MYOB EXO Business

Release Notes

2015.3

Contents

Introduction

What's New in this Release?

The primary benefits of the 2015.3 release are a number of 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.

Users of the EXO URL Protocol Handler will want this update as it allows more flexibility to specifically call features in the CRM module (such as open a Sales Order) than were previously not available. This release also adds more flexibility in searching (particularly when calling contacts or company records up from an external telephony application).

It represents a low impact release as there is little or no retraining required if upgrading from EXO Business Version 2015.1.3 and the 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 (however, see the Known Issues section on page 22).
    - Microsoft SQL Server 2014/SQL 2014 Express Edition
- The latest Service Pack for the version of SQL Server you are using

MYOB EXO Business 2015.3 works best on Microsoft SQL Server 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.

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 2015.3 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**.
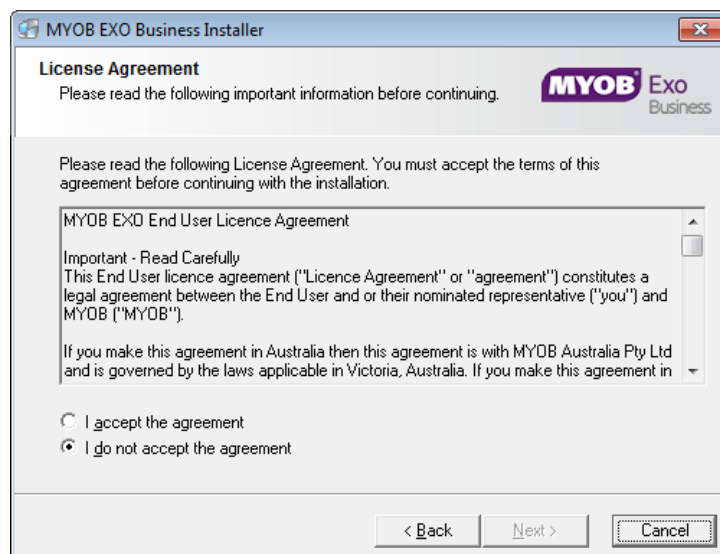
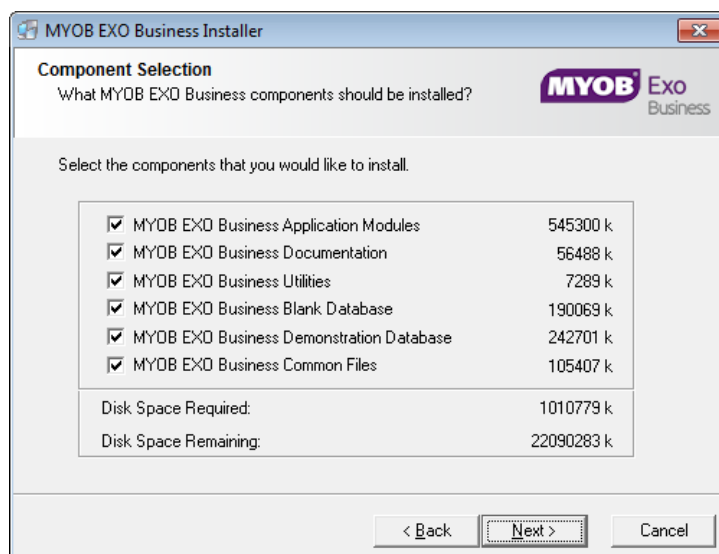4. Select the country you are based in and click **Next**.
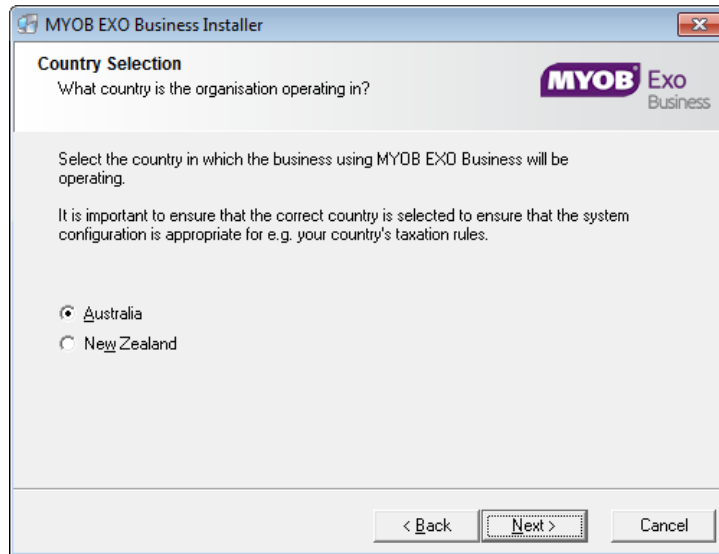
5. Select the components to install. Choose from:

