MYOB EXO BUSINESS

8.1.0.0

Release Notes

EXO BUSINESS

MYOB ENTERPRISE SOLUTIONS

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Contents

Introduction

What's New in this Release?

The focus of the 8.1.0.0 release is on improving system performance, and addressing issues identified by users and business partners.

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.

> **Note:** See the Minimum System Requirements document, available on the MYOB website, for full details on requirements and supported operating systems.

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 notes on SQL Express below).

Database Server

Any server where an MYOB EXO Business database is installed should meet the following minimum requirements:

- Windows Server 2003, Windows Server 2008
- 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 2005/SQL 2005 Express Edition
  - Microsoft SQL Server 2008/SQL 2008 Express Edition
- The latest Service Pack for the version of SQL Server you are using

SQL Server

Microsoft SQL Server must be present on the EXO Business database PC before the database is installed. The Installation Wizard can install SQL Server 2005 Express Edition (SQL Express) as part of the installation process. If you want to use a different edition of SQL Server, make sure it is installed before running the Installation Wizard. Whichever version of SQL Server you use, it must be set up to use Mixed Mode authentication.

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/ms165672.aspx

SQL Server 2000

SQL Server 2000 is no longer supported as a platform for EXO Business 8.1.0.0 and later.

The blank and demo databases supplied with EXO Business have their compatibility levels set to “SQL Server 2005 (90)”. When upgrading from previous version of Exo Business you will need to set this property manually in order to use SQL 2005 features.

See the following web page for information on compatibility levels:

http://www.mssqltips.com/tip.asp?tip=1436

Client Workstation

Any client workstation running the MYOB EXO Business application modules should meet the following minimum requirements:

- Windows XP Professional, Windows Vista Business, Windows Vista Enterprise, Windows Vista Ultimate, Windows 7
- 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 2000 to 2010

Contact synchronisation requires Microsoft Outlook 2002 to 2010

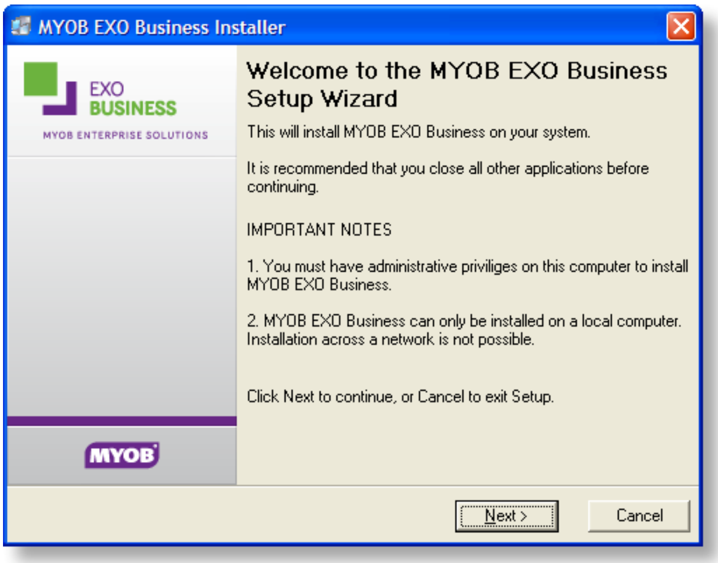
MYOB EXO Business 8.1.0.0 requires Exonetlib.DLL version 1.5.0.0 or later. Version 1.5.0.0 ships with this version.

Installing MYOB EXO Business

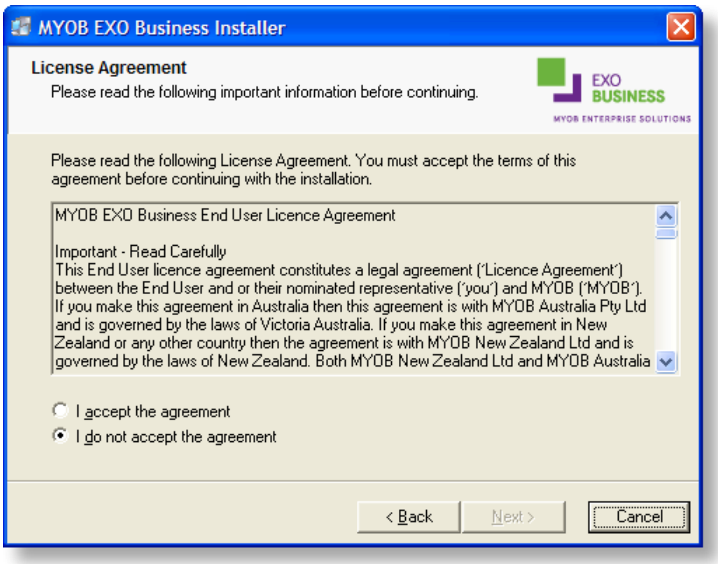
Note: Before you install this release, we recommend you take the precaution of backing up your data. Ensure there are no EXO Business modules running, locally or on your network.

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**.

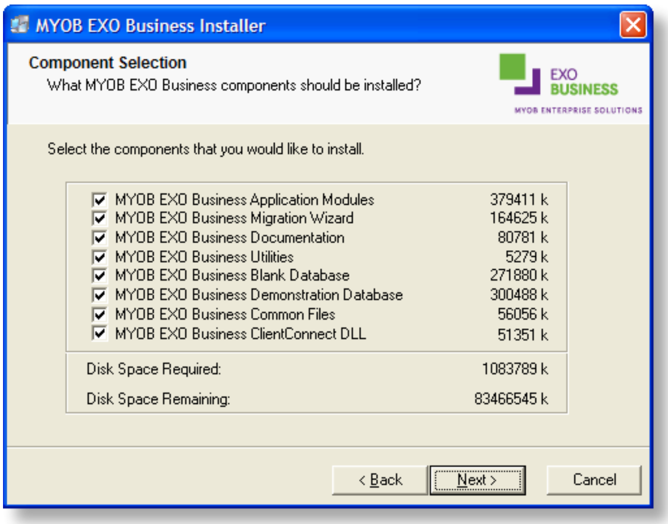


4. Select the country you are based in and click **Next**.

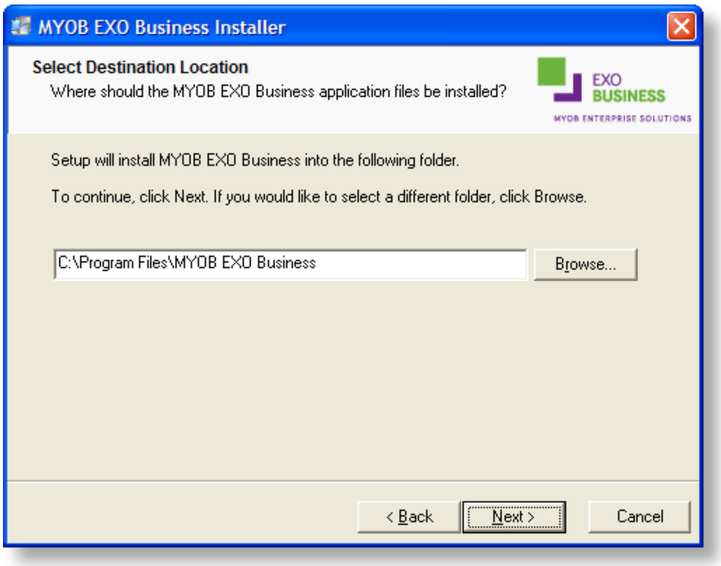
Note: Your selection here affects certain country-specific default settings that are set up during the install, e.g. tax rates and banks.

