

MYOB EXO Business Services

Release Notes

1.3 SP1

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Introduction

What's New in this Release?

The 1.3 SP1 release of the EXO Business Services adds the ability to create tax-inclusive Sales Orders via the EXO API.

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.
- The **Setting up EXO API** section provides information on configuring the EXO API after installation.
- 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.

For information on how to use the EXO API, including documentation on all API endpoints, see the EXO API Online Help at <http://apidocs.myob.com/api/exo/>.

Installation

Pre-Install Requirements

Full details of requirements and supported operating systems for PCs running MYOB EXO Business components are available on the [Minimum System Requirements page on the MYOB website](#).

The EXO API requires EXO Business 8.4 or later. If you are using EXO Business 8.7 or later, you can set up the EXO API using the EXO Business Configurator application; for EXO Business versions 8.4 – 8.6, you must use the separate **ExoMobileConfig.exe** application (see “Setting up EXO Business” on page 8).

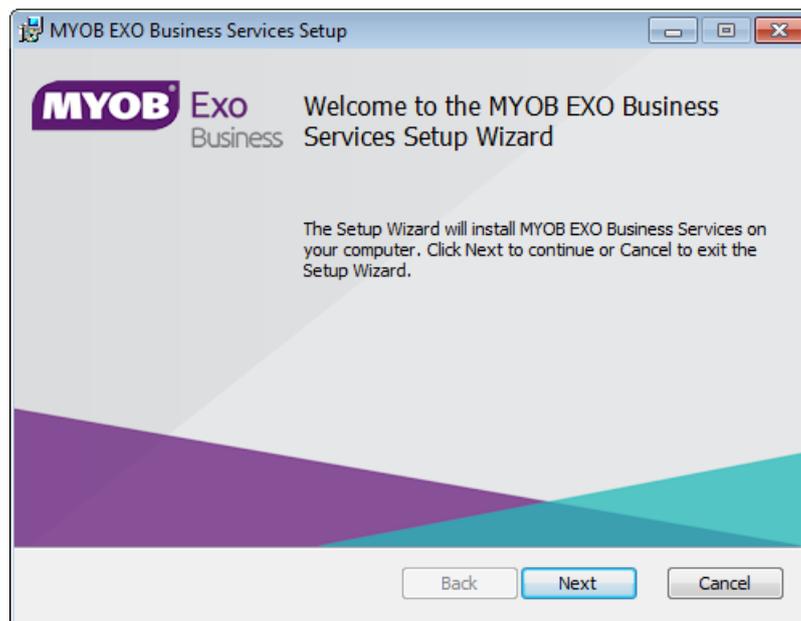
Installing the EXO Business Services

The EXO Business Services Setup Wizard, **EXO Business Services Installer.msi**, installs the local components needed to access the EXO API from an EXO Business server. This wizard is supplied with the main EXO Business installer in EXO Business 8.7 and later.

The EXO Business Services Setup Wizard must be run on a server that already has EXO Business installed on it. It must be run from an account with administrative permissions.

To perform the installation:

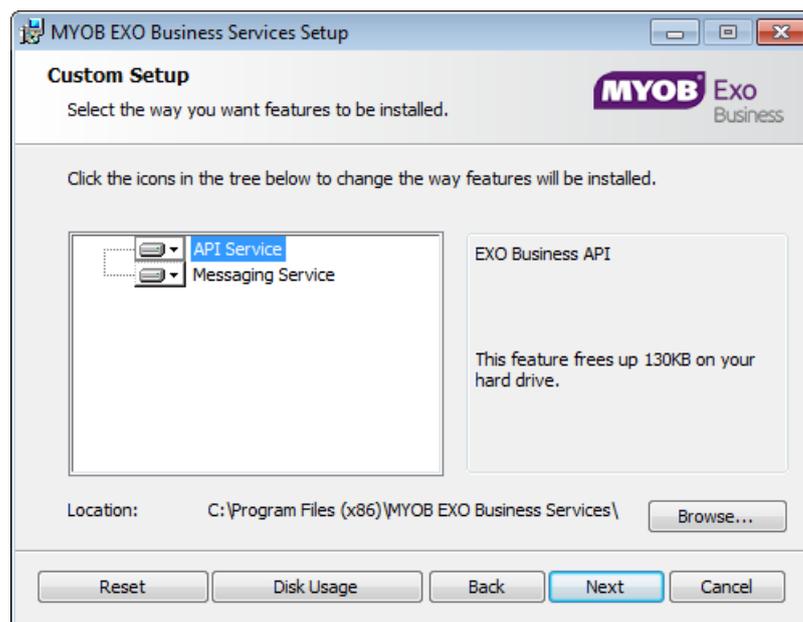
1. Double-click on the **EXO Business Services Installer.msi** installer. The welcome screen appears:



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



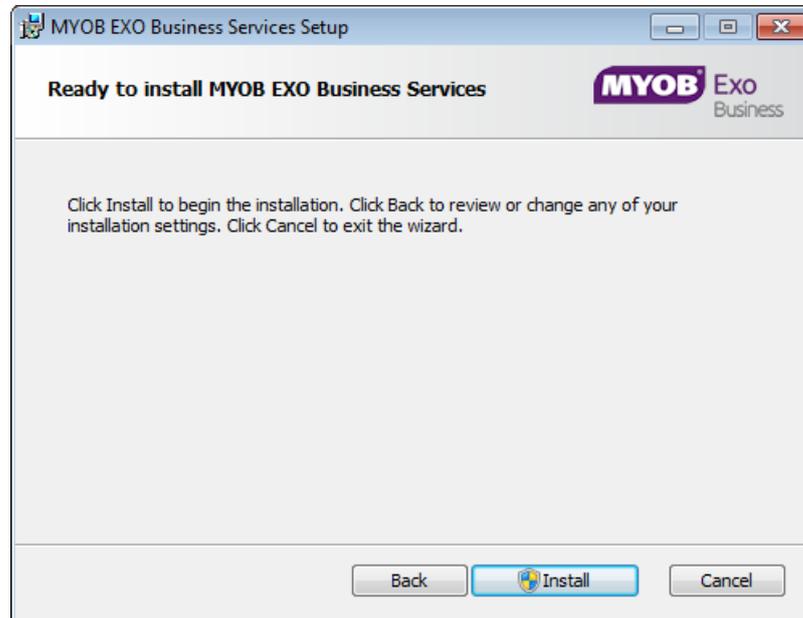
3. Tick **I accept the terms in the Licence Agreement** and click **Next** to continue.



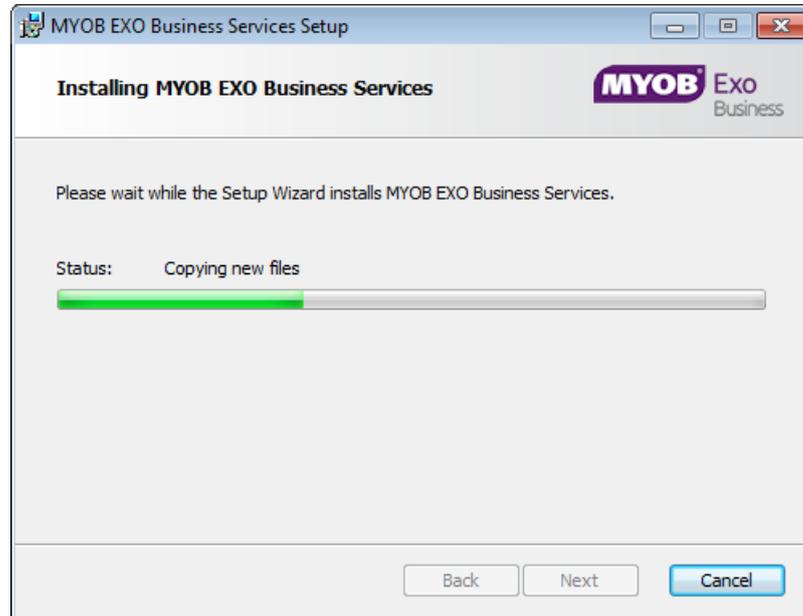
4. Select which components to install. Choose from:
 - The EXO API Service
 - The EXO Messaging Service

Note: The API configuration utilities are always installed (see "Setting up the Services" on page 6).

