

# New Features 2017.1

## Updates to Exo Clarity


This release includes a major upgrade to the Exo Clarity report builder, which adds new functionality and interface improvements. These are detailed below.

### New Report Components


Three new report components are available on the Advanced Components toolbar: PaintBox, TableGrid and Google Map:



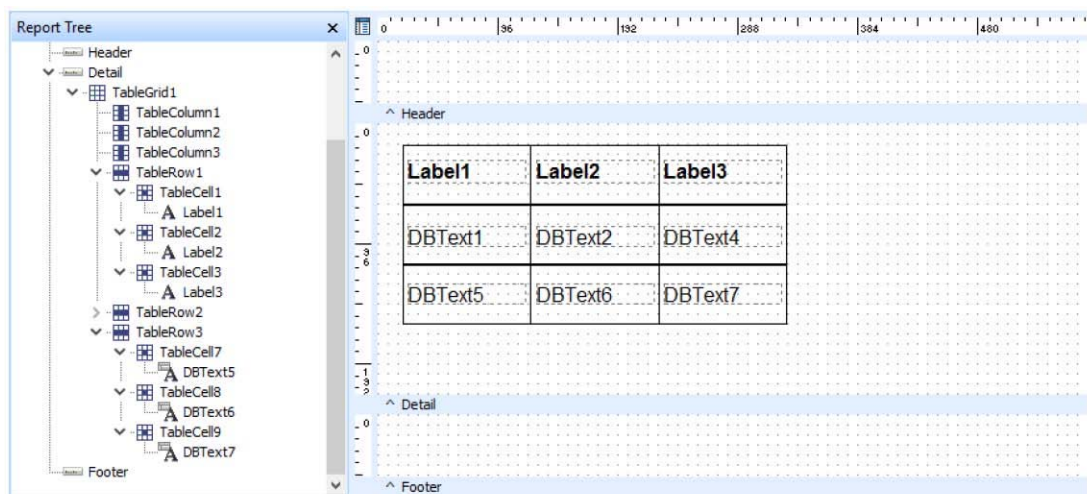
#### PaintBox

You can use the PaintBox button (  ) to place a canvas area on the report that can then be drawn on programmatically using the Calc tab. By adding code to the PaintBox's OnPrint event, you can create shapes and text that might otherwise be impossible using other report components. The updated Exo Clarity Help (see page 7) contains information on how to write code for a PaintBox component.

#### TableGrid

The TableGrid component lets you organise report components into a table layout. Use the TableGrid button (  ) to add a table to the report. By default, tables have one row with three columns—right-clicking on the table gives you options to add and delete rows and columns. You can place other components on the table by clicking on a component's toolbar button, then clicking on the cell you want to place it in. As the table is moved or resized, all components on it move and resize with it.

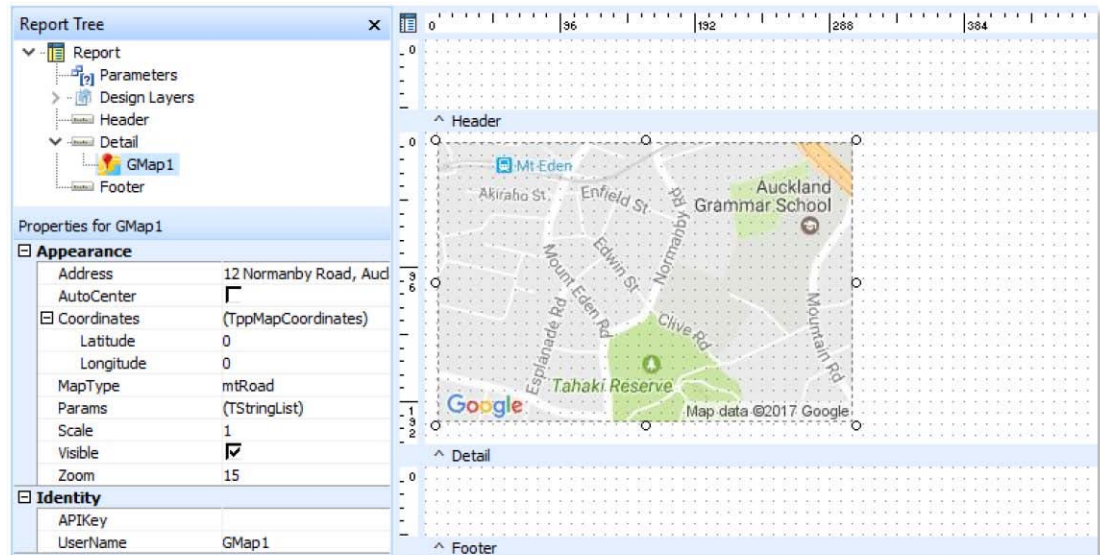
The table appears in the Report Tree, showing all columns, rows and cells, as well as the components that have been placed on it:




## Google Map

The Google Map component adds an image that displays data from Google Maps.

**Note:** This release simply allows you to display maps—future releases will build on this functionality by, for example, allowing you to add markers to a map.