    -   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**.
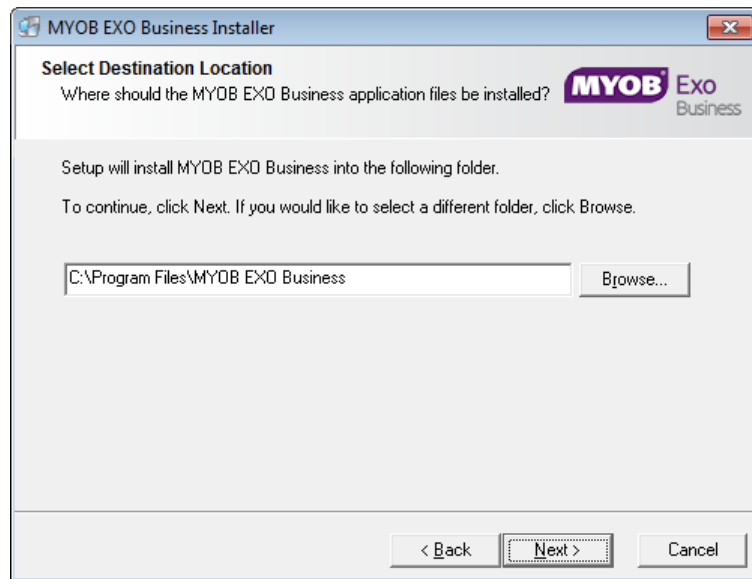

7. If the MYOB EXO Business Common Files are not installed on this PC, click Browse to choose the directory where the Common Files are located, then click **Next**.
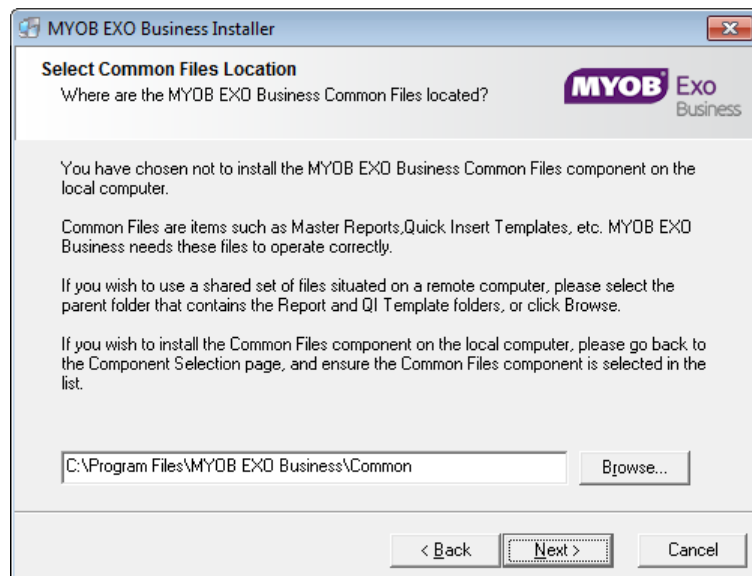
8. If you chose to install the MYOB EXO Business Database components, you must specify where to install the database:

    - 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 pre-requisites for SQL Server 2008 R2 SP1.
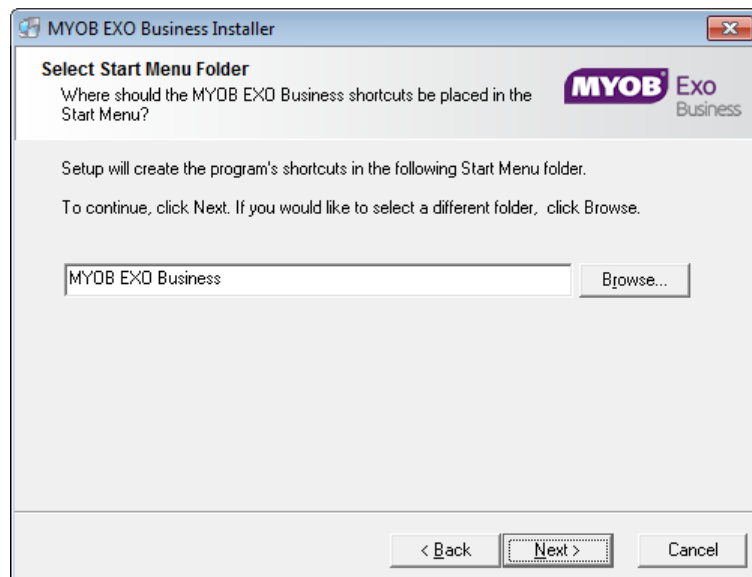
Click **Next**.
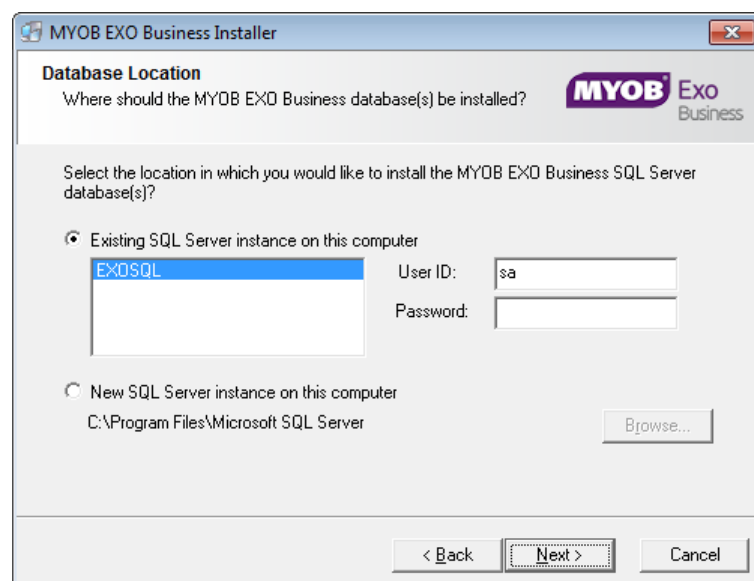
Note: The installer may appear unresponsive while it tries to detect SQL Server instances on the PC (this process may take a minute or more). Do not cancel the installer; simply wait until the detection operation is complete.

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**.
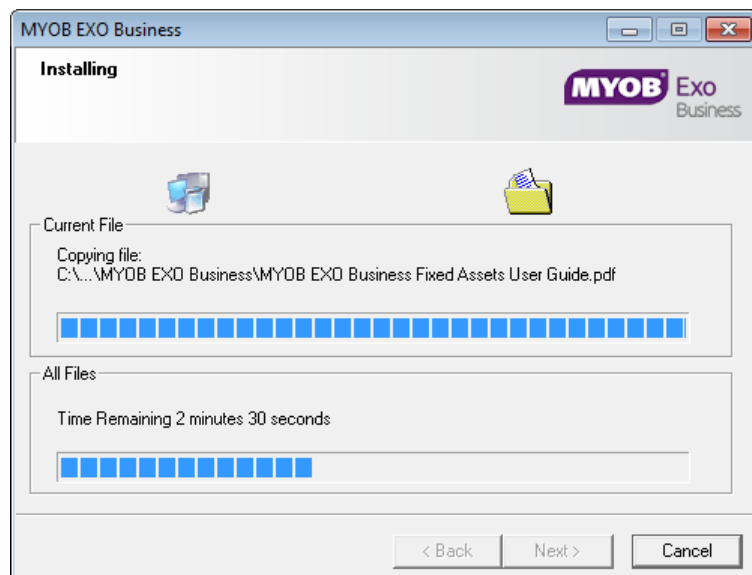

10. If you want to create a desktop icon or Quick Launch icon for MYOB EXO Business, tick the relevant box(es), then click **Next**.
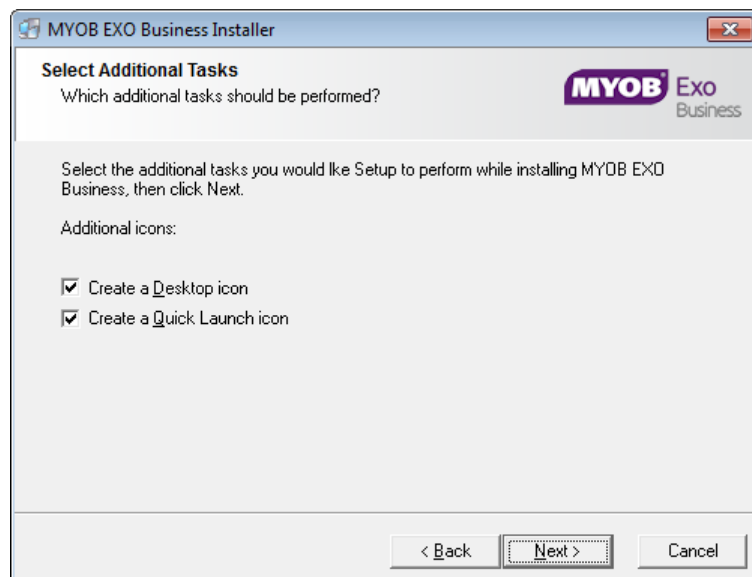
11. The installation is ready to begin. Review the details and click **Install** to proceed. If you need to change any details, click **Back** to return to the previous screen and change your selections.
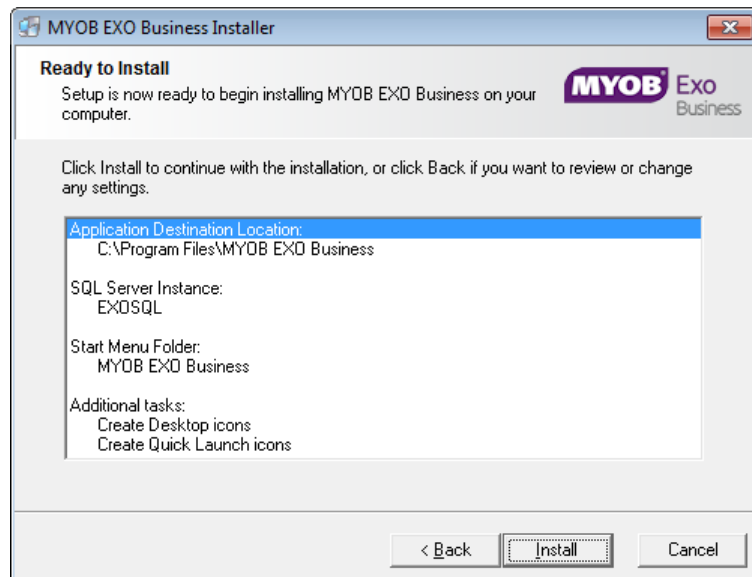
12. The installation progress is displayed.

