

MYOB Exo Business

Release Notes

2016.3



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Introduction

What's New in this Release?

The 2016.3 release delivers over twenty of the most requested enhancements registered and voted for on the Exo Business ideas portal, together with a refresh of the user interface that makes 'Windows Aero-Flip' the default behaviour for all modules and allows for main form panels to expand proportionally when you enlarge the form size. Also significant is a further enhancement of the New Zealand GST return web service to handle provisional tax payment or refund offset.

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

MYOB Exo Business 2016.3 works best on Microsoft SQL Server 2014 (version 12.0.2495.0) Standard or Enterprise editions.

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 (however, see the Known Issue on page 35).
 - Microsoft SQL Server 2014/SQL 2014 Express Edition
- The latest Service Pack for the version of SQL Server you are using

Note: Microsoft SQL Server 2016 is not currently supported.

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, Windows 10
- 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 2016.

Contact synchronisation requires Microsoft Outlook 2010 to 2016.

MYOB Exo Business 2016.3 requires **ExonetLib.dll** version 2016.3.0 or later. Version 2016.3.0 is included with this release.

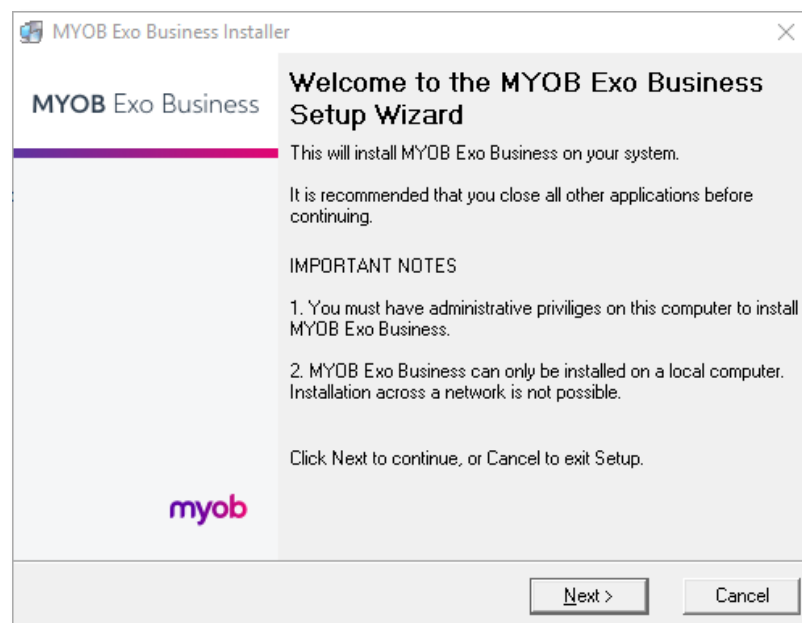
When installing manually on 64-bit operating systems, the file **RwEasyMAPI64.exe** must be copied from the **Supporting Files\RapWare** folder of the Exo Business DVD to the install directory. Register this file by running `RwEasyMAPI64.exe /regserver` from a command prompt.

Installing MYOB Exo Business

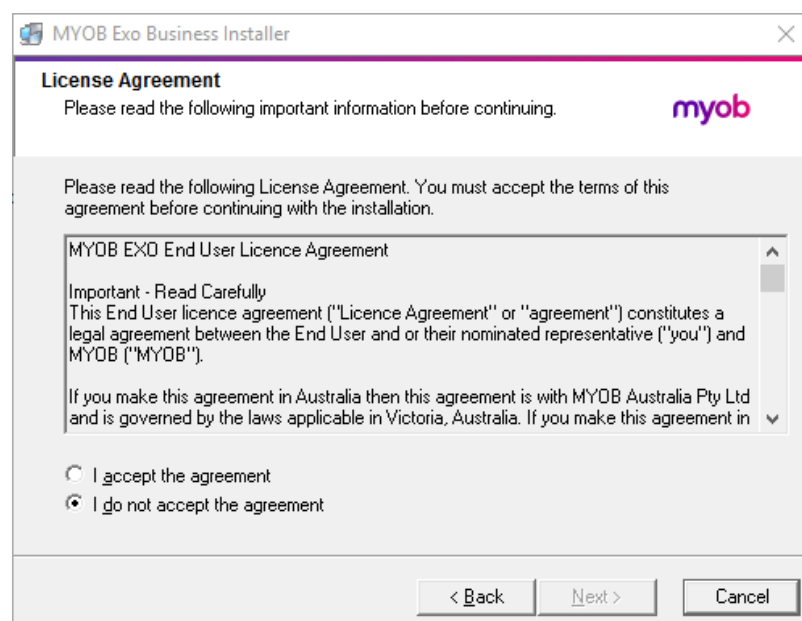
Note: Before you install this release, we recommend you take the precaution of backing up your data. Ensure there are no Exo Business modules running, locally or on your network.

