



MYOB EXO BUSINESS WHITE PAPER

Social Media in MYOB EXO Business



MYOB ENTERPRISE SOLUTIONS

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Introduction

MYOB EXO Business 8.4 introduced the ability to integrate with the Facebook, LinkedIn and Twitter social media networks. Integration includes:

- The ability to specify social media account IDs for companies and Contacts.
- The ability to view social media accounts from companies, Contacts and Opportunities on a separate social media tab.
- The ability to view social media information for the EXO Business company.
- The ability to post to the EXO Business company's social media accounts (requires the EXO Business CRM module).

This white paper describes how the EXO Business system integrates with the various social media networks, how to set up the system for social media integration, and how to diagnose and remedy any errors that may appear.

How Social Media Integration Works

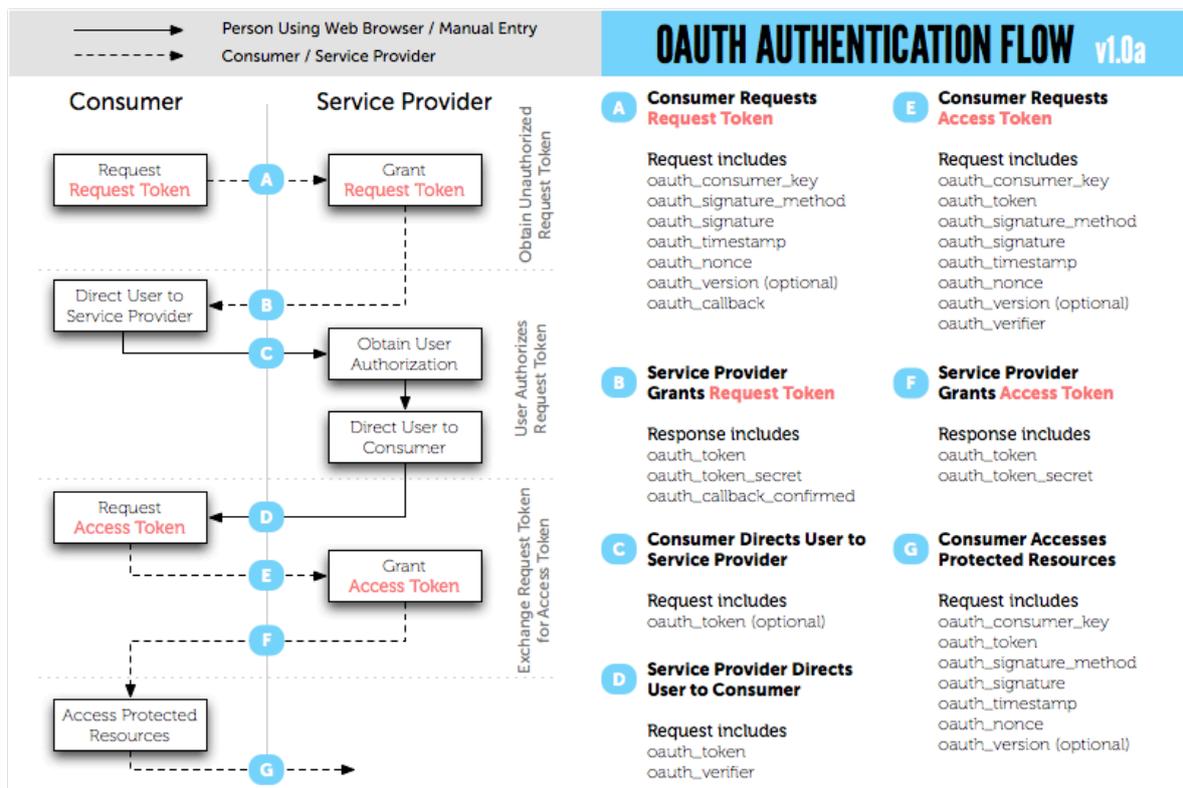
All three social media networks supported by EXO Business use the OAuth authentication protocol to grant access to users' social media accounts. LinkedIn and Twitter use OAuth 1.0, while Facebook uses OAuth 2.0.

