

# MYOB EXO OnTheGo

## Setup Guide

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# Introduction

## Welcome to MYOB EXO OnTheGo!

The MYOB EXO OnTheGo app communicates with MYOB EXO Business to provide access to the system from your mobile device. This document is intended to get you up and running with the app—it includes the following sections:

- **Installation** – how to download and install the EXO OnTheGo app, and what you need beforehand.
- **Setup** – how to set up EXO Business to use the EXO OnTheGo app, and how to set up the app itself and log in.
- **Troubleshooting** – support details and answers to commonly encountered problems.

# Installation

## Pre-Install Requirements

The MYOB EXO OnTheGo app supports iOS 7.0 or later, and can be installed on any tablet device that runs iOS 7.0. This includes:

- iPad 2
- iPad (3<sup>rd</sup> generation)
- iPad (4<sup>th</sup> generation)
- iPad Mini
- iPad Mini 2
- iPad Air

## Installing the EXO API

The EXO OnTheGo app communicates with EXO Business via the EXO API. To use the EXO OnTheGo app, you must use the EXO Business Services Setup Wizard to install the EXO API services, and then set up a Live Relay Service connection to your EXO Business database. See the *MYOB EXO Business Services Release Notes* document for information on installing and setting up the EXO API and services.

The EXO API and the EXO OnTheGo app support EXO Business 8.4 or later.

## Installing EXO OnTheGo

Download and install EXO OnTheGo as you would any iOS app.

To download the EXO OnTheGo app, search the App Store for “MYOB EXO” or click on this link:

[EXO OnTheGo in the App Store](#)

# Setup

## Setting up EXO Business

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

- If you are using EXO Business 8.7 SP2 or later, you can use the EXO Configurator to set up the system as usual.
- If you are using EXO Business 8.4 – 8.7 SP1, 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 and EXO OnTheGo.

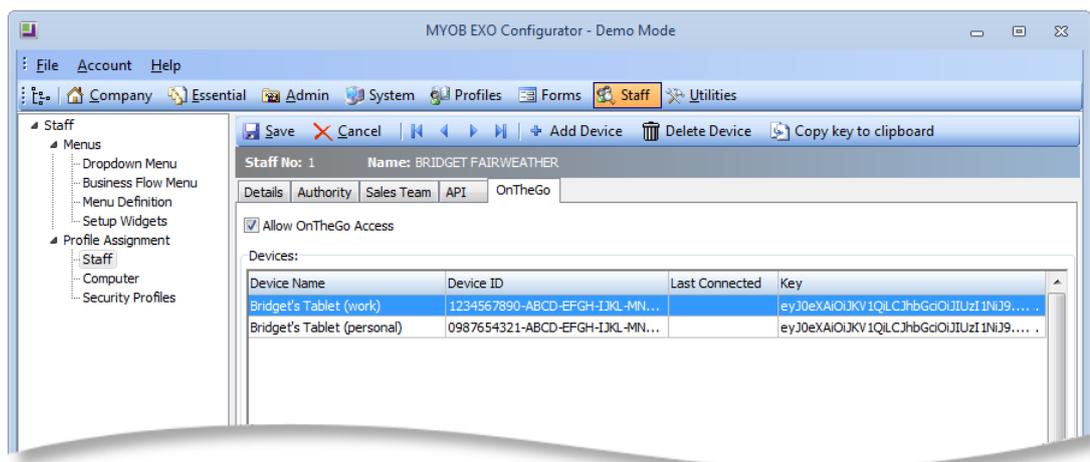
## Adding the EXO OnTheGo Licence

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

1. Click the **Add** toolbar button.
2. On the screen that appears, select “EXO OnTheGo Sales” from the **Module** dropdown.
3. Enter your registration key, licence expiry date and the number of users you are licensed for.
4. Click **Save**.
5. Click **Launch Update** to update the EXO Business system.

## Adding EXO OnTheGo Access and Devices

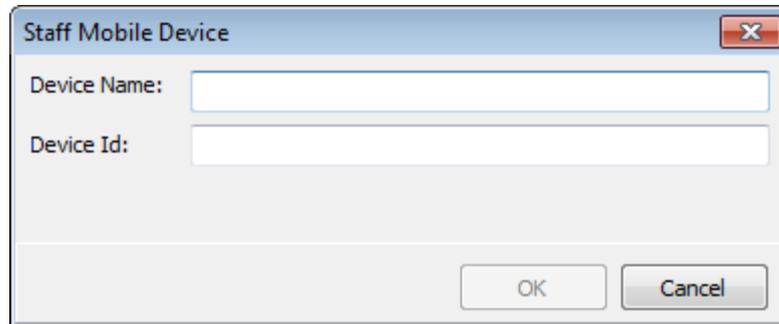
Once the EXO OnTheGo licence module is added, an **OnTheGo** sub-tab becomes available under **API/OnTheGo Access** when editing staff members in the EXO Configurator and EXO OnTheGo Configurator:



Tick the **Allow OnTheGo Access** box to enable access to the EXO OnTheGo app for that staff member. Your 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.