5. Select the components to install. Choose from:
   - MYOB EXO Business Application Modules
   - The Migration Wizard
   - Documentation files
   - EXO Business utilities
   - A blank "live" MYOB EXO Business Database
   - A pre-configured demonstration database
   - EXO Business Common Files
   - The DLL required for integration with MYOB EXO ClientConnect

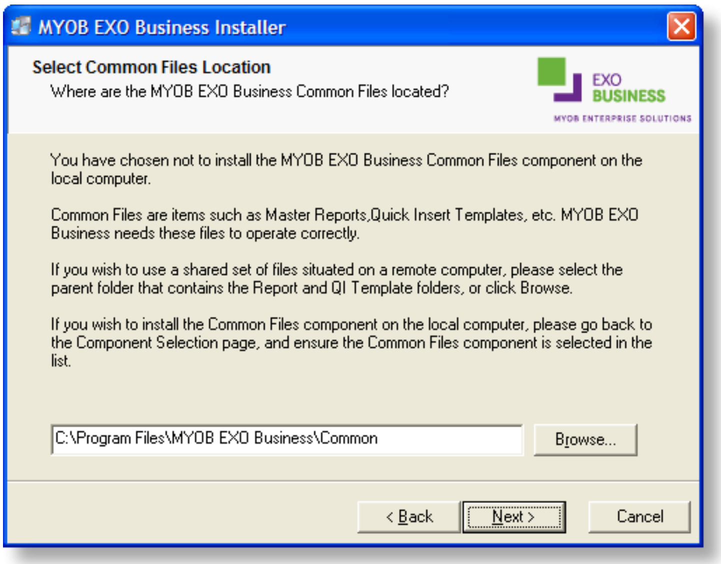
   Click **Next** to continue.



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**.



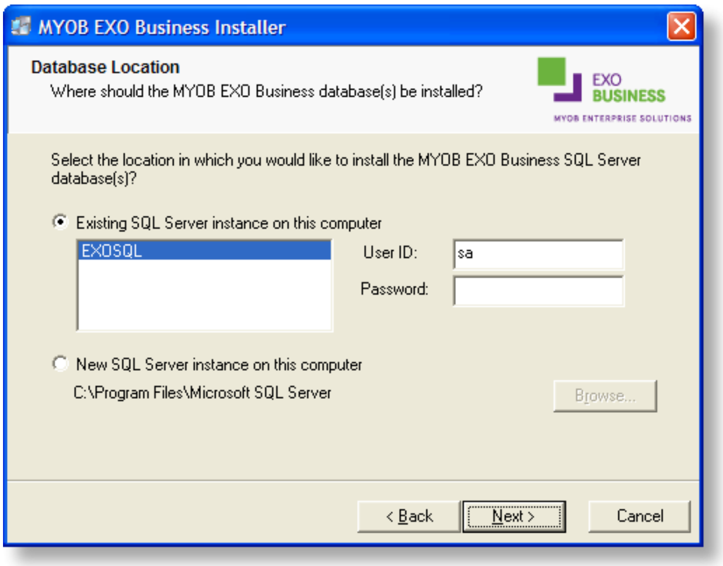
7. If the MYOB EXO Business common files are not installed on this PC, click Browse to choose the directory where the common files are located, then click **Next**.



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 compute**r, then click **Browse** to choose the location of the new instance. This will install SQL Server 2005 Express Edition.

    Click **Next**.



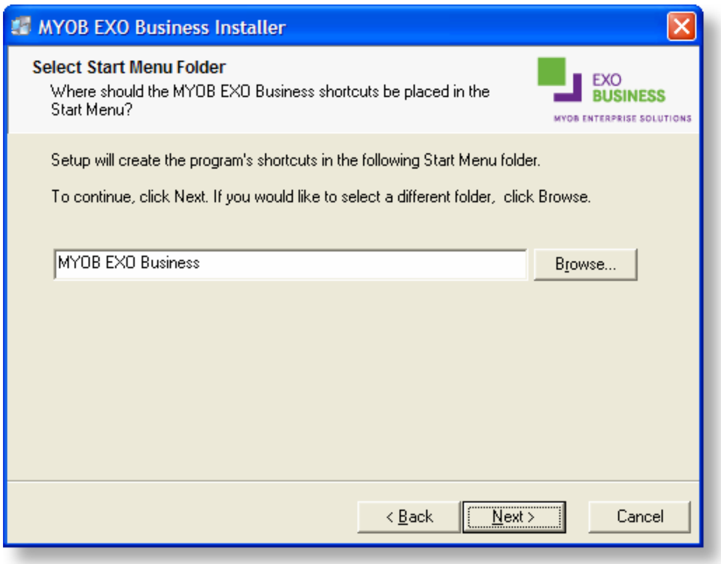
Note: The installer may appear unresponsive while it tries to detect SQL Server instances on the PC (this process may take a minute or more). Do not cancel the installer; simply wait until the detection operation is complete.

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

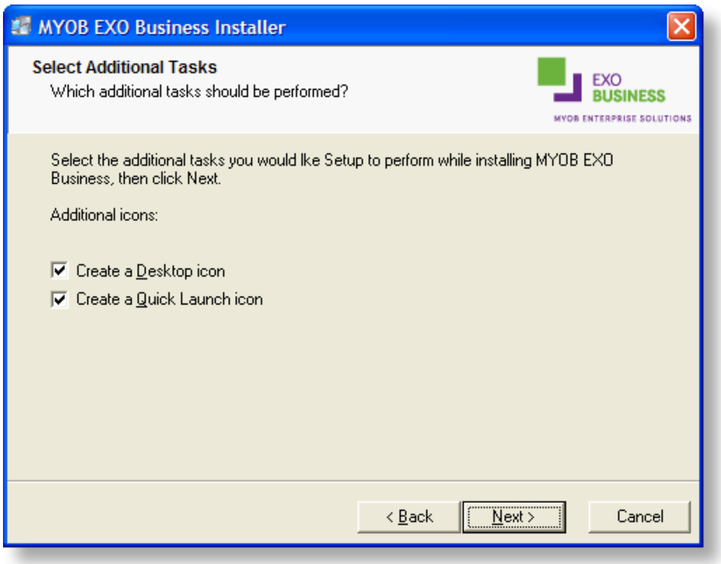
- Username: **sa**
- Password: **$ExoAdmin7000**

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.

