wasn't automatically added in the email, even if there was an email address entered in the **Details 1** tab of the **Debtor Account Details** screen. This has been resolved. |
| **CE00045620** CE00045352 CE00045619 CE00045881 CE00046610 | Because of changes to kit items rounding, there could be performance issues when posting to the general ledger. These have been resolved. This update attempts to fill in historical GLTRANS data with Kit information from Debtor's invoice lines. We recommend planning for some downtime and clearing the log files before you start. |

| Service Request ID | Description |
|---|---|
| **CE00046238** CE00046087 | Inactive salespersons were still shown on the **Contacts** screen. This has been resolved. |

# Exo Config

| Service Request ID | Description |
|---|---|
| **CE00038296** | Using the up and down arrow keys in a dropdown field could cause the value from that profile to be written into the profile column above or below. This has been resolved. |

# Exo Clarity Reports

| Service Request ID | Description |
|---|---|
| **CE00027072** CE00026153 CE00041369 | The **Clarity Report Parameters** screen only ran parameter SQL queries the first time you loaded it. This has been resolved. |
| **N/A** | When previewing a report, the checkboxes selected in the parameters list could be different to what you selected. This has been resolved. |

# Exo Job Costing

| Service Request ID | Description |
|---|---|
| **CE00038052** CE00033419 | When crediting a retention invoice, the credit value was negative instead of positive. This has been resolved. |
| **CE00039374** CE00039086 | If you were saving a job for the first time, business alerts were not being triggered. This has been resolved. |
| **CE00041643** CE00040874 | The master job number was not updating in the job cost contract billings table. This has been resolved. |
| **CE00046715** CE00046617 CE00046729 | When creating a purchase order for job cost items, the GST calculation was different between the **Cost** and **Quote** tabs. This has been resolved. |
| **CE00047781** CE00047743 | Copy quote lines with kits from one job to another could cause an error: "QuoteQuery: Dataset not in edit or insert mode." This has been resolved. |
| **CE00047786** CE00047741 | If you added a kit set to **Price By Total** to the **Quote/Budget** tab, the price was incorrect. This has been resolved. |

| Service Request ID | Description |
| --- | --- |
| **CE00047797** CE00047694 | For companies with large databases, the job cost search screen took a long time to open. This has been resolved. As part of the fix, we've updated the extra job cost search profile. |
| **CE00047976** CE00047911 Ce00047927 | When trying to split lines on the **Quote/Budget** tab, an invalid class typecast error could occur. |
| **CE00046282** CE00045726 CE00047605 | When creating an invoice for a job costing kit, the **Invoice** tab showed the total invoice value twice. This has been resolved. |
| **CE00047477** CE00047298 | When converting a quote with a kit to progress billing, subtotals could be calculated incorrectly. This has been resolved. |

# Exo POS

| Service Request ID | Description |
| --- | --- |
| **CE00039952** CE00039875 | A user could enter values in the sales screen without selecting staff. This has been resolved. |

# Profile Setting Changes

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

| Profile Name | Level | Description |
|---|---|---|
| Extra Job Costing Search Fields | Admin | You can now choose whether private notes are included in searches. By default, they are included.<br><br>If your company has lots of detailed notes, including private notes in searches can slow down performance.<br><br>To exclude private notes from searches, delete **J.PRIVATE_NOTE=Notes=WU** from the **Value** column. |
| Document Whitelisted File Types and Magic Numbers | Security | A new profile. For details, see File type whitelist for attaching documents. |