To perform the installation:

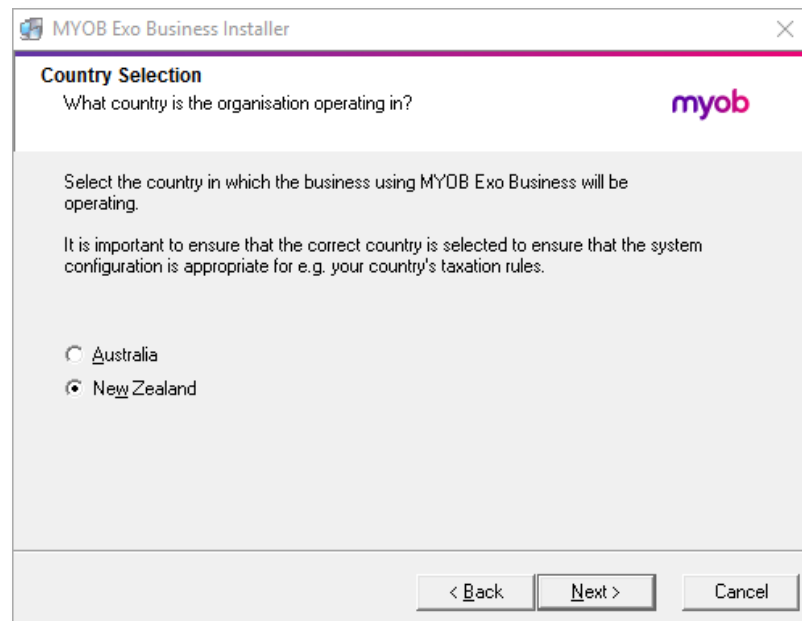
1. Insert the MYOB Exo Business CD and select **Install MYOB Exo Business** on the Install tab. If the install menu does not run automatically, run the **ExoBusinessInstaller.exe** program in the **Supporting Files** directory of the CD.
2. Click **Next** on the Welcome screen.



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



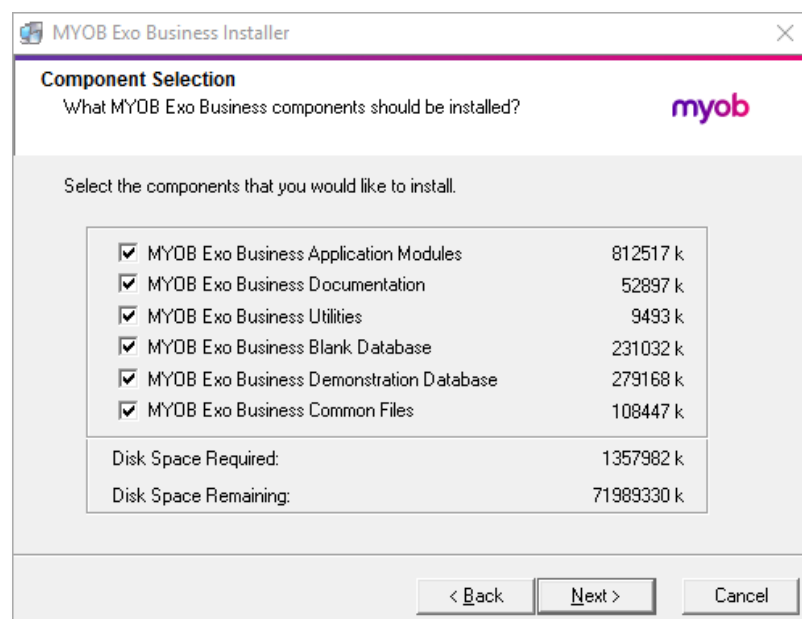
4. Select the country you are based in and click **Next**.



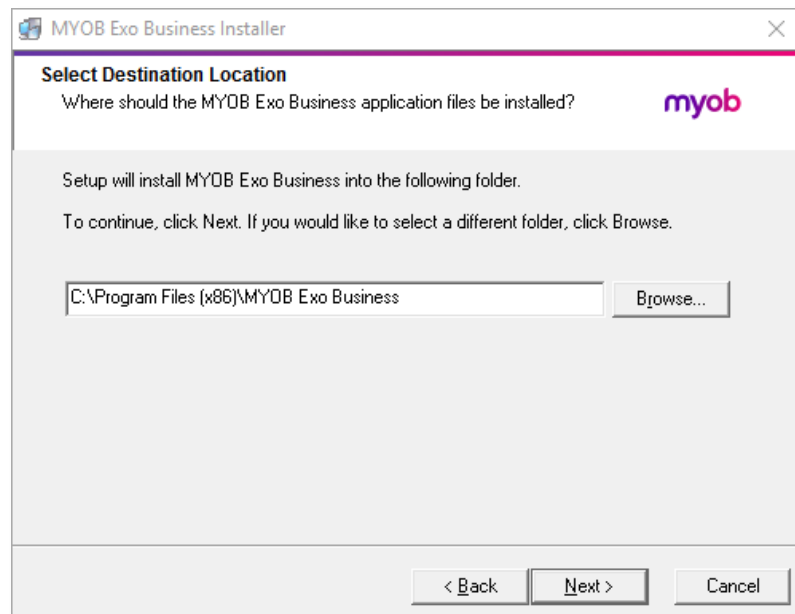
Note: Your selection here affects certain country-specific default settings that are set up during the install, e.g. tax rates and banks.