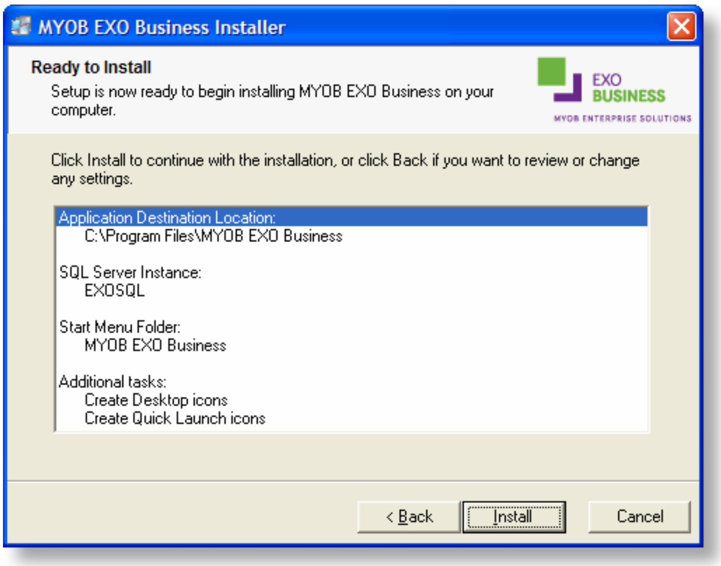
9. Click **Browse** to choose where the MYOB EXO Business shortcuts should be located in the Windows Start menu, then click **Next**.



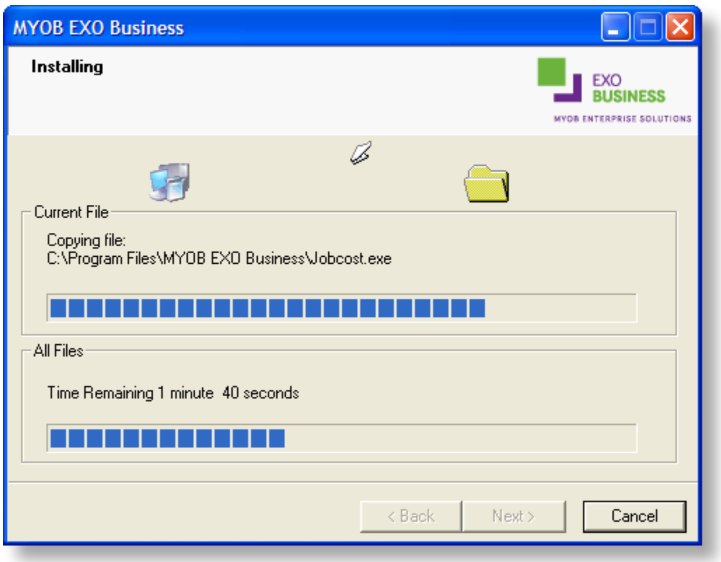
10. If you want to create a desktop icon or Quick Launch icon for MYOB EXO Business, tick the relevant box(es), then click **Next**.



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.

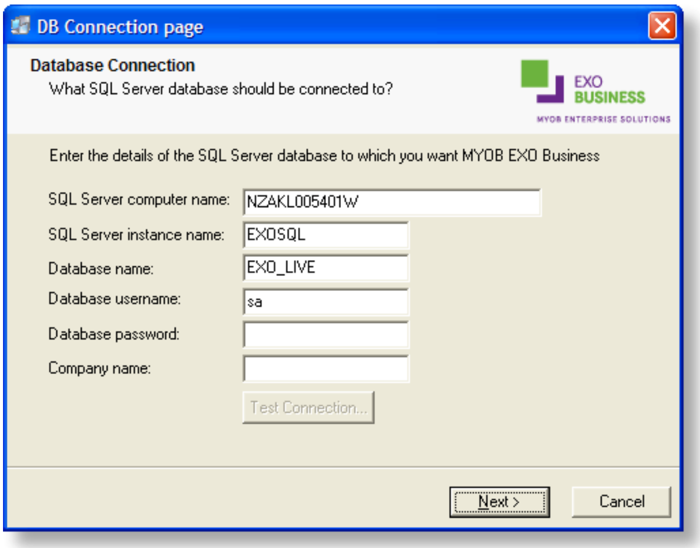


12. The installation progress is displayed.



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

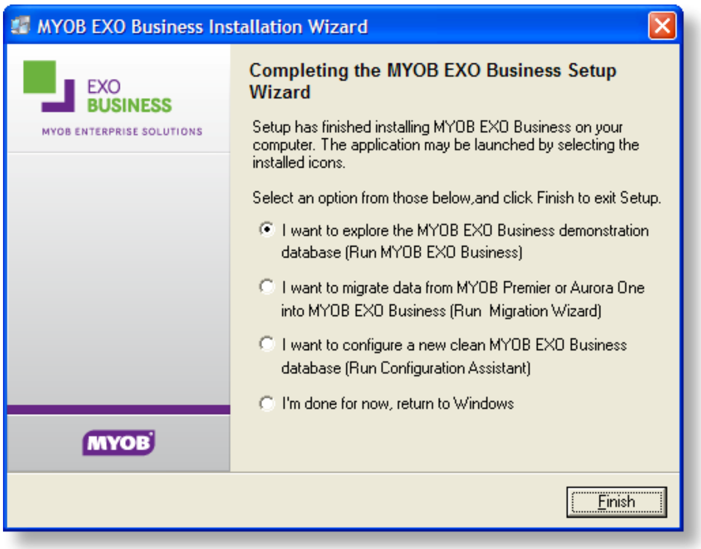
13. If you chose to install the application modules but not the database components on this PC, you must enter the details of the database once the installation has completed. Click **Test Connection** to check that the details you have entered work. If the test passes, click **Next**.



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.
- Return to Windows.
- Run the Migration Wizard to migrate data from an existing MYOB Premier or Aurora One installation into MYOB EXO Business.
- Run the Configuration Assistant to set up your new MYOB EXO Business database.



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: All login details are case-sensitive.