For more information on the OAuth protocol, see the OAuth website: <http://oauth.net/>

The Authentication Process

OAuth works by exchanging *tokens* and *key/secret* combinations between EXO Business and the social media networks. A token is associated with a single social media account; tokens must be set up in EXO Business in order to integrate with social media networks (see page 5). The key/secret is specific to the EXO Business social media application; it is pre-configured in the EXO Business database, and should not need to be changed.

The authentication process, by which tokens are requested and exchanged, works as follows:



(Diagram taken from <https://developer.linkedin.com/documents/oauth-overview>—see this web page for more information on the authentication flow.)

Access Tokens

Expiration

Access tokens expire after some time and must be renewed by logging in to the social media account again (they can also be renewed automatically if cookies exist). Once logged into an account, the access token is stored in the EXO Business database and updated when required. The user accounts used to log in to social media can revoke access from their account page. This in makes the access token invalid, so users viewing social media pages in EXO Business must login again to regenerate the token.

Company vs. Personal Tokens

In EXO Business, it is possible to use social media with separate accounts: one for the company, and one for the currently logged in user.

In practice, Debtors, Creditors and Non Accounts are most likely to have public pages, so accessing via the company account should be sufficient. However, there may be occasions when a company or a Contact has, for example, a private Facebook account, so that only Facebook users who are connected to that company or Contact can view their activity. If the EXO Business company account is not connected, then in order to view it, a user who is connected to the account would have to log in. Another use for multiple accounts is on the LinkedIn Connections tab for Opportunities; since this tab displays the Opportunity’s employees, sorted by degree of connection to the logged in user, logging in as different users will display different results.

Tokens are stored in the EXO Business database for all accounts. Tokens for the company account are generated in EXO Business Config (see page 5); tokens for individual users' accounts are generated when those users log in using the social media interfaces (see page 9).