The EXO OnTheGo app can be licensed for up to two devices per staff member. Click the **Add Device** toolbar button to enter the details for each of the staff member's devices.



The image shows a dialog box titled "Staff Mobile Device". It has a close button (X) in the top right corner. There are two text input fields: "Device Name:" and "Device Id:". At the bottom right, there are two buttons: "OK" and "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:

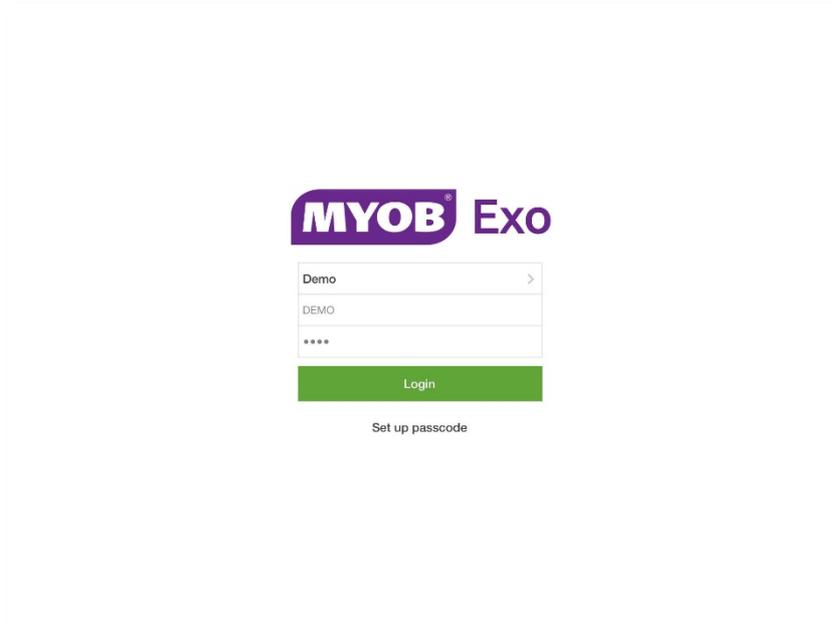
1. Open the app.
2. On the login screen that appears, tap the > arrow next to the connection name. (If this is the first time you are using the app, the connection name will be "Demo".)
3. On the Connections window, tap **Add connection** to open the Create connection window. The device's UDID appears 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.

See "Setting up a Connection" on page 5 for more information about viewing the UDID from the EXO OnTheGo app.

Click **OK**. A key is generated for the device; this key is to be used in requests to the EXO API 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.

## Logging in to EXO OnTheGo

The first thing you see when you run the EXO OnTheGo app is the login screen:

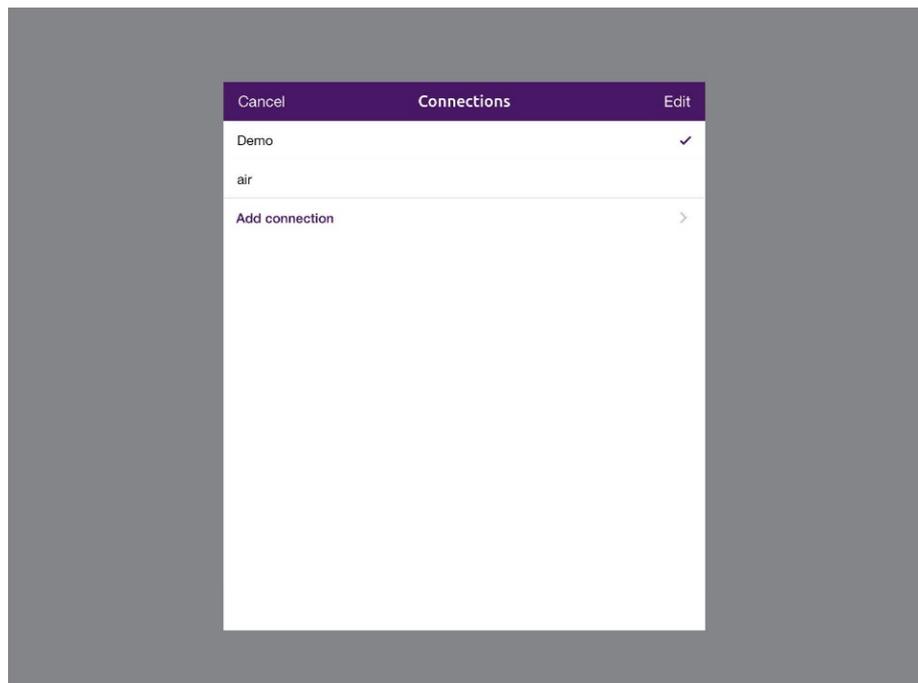


To begin with, you will only be able to log in to the demonstration database. You can use this database to familiarise yourself with the EXO OnTheGo interface without affecting any live data. (The demonstration database is refreshed nightly.)