New Features

Performance Improvements

This release includes a number of enhancements that improve the performance of the EXO Business system:

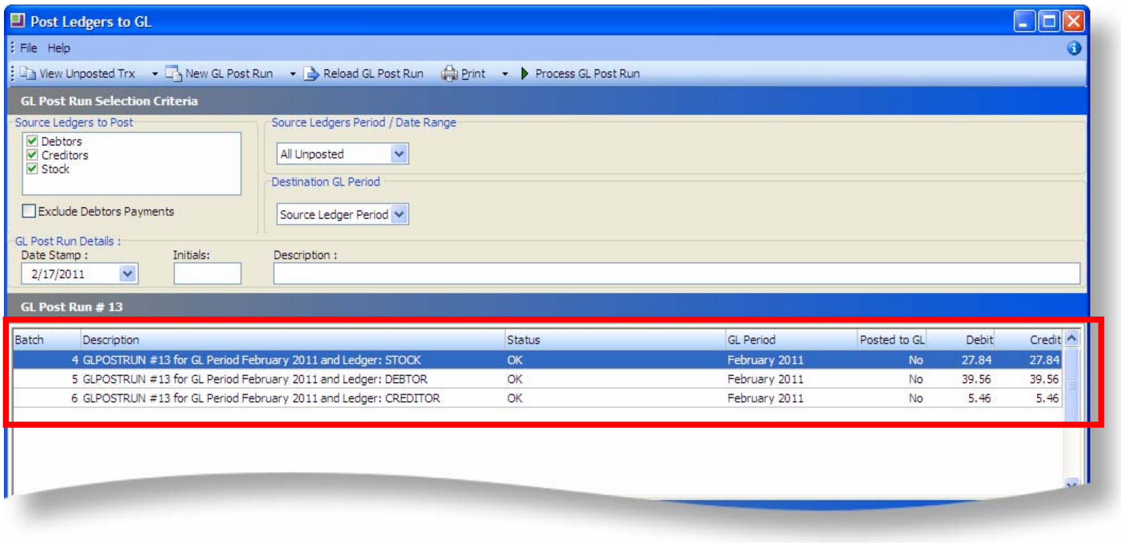
- Filters using the deprecated AGE field in transaction tables were replaced in the Debtors, Creditors and Stock screens and now use the primary period identifier PERIOD_SEQNO, improving speed on the Transactions and Analysis tabs on these screens. *These enhancements were first introduced in the 8.0.1.0 hot fix release.*
- Further improvements to the Stock Transactions tab have been made, significantly increasing the speed of operations on this tab.
- Improvements have been made when refreshing the stock requirement statistics for Forecast-based Purchase Orders, which drastically increases the speed of this operation—on a large database, the time taken is 0.005% of the previous performance time.
- Improvements have been made to the routines that return stock levels; this is particularly noticeable in Sales Order entry. The stored procedures STOCK_LEVELS and STOCK_IN_LOCATION have been modified.
- Serial numbers in Sales Orders are handled more efficiently, improving performance when processing Sales Orders, inserting Sales Order lines and using the Supply tab.
- Indexes have been created on the PERIOD_SEQNO column for the transaction tables DR_TRANS, CR_TRANS, STOCK_TRANS and GLTRANS.
- Business flow menus now load faster, improving the startup time of EXO Business applications.

Posting to GL

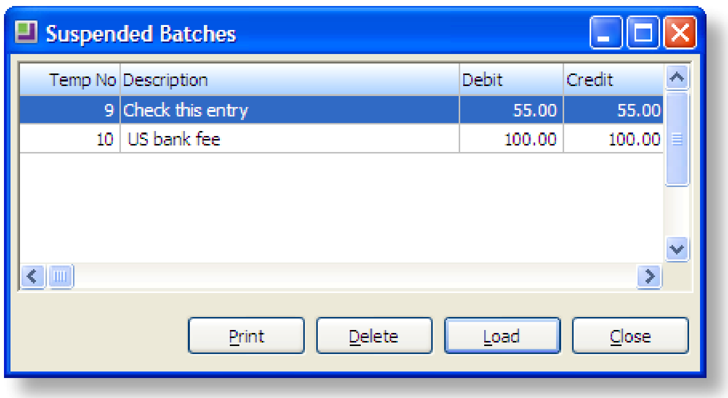
Prior to version 8.1.0.0, when doing a New GL Post Run, only one GL Batch was created for all ledgers ticked. The process now creates a batch for each ledger (Debtors, Creditors and Stock) and displays credit/debit totals for each batch.

The extraction is grouped by ledger source, which means that the top section of the Post to GL screen may show multiple batches, depending upon how many ledgers are selected.

Distinct batches are created on combination of Period and ledger, i.e. one for each period and ledger combination. The description for the batch now indicates the ledger for which the batch has been created.



The Load Suspended Batches window has also been updated. The window is now resizable and Debit, Credit, FC Debit and FC Credit are now available as selectable columns. To enable the new columns, right-click on the column headers and select **Select visible columns**.



Tax Rounding

A new method of invoice tax calculation has been added. This method only applies where the tax rate is consistent across all lines of an invoice and none of the lines have been overridden. In this case, tax is calculated on an Invoice or Sales Order transaction based on the subtotal. If any line on the invoice has a varied tax rate, or any line is recorded as TAX_OVERRIDDEN='Y' then the tax total on the invoice will be the sum of the GST on each line as it has been in previous versions.

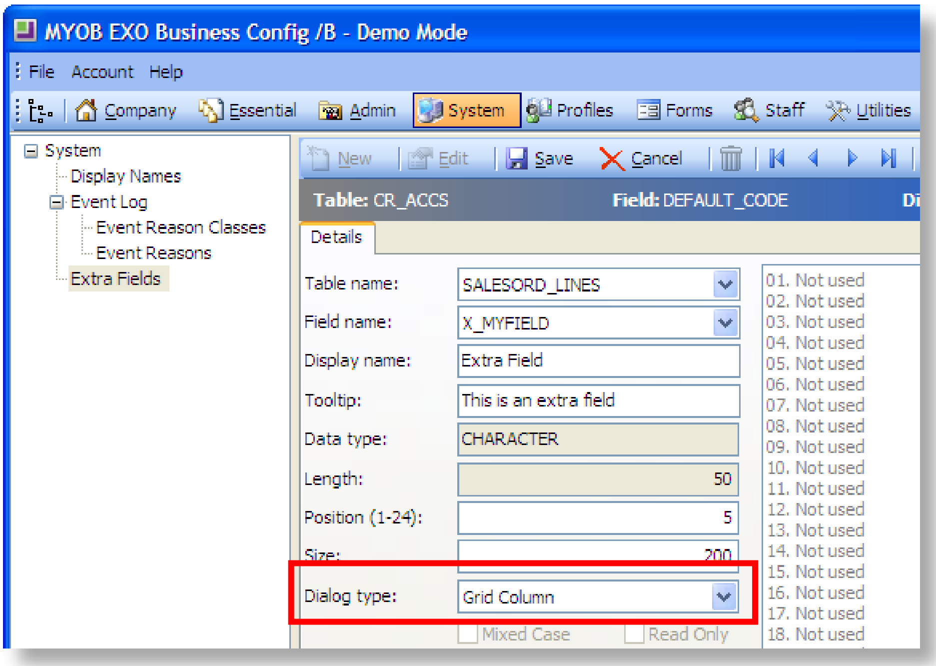
The differences between the sum of the rounded GST on the lines and the application of the tax rate to the subtotal (or Invoice Total in the case of a Tax Inclusive system) are placed in a new field on DR_TRANS called TAXROUNDING and are dealt with at ledger posting time. These are written to a new GL Control Account, **Debtors GST Rounding Account**, which is initially set equal to the **Debtors GST Account**.

