

MYOB EXO Business

Release Notes

2015.2

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Introduction

What's New in this Release?

The primary benefits of the 2015.2 release are a number behind the scenes technical performance improvements that have the potential to improve the general experience for the user. Particularly so for larger business using Sales orders and Serial numbers, but performance improvements may be experienced across the entire scope of the EXO Business product.

Users of the Exo URL Protocol Handler will very likely appreciate this update as it allows more flexibility to specifically call features in the CRM module (such as open a sales order) that were previously not available. It also adds more flexibility in searching for example when calling contacts or company records up from an external telephony application using a phone number.

It represents a low impact release in terms of implementation as there is little or no retraining required if upgrading from EXO Business Version 2015.1.3. Changes to the underlying database structure are very minimal.

In many respects this represents what would normally be a service pack release for MYOB, however because several of the changes are in the Exonetlib.dll file this requires us to change the release number.

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.

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
 - Microsoft SQL Server 2014/SQL 2014 Express Edition
- The latest Service Pack for the version of SQL Server you are using
- EXO Business 2015.2 works best on Microsoft SQL Server 2014/SQL 2014 (version 12.0.2495.0) Standard or Enterprise Editions.

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.

Installation

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
- 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 2015.2 requires **ExonetLib.dll** version 2015.2.0 or later. Version 2015.2.0 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

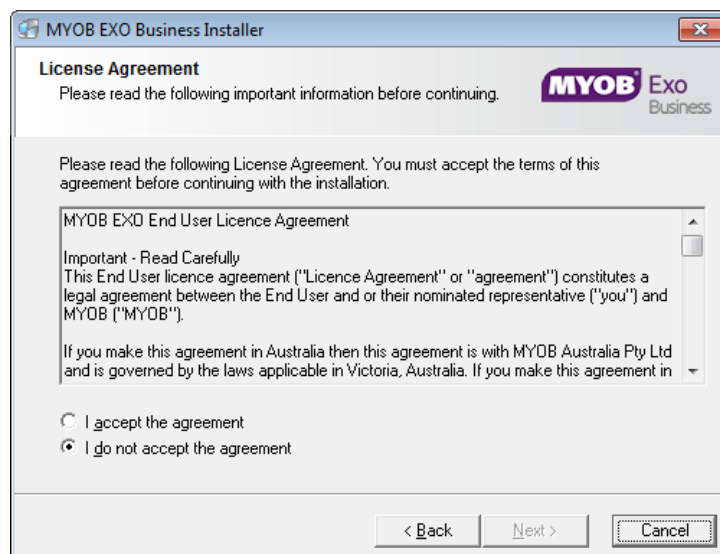
Note: Before you install this release, we recommend you take the precaution of backing up your data. Ensure there are no EXO Business modules running, locally or on your network.

To perform the installation:

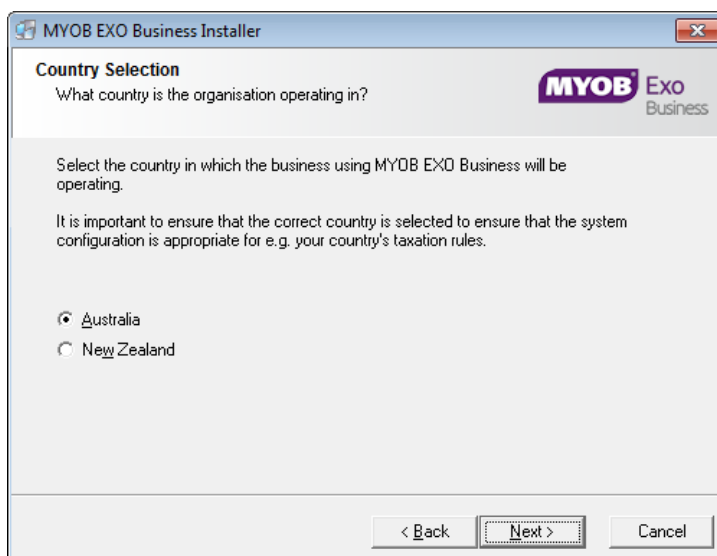
1. Insert the MYOB EXO Business CD and select **Install MYOB EXO Business** on the Install tab. If the install menu does not run automatically, run the **ExoBusinessInstaller.exe** program in the **Supporting Files** directory of the CD.
2. Click **Next** on the Welcome screen.



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**.