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**.

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.
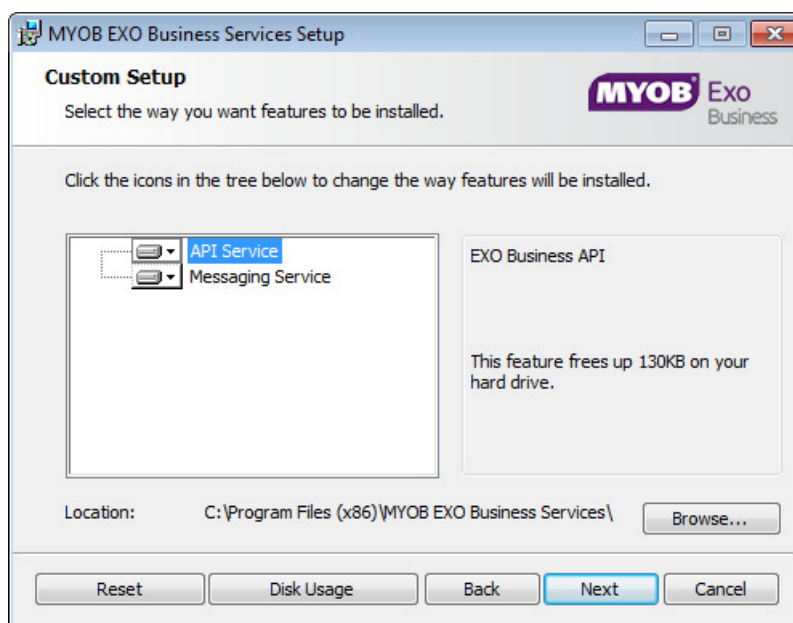
To perform the installation:

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

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.
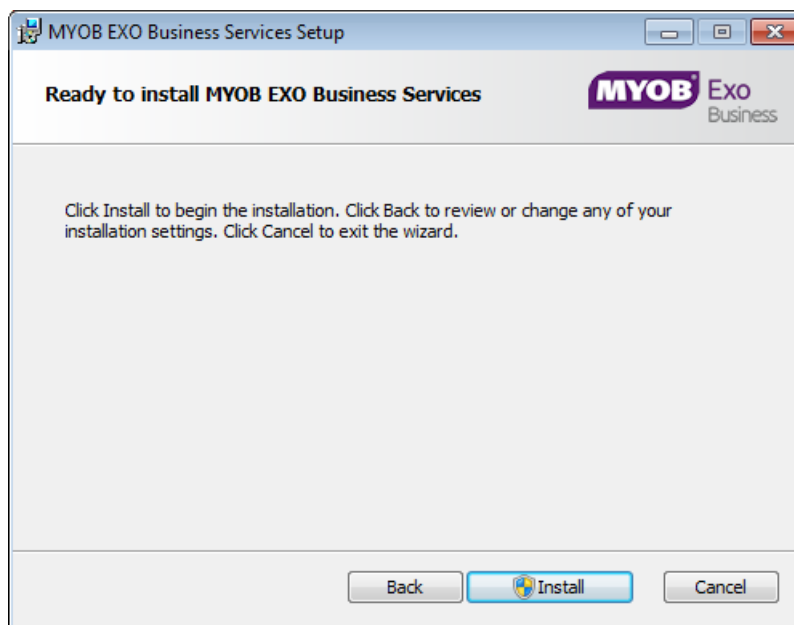
7. Click **Install** to being the installation. The progress of the installation is displayed:
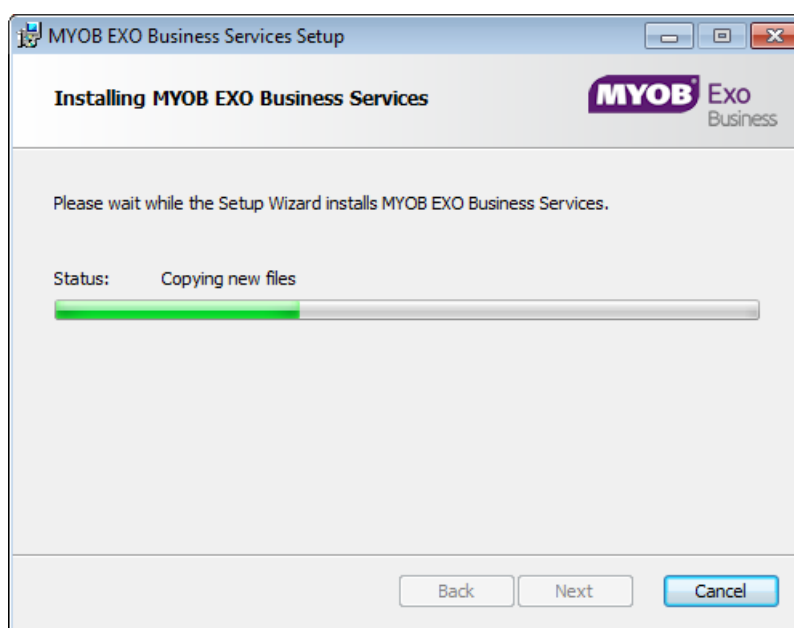
8. Once the installation is complete, click **Finish** to close the wizard. You can choose to open the EXO Business Service Configuration utility to set up details of the EXO API services.
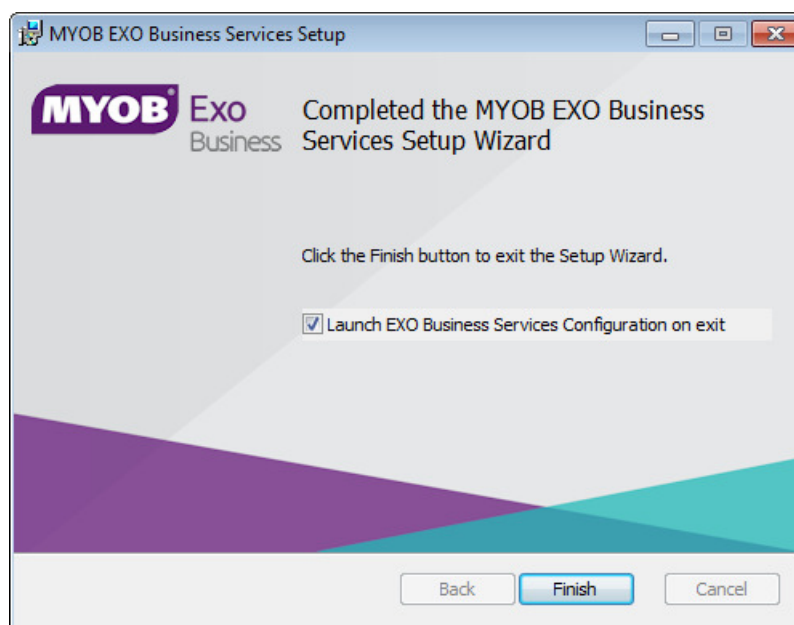
> *Note:* The EXO Business Service Configuration utility is installed in the same location as the EXO API services. You can run the utility (**MYOB.ED.EXO.Cloud.ServiceConfig.exe**) from this location at any time.