No changes are necessary to invoice layouts or procedures. Using this method the recipients of the invoice will get a GST total that they expect based on the subtotal.

In addition, a new Rounding method has been added, which rounds 5 up away from zero to infinity, giving a more predictable result on invoices and Sales Orders where rounding takes place. This method is now used for the above tax calculations, replacing the traditional default 'Bankers rounding' method. It is also used at the header level on the Debtors Invoice screen and Sales Order grids.

Sales Orders Enhancements

In previous versions, when Extra Fields were added to Sales Order lines, they displayed in the periscope for each Sales Order line. Extra Fields can now be added to the Sales Order grid as columns—to enable an Extra Field to be displayed as a column, set its **Dialog Type** property to “Grid Column”:

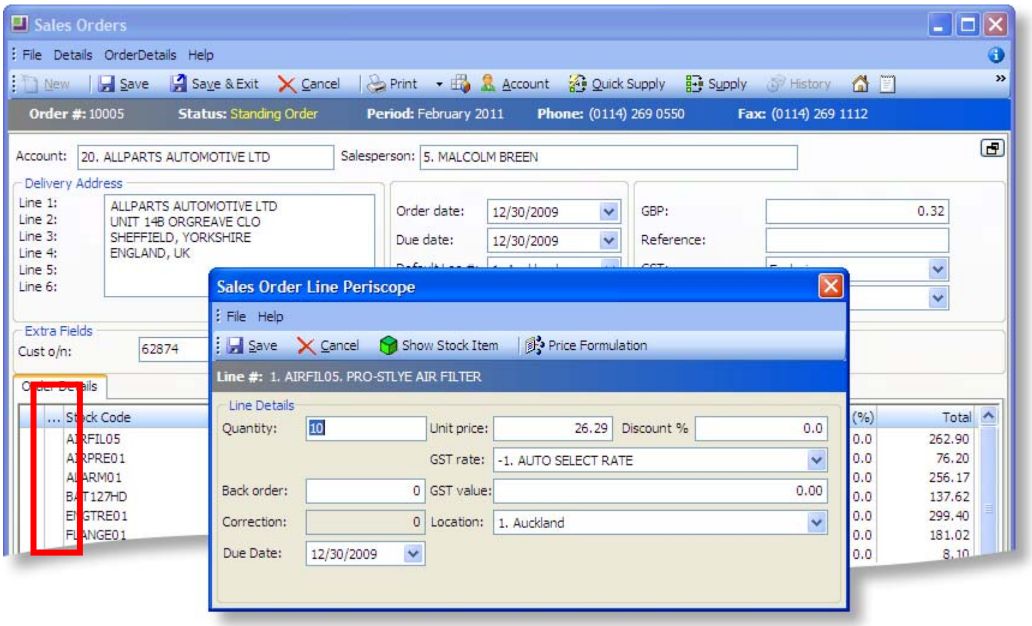


Once the Extra Field is added, to display it on the Sales Order screen, you must use the **Restore default column settings** right-click option, then enable it using the **Select visible columns** right-click option.

Hard-coded fields from the periscope window can now also be added as columns on the Sales Order entry grid. As with Extra Fields, to display periscope fields, you must use the **Restore default column settings** and **Select visible columns** right-click options.

Other enhancements:

- Extra fields on the Sales Order entry screen have the default field values pre-populated (both for columns and in periscopes).
- The title for the Options column is now **...** The options column is now the second column by default after narrative column. Clicking in the Options (**...**) column opens the periscope window for the selected line. A new right-click option to show more Line Options (Periscope) has been added.

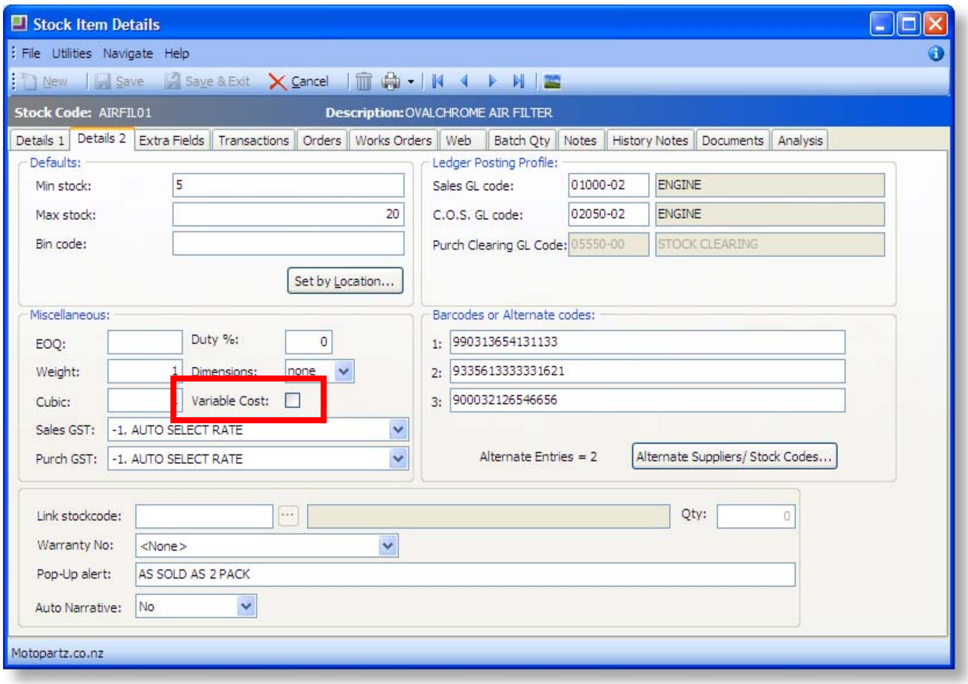


- On changing the location on the header of the Sales Order, if the user clicks **Yes** to update all of the existing order lines, the control moves to the first row on the grid.
- The Stock Code column is restricted to uppercase only; for all other columns, mixed case is allowed.