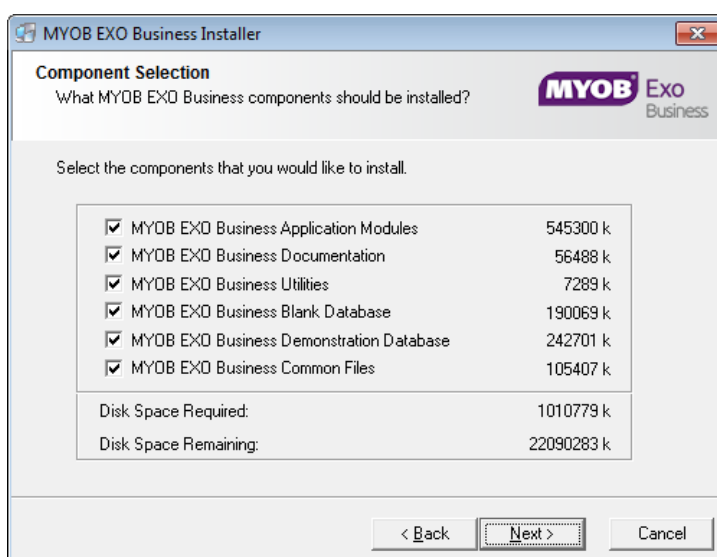


Note: Your selection here affects certain country-specific default settings that are set up during the install, e.g. tax rates and banks.

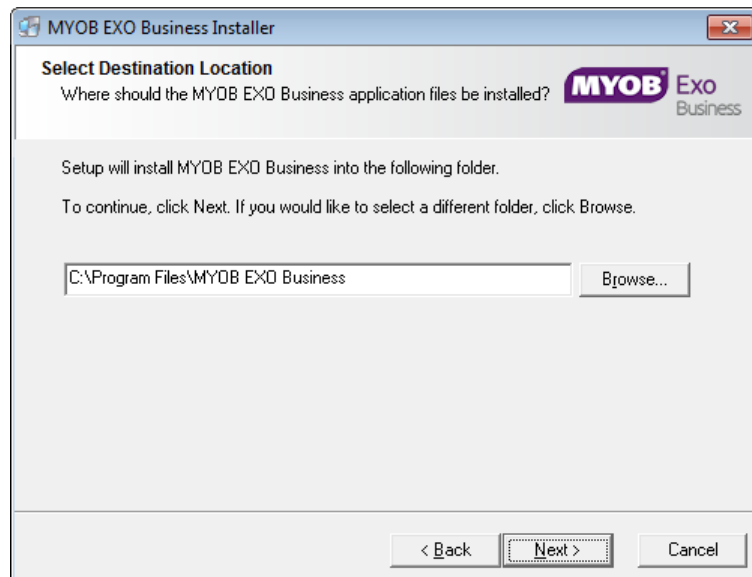
5. Select the components to install. Choose from:

- 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

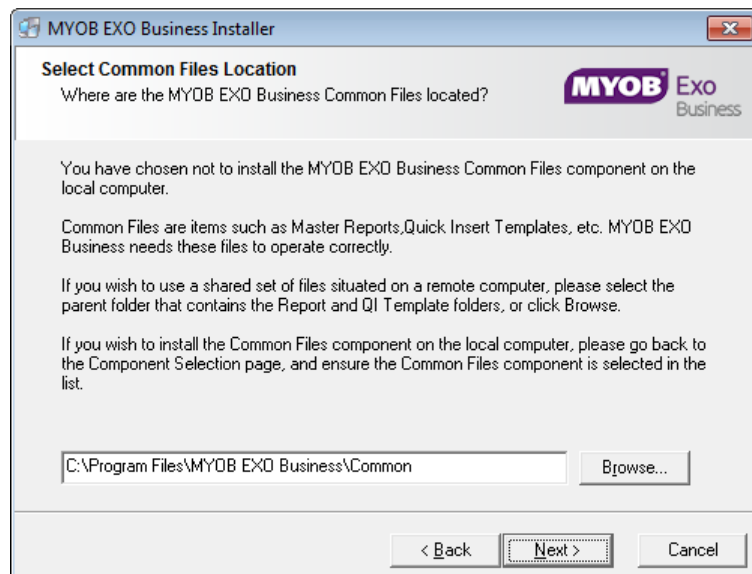
Click **Next** to continue.



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**.



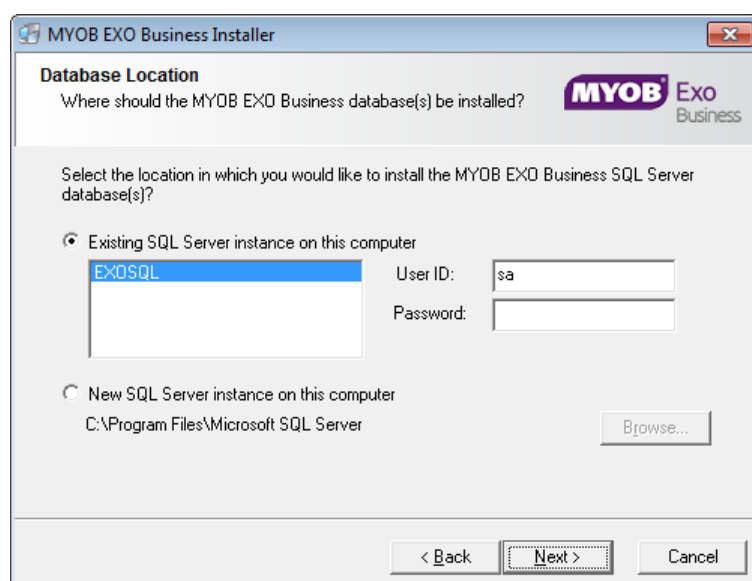
7. If the MYOB EXO Business Common Files are not installed on this PC, click **Browse** to choose the directory where the Common Files are located, then click **Next**.



