



MYOB EXO Business and MYOB EXO ClientConnect factsheet

MYOB EXO Business and MYOB EXO ClientConnect Integration

One of the great features about MYOB EXO ClientConnect is that it integrates with your existing MYOB EXO Business software*.



Synchronise debtor, creditor, non-account and contact information in MYOB EXO Business with MYOB EXO ClientConnect. By creating MYOB EXO Business quotes directly from within MYOB EXO ClientConnect, you can quote with confidence knowing you are using the right price rules and stock lists.

Integrating debtors, creditors and non-accounts

Debtors, creditors and non-accounts data created in MYOB EXO Business will appear as companies in MYOB EXO ClientConnect. Companies you create in MYOB EXO ClientConnect appear as non-accounts in MYOB EXO Business, where they can be converted to a debtor or creditor account if necessary.

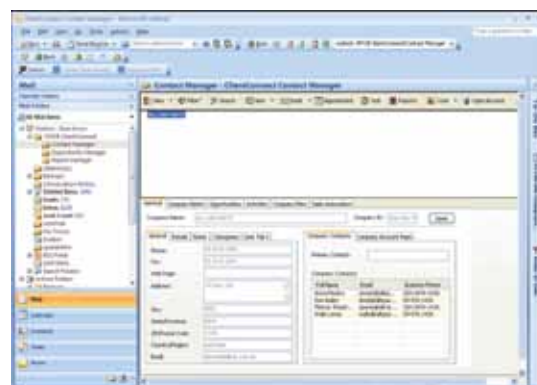
Any MYOB EXO Business debtor or creditor records that have the 'Private Account' flag ticked will not be synchronised with MYOB EXO ClientConnect.

Integrating quotes and contacts

The MYOB EXO Business Sales Order quoting function is used to generate quotes from MYOB EXO ClientConnect. If the MYOB EXO Business Job Costing module is installed, you also have the option of using the Job Costing quoting function.



Contacts created in MYOB EXO ClientConnect appear as Contacts in MYOB EXO Business and vice versa. Details of all contact, company and account records are synchronised as they are updated in either system.





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Integration requirements

MYOB EXO Business and MYOB EXO ClientConnect should be installed on the same server. Please ensure that the server meets the minimum system requirements for MYOB EXO Business and MYOB EXO ClientConnect.

MYOB EXO ClientConnect can optionally use Microsoft Exchange, which must be installed on a separate server.

More information

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*MYOB EXO Business 7.2 (and above).

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