Variable Cost Stock Items

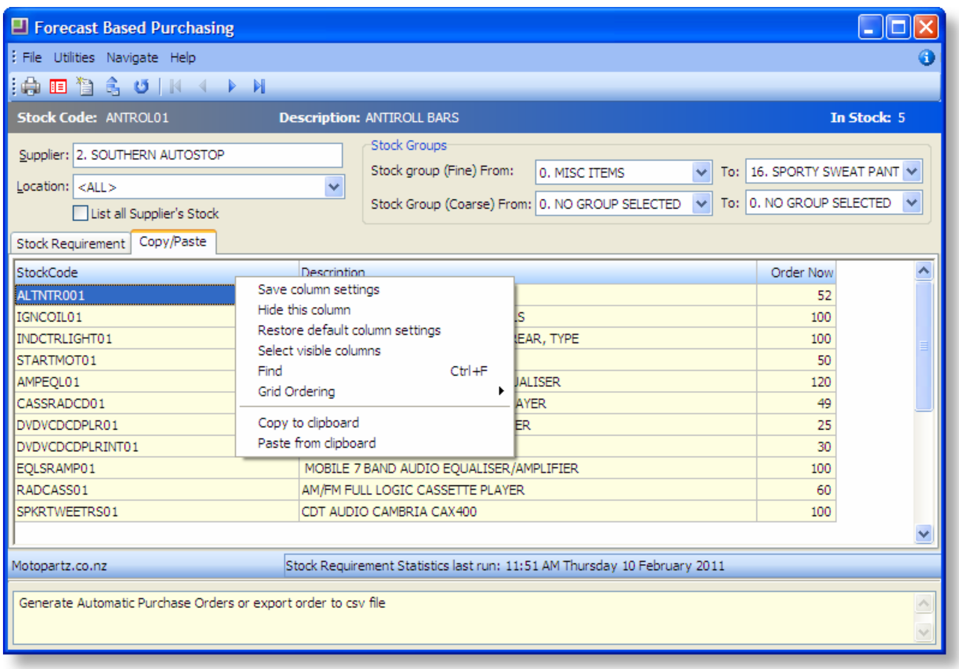
A new **Variable Cost** property is available for Stock items. Tick this option to signify that the Stock item is a Variable Cost Item—this is an item where the cost price varies for each instance, to the point that the average cost is misrepresentative, e.g. freight by weight. If this option is ticked, the invoice line cost for the item is calculated as a percentage of the selling price on the invoice line. The percentage used is the expected GP% on the product group for this item.

The new option appears in the miscellaneous section of the Details 2 tab (the **Auto Narrative** property has been moved to bottom of dialog to make room):



Forecast Based Purchase Orders

In addition to performance enhancements (see page 12), a new Copy/Paste tab is available on the Forecast Based Purchasing screen:

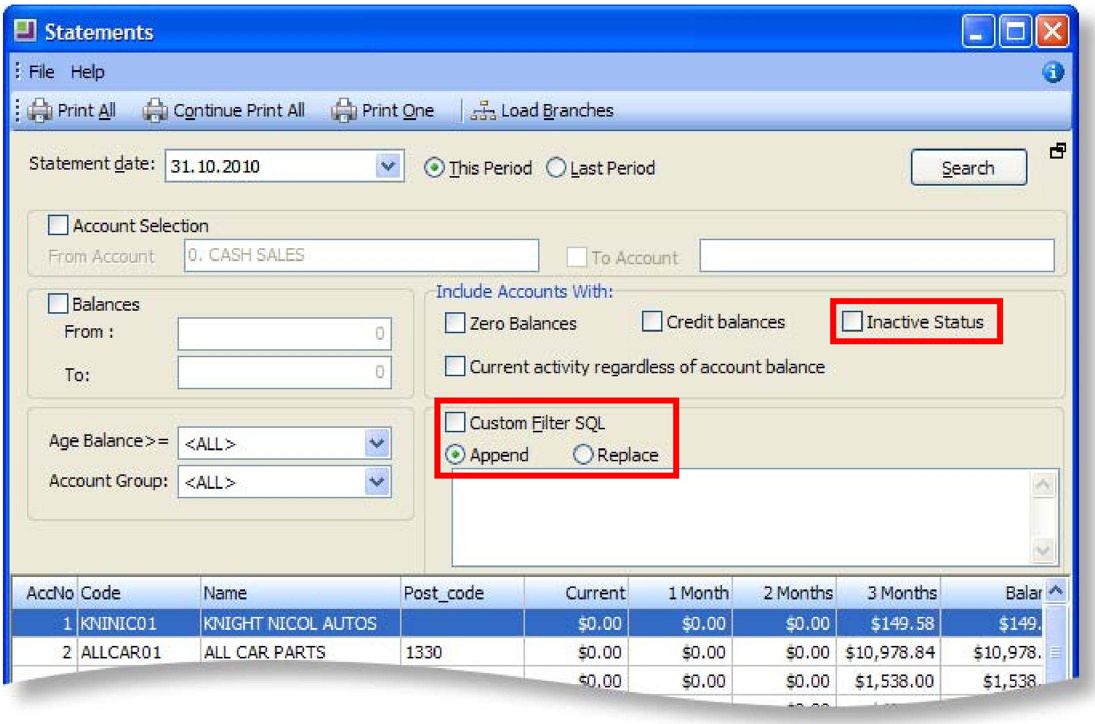


The right-click menu on this tab includes **Copy to clipboard** and **Paste from clipboard** options. This tab can be used for quick editing of data. For example, users can export the Stock Requirement grid to CSV, edit it in Excel, then paste the edited rows back into the Copy/Paste tab.

This release also adds support for multiple users running Forecast Based Purchase Orders concurrently.

New Options on Debtor Statements

New options are available on the Debtor Statements window:



A new option to include Inactive accounts is available in the **Include Accounts With:** section.

When applying a custom filter, users now have two choices:

- **Append** – the custom SQL entered is appended to the default filter using an AND operation. This is the default behaviour from previous versions.
- **Replace** – the custom SQL entered replaces the default filter completely. When using this option, the custom SQL must start with an AND or an OR operator.