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

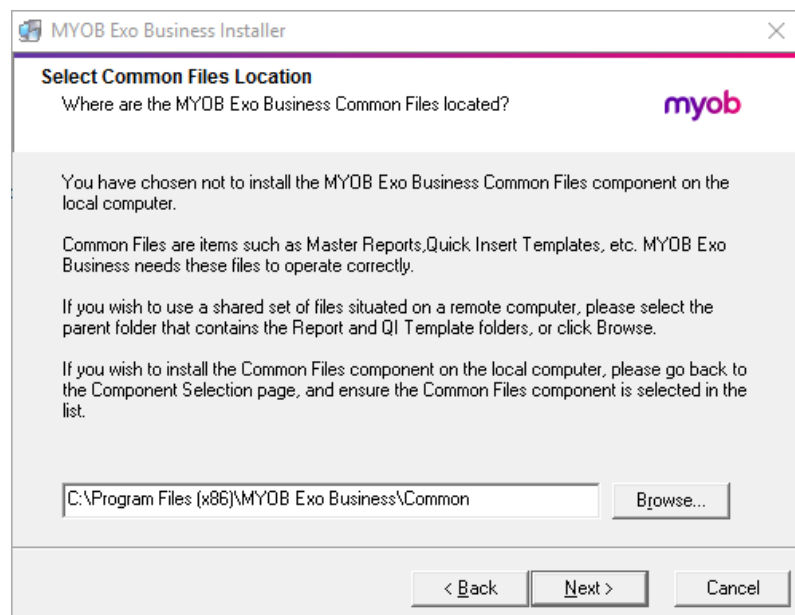
Click **Next** to continue.



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**.



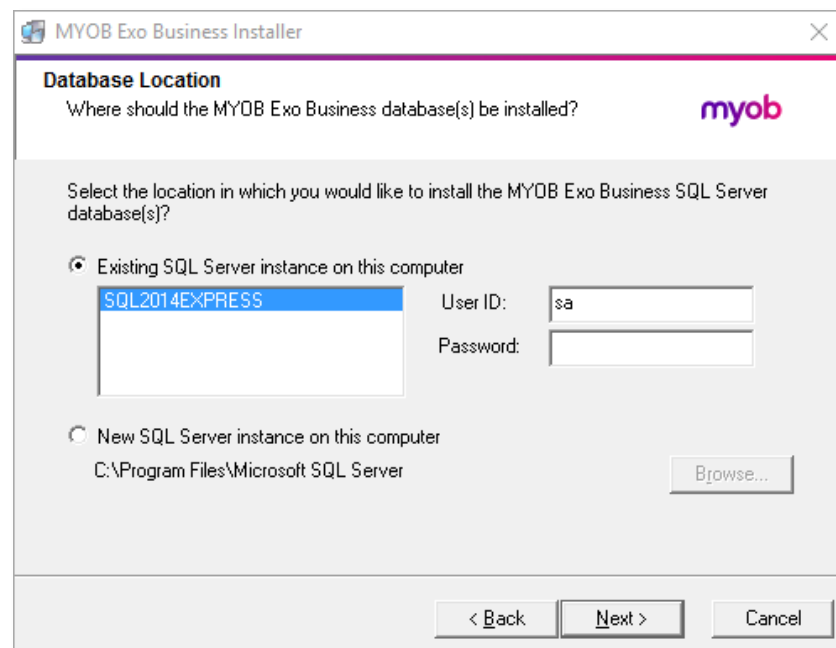
7. If the MYOB Exo Business Common Files are not installed on this PC, click Browse to choose the directory where the Common Files are located, then click **Next**.



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 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**.



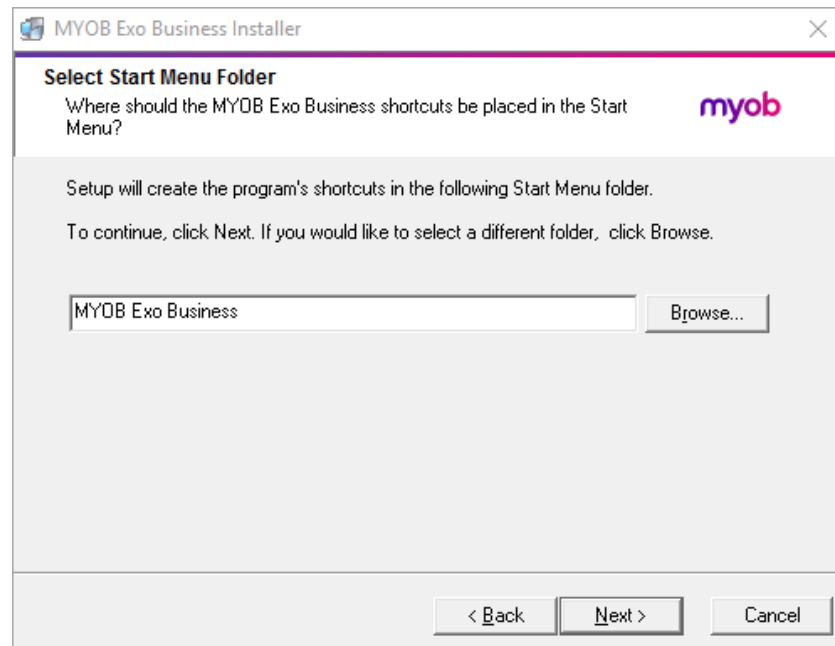
Note: The installer may appear unresponsive while it tries to detect SQL Server instances on the PC (this process may take a minute or more). Do not cancel the installer; simply wait until the detection operation is complete.