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 21 for information on the install prerequisites for SQL Server 2008 R2 SP1.

Click **Next**.



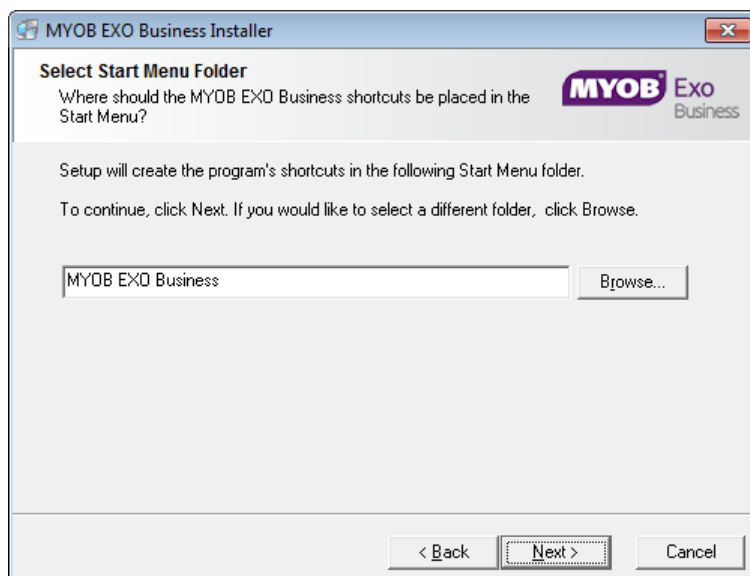
Note: The installer may appear unresponsive while it tries to detect SQL Server instances on the PC (this process may take a minute or more). Do not cancel the installer; simply wait until the detection operation is complete.

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

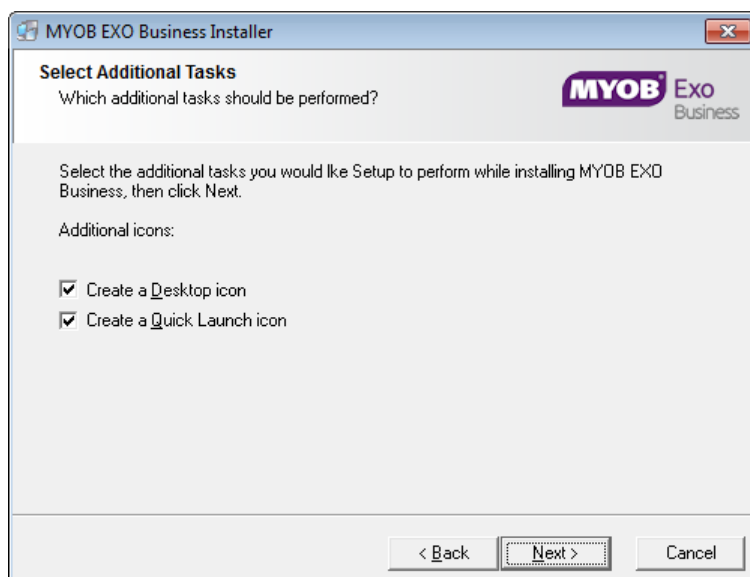
- Username: **sa**
- Password: **\$ExoAdmin7000**

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.

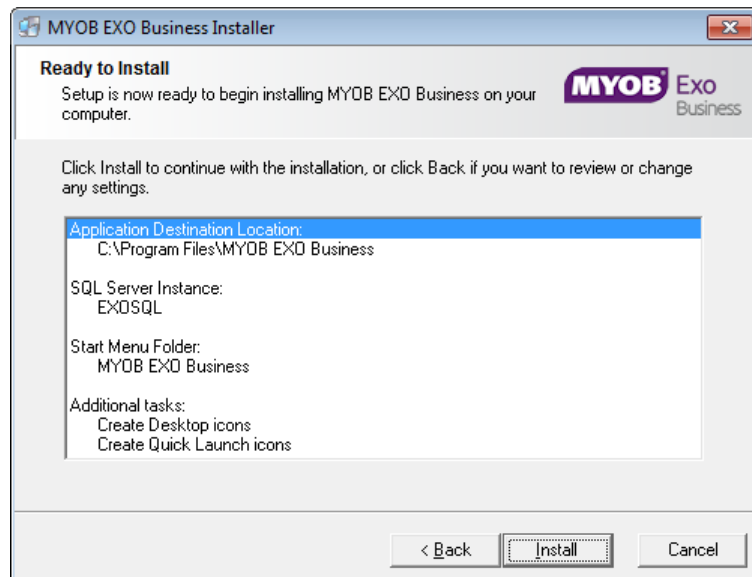
9. Click **Browse** to choose where the MYOB EXO Business shortcuts should be located in the Windows Start menu, then click **Next**.



