

Mobile Sales Overview & Setup

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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 your 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.

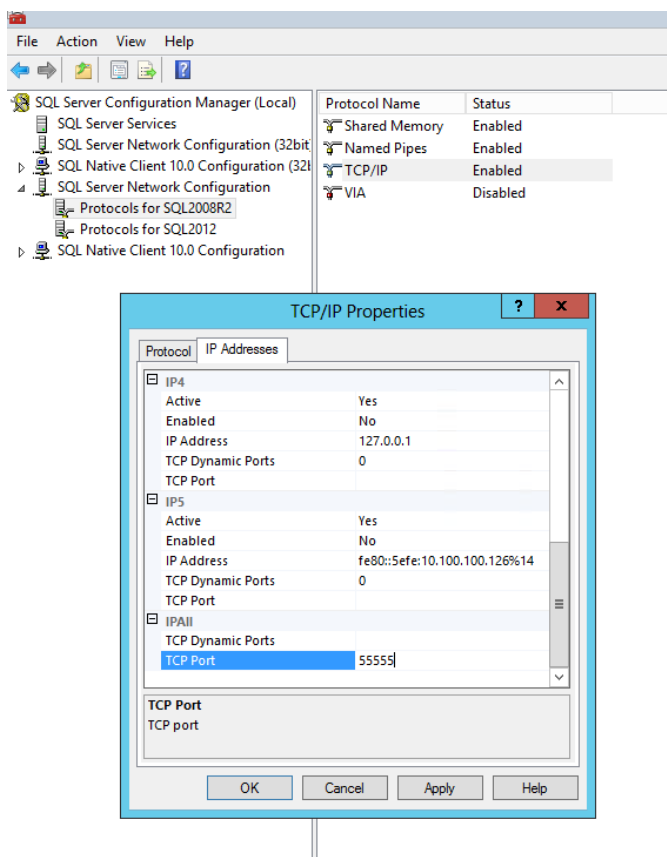
Note: In most cases, the SQL Server and Firewall configuration will require the assistance of an IT provider.

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.



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 you are unsure about which static port number to use, contact your network administrator.

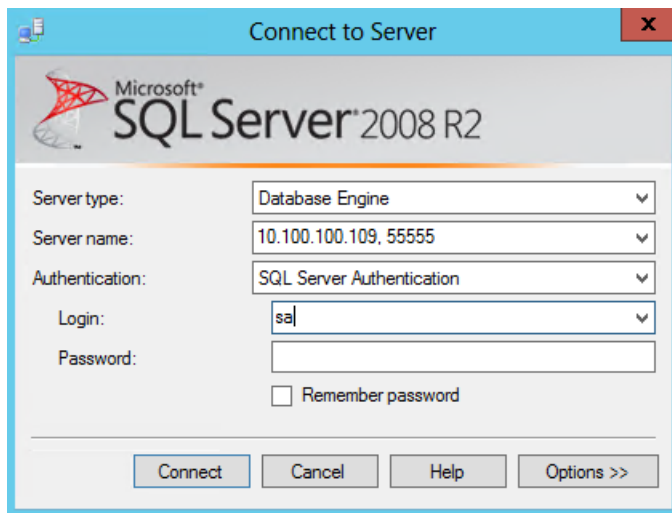
Setting up the SQL Server Machine to Use a Static IP Address

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

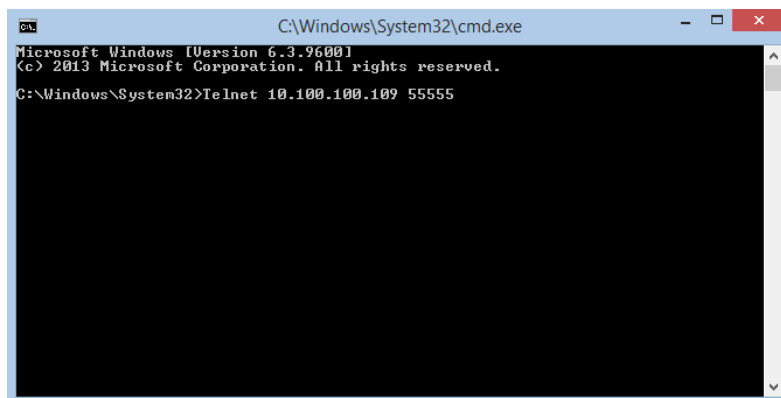
After making the change above, restart SQL by selecting *SQL Server Services* in the *Configuration Manager*. Right click on the name of the SQL instance, and then select **Restart**.

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 your static IP number and 55555 with your 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 your static IP number and 55555 with your 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

Setup 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 you are already using Agvance Mobile Energy or any other Agvance Web API based service, most of this setup has already been completed. In this case, simply 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 your 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.

Your static public IP address: _____

Your 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.

A *Mail Host* address must be entered at *Hub / Setup / Company Preferences*.

Your *Mail Host* address can usually be found by searching your domain name (the last part of your email address, i.e. *gmail.com*) at mxtoolbox.com. This site can often discover the IP address of your Mail Host, which is also usable.

Note: You may need to contact your IT provider to help you gather this information. Also, Agvance users will need to enter their respective e-mail addresses and passwords at *Hub / Setup / Users / Edit*.

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, click the **INSTALL** button.

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

Contact SSI with any additional questions.