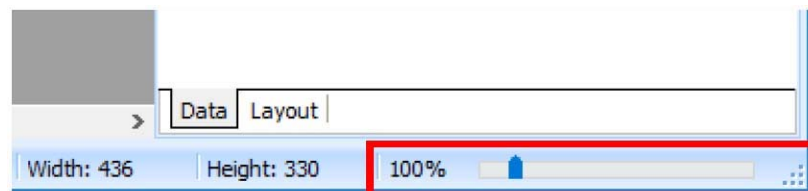
Add a map using the TableGrid button (  ), then edit its properties in the Report Tree to set up the information that it displays. You can specify the street address or latitude/longitude coordinates to centre the map on, and a zoom level to determine how closely the map should zoom in on the address/coordinates.

The **MapType** property controls the kind of map to display: a road map, a satellite photograph, a hybrid map showing roads overlaid on a satellite photograph, or a terrain map.

**Note:** As with all components, you can change a Google Map component's properties using code entered on the Code tab. This allows you to change a map's appearance dynamically, e.g. by loading the values of Debtor accounts' address fields into the component's **Address** property, you can display a map next to each Debtor record showing its address.

## Design Tab Zoom Setting

A zoom control is available at the bottom right of the Design tab:



You can use this control to zoom in and out on the Design tab, which can be useful for positioning report components in fine detail, or for seeing an overview when editing a report that is too large to fit on the Design tab without scrolling.

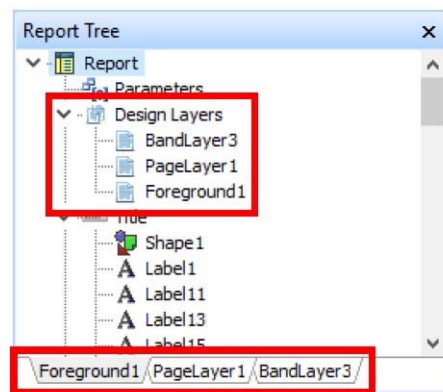
You can also use CTRL+UP ARROW and CTRL+DOWN ARROW to zoom in and out.

## Design Layers

Reports can now contain multiple layers, each with its own content. Design layers are displayed on top of each other, allowing you to place elements like background images, watermarks or header/footer images into a background layer without affecting any parts of the main report in the foreground layer. Background layers can also be saved and loaded independently of the main report, so that you can create reusable report elements or templates that are common to all of your reports.

**Note:** In previous versions, the Page Style report band was used to contain background elements like watermarks. Enabling the **Page Style** option in the Report menu now adds a new page layer containing only a single Page Style band.

All design layers in the report are displayed on the Report Tree. Initially, there is only a single Foreground layer; if more layers are added, tabs appear at the bottom of the tree, allowing you to switch between them:



Whatever layer is selected in the Report Tree is displayed at the “top” of the report canvas, with all other layers appearing greyed out behind it.

To add a new layer, right-click on **Design Layers** and choose one of the following options:

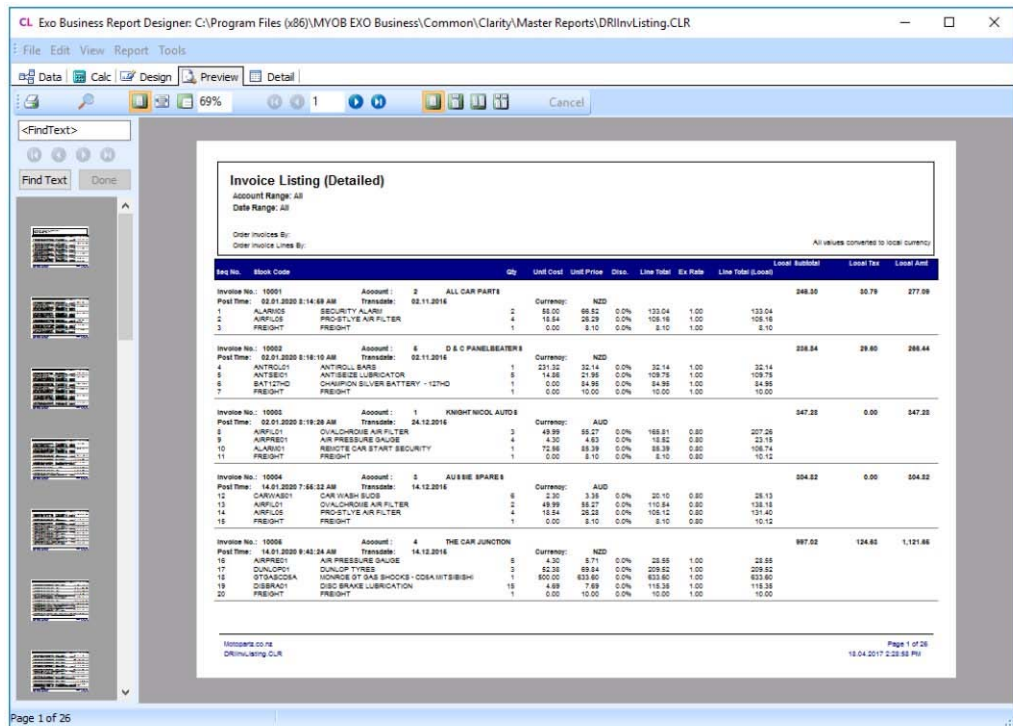
- New Page Layer – adds a new design layer that contains only a single Page Style report band.
- New Band Layer – adds a new design layer that contains all of the report bands that are in the Foreground layer.