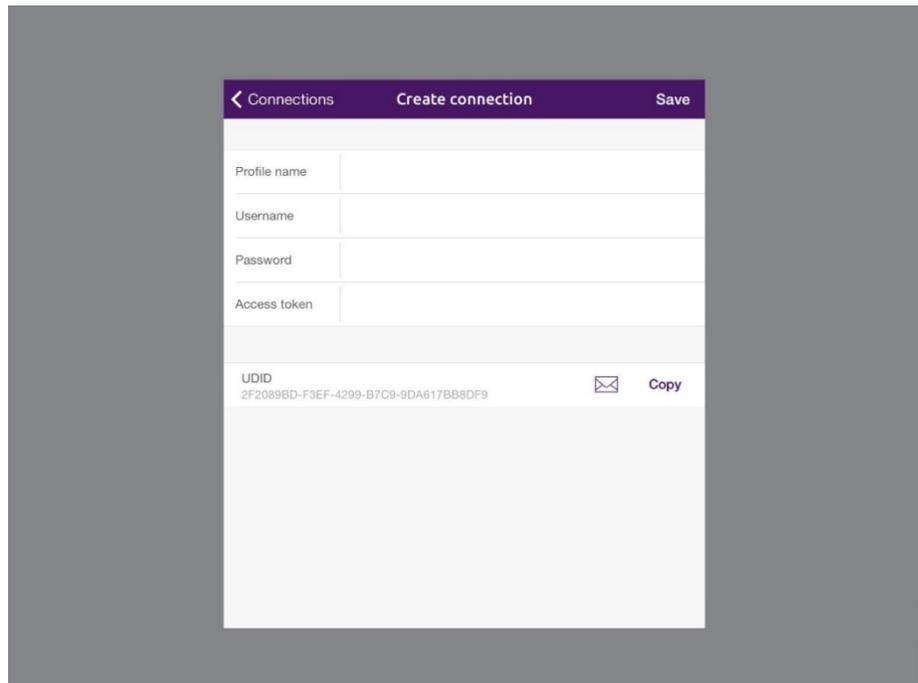
To log in to your own database, you must set up a new connection to it.

## Setting up a Connection

Tap the > arrow next to the connection name to show a list of all connections:



Tap **Add connection** to set up a new database connection:



Enter the following details:

**Profile name**

Enter a descriptive name for the database connection.

**Username**

Enter the default username to use when logging in with the connection.

**Password**

Enter the default password to use when logging in with the connection. The password is case-sensitive.

**Access token**

Enter the device key generated on the OnTheGo sub-tab of the Staff screen in EXO Configurator or EXO OnTheGo Configurator (see “Adding EXO OnTheGo Access and Devices” on page 3). MYOB recommends the following process for entering the key on your mobile device:

1. In EXO Configurator or EXO OnTheGo Configurator, right-click on the key for the device you are logging in to and select **Copy key to clipboard**.
2. Copy the key into an email and send it to an address that can be accessed from the mobile device.
3. On the mobile device, open the email and copy the key.
4. Open the EXO OnTheGo app and paste the key into the Create connection screen.

**Note:** The device’s Unique Device Identifier (UDID) is displayed at the bottom of the screen—you can copy this ID number into an email so that you can enter it in EXO Configurator or EXO OnTheGo Configurator as its Device ID.

Once you have entered all details, touch **Save** to create the new connection. You can now select the connection and log in to it on the login screen.

# 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/onthego>.

## Frequently Asked Questions

### **What operating systems and devices does the MYOB EXO OnTheGo app support?**

The app supports iOS 7.0 or later, and any tablet that runs iOS 7.0. Version 1.1.2 of the app adds support for iOS 8.0. If you are using EXO OnTheGo on a device that is running iOS 8.0, you must upgrade to this version or later.

### **Does the MYOB EXO OnTheGo app support iPhones?**

No, the app is designed for use on iPad tablets only.

### **What versions of MYOB EXO Business does the MYOB EXO OnTheGo app support?**

The EXO OnTheGo app can be used with EXO Business 8.4 or later.

### **Does the MYOB EXO OnTheGo app require the MYOB EXO API and MYOB LiveRelay?**

Yes, the EXO OnTheGo app communicates remotely with the EXO API via the online MYOB LiveRelay. You must use the EXO Business Services Setup Wizard to install the EXO API services, and then set up a Live Relay Service connection to your EXO Business database. See the *MYOB EXO Business Services Release Notes* for information on how to do this.

### **How is MYOB EXO OnTheGo licensed?**

EXO OnTheGo is licensed on a per user basis. Each user can nominate up to two devices to install the EXO OnTheGo app on.

You do not need a licence for the EXO API to use EXO OnTheGo; however, you will need an EXO API licence if you want to connect to other third-party applications using the API.