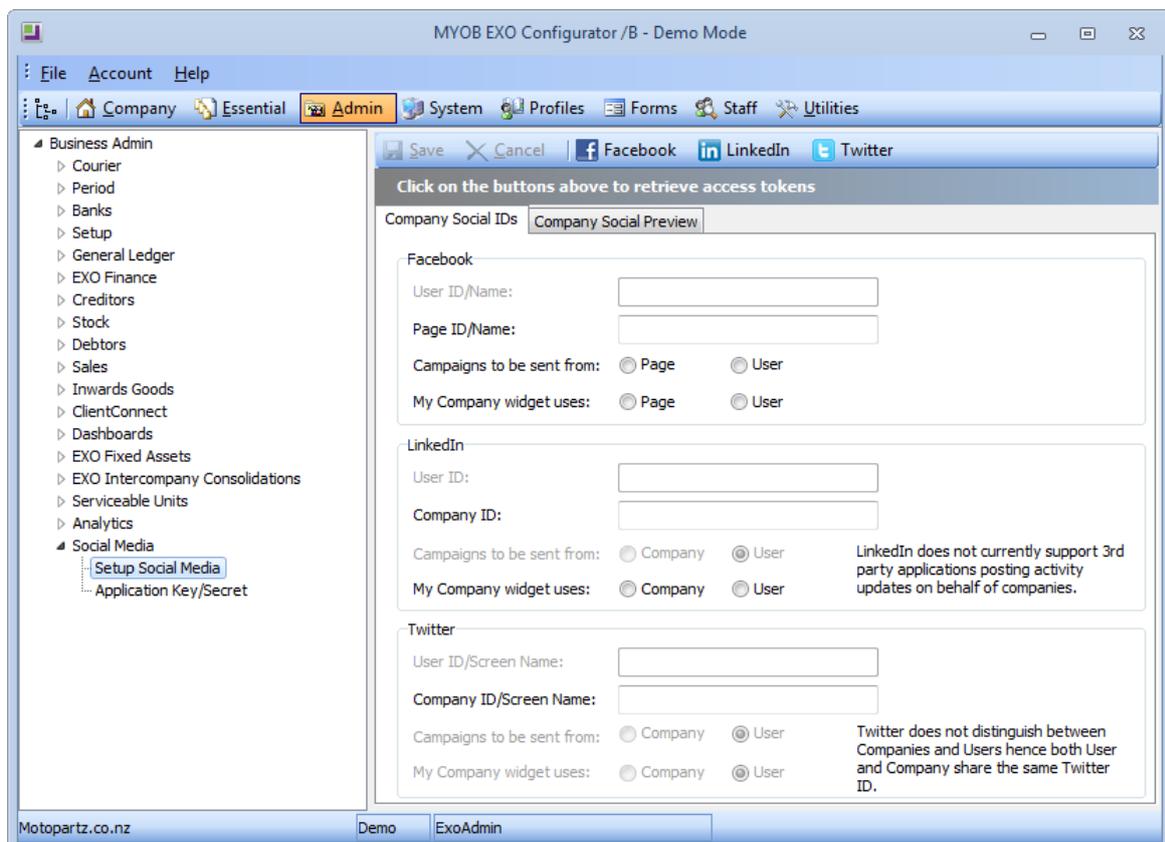
Application Key/Secret

The application key/secret used by OAuth is specific to the application integrating with social media networks (in EXO Business, this application is called `exo_social`). To access the social media APIs, every application uses a unique key/secret combination to generate access tokens and sign URLs being posted to the API. The key/secret is stored in EXO Business Config.

In exceptional circumstances the social media network may need to update the key/secret, e.g. if the EXO Business application were to be hacked or the key/secret leaked. If this happens, the application will not work until the new key/secret is entered in the EXO Business database. This is the only situation when the key/secret should be edited—changing these details at any other time will cause the `exo_social` application to stop working.

Setting up Social Media Integration

Company-wide social media details are set up in EXO Business Config at **Admin > Social Media > Setup Social Media**:



Retrieving Company Tokens

Tokens for the company account can be retrieved by clicking the **Facebook**, **LinkedIn** and **Twitter** toolbar buttons on this screen.

Clicking a button switches the screen to the Company Social Preview sub-tab, where you can enter you social media network login details to authorise the EXO Business application. Doing so retrieves the access token for that network and saves it in the EXO Business database.

To change the company account in use, go to the Twitter, Facebook or LinkedIn website and revoke access to the EXO Social application, then come back to this screen in EXO Business Config. You will be prompted to log in again.

Revoking Access in Twitter

1. Go to **Settings > Apps**.
2. Click the **Revoke access** button next to the EXO Social application.

Revoking Access in Facebook

1. Go to **Account Settings > Apps**.
2. Click the **X** button next to the EXO Social application.

Revoking Access in LinkedIn

1. Go to **Settings > Groups, Companies & Applications**.
2. Click **View your applications**.
3. Under **External Websites**, tick the box next to the EXO Social application.
4. Click **Remove**.

Setting Company Social Media Accounts

The settings on the Company Social IDs sub-tab specify the social media accounts that will appear on the social media widgets (see page 10), and that will be used when running a “Social Media Post” communication wave from EXO Business CRM (see page 11). These should be the same as the accounts that are used to log in and retrieve access tokens (after retrieving a token, the account used is automatically copied to the relevant field on this the Company Social IDs sub-tab).

Facebook

Facebook has two types of accounts: users and pages. For pages, Facebook allows the owners of the page to either post as the page itself or as the user who is the page owner.

The following settings are available to control Facebook accounts:

Setting	Description
User ID/Name	This read-only field is populated automatically when clicking the Facebook toolbar button.
Page ID/Name	If your company has its own Facebook page, enter its ID number or name here.

Campaigns to be sent from	When posting to social media from a campaign wave, you can post using the User ID or for the Page ID; use these options to select which.
My Company widget uses	This setting determines what appears on the “My Company’s Facebook Wall” widget. In Facebook, the company page is owned by a user. Select whether to display the Facebook wall for the User ID/Name or for the Page ID/Name .

LinkedIn

LinkedIn has two types of accounts: users and companies. At present, LinkedIn does not allow third party applications such as EXO Business to post activity to a company account.

The following settings are available to control Facebook accounts:

Setting	Description
User ID	This read-only field is populated automatically when clicking the LinkedIn toolbar button.
Company ID	If your company has its own account on LinkedIn, enter its ID number here.
Campaigns to be sent from	Because LinkedIn does not allow third party applications such as EXO Business to post activity to a company account, these options are disabled and User is always selected.
My Company widget uses	This setting determines what appears on the “My Company’s LinkedIn Activity” widget. In LinkedIn, the company page is owned by a user. Select whether to display the LinkedIn activity for the User ID or for the Company ID .