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

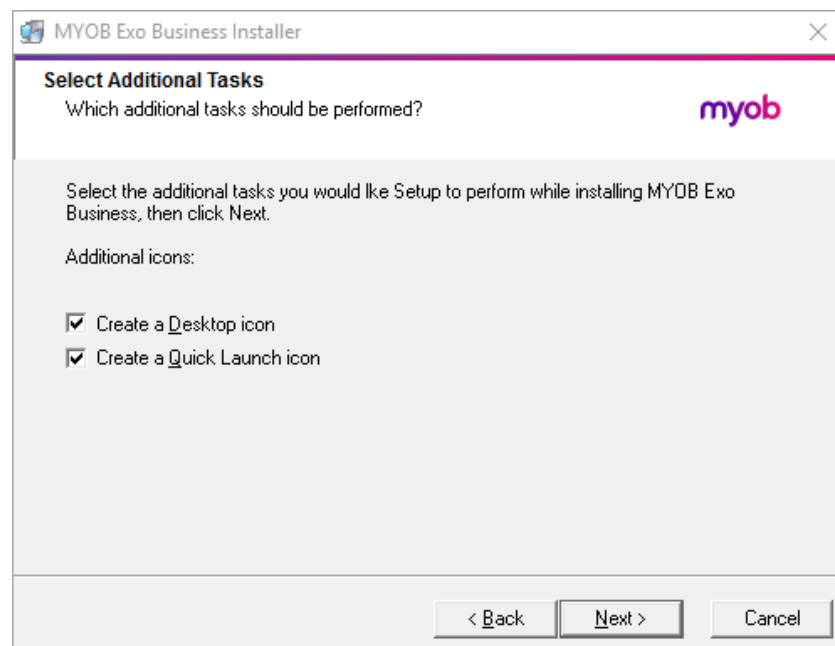
- Username: **sa**
- Password: **\$ExoAdmin7000**

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.

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

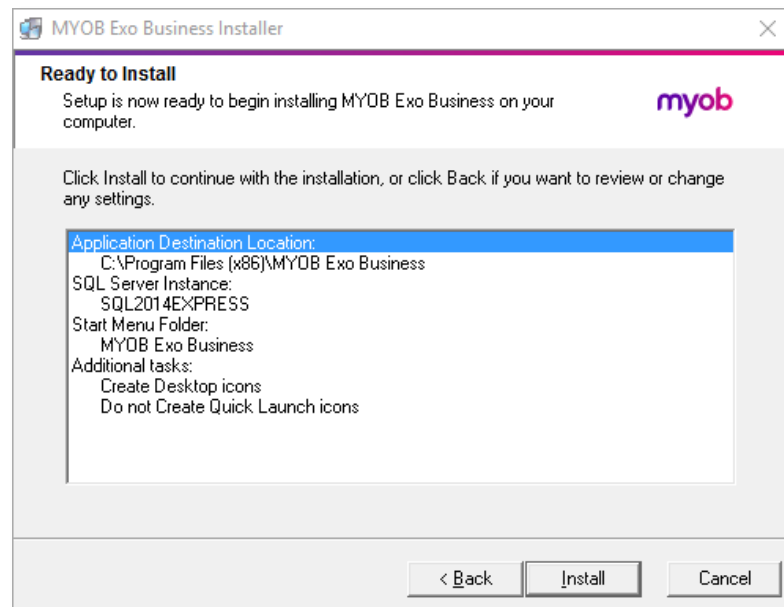


- If you want to create a desktop icon or Quick Launch icon for MYOB Exo Business, tick the relevant box(es), then click **Next**.

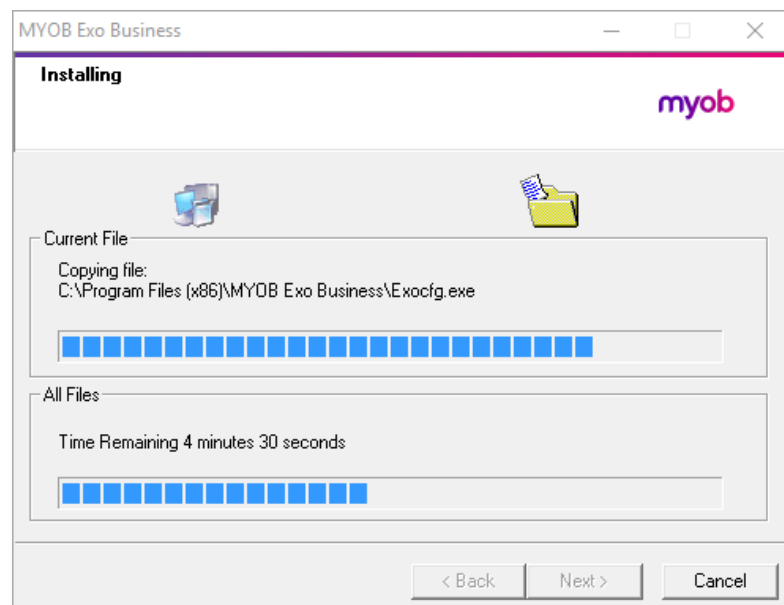


Installation

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.