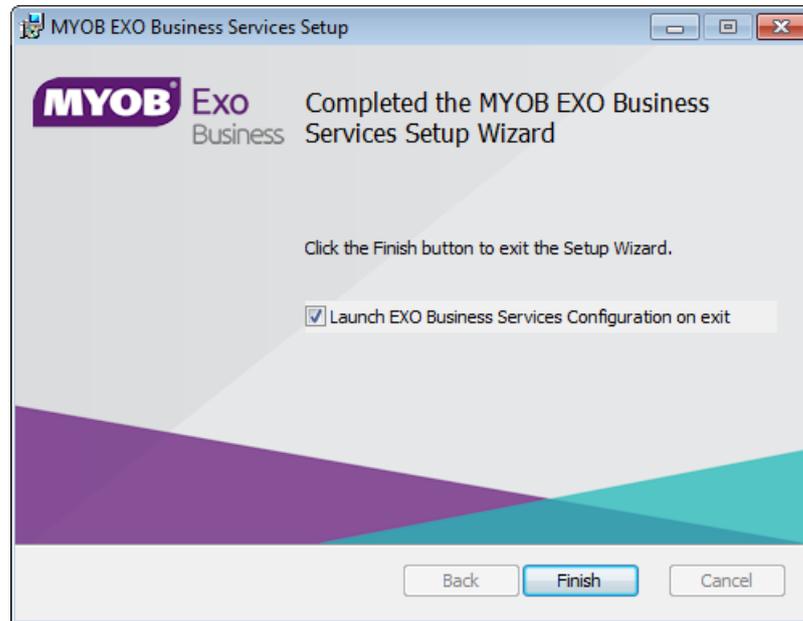
5. The install location is displayed at the bottom of the window. Click **Browse** to choose a different location if necessary.
6. Click **Next**. You are now ready to install the EXO API components.



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 (see page 6).



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.

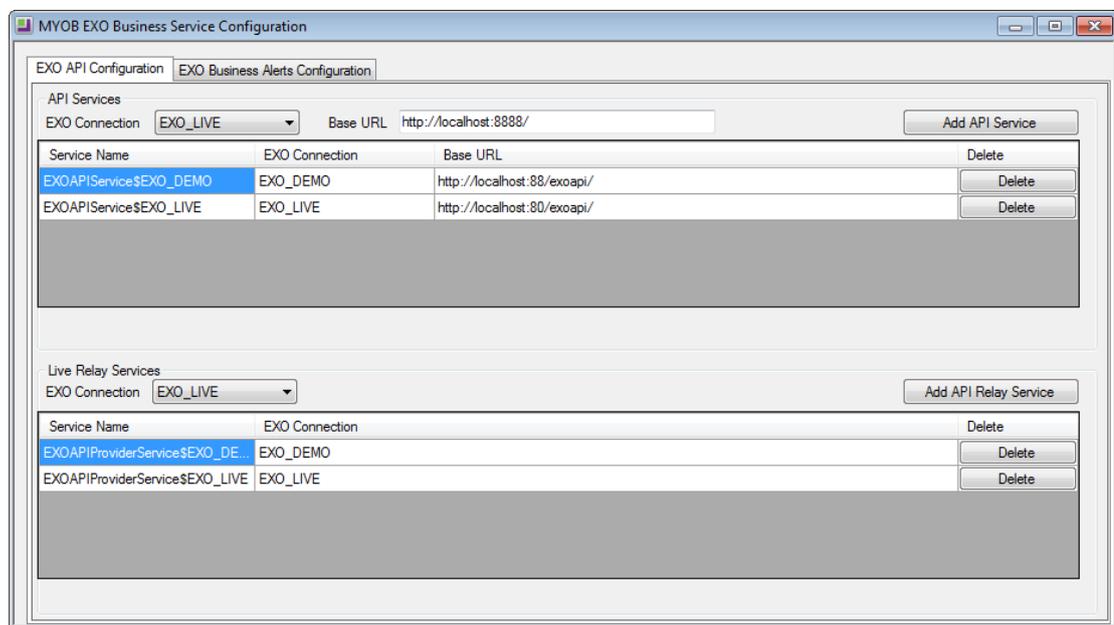
Setting up the Services

Once the EXO Business services have been installed, they must be set up and the EXO Business system must be configured to interact with them. These steps are detailed below.