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.
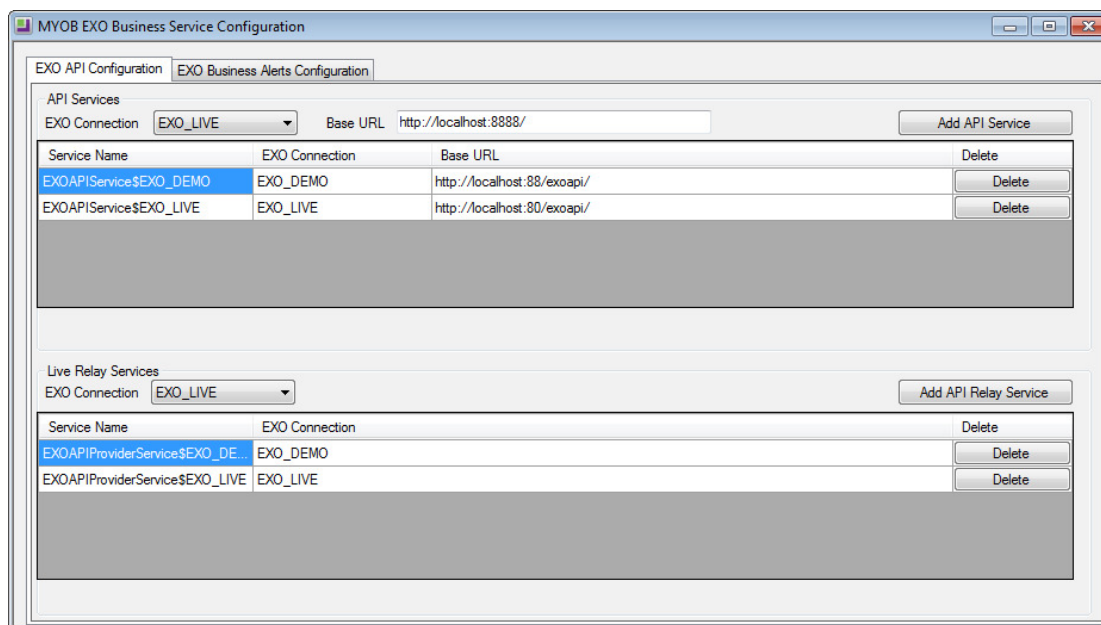
The utility displays configuration settings for the following services:

- 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.

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.
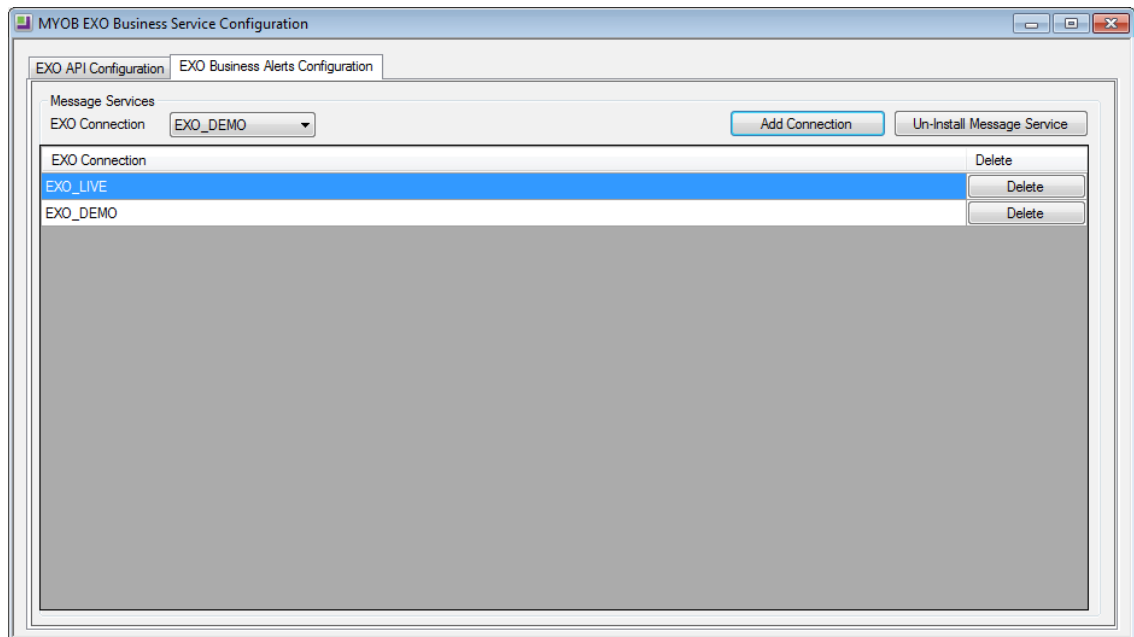
To install the messaging service instance, select a database connection and click **Add Connection**. This adds the service and sets up a connection to the selected database. To add new connections, select them from the **EXO Connection** dropdown and click **Add Connection**.

New Features

Custom Table Extra Fields

It is now possible to add Extra Fields to custom tables using the EXO Configurator. This makes it easier to set up custom tables that you want to access via the EXO API using the `customtable` endpoint (introduced in version 1.3 of the EXO API).

When creating Extra Fields, custom tables (i.e. tables whose names start with "X_") are now available for selection in the **Table name** dropdown.

