MYOB Exo Business Services Release Notes

myob

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Introduction

What's New in this Release?

The 1.6 release of the Exo Business Services is a stability update.

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.
- The **Known Issues** section details any issues in this release that have been identified as requiring attention.

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

Installation

Pre-Install Requirements

Full details of requirements and supported operating systems for PCs running MYOB Exo Business components are available on the <u>Minimum System Requirements page</u> on the MYOB website.

The Exo API requires Exo Business 2018.5 or later.

Installing the Exo Business Services

Information on installing and setting up MYOB Exo Business and the MYOB Exo Business Service is available on the MYOB Exo Business Education Centre—see the following pages:

- Installing Exo Business
- Installing Exo Business Services

Setting up Exo Business

The Exo Business system must be set up to use the Exo Business services. You can use the Exo Configurator to set up the 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. 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 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:

•	MYOB EXO Configurator - Demo Mode 👝 🗉 🛽						
Eile Account Help							
្រំ ៉្មែ៖ 🚮 Company 🖓 Essent	tial 🗃 Admin 😼 System 🔞 Profiles 🖃 Forms 🕰 Staff 🤆 Utilities						
▲ Staff ▲ Menus	🚹 New 🖀 Edit 📙 Save 🗙 Cancel 🕅 🔹 🕨						
··· Dropdown Menu	Staff No: 1 Name: BRIDGET FAIRWEATHER						
Business Flow Menu Menu Definition	Details Authority Sales Team API/OnTheGo Access						
Setup Widgets	API OnTheGo						
Profile Assignment Staff Allow API Access							
Computer Segurity Profiles							
Security Profiles							

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 <u>http://developer.myob.com/api/Exo/Exo-api-overview/getting-started/</u>.

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:

File Account Help [1]: ↓ △ Company ﴾ Essential ⓐ Admin ⓓ System ⓓ Profiles ⓓ Forms ⓓ Staff ﴾ Utilities Staff Annus Save × Cancel ↓ ▲ ↓ ↓ ▲ Add Device ⑪ Delete Device ⑤ Copy key to clipboard Staff Annus Save × Cancel ↓ ▲ ↓ ↓ ▲ Add Device ⑪ Delete Device ⑤ Copy key to clipboard Staff → Business Flow Menu Detaile Authority Calcer Tare Adt			
Image: Image			
▲ Staff Save Cancel ↓			
- Menu Definition - Setup Widgets ■ Profile Assignment - Staff - Computer - Security Profiles Device Name Device ID Bridget's Tablet (work) 1224567390-ABCD-EFGH-IJKL-MN Bridget's Tablet (personal) 0987654321-ABCD-EFGH-IJKL-MN	i JTUZI INIJ I JTUZI INIJ	J9 J9	

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.

Installation

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.

Staff Mobile De	vice 💌
Device Name:	
Device Id:	
	OK Cancel

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.
- 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 \bowtie 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.

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 Configurator.

То	enter	location	details.	click the	Geo	Locations	button	on the	main	toolbar:
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🚰 Company 🖏 Staff 💡 Geo Locations				
💡 Bulk Update 🛛 🗙 Cancel				
eo Code Location Bulk Update				
Ipdate locations for: Debtors 🗸	Update where status is in: Unched	ked, Multiple, Not found, Error 🔹]	
Accno Name	Delivery 1	Delivery 2	Delivery 3	Delivery ·
0 CASH SALES				
1 KNIGHT NICOL AUTOS	94 CLARKE ST	PENRITH	SYDNEY	AUSTRAL
3 AUSSIE SPARES	97 BRIDGE ST	FOREST LAKE	QLD	AUSTRAL
4 THE CAR JUNCTION	3 GOLDENEYE AVE		MT MAUNGANUI	NEW ZEA
5 D & C PANELBEATERS	61 FERNHILL DRIVE	MASSEY	AUCKLAND	NEW ZEA
7 JAMES BARRY	29 WHITES WAY	KELBURN	WELLINGTON	NEW ZEA
24 DOROTHY HEDGES	DOROTHY HEDGES	20 WILLIAMSON AVE	GREY LYNN	AUCKLAN
9 MARKET PARTS	215 EAST ST	PAPAKURA	AUCKLAND	NEW ZEA
10 NIGEL EMERSON	151 PILKINGTON DRIVE	WADESTOWN	WELLINGTON	NEW ZEA
31 TEST ACCOUNT 2				
32 TEST ACCOUNT 3				
33 TEST ACCOUNT 4				
22 INTERNET SALES ACCOUNT				
11 OWEN DENTON	528 GREAT SOUTH RD	ONEHUNGA	AUCKLAND	NEW ZEA
12 PAUL HOLLAND MOTORS	36 BURLEIGH ST		PALMERSTON NORTH	NEW ZEA
13 SUVA PARTS	12 THE PARADE	SUVA		FIJI
14 TERRY'S SPARES	164 CENTRAL PARK DRIVE	THORNDON	WELLINGTON	NEW ZEA
15 TIMARU CAR SERVICES LTD	59 PRINCES ST		TIMARU	NEW ZEA
16 TIMOTHY JACKSMAN	600 great south road	auckland		
17 TRENT HASKELL PARTS CENTRE	36 GRASSMERE LANE	NEUTRAL BAY	NSW	AUSTRAL
18 V8 SPECIALISTS	347 ST GEORGES RD	MELBOURNE	VIC	AUSTRAL
19 VICTORIA CARS	293A BOTANY RD	MT VICTORIA	WELLINGTON	NEW ZEA
20 ALLPARTS AUTOMOTIVE LTD	ALLPARTS AUTOMOTIVE LTD	UNIT 14B ORGREAVE CLO	SHEFFIELD, YORKSHIRE	ENGLAND
23 DANIEL PAYNE	DANIEL PAYNE	15 NUGENT STREET	GREY LYNN	AUCKLAN
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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.

Testing the API Service

Once the API service is installed and set up, you can test it using the <u>Advanced Rest</u> <u>Client</u> 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**.

Login:		
ExoAdmin		
Password:		
	show password	

- 6. Add a header called "x-myobapi-Exotoken".
- 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.

Advanced Rest	[Unnamed]	🝐 Save 🛛 O	pen		
	http://localhost:8888/conta	act			
Request	● GET ● POST ● PUT	PATCH DELETE HEAD OPTIONS Other	- 1		
Socket	Raw Form	Headers			
Projects	Add new header				
Saved	Authorization	Basic RXhvQWRtaW46RXhvQWRtaW4=	x		
History	x-myobapi-exotoken	eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJleHAiOjE0MjY2NzY0MDAsImIzcyl6llMtMS01LTIxLTM5NDgzMDY3N	x		
Settings					
About		Clear S	end		
Rate this application ♥	Status 200 OK 🕄	Loading time: 43 ms			

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 <u>http://help.myob.com.au/Exo/onthego</u>.

New Features

Security Update

This release updates the Exo API to use version 1.2 of the TLS encryption protocol, enhancing the security of the system.

Resolved Issues

Service Request ID	Description
-	The Exo OnTheGo mobile app would fail during the Exo Business license grace period, and once a new license was issued, the user would need to reset the connection to be able to use Exo OnTheGo. This has been resolved; Exo OnTheGo will continue to work during license grace period, and users need only log out and back in to get the new license token.
-	Calls to the Exo API would fail when querying standard Extra Fields with a lookup table where the key value was not unique or NULL. This has been resolved.
-	The Exo API was case sensitive to the Company Name, which did not match the behaviour of the rest of the Exo Business system. This has been resolved.

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.