Additional Changes

The following additional new features and enhancements are included in this release:

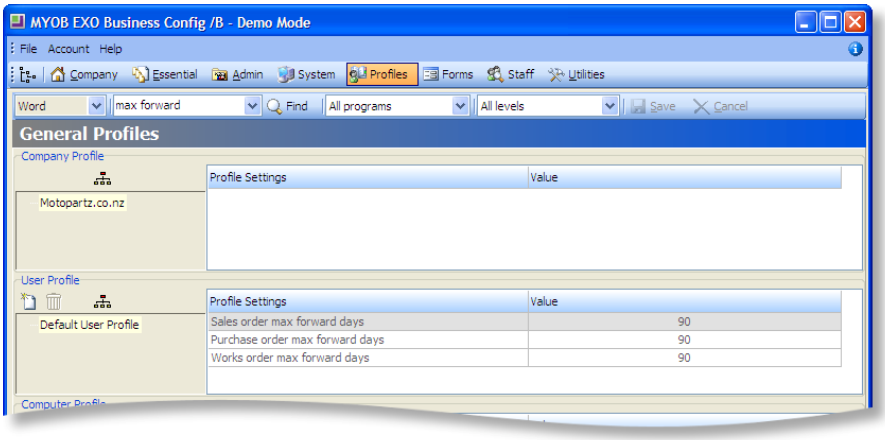
Module	Description
EXO Business Core	Object lock has been introduced in Purchase Orders. If a user tries to open a Purchase Order that is already in use by another user, the system displays a warning message (as for Sales Orders). If the user wishes to continue in read-only mode, the following menu options are disabled: Save, Save and Exit, Receipt and Inwards Goods Receipt.
	Extra fields are now automatically populated with the designated default value before the form is saved. Previously the default was sometimes ignored because the form automatically populated the field with a valid value (not null), so the database default constraint rule for the column in the database never came into play.
	A new field, TAXROUNDING FLOAT, has been added to the tables DR_TRANS, DR_TRANS_PARK, SALESORD_HDR and SALESORD_HDR_ARCHIVE. This field defaults to 0.
EXO Business Config	The following new GL Control Accounts have been added at EXO Business Config > Admin > General Ledger > GL Control Accounts: • Debtors Tax Rounding • Creditors Adjustments The existing Adjustments account has been renamed to Debtor Adjustments. **Note:** Posting of the Debtors Ledger to GL now posts DR_TRANS.TAXROUNDING to the new Debtors Tax Rounding control account. DR_TRANS.TAXROUNDING is the variance between the sum of the GST on the lines and the multiplication of the subtotal by the tax rate where all of the lines on the invoice have a consistent tax rate and no lines have been overridden.

<table>
<tr><th>Module</th><th>Description</th></tr>
<tr><td></td><td>

The **Max forward days** profile setting has been replaced by three User-level settings that control how far into the future pending transactions are considered to impact on stock commitment and therefore count as “Free Stock”.

- Sales order max forward days
- Purchase order max forward days
- Works order max forward days

Each automatically inherits the current value of the **Max forward days** setting during the upgrade to 8.1.0.0.



</td></tr>
<tr><td></td><td>

The following modules no longer require license keys:

- EXO Business Config
- EXO Finance Direct Debits
- EXO Sales Analysis Matrix

The following menu items are now accessible from the core in demo systems:

- Setup Stock Serial Numbers
- General Setup
- Setup Extra Fields
- Setup Analysis Codes
- Setup Period History
- Setup Stock Price Names
- Quick Insert Template

In EXO Business Config, double-clicking on a module that does not require a license key now displays a message informing the user that a license key is not required.

</td></tr>
</table>

Module	Description
	A new stored procedure, SP_GL_CONSOLIDATION, has been added to the database, replacing the old executable code for consolidating GL transactions. The utility for consolidating GL is no located on a separate tab in EXO Business Config under Utilities > General Ledger > Utilities. Once the **Consolidate** button is clicked, the new stored procedure is executed, consolidating the GL transactions up to the age specified and optionally moving transaction details to the GLTRANS_ARCHIVE table. (A **Do not retain archived general ledger transactions** option is available to let users not archive the consolidated GL transaction details.) **Note:** The utility cannot be run for the current financial year. In case of any error, the transactions are rolled back to the original state, informing the user about the rollback.
EXO Job Costing	The **Cost Method to use on Job Time and Cost Tabs** profile setting has been split into two separate profiles: one for stocked items and one for lookup items (typical scenario would be Average for stocked items and Standard for lookup items). The new profile settings are named **Cost method for Stock Items to use on Job Time and Cost tabs** and **Cost method for Lookup Items to use on Job Time and Cost tabs**. They inherit the setting of the existing profile.

Resolved Issues

> **Note:** This release includes the fixes introduced in the 8.0.1.0 hot fix release. See the 8.0.1.0 Release Notes document for information on these fixes.

EXO Business Core

Exotrack ID/ Service Request	Partner ID	Description
31825, 31966	2307, 1488	Custom line fields set up to display the contents of an Extra Field at the Sales Order line level did not appear when the order was Partly Processed. This has been resolved; custom line fields now display for all Sales Order statuses.
34768, 35323	5595, 5267	If the notes on the Debtors, Creditors or Stock screen were empty, it was not possible to paste on the notes memo when the memo was blank. This has been resolved; pasting is always allowed.
37105	5267	The option “<All Branches>” was available for the **Branch** field on the Sales Order screen. While this is an appropriate option when searching for a Sales Order, it is not appropriate when entering one. The “<All Branches>” option no longer appears on the Sales Order master screen.
35620	5480	The Style Picker window could be too small when a single colour variation was configured with many size variations. This window is now resizable.
36186	2050	GLTRANS had no link back to DR_INVLINES and CR_INVLINES, which made reporting difficult. This has been resolved: a new field SOURCE_INVLINEID has been added to GLTRANS and GL_SJLINES. The extraction process now stamps GL_SJLINES.SOURCE_INVLINEID with the Debtor/Creditor invoice line ID for the stock line.
35898	-	The SHIFT+TAB behaviour on the Sales Order screen failed to navigate between fields correctly. This has been resolved.
11126942620	-	The **Current activity regardless of account balance** option on the Debtors Statement screen did not work correctly; the period selection was ignored when checking for activity and always included transactions with activity in current period, i.e. age =0. This has been resolved; the **Current activity regardless of account balance** option now filters transactions based on the period the statement is being run for.
11142812541	-	The Stock Code column on the Bill of Materials screen was not wide enough to display long stock codes. The columns on this screen are now resizable, and the Stock Code column’s default width is now set according to the **Stock item code size** profile setting.

