Mobile Sales Overview & Setup

Overview

Agvance Mobile Sales is an iPad app allowing sales people to retrieve customer data, view inventories, create orders, and close deals quickly and easily from anywhere. The Agvance Mobile Sales app communicates with the Agvance web service, which accesses the home office Agvance database and returns the data to the Mobile Sales app.

Because the Agvance web service needs to access live data, some setup is required:

- The home office must have a public static IP address
- The SQL Server must be configured with a static (non-changing) IP address and port
- A firewall rule must be configured to forward connections from the SSI web service to the SQL server

Note: If Agvance Mobile Energy or any other Agvance web service connecting to home office data is being used, most of this setup has already been completed. In this case, add the Agvance Mobile Sales server to the list of servers available to access the data.
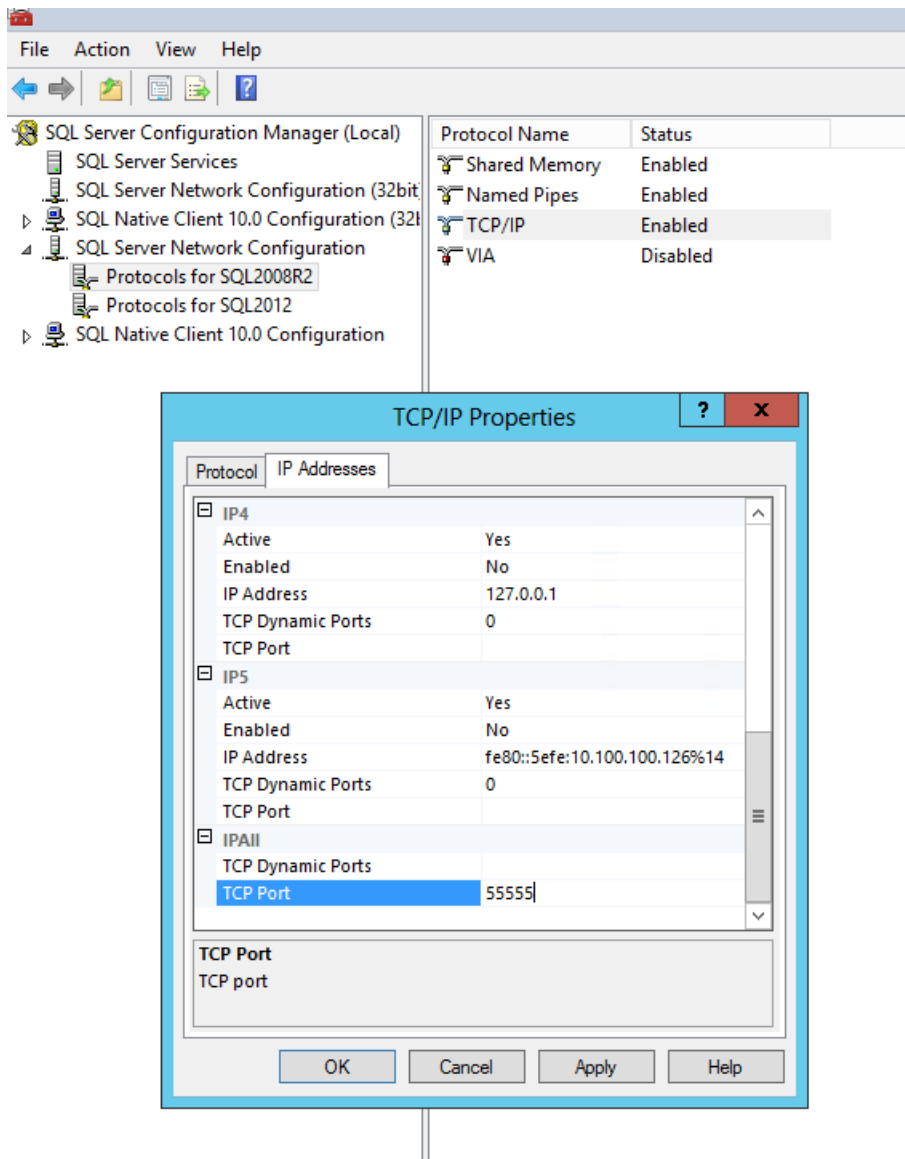
Note: In most cases, the SQL Server and Firewall configuration will require the assistance of an IT provider.