Note: All setup must be performed on the server that the services are installed on, using an account with administrative permissions.

Setting up EXO Business 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 API install directory at any time.



The utility displays configuration settings for the following services:

- EXO API Configuration
 - API Services – use this service if you want to use the EXO API on a local network.
 - Live Relay Services – use this service if you want to communicate with the EXO API remotely using the online MYOB LiveRelay. (You can use both the API Service and the Live Relay Service at the same time.)
- EXO Business Alerts Configuration
 - Message Services – this is the EXO Business messaging service.

To configure an API service, select an EXO Business database connection, then click the relevant **Add Service** button.

Setting up the Services

Note: The EXO Business database connection must have been created using an account with administrative permissions. It should specify a valid server name (not blank, local, localhost, etc). This same account should be used to run the MYOB EXO Business Service Configuration utility.

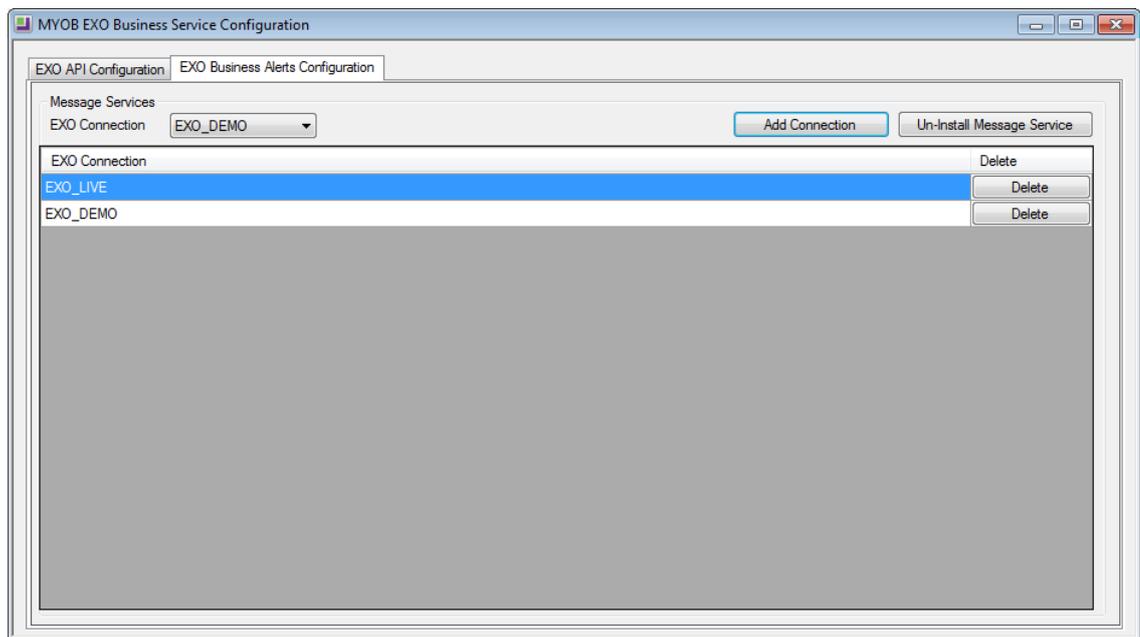
For the API Service, you must also enter a **Base URL**, which is the location and port the API is accessible on (the default should be suitable in most cases, unless you want to use a different directory and/or port).

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.

Note: The API Services should be set to the “Automatic (Delayed Start)” startup type. If the API Service attempts to start before the MSSQL service has started, it will fail. Setting the API Service to a delayed start, and having SQL Server as automatic (not delayed) should overcome this problem during bootup.

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**.

Setting up EXO Business

The EXO Business system must be set up to use the EXO Business services. Setup can be performed in two ways:

- If you are using EXO Business 8.7 or later, you can use the EXO Configurator or the EXO OnTheGo Configurator to set up the EXO API.
- If you are using EXO Business 8.3 – 8.6, you must use the EXO OnTheGo Configurator, which is installed with the EXO API. This application contains only the EXO Configurator screens that are relevant to EXO API.