Exotrack ID/ Service Request	Partner ID	Description
11191276044	-	In the Integrated Cashbook, when a cash book expense or Income transaction was recorded for a prior period, the allocation age was recorded within the associated ledger as being current (0) instead of the entered prior period age of the GL Transaction. This meant that the aged balance figures on the Debtor or Creditor accounts showed incorrect ageing values. This has been resolved; the period on the Invoice and Payment transactions created are now entered with the same period as the General Ledger transaction entry. If the period is locked in the Debtor or Creditor Ledger, the user will receive appropriate warning messages.
11151293262	-	When overriding a Prompt Payment Discount, the tax rate defaulted to the first tax rate in the list. The tax rate now defaults to the tax rate of the Debtor account.
-	-	The Change Stock Code functionality on Stock Item Details screen updates the stock code in all the tables in the database that have a stock code field; however, some tables were missed out. This has been resolved; the field list has been updated to all known standard fields for the 8.1.0.0 schema.
-	-	On the Debtors Statement screen, the default options for a new installation are to have the **Custom Filter SQL** checkbox is unchecked, but Append/Replace options enabled. If custom SQL was appended to the query, an error message appeared saying that the filter was invalid—this was confusing to new users. The Debtors Statement screen now correctly ignores the custom filter on new installations if the **Custom Filter SQL** checkbox is unchecked.
-	-	The description of the **Custom Statement Logic** profile setting (STATEMENT_LOGIC) was unclear. The profile description has been updated to make it clear which options it applies to.
-	-	The **Select transactions based on accounting periods** fields on the Tax Return screen were using AGE, when they should have been using PERIOD_SEQ. This has been resolved.
-	-	When pressing CTRL+DEL to delete rows from a grid, the confirmation prompt would appear twice. This has been resolved.
-	-	When making a single Debtor Payment or Creditor Payment, if an email was called after refreshing the screen, the email sender opened with the email address of the default Creditor (0), not the Creditor for whom the payment had just been processed. The PDF attachment was correct, however. The correct email address is now copied into the Send to section.
-	-	When searching Creditor or Debtor accounts by name, the search always returned account 0 (CASH SALES for Debtors and MISC PRUCHASES for Creditors), even if the search text did not match any accounts. This has been resolved.

Exotrack ID/ Service Request	Partner ID	Description
-	-	EXO Business would close with an error message if Analysis Codes and Branches were disabled on the Creditor Invoice entry screen, the Stock Code column was selected and user then clicked on the Options column. This has been resolved.
-	-	Stock transactions created after costing an Inward Goods Receipt for a job had the Job Number incorrectly set to NULL. This has been resolved; the Job Number is now set to the number of the job that the Inward Goods Receipt belongs to.
-	-	When printing a Sales Order Listing by clicking Print > List (Clarity) on the Sales Order screen, “Status Not Defined” was displayed for order with “Lost Quote” status. This has been resolved; the report now displays “Lost Quote” instead.
-	-	The Sales Orders Supply grid (not Quick Supply) ignored the period and date selected on the screen and posted to the current period regardless. This was identified as a common cause of reconciliation problems with backlog orders being processed and invoiced in the previous period on the first working day after the rollover. This problem has been resolved; the grid now posts to the period/date selected, if not current.
-	-	In previous versions, the Due Date on the Sales Order grid was set when the Sales Order Periscope was opened or when the Sales Order was save, which meant that the wrong date was sometimes displayed. This has been resolved; the Due Date is now set to the date on the header when the grid is first populated.
-	-	The Cost method on the Sell Price Formulation screen defaulted to Last cost regardless of the cost method selected at EXO Business Config > Essential > General Settings. This has been resolved; the system now defaults the system cost method based on the setting in EXO Business Config.
-	-	There were no business rules around changing a Stock item’s status, which meant that the stock valuation could suddenly change and be very hard to reconcile. Marking a Stock item as inactive, or changing it from physical to lookup, is now subject to the rule that Total Stock should be zero in all locations.

EXO Business Config

Exotrack ID/ Service Request	Partner ID	Description
-	-	Ampersands (&) did not display correctly in profile descriptions. The PROFILE_FIELDS table has been updated—where the DESCRIPTION field contained an ampersand, it has been changed to “and”.
-	-	Attempting to delete GL transactions in EXO Business Config (Utilities > General Ledger > Utilities > Delete tab) resulted in the error “Invalid column name”. This has been resolved.
-	-	In previous versions, to open the Search window on the Admin > General Ledger > GL Control Accounts screen, users had to right-click and select Search; this was non-standard and unintuitive. The Search window can now be opened by double-clicking on the grid.
-	-	The **Purchasing Rate** and **Selling Rate** fields at Admin > EXO Finance > Currencies have been renamed to **Buy Rate** and **Sell Rate** to be consistent with the labels used elsewhere in the system.

EXO POS

Exotrack ID/ Service Request	Partner ID	Description
-	-	When a discount is added to a kit, an error message saying that the maximum discount had been exceeded would appear whenever focus moved away from the line. This has been resolved.

Management Report

Exotrack ID/ Service Request	Partner ID	Description
-	-	The Management Report included Sales Order quotations in statistics even if the **Exclude Quotes from Sales Orders** option was selected on the Setup Management Report Info window. This has been resolved.

Known Issues

The following issues have been identified as requiring end-user attention in this release.

Installation Issues

- If you are using the MYOB EXO Business Installation Wizard to install an instance of SQL Express, Windows Installer 3.1 must be present on the PC.
- 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.
- When running the EXO Business installer, 64-bit SQL Server 2008 instances do not appear at the Database Location screen (see page 7). EXO Business will run on 64-bit SQL Server 2008; however, it is not currently possible to install on this version using the EXO Business installer.

Issues with ClientConnect Integration

- If a record is deleted from ClientConnect, it will **not** be deleted from EXO Business; however it will be flagged in EXO Business to stop it from reappearing in ClientConnect the next time data is synchronised. This also means that it will not be possible to add the record back into ClientConnect later. Records should not be deleted from ClientConnect; always delete them from EXO Business. This will ensure that the record is deleted from both systems once data is synchronised (provided both systems are online).
- Address fields in EXO Business are limited to 30 characters, while fields in ClientConnect can be longer than this. Any data longer than 30 characters that is entered in ClientConnect will be truncated when the data is synchronized with EXO Business. This may not be immediately obvious—the data is truncated as soon as it is saved in EXO Business, but the data will not appear truncated in ClientConnect until the data is synchronized back from EXO Business.

Note: A SQL script is available in the **ClientConnect Tools** directory of the EXO Business CD, which will check the ClientConnect database and report on any Contact address data that is longer than the fields it will be mapped to. Directions for using this script are included in the header of the script itself.

- EXO Business allows one more address line than ClientConnect for both Postal Address and Delivery/Shipping Address. In the case of the Postal Address, the last two lines in EXO Business are concatenated into one in ClientConnect. In the case of the Delivery/Shipping Address, the last address line in EXO Business is not synchronised with ClientConnect.

- Compatibility issues when integrating EXO Business with ClientConnect using Outlook 2007 on Windows XP can result in Outlook hanging. The **ClientConnect Tools** directory of the EXO Business CD contains a fix for this issue. See the accompanying documentation for more details.
- Peer-to-peer data sharing is not supported in ClientConnect when it is integrated with EXO Business.
- Data synchronisation will not occur if the EXO Business system is offline.
- Data synchronisation uses the timestamp on records in ClientConnect and EXO Business to determine which is newer, with the newer record overwriting the older. While ClientConnect always uses the server time, EXO Business uses the time on the local PC—this means that synchronisation can fail where clients are in different time zones from the server.
- If the name of the server PC is changed, ensure that the internal instance name for SQL Server is similarly updated; otherwise ClientConnect will not be able to contact EXO Business.