You can right-click on a layer in the Report Tree to access management options, including **Open** and **Save** options that let you save a layer to an .LTM file and reuse it by opening it in other reports.

**Note:** The **Open** and **Save** options are not available for the Foreground layer.

## Updates to the Preview tab

The Preview tab now has page thumbnails down the left side of the tab:



You can click on a page's thumbnail to jump directly to that page.

A search box is available above the thumbnails—you can enter search terms and click **Find Text** to locate that text in the report.

**Note:** You can enable and configure the thumbnail and text search controls by editing the report's properties in the Report Tree - edit the **TextSearchSettings** and **ThumbnailSettings** properties under **User Interface**.

A new right-click menu is available on the Preview tab. The following options are available when right-clicking on the preview:

- Zoom Tool – when this option is selected, clicking on the preview zooms in.
- Scroll Tool – when this option is selected, you can click on the preview and drag to scroll.
- Print – prints the report (same as clicking the existing toolbar button).
- Find – turns the text search options on and off.
- Hide Thumbnails/Show Thumbnails – turns the page thumbnails on and off.

## New Exo Clarity Help

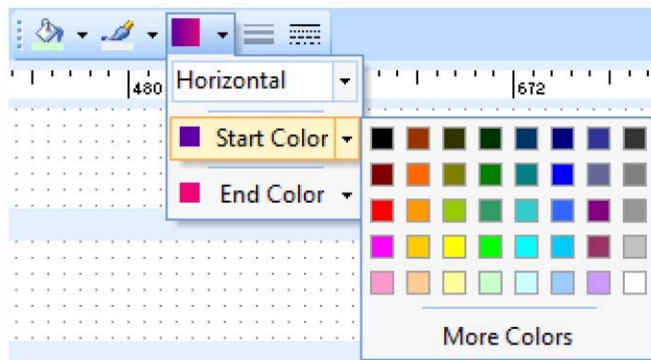
The Online Help for the Exo Clarity module has been completely rewritten. The Help has been re-organised to make information easier to find; expanded to include more detail on the available settings and options in the Exo Clarity interface; and updated for all of the changes introduced in this release.

You can access the Exo Clarity Help on the Exo Business Education Centre.

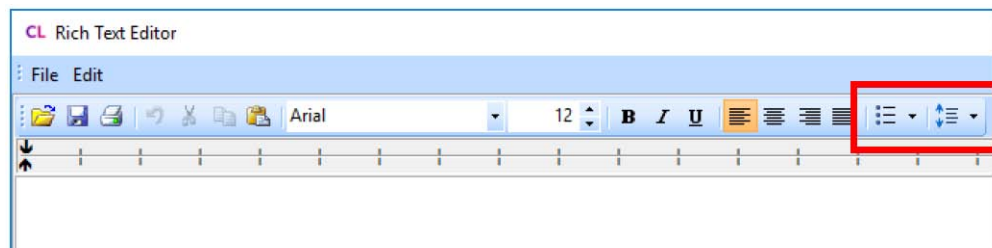
## Other Updates to Exo Clarity

The Exo Clarity upgrade also features the following enhancements:

- • CheckBox components now allow for three possible states: checked, unchecked and greyed-out. The **AllowGrayed** property determines whether or not the greyed-out state is available.
- • You can now specify a hyperlink for Image components. Tick the new **HyperlinkEnabled** property and enter a URL for the **Hyperlink** property, and the image will open the specified URL when clicked on. (The hyperlink can include an `exo://` protocol link.)
- • You can now right-click on components and report bands in the Report Tree to access the usual right-click options for the component/band.
- • The new Gradient dropdown on the Draw toolbar makes it easier to add a gradient to a shape by providing options for the direction and colour picker controls for the start and end colours:



- • The Rich Text Editor has new dropdown controls for bulleted/numbered lists, and for controlling the text's line height.



- • New buttons are available on the Format toolbar for aligning text to the top, middle or bottom of the bounding box and for moving components forward or backward by one place:



- • A new `OnCreateDrawCommand` event is available for all report bands. This event fires each time the band prints on a page—you can use this event to add additional draw commands to the page.