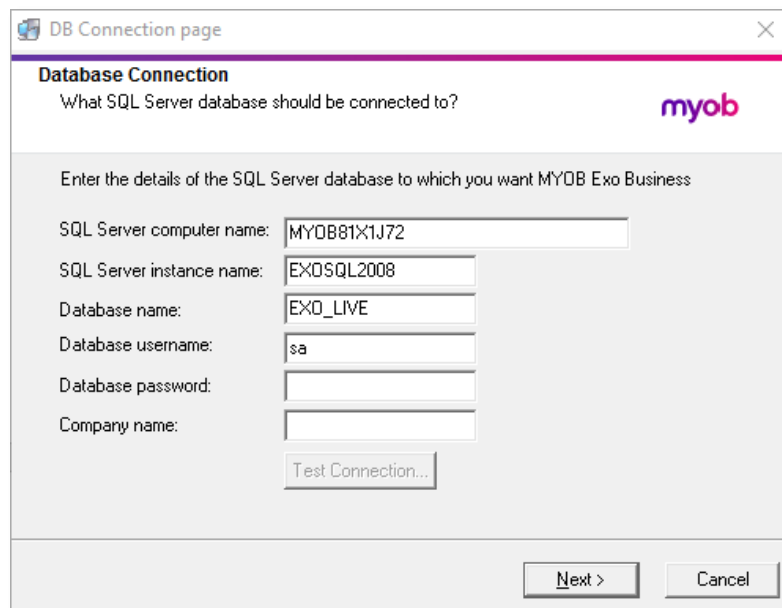


12. The installation progress is displayed.



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

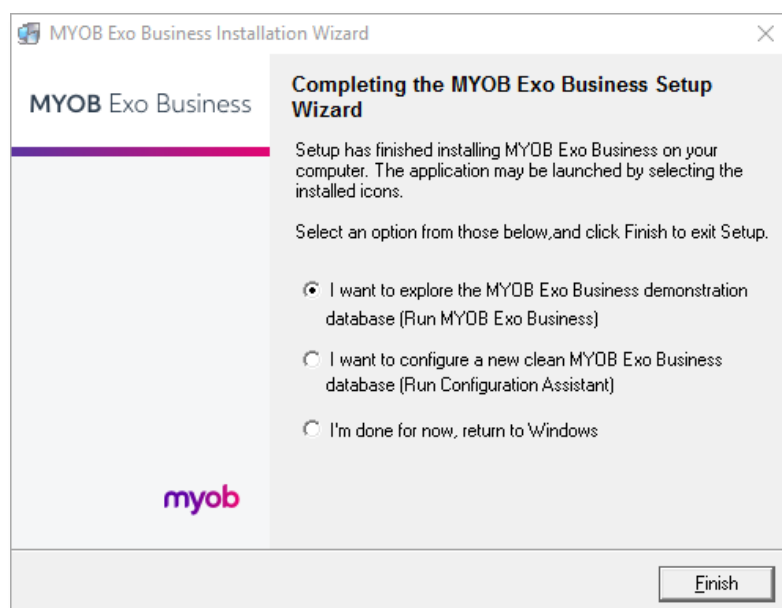
13. If you chose to install the application modules but not the database components on this PC, you must enter the details of the database once the installation has completed. Click **Test Connection** to check that the details you have entered work. If the test passes, click **Next**.



The 'DB Connection page' dialog box is titled 'Database Connection' and asks 'What SQL Server database should be connected to?'. It contains a 'myob' logo in the top right. The main area prompts the user to 'Enter the details of the SQL Server database to which you want MYOB Exo Business'. It includes input fields for 'SQL Server computer name' (MYOB81X1J72), 'SQL Server instance name' (EXOSQL2008), 'Database name' (EXD_LIVE), 'Database username' (sa), 'Database password', and 'Company name'. A 'Test Connection...' button is located below the password field. At the bottom right are 'Next >' and 'Cancel' buttons.

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.



The 'MYOB Exo Business Installation Wizard' dialog box shows the 'Completing the MYOB Exo Business Setup Wizard' step. It states: '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.' There are three radio button options: 'I want to explore the MYOB Exo Business demonstration database (Run MYOB Exo Business)' (selected), 'I want to configure a new clean MYOB Exo Business database (Run Configuration Assistant)', and 'I'm done for now, return to Windows'. A 'myob' logo is in the bottom left, and a 'Finish' button is in the bottom right.