Twitter

Twitter does not distinguish between users, companies or pages, so one account is all that is needed. The **Company ID/Screen Name** field is populated automatically when clicking the **Twitter** toolbar button; it can also be entered and edited manually. All other properties are disabled.

Application Key/Secret

The **Admin > Social Media > Application Key/Secret** section in EXO Business Config contains the application key/secret combination used by the EXO Business application to connect to social media networks (see page 5). **Do not alter these details unless instructed to do so by MYOB; altering these details could cause the social media functions to stop working.**

Entering Social Media Details for Companies and Contacts

Social media usernames or account IDs can be set up for companies and Contacts in the following places:

- On the Details 2 tab of the Debtor Account Details window.
- On the Details 2 tab of the Creditor Account Details window.
- On the Details tab of the Non Account Details window.
- On the Details tab of the Contacts window.
- Opportunities use the social media details set up for the company that they are associated with.

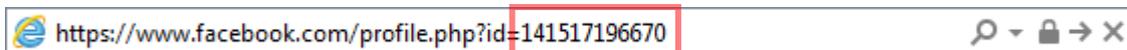
Note: The LinkedIn ID must be the numerical ID, not a username. The Facebook ID can be a numerical ID or a Facebook username, if one has been set up.

Finding Account IDs

If you do not know social media details for a company or Contact, they can be searched for and filled in automatically from the Social tab (see page 9). Alternatively, you can find out an account's ID number by opening the account in a web browser and examining the URL.

Facebook

All Facebook accounts have a numerical ID number. This number appears after **id=** in the URL:



It is also possible to set up a Facebook username for an account (user or page). If an account has a username, it appears in the URL instead of the ID number, like so:



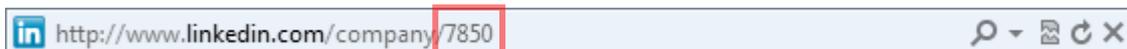
LinkedIn

LinkedIn has two types of accounts: users and companies.

For a user's LinkedIn account, the ID number appears after **id=** in the URL:



For a company's LinkedIn account, the ID number appears after **company/** in the URL:



Twitter

Twitter does not distinguish between users, companies or pages; all Twitter accounts are the same. A twitter account's ID appears in the URL like so:

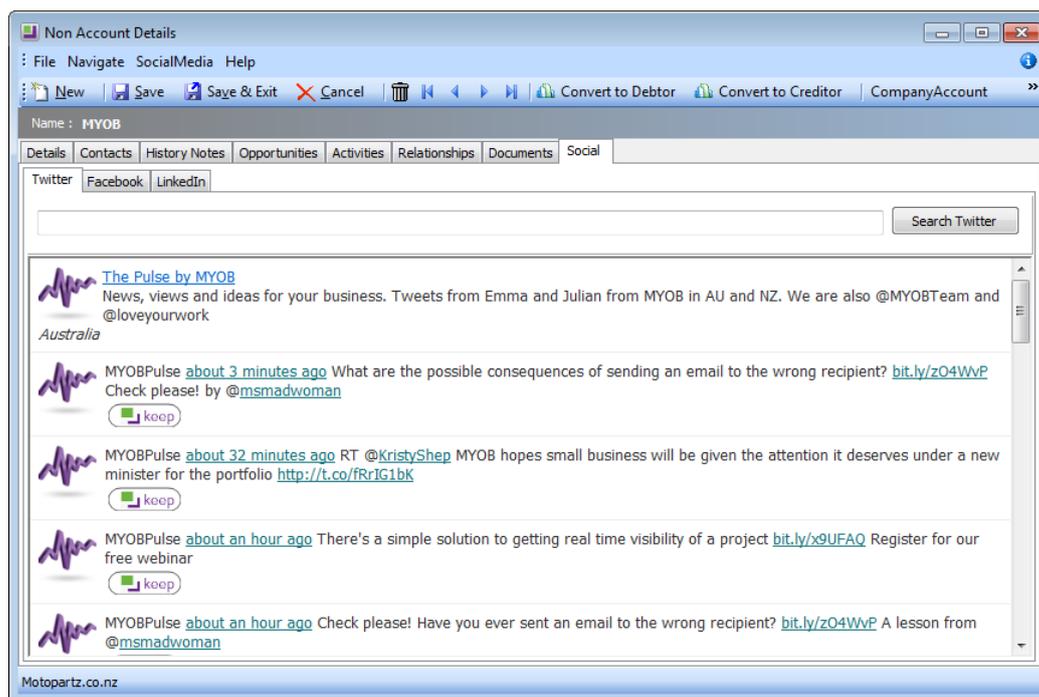


Social Media Interfaces

The Social Tab

Social media information is displayed on the Social tab, which is available on the Debtor, Creditor, Non Account, Opportunity and Contact screens.

Note: The Disable Social Media Tabs profile setting can be used to hide this tab on some or all of these screens.



If social media account details have been entered for the company or Contact, their latest social media information is displayed on the Social tab automatically; if no details have been entered, each sub-tab displays the results of a search for the company/Contact's name. All search results have a **keep** link next to them—clicking a **keep** link populates company/Contact's social media details with the details from that result.

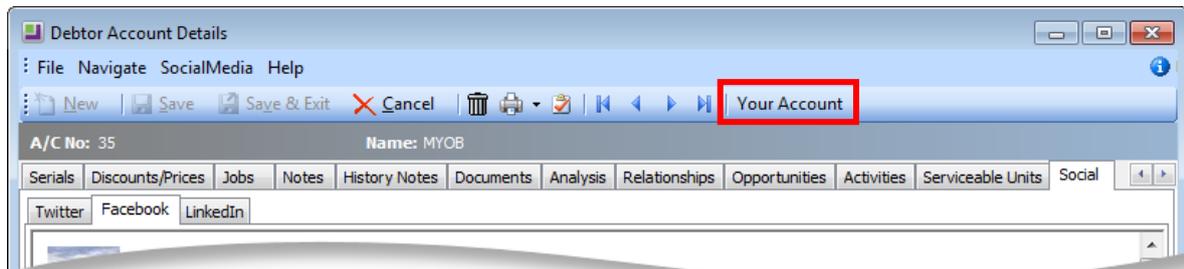
Note: EXO Business captures as many details as it can; for example, LinkedIn search results may also specify a website and a Twitter feed - these details will be copied as well if they are not already present.

Each sub-tab has a **More Results** link at the bottom. Clicking this button opens a separate browser window to display the company's Twitter feed, Facebook wall or LinkedIn page.

On all sub-tabs, each entry has a **keep** button. Clicking this button copies the entry to the company/Contact/Opportunity's History Notes tab.

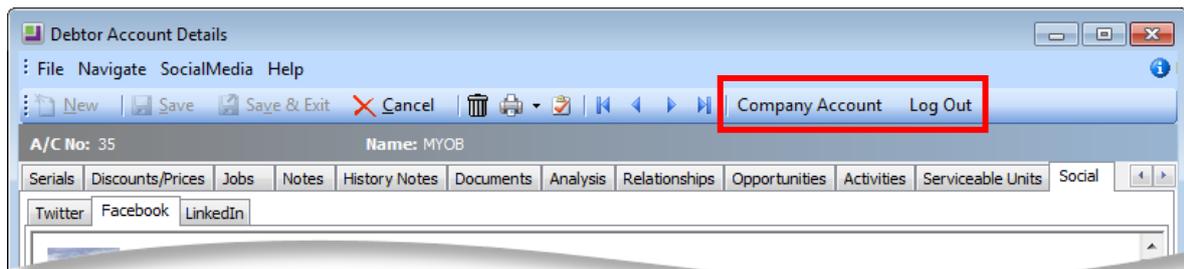
Logging In and Retrieving User Tokens

When first accessing the Social tab, the company details entered in EXO Business Config (see page 5) are used to log in. Users can click the **Your Account** button to log in with their own details instead:



If this is the first time that the user has logged in, an access token will be retrieved for them and stored against their Staff record in the EXO Business database. Once logged in, the **Your Account** button is replaced by two buttons:

- **Company Account** – goes back to using the company account to view the social media information.
- **Log Out** – logs the user account out, removing their access token. They can log in again or go back to using the company account.