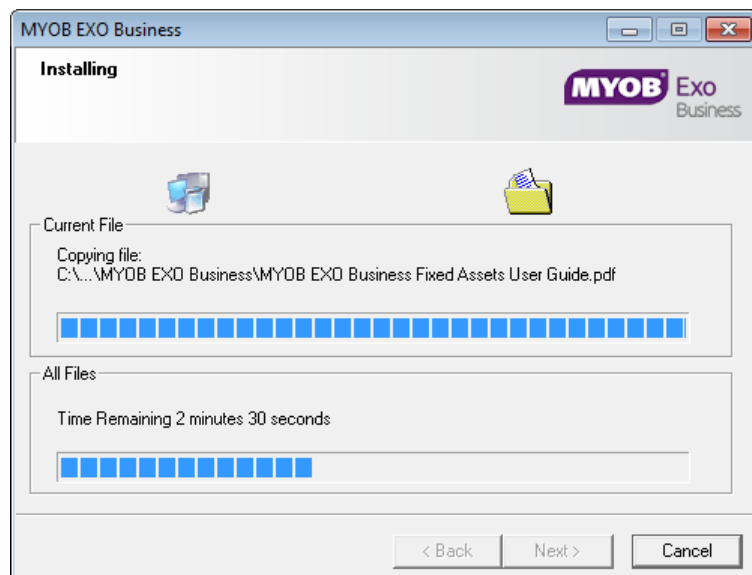
10. If you want to create a desktop icon or Quick Launch icon for MYOB EXO Business, tick the relevant box(es), then click **Next**.



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.

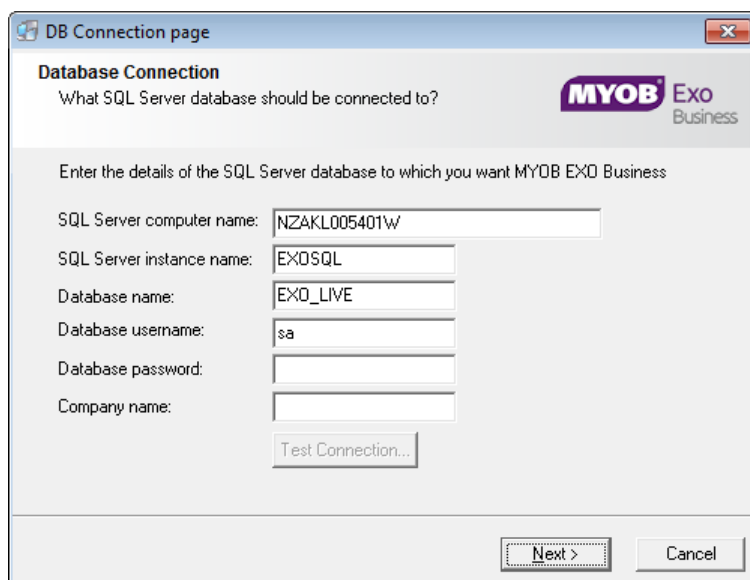


12. The installation progress is displayed.



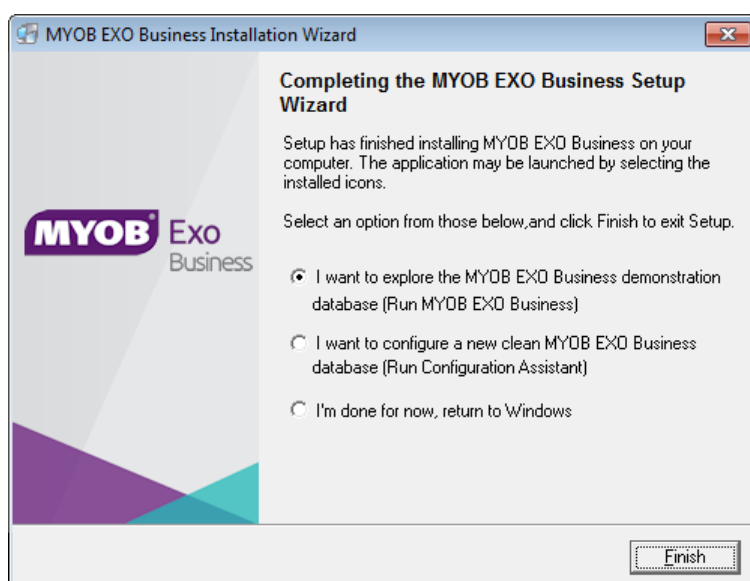
Note: During installation, other windows may appear if SQL Express is being installed.

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**.



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.