Notifications

The Business Alerts feature can now be used to send notifications to a mobile device using the EXO OnTheGo mobile app. A new **Action Type** dropdown on an action's Details sub-tab allows you to select an email message or a device notification:
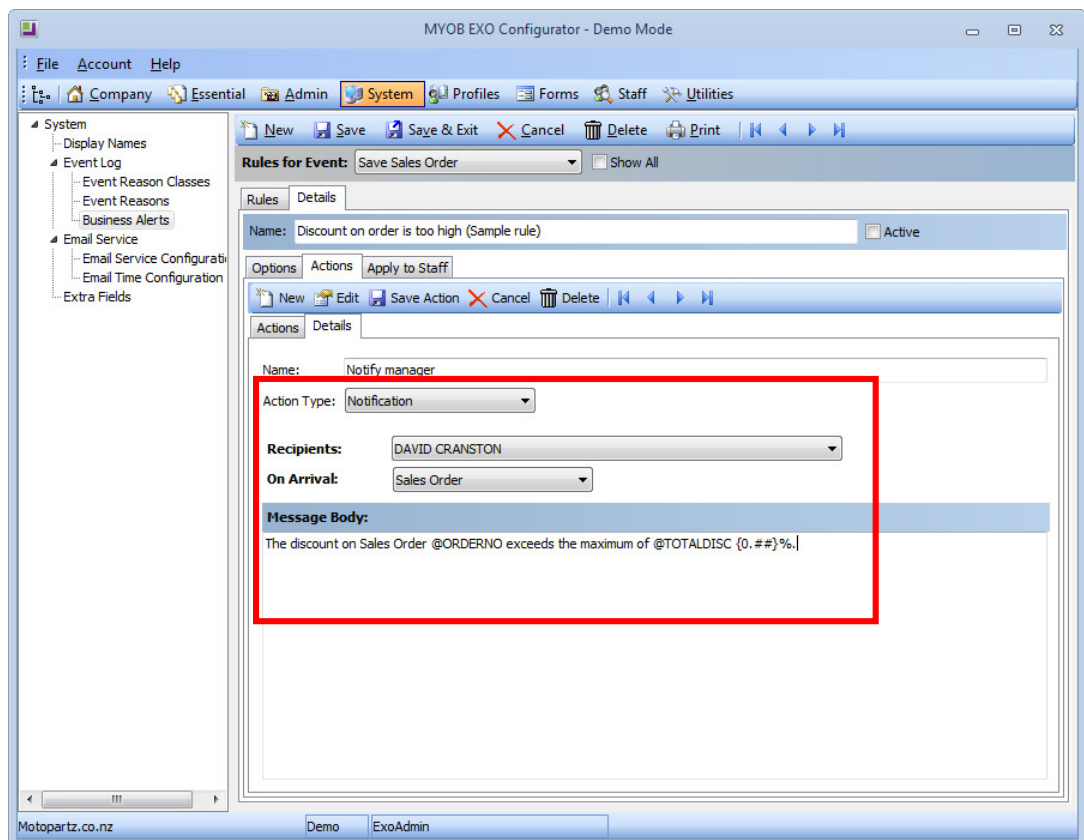
You can select one or more staff members to receive the notification; the **Recipients** dropdown contains all staff who have the **Allow OnTheGo Access** option enabled.

When a notification arrives at the OnTheGo app, it can be tapped to open a related record. The **On Arrival** dropdown lets you specify what record should be opened when

the notification is tapped. The available options depend on the kind of rule being configured. For example, for a rule on the "Save Sales Order" event, you have the option of opening the Sales Order itself, the Debtor account on the Sales Order, or the stock item on the relevant Sales Order line.

The **Message Body** can include any of the parameters that are available for email actions.