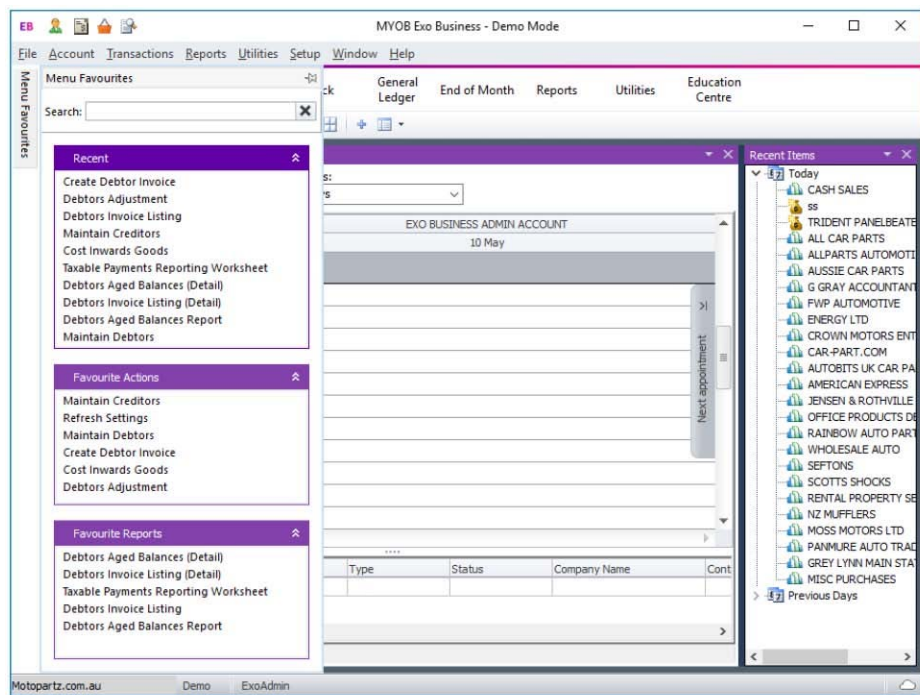
# Interface Enhancements

This release adds a variety of enhancements to user interfaces throughout Exo Business, which improve workflows and make data more visible and easy to read.

## Menu Favourites

**Note:** Video Help is available for this feature on the Exo Business Education Centre.

A new **Menu Favourites** control is available at the left of the major Exo Business modules. Clicking on this control (or pressing CTRL+SPACE) opens a pane containing commonly and recently used menu options:



Clicking the push pin icon at the top right of the Menu Favourites pane keeps it open and permanently docked on the left of the interface.

The Menu Favourites pane allows end users to customise their menu options without requiring access to the Exo Business Configurator. After upgrading to Exo Business 2017.1, the system monitors the menu options each user selects and updates the Menu Favourites pane accordingly. A separate list of recently and commonly used menu items is saved for each user.

## Customising the Menu Favourites Pane

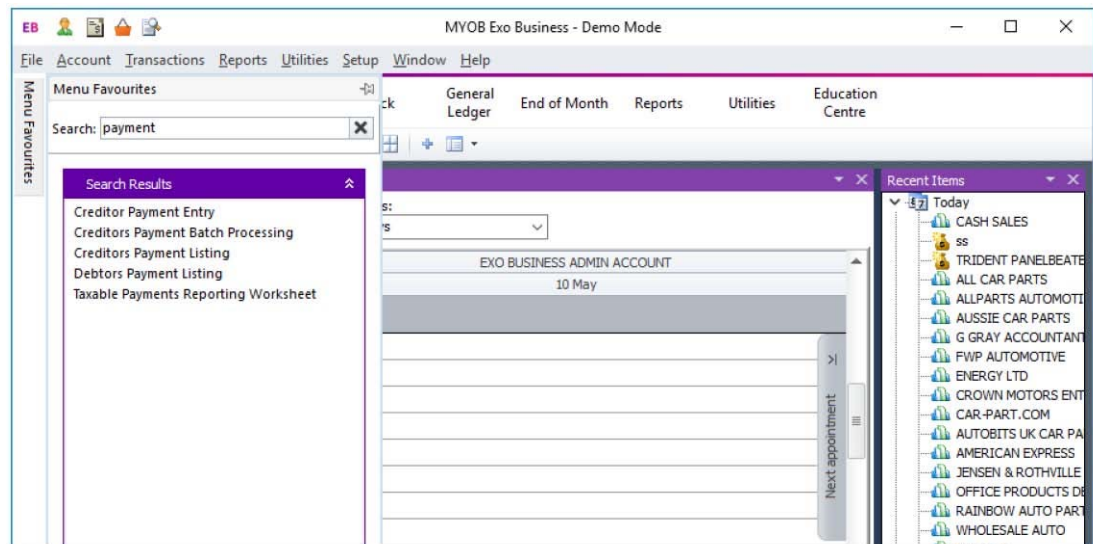
Users can customise the items that appear in each section by right-clicking on them, which gives access to the following options:

- Always show this item – the item will always appear at the top of the section.
- Never show this item – the item will never appear on the Menu Favourites pane, no matter how often it is used.
- Show hidden items – this shows any items that have been hidden by the **Never show this item** option, so that they can be restored.

Each section of the Menu Favourites pane can be collapsed and expanded by clicking the arrow control on the section's title bar. You can also re-size each section and re-order the sections by clicking on a sections' title bar and dragging it up or down.

## Searching for Menu Items

The Menu Favourites pane also includes a **Search** box—you can enter search terms into this box to search all menu options that are available to the user, i.e. the search only returns menu items that have been added to the dropdown menu for the logged in user.



## Cloud Service Status Icon

A new icon at the bottom of the major Exo Business modules displays the status of the Exo Business cloud services (such as Bank Feeds, geolocation features and ABN lookups):



The icon indicates one of the following statuses:

- - Cloud services are available
- - Cloud services are not currently available
- - Cloud features have been disabled

You can click on the icon to check the status again. The system polls the status on first login, when a new user logs in or when the user chooses to refresh database settings.