Setup

SQL Server to Use a Static Port

Start the *SQL Server Configuration Manager* on the data server. In the left pane, expand *SQL Server Network Configuration*, and select the proper instance of SQL.

Right-click on *TCP/IP* in the right-hand pane and navigate to the *Properties / IP Addresses* tab. In the *IP All* section, remove any existing port number from the *TCP Dynamic Ports* field, and place a static port number in the *TCP Port* field.

File   Action   View   Help

SQL Server Configuration Manager (Local)
  SQL Server Services
  SQL Server Network Configuration (32bit)
  ▷ SQL Native Client 10.0 Configuration (32l
  ▲ SQL Server Network Configuration
      Protocols for SQL2008R2
      Protocols for SQL2012
  ▷ SQL Native Client 10.0 Configuration

Protocol Name	Status
Shared Memory	Enabled
Named Pipes	Enabled
TCP/IP	Enabled
VIA	Disabled

TCP/IP Properties   ?   X

Protocol | IP Addresses

IP4
  Active   Yes
  Enabled   No
  IP Address   127.0.0.1
  TCP Dynamic Ports   0
  TCP Port
IP5
  Active   Yes
  Enabled   No
  IP Address   fe80::5efe:10.100.100.126%14
  TCP Dynamic Ports   0
  TCP Port
IPAII
  TCP Dynamic Ports
  TCP Port   55555

TCP Port
TCP port

OK   Cancel   Apply   Help

Removing the existing port number from the *TCP Dynamic Port* field tells SQL Server to use a static, as opposed to dynamic, port number. The port number chosen should not conflict with any other ports in use on the machine. If unsure about which static port number to use, contact the network administrator.

## Setting up the SQL Server Machine to Use a Static IP Address

Change the network adapter on the machine to use a static IP address. For more information about how to do this or what static IP address to use, contact the network administrator.

After making the change above, restart SQL by selecting *SQL Server Services* in the *Configuration Manager*. Right click on the name of the SQL instance, and then select **Restart.**

After setting up the SQL Server with a static IP address, use SQL Server Management Studio or Telnet to confirm SQL is running on the appropriate port.