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

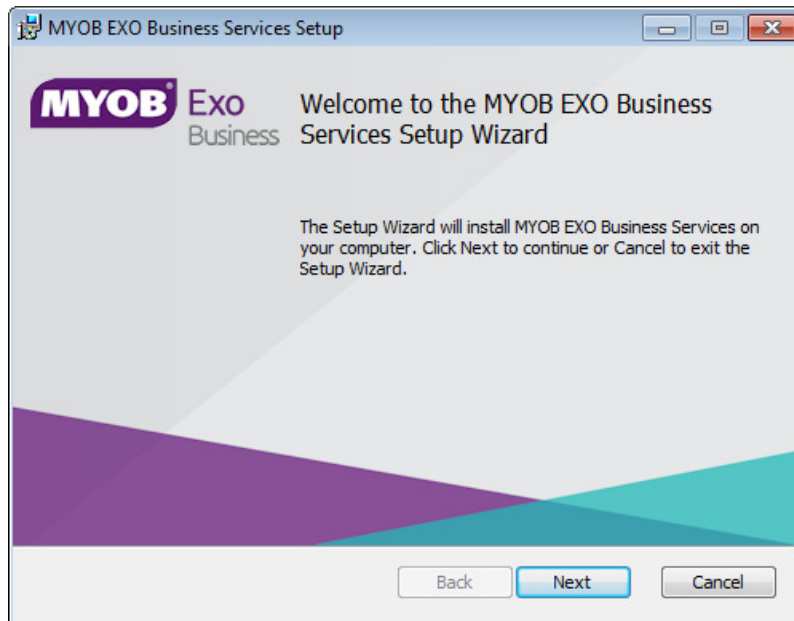
Note: Passwords are case-sensitive.

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:

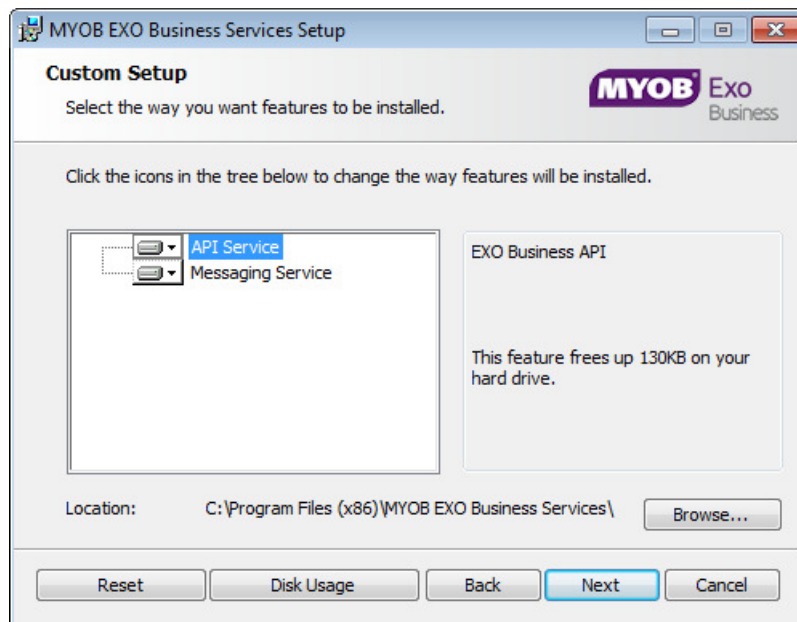
1. Double-click on the installer to run it. The welcome screen appears:



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



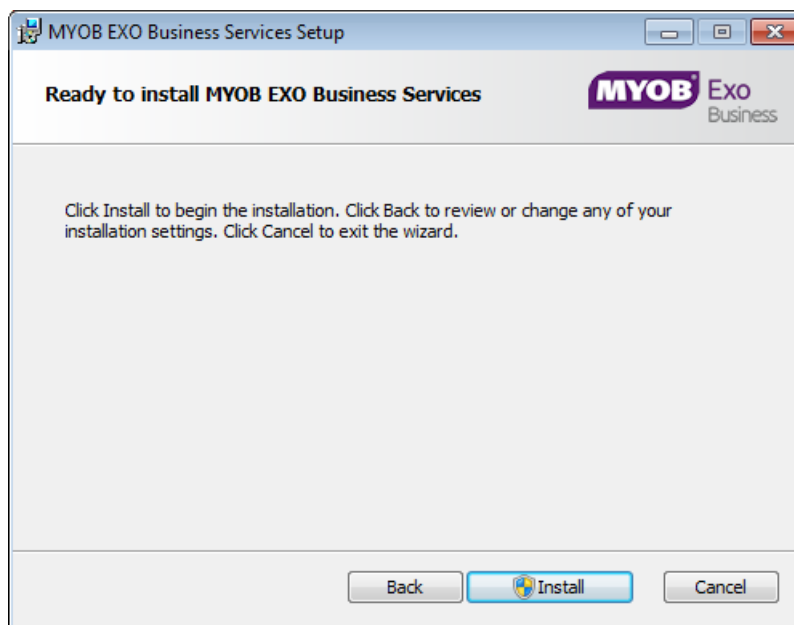
3. Tick **I accept the terms in the Licence Agreement** and click **Next** to continue.