**Note:** This icon replaces the **Check Online Connectivity** button on the About window, which has now been removed.

## Stop Credit Options when Receipting Payments

This release updates several interfaces relating to Debtor accounts that have the “Stop Credit” flag set. The Debtor Adjustment window now highlights “Stop Credit” Debtors in red, and includes a checkbox to take the Debtor on or off Stop Credit:

Debtors Adjustment Entry

Account: 5. D & C PANELBEATERS ☒ Stop Credit

Account Details

5. D & C PANELBEATERS

Aged Balances:

Current:	0.00
1 month:	0.00
2 months:	0.00
3+ months:	833.80
Balance:	833.80

Adjustment Details

Date: 23.03.2017 Invoice No:

Amount: 0.00 Type: SMALL BAL

Age: Current Period: 0. March 2017

AUD: 1

GST: 20. 10% SALES - ATTRACTING GST

Details:

GL Code: 00-03070-00 ADJUSTMENTS

Analysis Codes:

OK Cancel

The Integrated Cashbook window now highlights “Stop Credit” Debtors in red, and includes a right-click menu option to take the Debtor on or off Stop Credit:

EB Cashbook Entry with GL, Debtors & Creditors Integration

File Utilities Help

New Open Save Save As Cancel Post To GL PreAllocate Clear PreAlloc

Batch No: New Last Batch Posted: --

Reference:  Date: 23.03.2017 Entered by:  ☐ PreAllocation mode

Bank account: 00-04000-00. CURRENT BANK ACCO Period: 0. March 2017 ☐ Print Transactions

☐ Consolidate GL Postings

Details for consolidated transactions: CONSOLIDATED C/B TRANS Cheque number:

Dr: 0 = March 2017, Cr: 0 = March 2017, GL: 0 = March 2017

Lr	A/c	Name	Details	Subledger A Type	Chq/Ref	Date	\$ Expense	\$ Income	GST	Options	Analysis Codes
Dr	3	AUSSIE SPARES	3. AUSSIE SPARES	CASH		23.03.2017		0.00	EXPORT		
Dr	5	D & C PANELBEATERS	5. D & C PANELBEATER	CASH		23.03.2017		0.00	SALES		
Dr	6	SYMONDS ST CENT	6. SYMONDS ST CENTR					0.00	SALES		
Dr	7	JAMES BARRY	7. JAMES BARRY					0.00	SALES		

Opening Bal: 52648.05 - Expenses: 0.00 Closing Bal: 52648.05

Enter the account number or part of the account name

Motopartz.com.au SYDNEY

Stop Credit Status

These features already existed on the Payment/Receipt Entry and Payment/Receipt Batch Entry windows. For all windows, the option to turn Stop Credit on or off for a Debtor account is now governed by the **Debtors account access level** profile setting; the user must be set to “Full Access” to be able to use the Stop Credit option.



## Company Type on Contacts

The **Account Type** column on the Accounts tab of the Contacts window now displays “Creditor”, “Debtor” or “Non-Account”, where previously it displayed a numerical code for the type (1 = Debtor, 2 = Creditor, 3 = Non-Account).

## Opportunity Seqno

A new **Seq No.** column is available on the Opportunities tab of the Debtor Account Details, Creditor Account Details and Contacts windows. This column displays each opportunity’s unique ID number.

**Note:** The new column can be turned on or off by right clicking on the column headers and clicking **Select visible columns**.

## Creditors Payment Processor Default

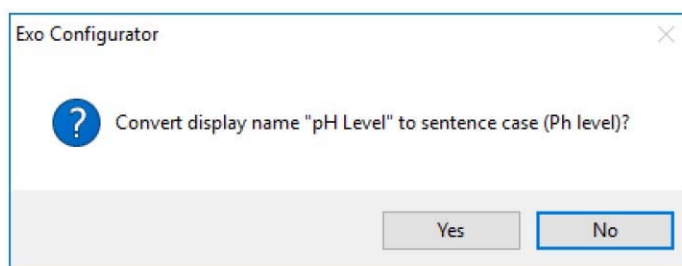
The payment method on the Creditors Payment Processor now defaults to **Direct credit** instead of **Cheque**.

## Saving Exchange Rates

When editing currency exchange rates in Exo Business Config, if the user makes changes and clicks the **Re-evaluate** button without saving, the changes are now saved automatically before the re-evaluation is performed.

## Sentence Case on Extra Fields


In previous versions, the display names of Extra Fields were automatically changed to sentence case at runtime, i.e. in Exo Business Config, the name appeared as it was entered, but when the field appeared on a window, its name would be rendered in sentence case. However, sentence case is not suitable for names like “pH Level”, “IRD” or “ATO”. As of this release, sentence case is no longer enforced for display names—display names appear on interfaces as they are entered in Exo Business Config. When an Extra Field is saved, a message is displayed asking the user if they want to convert the name to sentence case, but this is optional:

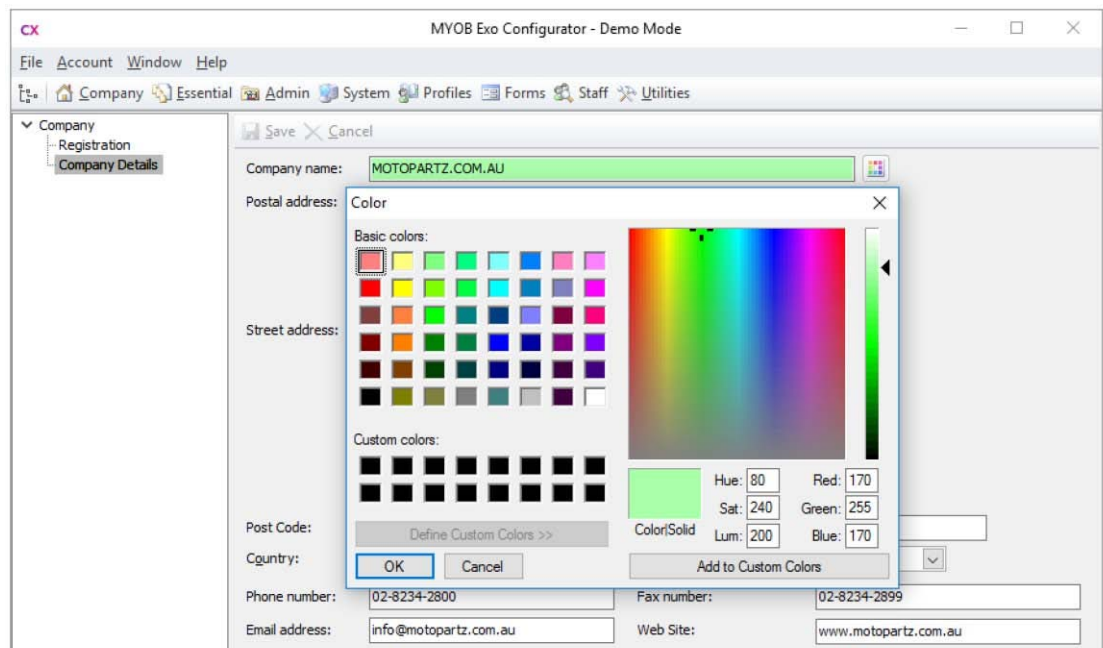


**Note:** In an upgrade to Exo Business 2017.1, all existing Extra Field display names are converted to sentence case in the Exo Business database. This ensures that existing Extra Fields will continue to appear as they did in previous versions; they can be edited and re-saved if you want to change them from sentence case now.

## New Company Colour Settings

In previous releases, the colour of the status bar at the bottom of all windows could be changed by editing the **Company user interface colour** profile setting; this made it easier to differentiate between Exo Business companies in a multiple company scenario.

This release introduces a new way of setting the company colour. A colour picker button (  ) is now available next to the **Company name** field on the Company Details screen in Exo Business Config. Click the button to open a colour picker window that lets you select any colour you want for the company colour:



This makes it easier to pick a colour, and offers a much wider range of colours than the pre-set list that was available from the **Company user interface colour** profile setting.

In an upgrade to Exo Business 2017.01, the colour that had been selected for the **Company user interface colour** setting is preserved as the default for this control. The selected colour is displayed as the background of the **Company name** field.

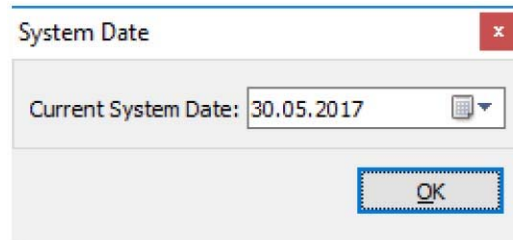
## Geolocation Service Change

Exo Business now uses Google Maps for geolocation functions. The geolocation service functions as it did in previous versions—the only noticeable difference should be the appearance of the thumbnail image on the Confirm Location window. (While this update occurred around the time of the 2017.1 release, it affects all versions that use geolocation features.)

**Note:** By using geolocation features, you consent to send information to MYOB and for us to relay part of this information to Google Mapping Services in accordance with their privacy statement (see <http://google.com/policies/privacy/>) in order to retrieve mapping coordinates and confirmation of the existence of a physical address.

## Exo Job Costing Date Controls

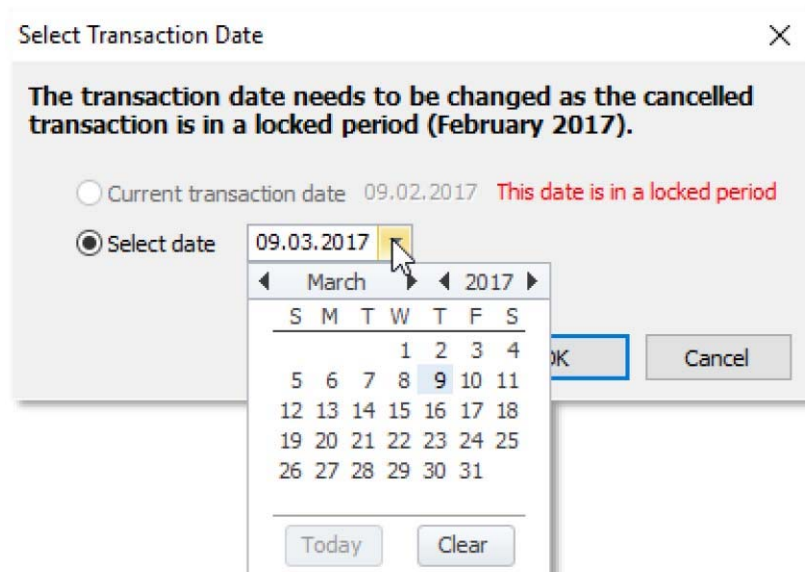
Exo Job Costing now supports the **Prompt for date on login** profile setting, which allows you to pre-set the system date when you log in:



The date you select will be the default for all new Job Costing transactions. (If the setting is disabled, the Windows system date is used.)