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

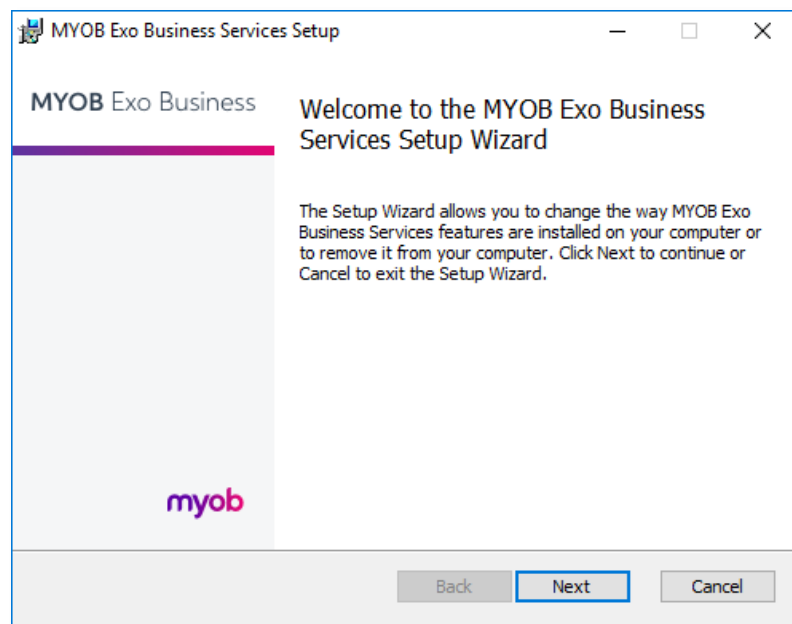
Note: Passwords are case-sensitive.

Installing Exo Business Services

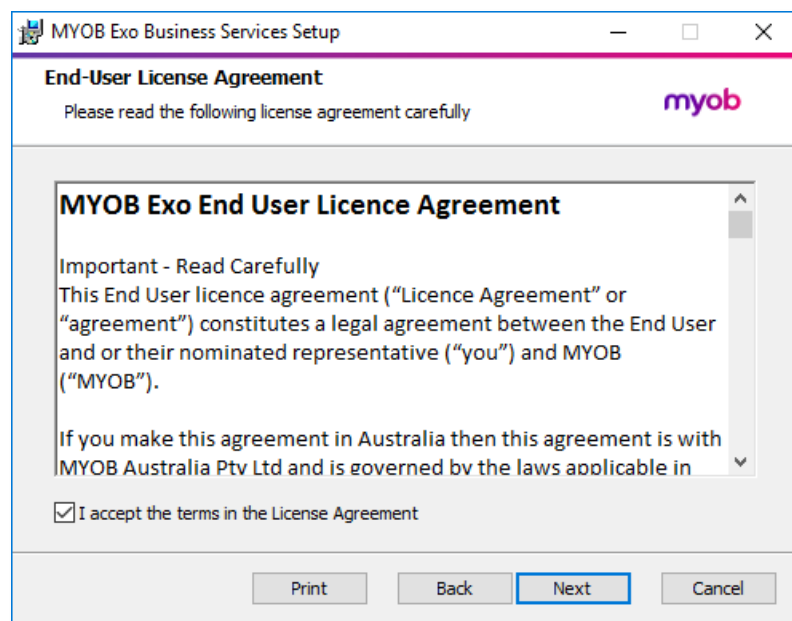
Once the Exo Business system is set up, you can install supporting services for the Exo API and Exo Email Service using the Exo Business Service Setup Wizard, **Exo Business Services Installer.msi**. This installer is supplied with the main Exo Business installer. It must be run on a server that already 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:

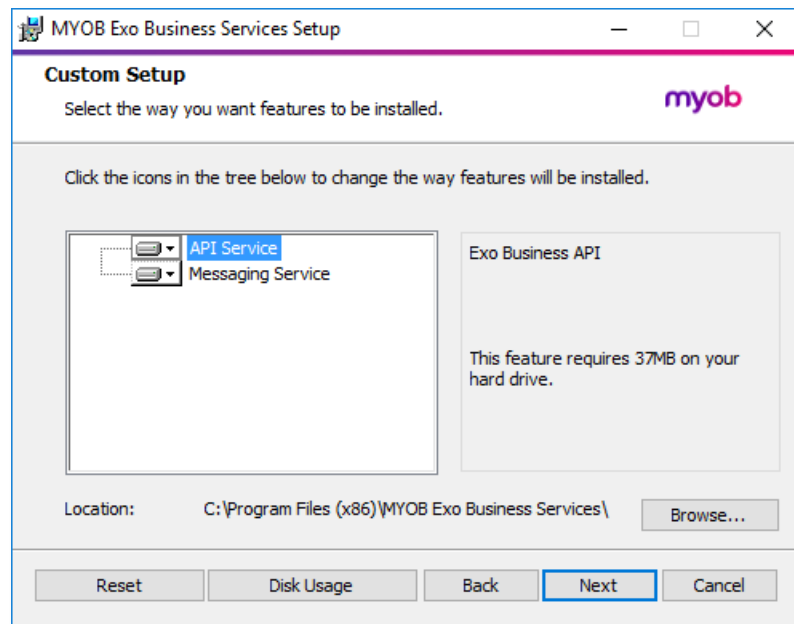


2. Click **Next**. The MYOB Exo End User Licence Agreement is displayed:



Installation

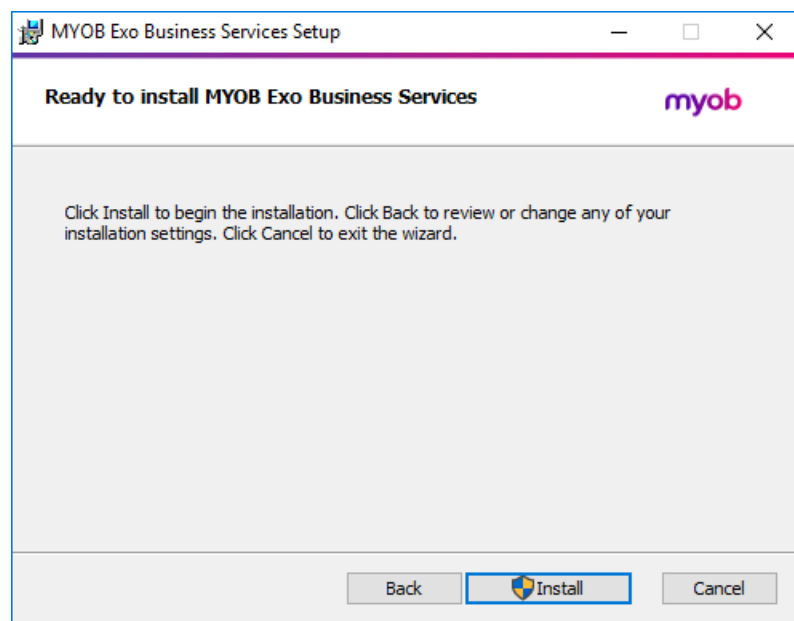
3. Tick **I accept the terms in the Licence Agreement** and click **Next** to continue.



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

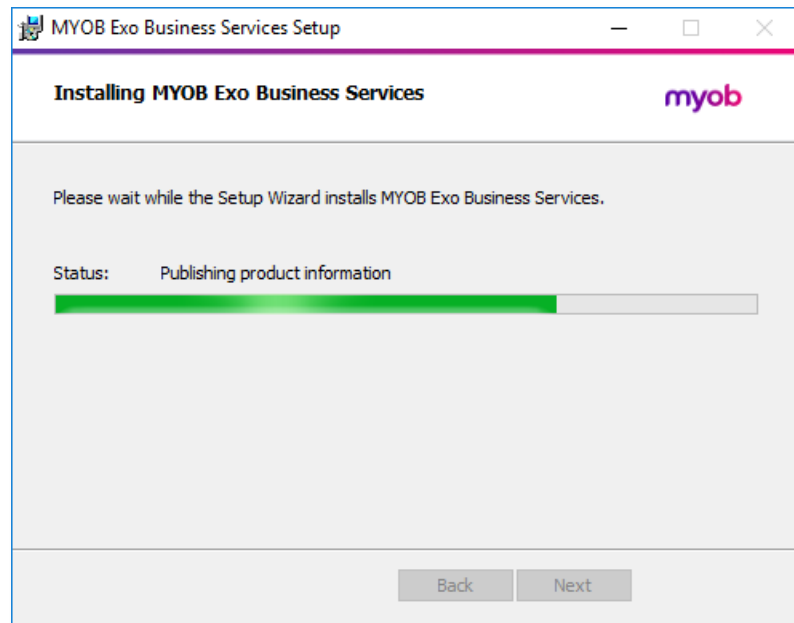
Note: The API configuration utilities are always installed (see “Setting up the Services” on page 15).

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.

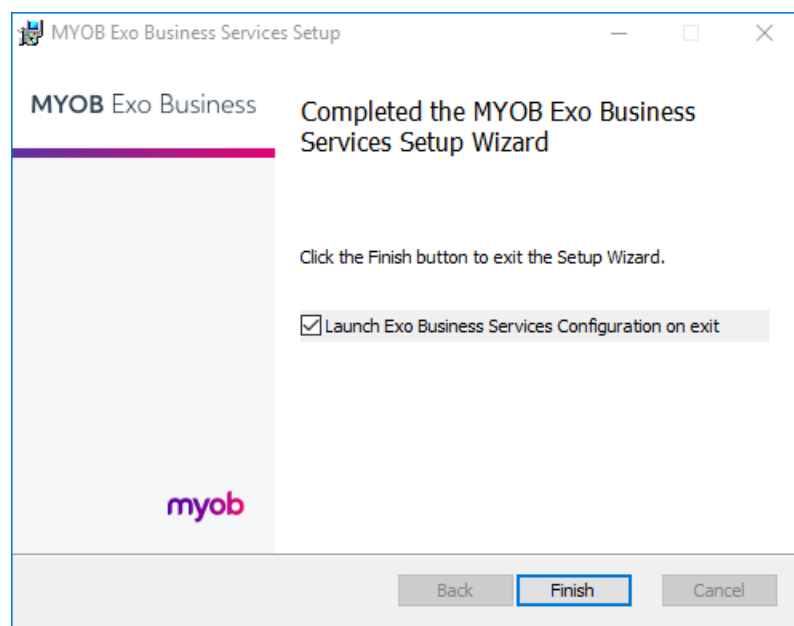


Installation

- Click **Install** to begin the installation. The progress of the installation is displayed:



- 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.