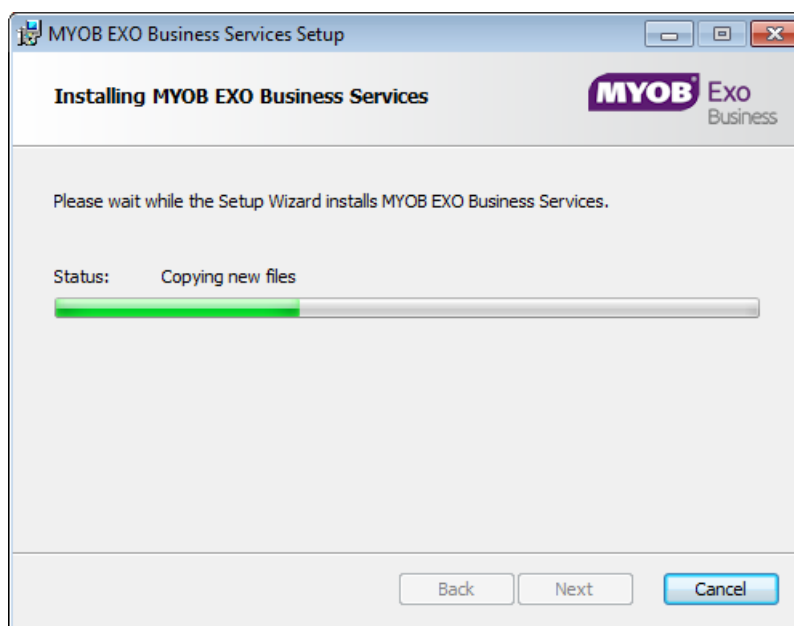
4. Select which components to install. Choose from:
 - The EXO API Service
 - The EXO Messaging Service

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

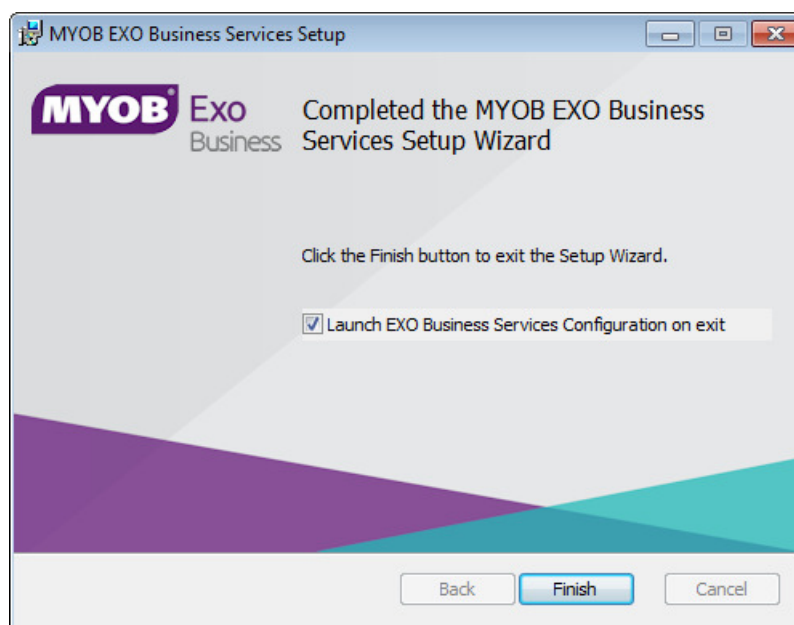
5. The install location is displayed at the bottom of the window. Click **Browse** to choose a different location if necessary.
6. Click **Next**. You are now ready to install the EXO Business services.



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.