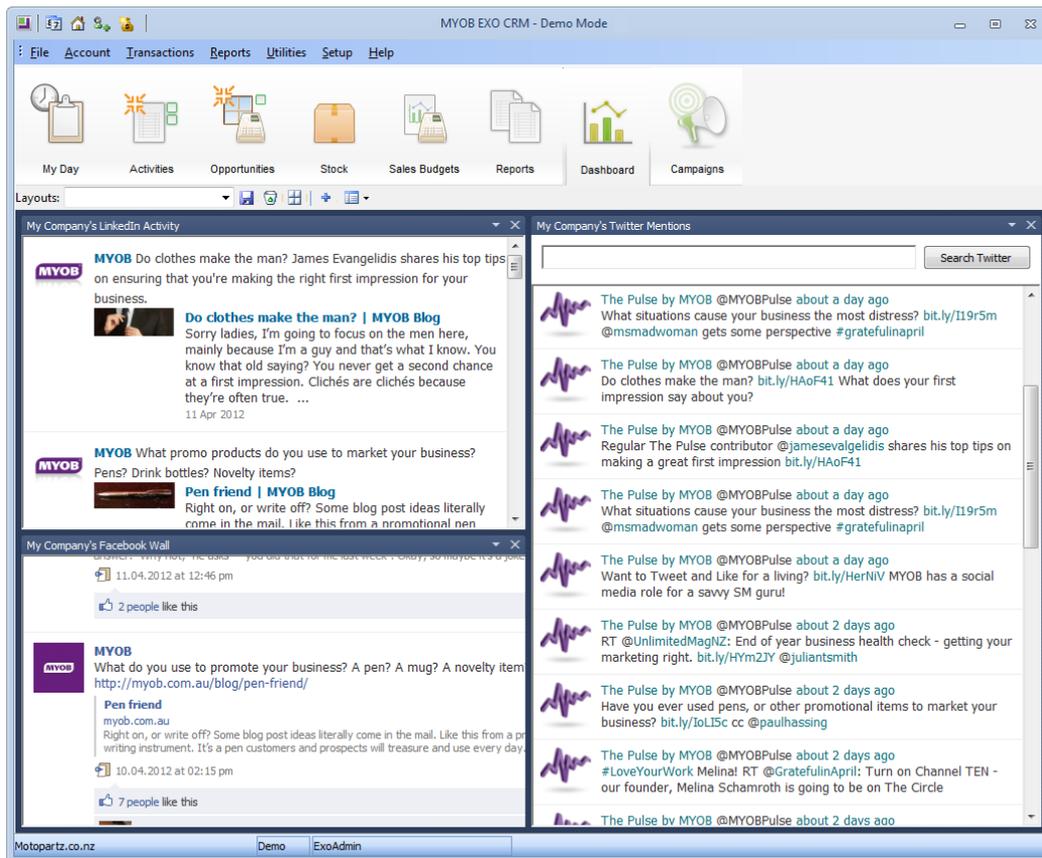


Social Media Widgets

The following widgets are available to display social information about your own company on dashboard displays:

- My Company's Facebook Wall
- My Company's LinkedIn Activity
- My Company's Twitter Mentions

These widgets use the account IDs entered in EXO Business Config (see page 5); if no details have been entered, these widgets perform a search for the Company Name as set up in EXO Business Config at **Company > Company Details**.



Social Media Post (EXO Business CRM)

The EXO Business CRM add-on module allows users to post information to the company Facebook page, LinkedIn account or Twitter feed from a campaign wave. See the *EXO Business CRM User Guide* for more information on campaign waves.

When making a social media post, the accounts posted to are those that were entered in EXO Business Config (see page 5).

Troubleshooting Social Media Integration

Possible errors that can be encountered when using social media features are discussed here.

“Revocation information for the security certificate for this site is not available. Do you want to proceed?”

If this error appears when accessing social media sites, see the following web page for information on how to resolve the issue:

<https://knowledge.verisign.com/support/ssl-certificates-support/index?page=content&id=SO1193>

Setting up Facebook page names

It is possible to give a Facebook page a username, which can be used instead of a numerical ID number. However, Facebook requires that a page have at least 25 fans before a username can be assigned—keep this in mind when setting up Facebook pages for your company.