Adding the EXO API and EXO OnTheGo Modules

The first step is to add the “EXO API” module in the Company section of EXO Configurator/EXO OnTheGo Configurator. To do this:

1. Click the **Add** toolbar button.
2. Select “EXO API” from the **Module** dropdown.
3. Enter your licence details.
4. Click **Save**.
5. Click **Launch Update** to update the EXO Business system.

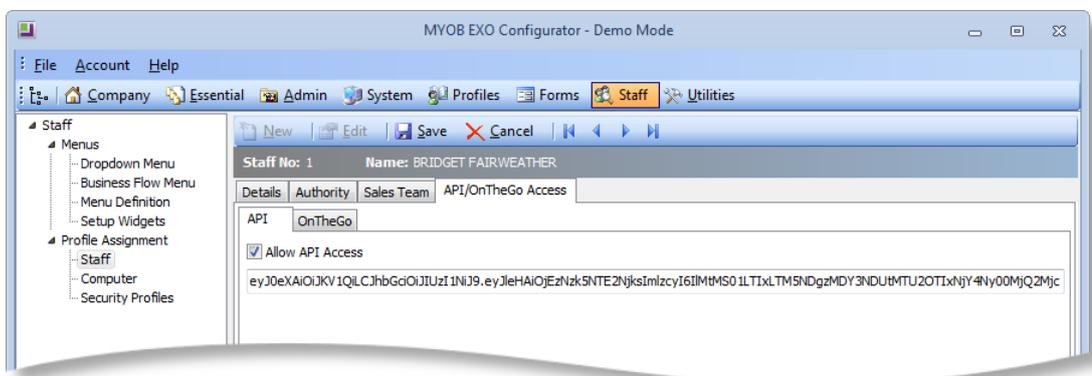
If you are licensed to use the EXO OnTheGo app, you must also add the “EXO OnTheGo Sales” module. Repeat steps 1 – 5, selecting “EXO OnTheGo Sales” at step 2.

Updating the EXO Business Database

If you are upgrading to a new version of the EXO API, you must update the database to add support for any new features used by the API. Open the EXO OnTheGo configurator and click the **Launch Update** button on the Company section.

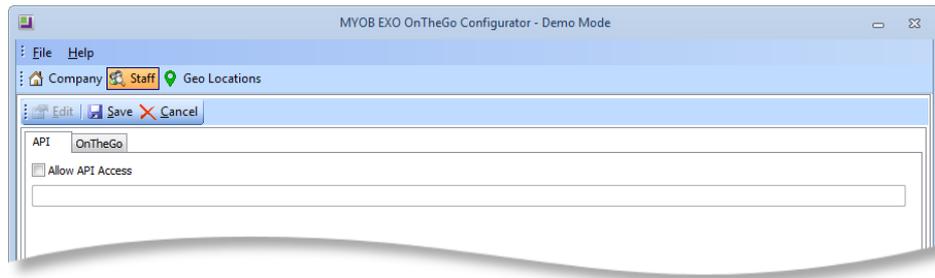
Generating User Tokens

Once the EXO API module is added and licensed, an API/OnTheGo Access tab becomes available when editing staff members in the Staff section of the EXO Configurator:



Setting up the Services

A similar tab is available in the EXO OnTheGo Configurator:

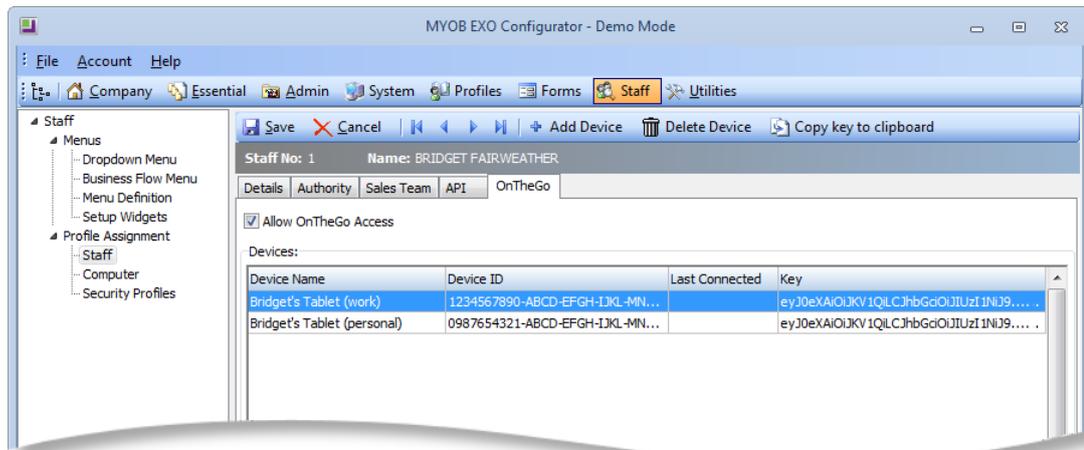


Tick the **Allow API Access** box for each staff member who will need to use the EXO API. This generates an API token for the staff member, to be used in API requests. You can right-click on the token to copy it to the clipboard.

For more information on working with the API and required token, see the EXO API Online Help at <http://developer.myob.com/api/exo/exo-api-overview/getting-started/>.

Adding EXO OnTheGo Access and Devices

Once the EXO OnTheGo module is added and licensed, an OnTheGo sub-tab becomes available when editing staff members in the EXO Configurator and EXO OnTheGo Configurator:

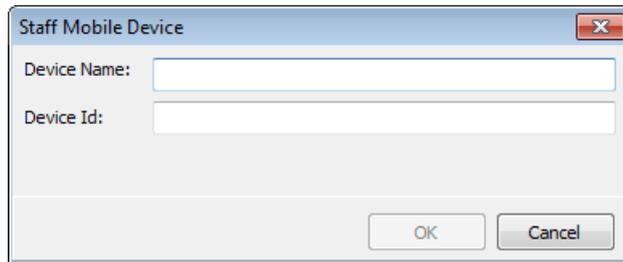


Tick the **Allow OnTheGo Access** box to enable access to the EXO OnTheGo app for that staff member. The EXO OnTheGo license specifies a maximum number of users—once this limit has been reached, the **Allow OnTheGo Access** box is disabled on all other staff members.

Note: If you reduce the number of EXO OnTheGo users you are licensed for, you must untick the **Allow Mobile Access** boxes of enough staff members to bring you down to the new limit before you can save the new licence.

Setting up the Services

The EXO OnTheGo app can be licensed for up to two devices per staff member. Click the **Add Device** button on the OnTheGo sub-tab to enter the details for staff members' devices.



Device Name

Enter a descriptive name for the device.

Device ID

Enter the device's Unique Device Identifier (UDID). You can find this number using the EXO OnTheGo app:

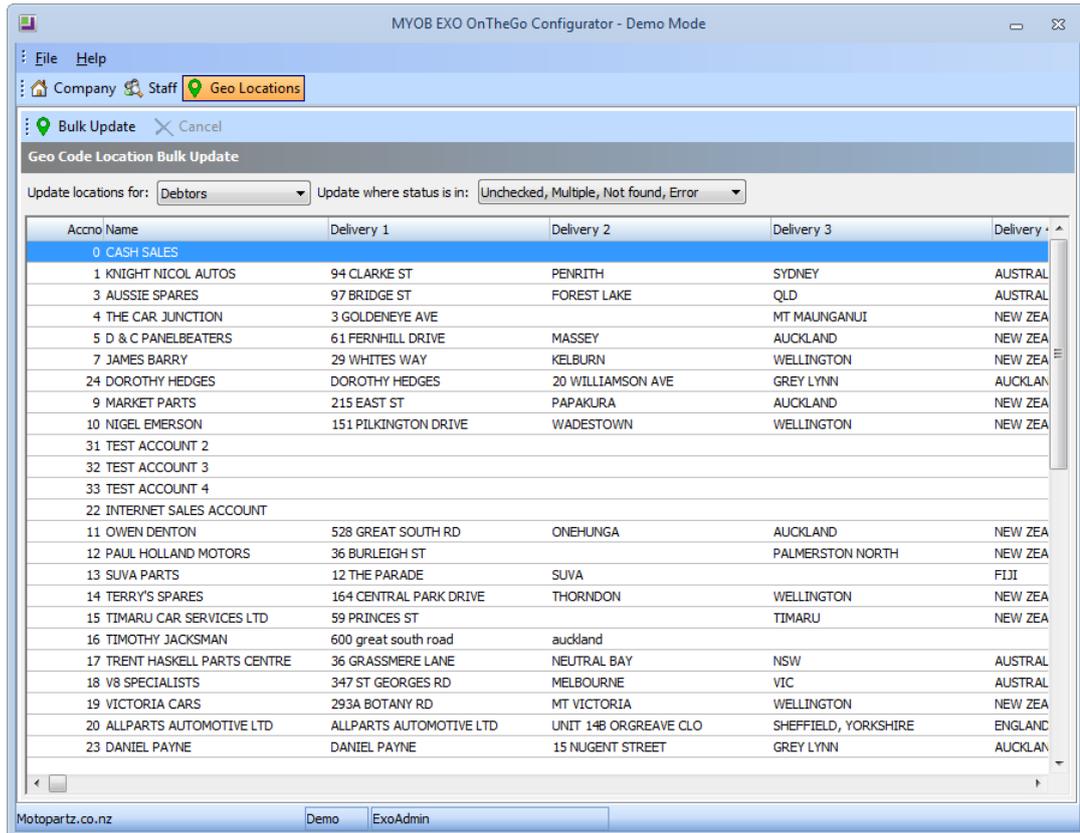
1. Open the app.
2. On the login screen that appears, tap the > arrow next to the connection name. (If this is the first time you are using the app, the connection name will be "Demo".)
3. On the Connections window, tap **Add connection** to open the Create connection window. The UDID appears at the bottom of this window.
4. Tap the ✉ icon to create an email containing the UDID. Send this email to an address that can be accessed from the EXO Business server.
5. On the EXO Business server, open the email and copy the UDID.
6. Paste the UDID into EXO Configurator or EXO OnTheGo Configurator.

Click **OK**. A key is generated for the device; this key is to be used in API requests from the device, and must be entered when setting up a connection to the device in the EXO OnTheGo app. You can right-click on the key to copy it to the clipboard.

Bulk Loading Locations

The EXO API can retrieve the geolocation details (latitude and longitude) stored for Debtors, Creditors, Non Accounts and Contacts to search for accounts based on their physical location—the EXO OnTheGo app makes use of this functionality, for example. These details can be entered in the EXO Business system in version 8.7 SP2 and later; in previous versions, the details must be entered and updated in bulk using the EXO OnTheGo Configurator.

To enter location details, click the **Geo Locations** button on the main toolbar:



To bulk update location details:

1. Use the **Update locations for:** dropdown to select the kind of account to update (Debtors, Creditors, Non Accounts or Contacts).
2. Use the **Update where status is in:** dropdown to filter the list of accounts by status. Only accounts that appear on the list will be updated. By default, accounts whose status is already “OK” are filtered out.
3. Click **Bulk Update**.

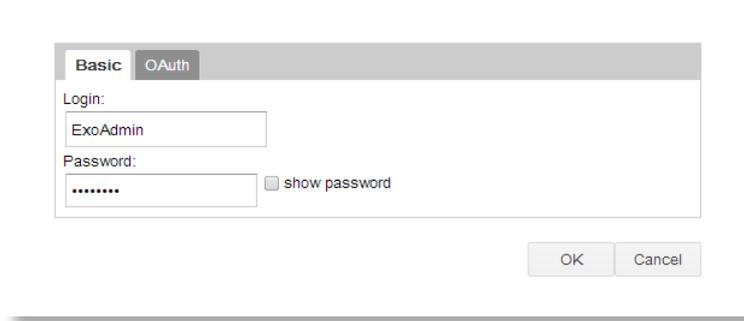
The system attempts to retrieve details for each account in the list, and updates each account’s status according to whether the attempt succeeds or fails.