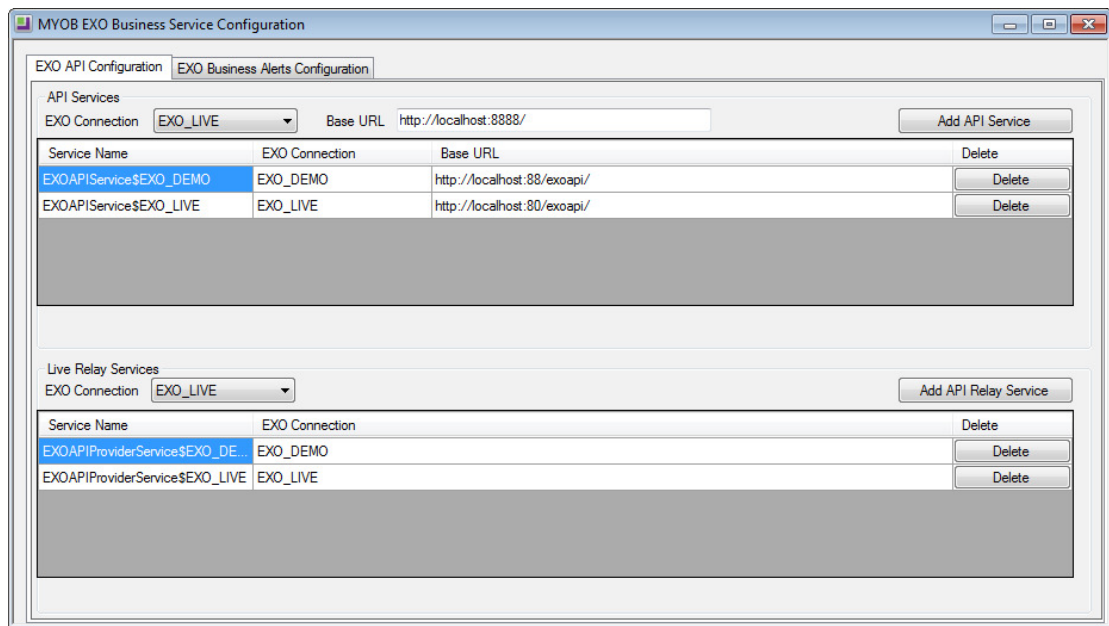


Note: The EXO Business Service Configuration utility is installed in the same location as the EXO API services. You can run the utility (**MYOB.ED.EXO.Cloud.ServiceConfig.exe**) from this location at any time.

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.

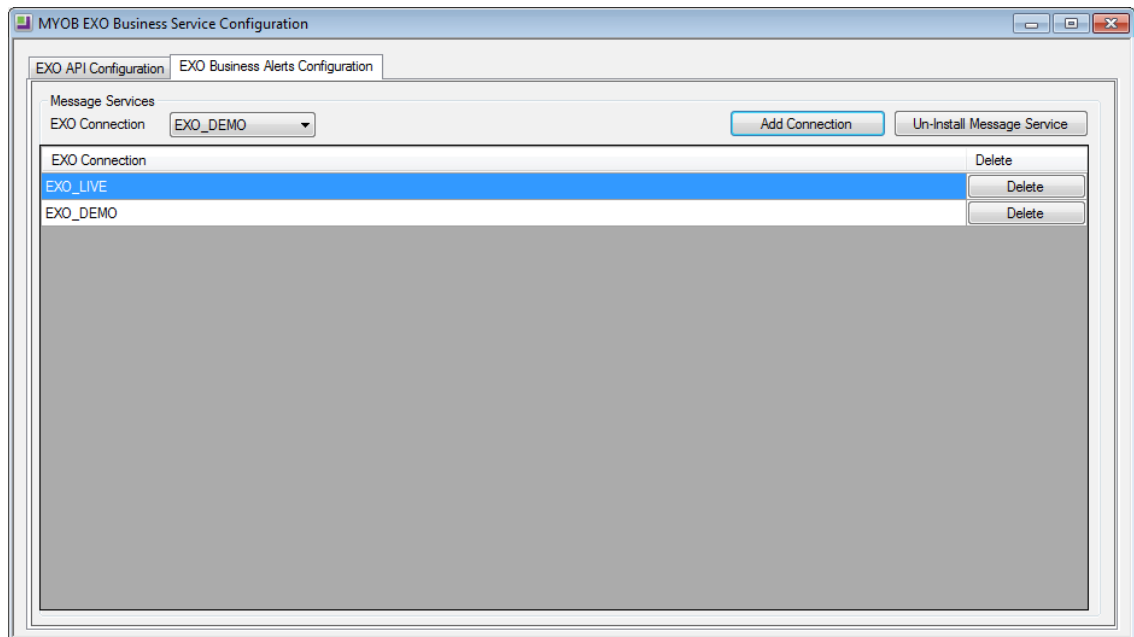
To configure an API service, select an EXO Business database connection, then click the relevant **Add Service** button. For the API Service, you must also enter a **Base URL**, which is the location and port the API is accessible on (the default should be suitable in most cases, unless you want to use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

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 to provide performance improvements (see page 19) and enhancements to object locking (see page 20). When upgrading manually, make sure to install and register the upgraded DLL—its version number should be 2015.2.0 or later.

Enhancements to the `exo://` URL Protocol

This release adds new features to the `exo://` URL protocol. To use these new features, you must replace the **exoprotocolhandler.exe** file with the version of the file supplied with this release. This must be done on all PCs that use the `exo://` protocol.

New Commands

The following new commands are supported by the `exo://` URL protocol:

Command	Description
<code>crm_saleorder</code>	Opens or searches for Sales Orders in the EXO CRM module.
<code>crm_company</code>	Searches for company accounts in the EXO CRM module.
<code>jc_purchaseorder</code>	Opens or searches for Purchase Orders in the EXO Job Costing module.
<code>workorder</code>	Opens or searches for Works Orders in the core EXO Business module.

All of the new commands support searching for records with the `?search` parameter, e.g. `workorder?search=test`.

All of the new commands except for `crm_company` support opening an individual record by its ID code, e.g. `crm_saleorder(11012)`.

Improvements to Searching

The `?search` parameter now supports spaces in search terms, e.g. the URL:

```
exo://draccount/?search=test company
```

will search Debtor accounts using the search string “test company”.