If Work in Progress and Stock on Hand are not being tracked live in the General Ledger, but are only posted as closing values at the end of each accounting period, then financial period and date integrity may be less of a priority than freeform entry of transaction dates—disabling the **Enforce stock period locks in Job Costing** Company-level setting lessens the date constraints for the Job Costing module.

When the **Enforce stock period locks in Job Costing** profile setting is enabled, a new dialog has been added to handle transactions that could run contrary to existing period controls:



**Note:** Pressing CTRL+C copies the body text to the clipboard, so that users can paste it into a message if they need assistance with this dialog.

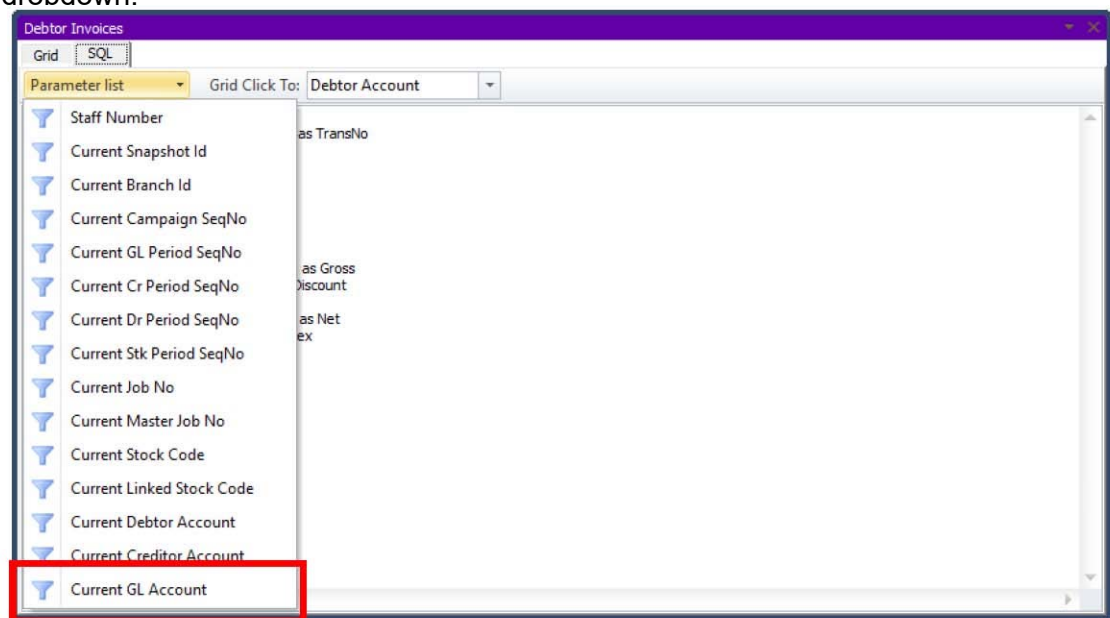
This dialog appears when cancelling, writing off, moving or changing the quantity of a transaction line in a locked period. The default date is taken from the Windows system date or the pre-set system date (if **Prompt for date on login** is enabled). Any dates that fall inside a locked period will be greyed out.

## Controlling Access to Job Line Write Offs

A new profile setting is available to control access to the write off function for job lines. The user-level setting **Allow job transaction line write offs** is ticked by default, preserving the behaviour from previous versions. You can untick the setting to deny access to write offs—the **Write-off line** option will be removed from right-click menus in Exo Job Costing.

## Update to SQL Widgets

A new `@CURRENT_GLACCOUNT` parameter is available for Grid and Pivot dashboard widgets. When entered into the SQL statement that defines the widget, the parameter is replaced by the current GL account at runtime. When the SQL tab has been enabled for Grid and Pivot widgets (by enabling the **Edit Pivot Widget SQL at runtime** profile setting), the new parameter is available from the **Parameter list** dropdown:

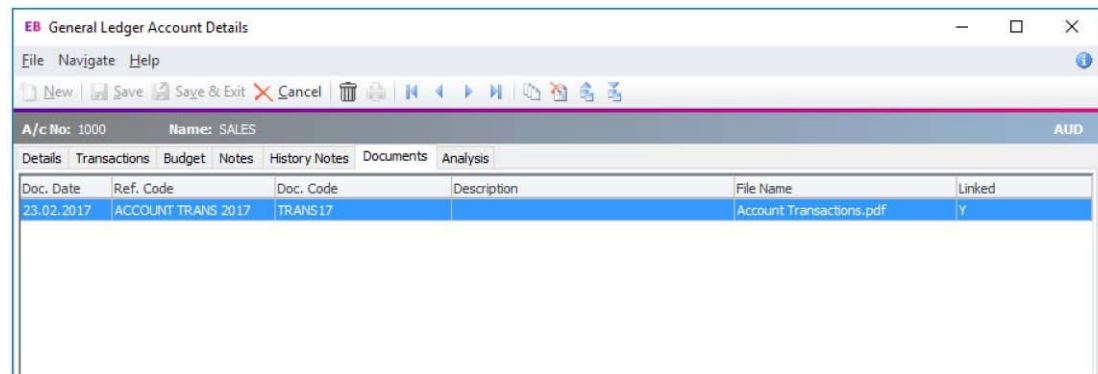


## Enhanced Invoice Search

The Invoice Search function for Creditors has been enhanced to match the functionality that exists for Debtor invoice searches. Enhancements include the ability to search by account name and fixes to existing issues (see “Resolved Issues” on page 18).