Note: For versions prior to EXO Business 8.7 SP2, the EXO OnTheGo Configurator inserts database triggers to ensure that geolocation details are updated automatically if an account’s address is edited. These triggers are removed upon upgrading to EXO Business 8.7 SP2 or later.

Testing the API Service

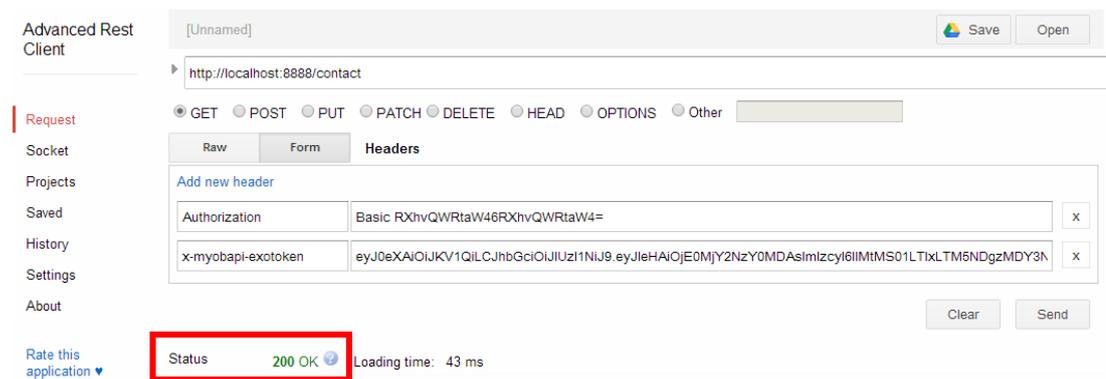
Once the API service is installed and set up, you can test it using the [Advanced Rest Client](#) in Google Chrome:

1. Download and run the Advanced Rest Client.
2. Enter the URL: `http://localhost:8888/contact`
3. Add a header called "Authorization".
4. Right-click on this header and click the **Edit value** box that appears.
5. On the Basic tab of the popup that appears, enter the login details of a user for the EXO Business connection you're using and click **OK**.



6. Add a header called "x-myobapi-exotoken".
7. Enter the API access token for the user whose login details you entered in step 5. (You can copy the token from EXO Business Config > Staff > Staff > API/OnTheGo Access tab > API sub-tab.)
8. Click **Send**.

The response should be **200 OK** and a list of the contacts from the system should be returned.



Troubleshooting

If you encounter any problems when using the EXO API, the *EXO API & OnTheGo Troubleshooting Guide* may help you to diagnose and solve these problems. This document is available on the EXO Business Education Centre at

<http://help.myob.com.au/exo/ontheego>.

New Features

Tax-Inclusive Sales Orders

The EXO API now observes the `istaxinclusive` attribute when creating Sales Orders via a POST request. To create a Sales Order with tax-inclusive pricing, ensure that the `istaxinclusive` attribute is set to `true` in the JSON packet representing the transaction that is passed in via the POST request.

If the `istaxinclusive` attribute is NULL, the system will follow the **GST inclusive pricing for debtors** setting in the General Settings section of EXO Configurator. If the attribute is specified, this will override the **GST inclusive pricing for debtors** setting.

Note: A call to the `salesorder/validate` endpoint will return a `SalesOrder` object with the `istaxinclusive` attribute set based on the EXO Configurator setting—you can use this to determine the value of the attribute for PUT/POST requests.

Resolved Issues

Service Request ID	Description
114550097502 119492202801 113983034101	This release adds the ability to create tax-inclusive Sales Orders via the EXO API—see page 13.

Known Issues

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

Timeout Issues

The API communicates using HTTP; any request that takes more time to complete than the standard HTTP timeout period will fail. This may include search operations that would return a large set of results or operations on transactions like Sales Orders that have a large number of lines. How large an operation has to be before it times out will depend in part on the speed of the EXO Business database server, network connectivity, etc.

Tax Inclusive Orders in EXO OnTheGo

When using the EXO OnTheGo app (which communicates with the EXO Business system via the EXO API), you can create tax-inclusive Sales Orders, but you cannot edit existing tax-inclusive orders.

Known Issues