The following commands now support an alternate `?find` parameter, which offers more options using % wildcards:

- `company`

New Features

- contact
- crm_company (new—see above)
- crm_contact (new—see above)

You can use the `?find` parameter in place of the `?search` parameter as follows (in a URL, the percent symbol must be escaped with `%25`):

- `?find=test` – return records that match “test” exactly
- `?find=test%25` – return records that start with “test”
- `?find=%25test` – return records that end with “test”
- `?find=%25test%25` – return records that contain “test” anywhere in the name

For example:

```
exo://contact/?find=a%25
```

This will return all contact records whose name starts with a.

While the `?search` parameter always opens the relevant search window, if the `?find` parameter matches only one record, that record will be opened automatically and the search window won't appear.

Performance Improvements

This release includes improvements to the system's performance in several areas:

- The **Exonetlib.dll** DLL, which manages the connection to the EXO Business database, has been enhanced in this release to optimise the performance of database queries. Using the new version supplied with this release can result in speed improvements of up to 10% across the whole EXO Business system.
- The system's performance has been improved when adding lines to Sales Orders. This improvement is particularly noticeable when copying Sales Orders and when populating a Sales Order using an Order Template.
- The system's performance has been significantly improved when using serial numbers on products with large unit counts.

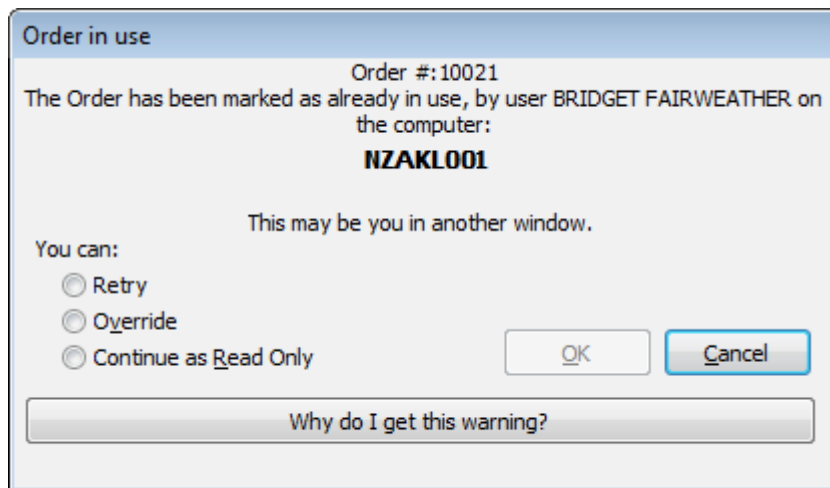
Update Logging

The DBUpdate process no longer attempts to email system information to MYOB on completion; the same information is now sent to MYOB automatically, with no user intervention required.

Changes to Object Locks

This release includes enhancements to the management of object locks, to prevent historical object locks remaining in the system and warning users unnecessarily. The following changes have been made:

- All historical object locks are cleared when the DBUpdate process is run.
- Object locks are now recorded against the staff member's ID, and the staff member is now displayed on object lock warnings:



- All object locks for logged out staff members are cleared, i.e. all object lock records associated with a staff member are deleted once that staff member's session ID is not in the list of active session IDs.

Resolved Issues

EXO Business Core

Service Request ID	Description
113497190815 110890068091 114562002371	Serial numbers could be missed out from the list of available serials if there was a large gap in the sequence. This has been resolved.
112959991963 112791626301	Processing a Purchase Order with negative stock quantities created incorrect stock journals on the Post Ledgers to GL window. This has been resolved.
114438344259 113362603971	Sales Orders performed slowly when adding new lines – this was particularly noticeable when copying Sales Orders or when populating a Sales Order using an Order Template. This has been resolved—see page 19.
114972354976 114971971525	This release includes enhancements to the exo:// URL protocol—see page 18.
-	Using serial numbers on products with large unit counts resulted in performance issues. This has been resolved—see page 19.

EXO CRM

Service Request ID	Description
110664225601 110495083911	When splitting a line on an Opportunity, the OPPLINEID of the original line was duplicated to the new line. This has been resolved; new Opportunity lines are always given unique OPPLINEID values.
112996339418 114466896741 112725567631	It was not possible to delete lines from an unprocessed Sales Order in EXO CRM. This has been resolved.

Clarity Reports

Service Request ID	Description
11726134576 113332606445	When sorting a report on a mixed-case string variable, records could be missing from the report. This has been resolved.

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.

SQL 2012 versions – Identity reseeding issue

All versions of SQL server 2012 exhibited a subtle, but now well-known change in default behaviour with regard to identity or auto number sequences. Unfortunately for many existing applications this would be experienced as an unexpected anomaly where number sequences could apparently spontaneously jump by increments of 1000 if the SQL server was restarted. EXO Business is one of these applications. This behaviour was reversed in SQL server 2014. No known complete solution exists for completely preventing this aberrant behaviour in any versions of SQL server 2012 other than to upgrade to SQL server 2014 to completely eliminate the potential for this issue to occur.

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.