To use Management Studio, in the *Server name* field, enter the IP address of the SQL Server, a comma, and then the
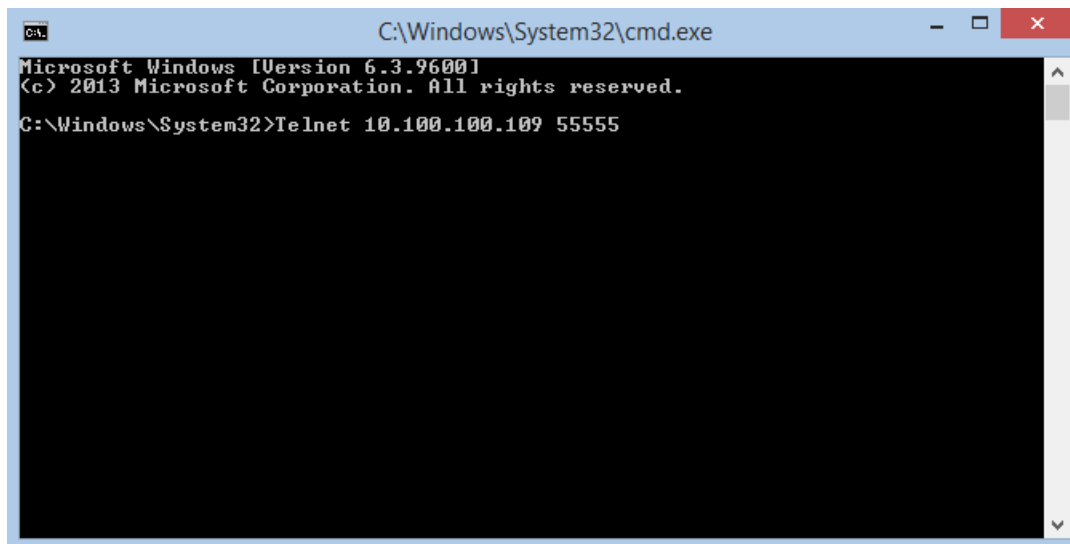
port number. Replace the 10.100.100.109 with the static IP number and 55555 with the port number.
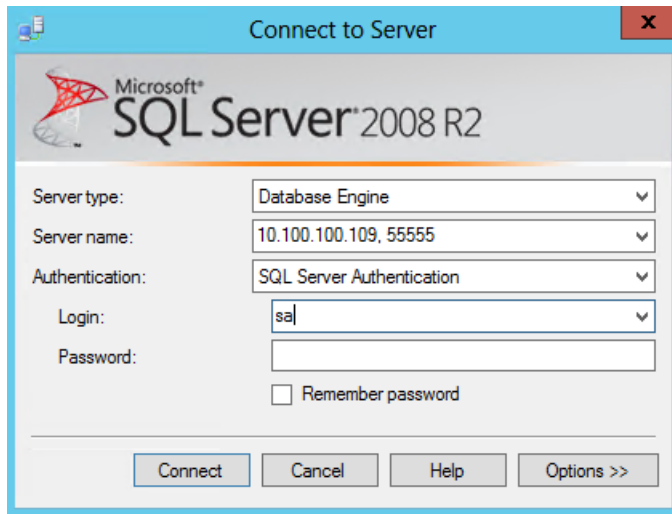
To use Telnet, type the following command in a command prompt:

Telnet 10.100.100.109 55555

Replace 10.100.100.109 with the static IP number and 55555 with the port number.

If a *Could not open connect* message displays, SQL is not listening on that IP and port. If the screen turns black, the connection was made.

Firewall Setup

Set up the firewall to allow the SSI server to connect to a public IP address and port available on the firewall's external interface. The firewall will then need to use NAT (Network Address Translation) to forward the connection from the SSI server to the SQL Server's IP address inside the network. Be sure to set the firewall rule with a filter, which only allows connections from the SSI server using the public IP address *54.209.30.54*. This is the IP Address of the Agvance Mobile Sales web server.

Note: If already using Agvance Mobile Energy or any other Agvance Web API based service, most of this setup has already been completed. In this case, edit the existing firewall rule and add *54.209.30.54* to the list of *Allowed From* addresses.

If these steps are unclear, please forward this document to an IT/Hardware provider. The IS Customer Advocate team at SSI will be glad to assist with the setup.

Setting up the Mobile Sales Connection

When the SQL Server and firewall setup is complete, please contact SSI support at 800-752-7912 and an IS Customer Advocate will use the following information to complete the setup.

Static public IP address: _____

SQL Server static port: _____

Emailing from the Mobile Sales App

To email from the Mobile Sales App, email information will need to be configured in Agvance.

The emailing process will look at the *Mail Host Email Address* and *Password* at *Hub / Setup / Company Preferences* to determine the email address and password. Entering an email address and password in this area and having an *API Database ID* populated in the *Web API Database Connection Information* section will send an email with a link for the following customer-facing documents:

1. Sales Invoices (optionally send as a PDF attachment)
2. Combo Statements
3. Budget Billing Statements
4. Regular AR Statements

Please contact SSI Support with any questions.

Downloading the Mobile Sales App

Visit the iPad App Store, and type *Agvance* in the *Search* bar. Select the Mobile Sales app and, when the preview screen appears, tap **INSTALL**.

After the installation is finished, tap **OPEN**. When the app opens, complete the Login information, including the *User ID*, *Password*, and *Company Serial Number*.

Contact SSI with any additional questions.