## Documents on General Ledger Accounts

The General Ledger Account Details window now has a Documents tab:



This tab behaves in the same way as the Documents tabs that are available on other records. You can add and remove documents using the standard document toolbar buttons, and you can attach a document by dragging and dropping it onto the Documents tab.

## Transaction Type on Cashbook Transactions

Transactions entered using the Integrated Cashbook are now assigned a transaction type in the GLTRANS table—for Cashbook-created transactions, the TRANSTYPE field is now populated as follows:

Debtor	BD
Creditor	BC
General Ledger	BG
Expense	BX
Income	BI

## Update to ABN Verification

Exo Business includes the ability to verify ABN numbers entered for Debtor and Creditor accounts using an online service. The service verifies that ABNs are valid, and that they match the company name registered for them.

This release adds the ability to exclude certain Debtor and Creditor accounts from the ABN/company name validation check. This can be useful if a company's trading name differs from the name registered against their ABN.



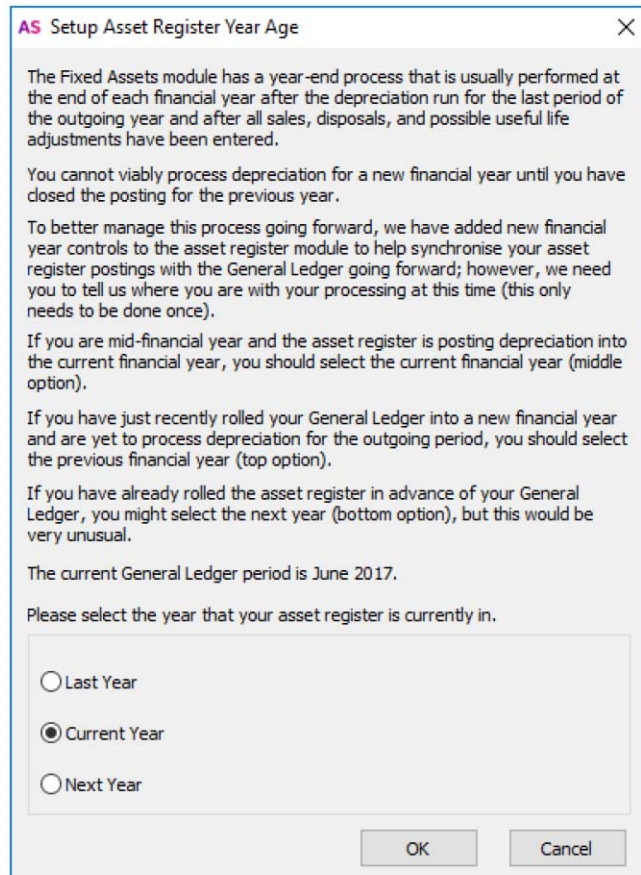
A new **Ignore ABN Check** flag is available on the Details 1 tabs of the Debtor Account Details and Creditor Account Details windows. When this flag is ticked for an account, its ABN number will not be checked against the company name.

**Note:** The system always checks that the ABN is valid, regardless of this flag's setting—ticking the flag only stops the system from checking that the ABN matches the company name.

## Financial Year Validation in Exo Fixed Assets

The Exo Fixed Assets module now validates postings against the financial year—users are prevented from posting in a new financial year until a Year End Rollover has been performed in Fixed Assets.

In order to keep Fixed Assets synchronised with the Exo Business core module, the system needs to be told which financial year Fixed Assets is currently in—the first time that Fixed Assets is run following an upgrade to 2017.1, a window appears asking the user to specify the financial year:



**AS Setup Asset Register Year Age**

The Fixed Assets module has a year-end process that is usually performed at the end of each financial year after the depreciation run for the last period of the outgoing year and after all sales, disposals, and possible useful life adjustments have been entered.

You cannot viably process depreciation for a new financial year until you have closed the posting for the previous year.

To better manage this process going forward, we have added new financial year controls to the asset register module to help synchronise your asset register postings with the General Ledger going forward; however, we need you to tell us where you are with your processing at this time (this only needs to be done once).

If you are mid-financial year and the asset register is posting depreciation into the current financial year, you should select the current financial year (middle option).

If you have just recently rolled your General Ledger into a new financial year and are yet to process depreciation for the outgoing period, you should select the previous financial year (top option).

If you have already rolled the asset register in advance of your General Ledger, you might select the next year (bottom option), but this would be very unusual.

The current General Ledger period is June 2017.

Please select the year that your asset register is currently in.

☐ Last Year

☒ Current Year

☐ Next Year

OK Cancel

Once this has been established, the system keeps track of which financial year Fixed Assets is in compared to the Exo Business core. When an End of Year procedure is run in Exo Business, moving the system into a new financial year, Fixed Assets cannot post into the new year's periods until a Year End Rollover is performed, which will bring Fixed Assets into the same year as the core.