Serviceable Unit Display Names

User-defined Display Names can now be configured for a range of labels in Serviceable Units. Entries for Serviceable Unit labels have been added to the DISPLAY_NAMES table; these labels can be configured in the Display Names section of the EXO Configurator:
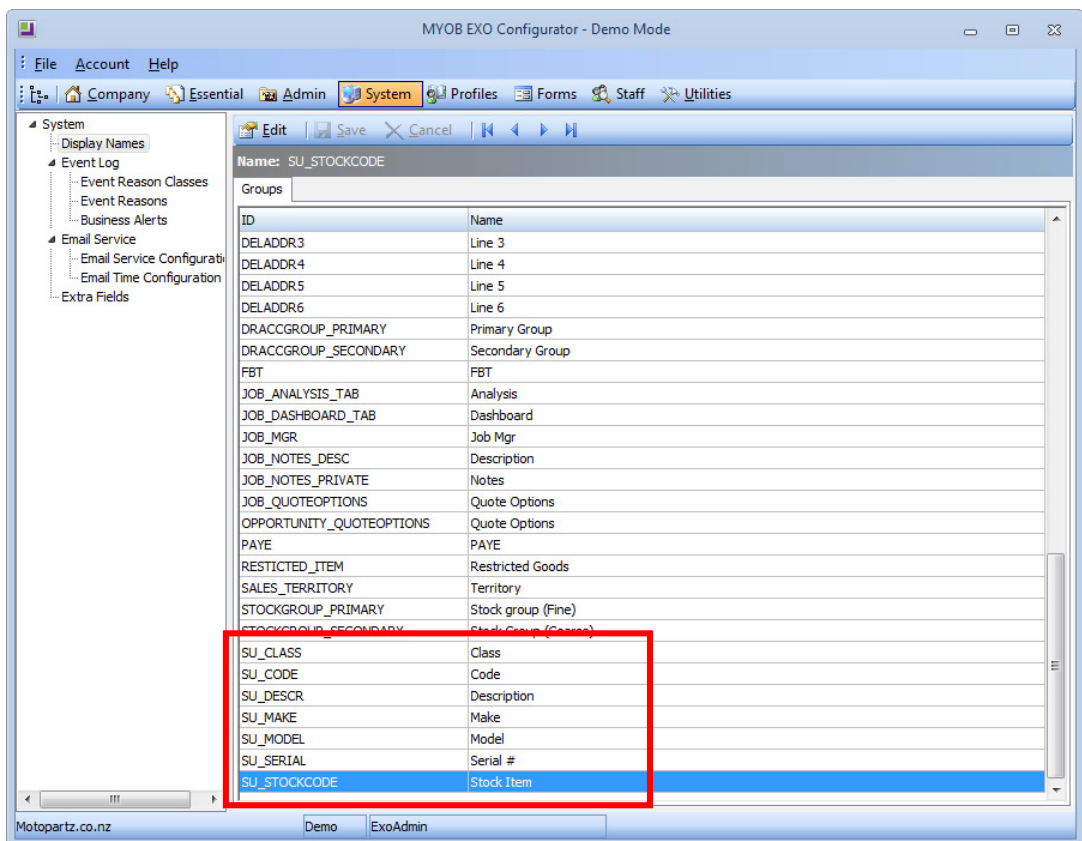
Company Search Templates

The release adds a new type of search template: company search templates can be used to return a list of company accounts. A new "Company" type is available when setting up search templates in the EXO Configurator:
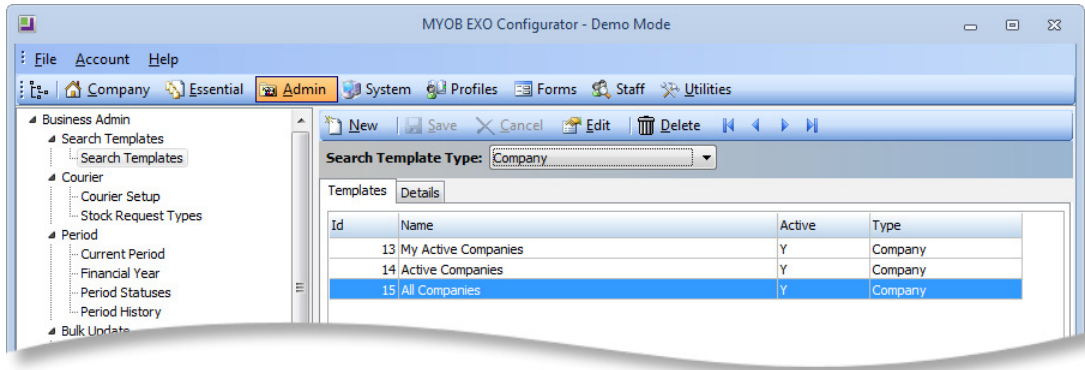
Note: Company search templates are currently available for use via the EXO API only; they are not yet available on company search windows in EXO Business.

Resolved Issues

EXO Business Core

Service Request ID	Description
112219958669 111939667771 111939667881	The Purchase Order Inward Goods process generated "Operation aborted" messages if the Creditor's **Default Invoice Mode** was "GL" and the order was receipted as "Stock" and vice versa. This has been resolved.

EXO CRM

Service Request ID	Description

Clarity Reports

Service Request ID	Description

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 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 CHM 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. (This issue does not apply if you are viewing online Help files on the EXO Business Education Centre.)

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.

SQL Server 2012 Issues

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. In MYOB EXO Business, 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.

This behaviour was reversed in SQL server 2014, but no known complete solution exists for completely preventing this 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.

SQL Server 2008 R2 prior to SP3

MYOB EXO Business uses a SQL Server feature called Common Language Runtime Integration. This feature was disabled by default in versions of SQL Server 2008 R2 prior to Service Pack 3. If this feature is not enabled, users may encounter the following error during the upgrade process:

Updating server configuration: 'clr enabled'