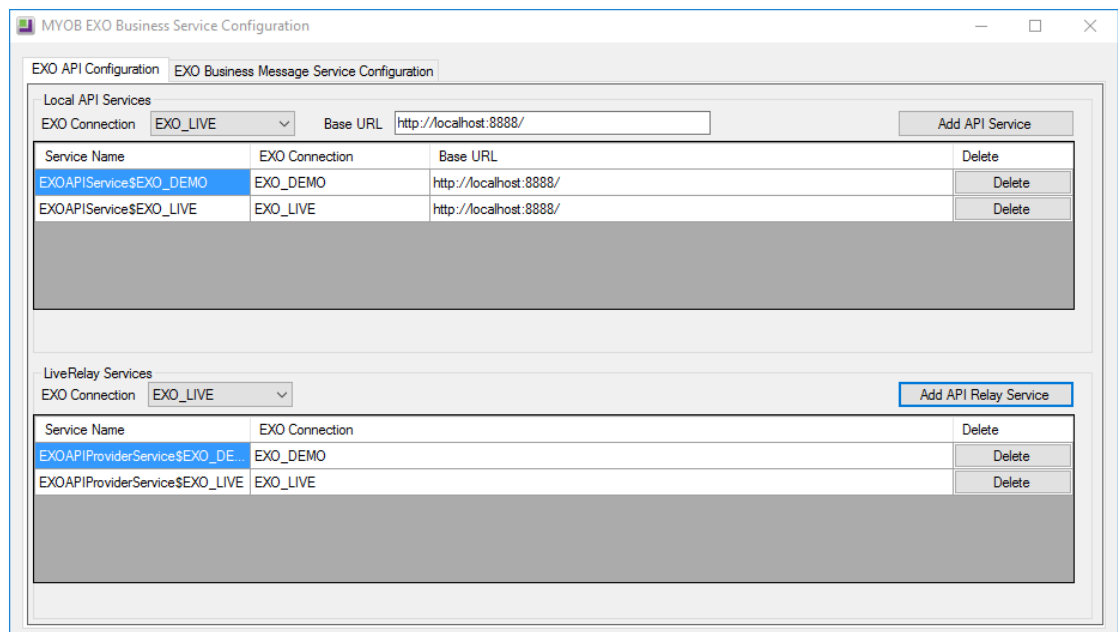


Note: The Exo Business Service Configuration utility is installed in the same location as the Exo API services. You can run the utility (MYOB.ED.EXO.Cloud.ServiceConfig.exe) from this location at any time.

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.

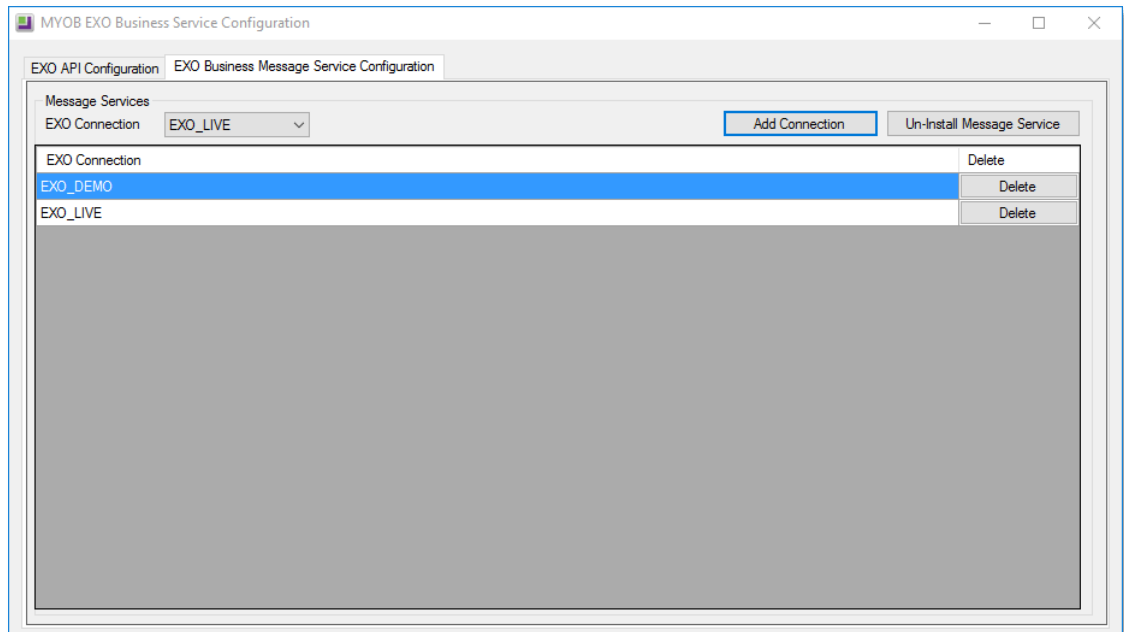
To configure an API service, select an Exo Business database connection, then click the relevant **Add Service** button. For the API Service, you must also enter a **Base URL**, which is the location and port the API is accessible on (the default should be suitable in most cases, unless you want to use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

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.



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 2016.3.0 or later.

Updates to Business Alerts

This release adds the ability to set up new Business Alerts for a wide range of events. New event categories are available in the **Rules for Event** dropdown on the Business Alerts screen in Exo Business Config:

- Save Debtor
- Save Creditor
- Save Non-Account
- Save Contact
- Save Stock Item
- Save GL Account
- Save Serviceable Unit

The Business Alerts screen has been redesigned to group events into sections:

