How To Use

# User Agents in the Financials (Self-Hosted)

Overview

The Financial customers who are self-hosted can use the User Agent to download the latest tax tables and send queued emails. The agent is controlled by a single config file. You can change options in the config file to alter agent settings. You can then configure the agent service within Windows.

As long as the Service is running and your settings in Financials and the configuration file described below are correct, queued emails are sent and tax table updates are retrieved automatically.

Configure Settings

The configuration file for the Financials user agent is called **Shelby.Agent.exe.config**. In a default install it is located on the server at **C:\Program Files (x86)\ShelbyNext** in a folder named **Shelby Agents**.
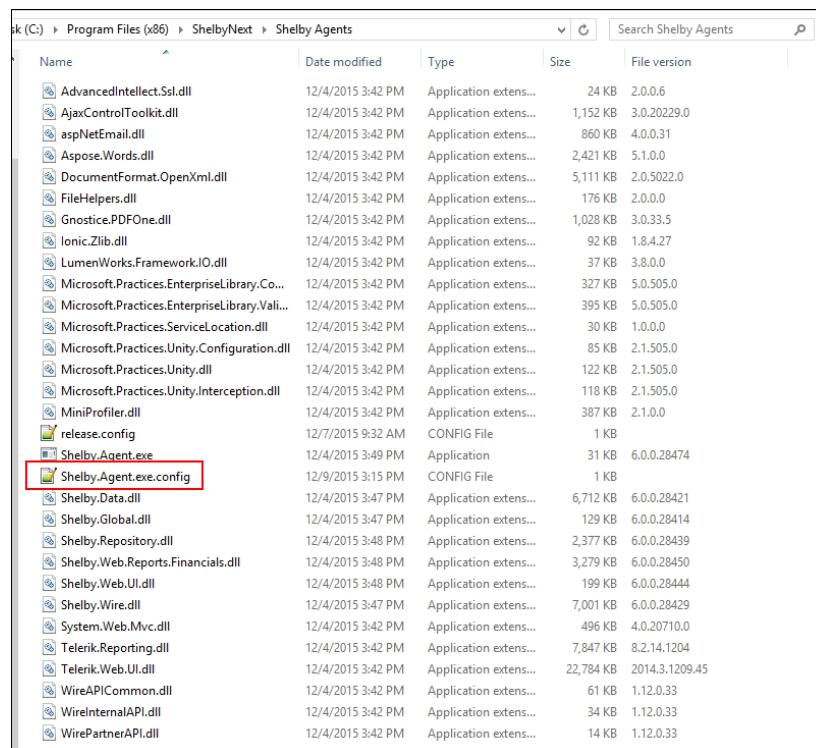
Right-click the **Shelby.Agent.exe.config** file and choose to open it with a text editor such as Notepad. Here are the settings for the configuration file:

- **ConnectionStrings –** This section contains information that the Agent needs to connect to your Financials database. Verify that the **data source** is your server\SQL instance name and that the **initial catalog** is your financials database.

```
<connectionStrings>
    <add name="Arena" connectionString="data source=server\sql2008;initial catalog=Testdb;" />
</connectionStrings>
```

- **aspNetEmail.LicenseKey –** This license key is required for the agent to function and should not be altered.
- **WireServiceUrl –** This URL is required for the agent to function and should not be altered.
- **TenantDataPath –** Enter the root path of your Financials site in double quotes (e.g., "C:\Program Files (x86)\ShelbyNext\Financials" for the default install location). This is required to email statements from Deposits on Hand.
- **LogFile –** This is the path indicating where you want a log file to be located and what you would like the file to be called. The default is blank. It should be changed to "C:\Program Files (x86)\ShelbyNext\Shelby Agents\ShelbyAgentLog.txt".
- **LogStatusMessages –** This tag allows you to choose how detailed you want the log file created from the agent to be and can be set to "True" or "False." Type a value of "True" to log everything from the time the agent is turned on, when emails are sent, errors, etc. "False" is the default setting and logs only errors.
- **ServiceName –** This tag determines the name of the Windows Service that is installed. The default name for this service is "ShelbyNext Service".
  Note: We do not recommend you change the name of the service. If you do need to change it, see the Change the Windows Service Name section.
- **SleepTimeInMinutes –** This tag determines how often the agent starts. The default is set to 15 minutes. This means that once the agent has finished sending emails it waits this amount of time to check to see if there are any items queued to send again.

```xml
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
    <startup>
        <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.5" />
    </startup>
    <connectionStrings>
        <add name="Arena" connectionString="data source=development\sql2008;initial catalog=ASMTest;" />
    </connectionStrings>
    <appSettings>
        <add key="aspNetEmail.LicenseKey" value="                                                                          "/>
        <add key="WireServiceUrl" value="https://wire.shelbyinc.com/" />
        <add key="TenantDataPath" value="c:\Program Files (x86)\ShelbyNext\Financials"/>
        <add key="LogFile" value=""/>
        <add key="LogStatusMessages" value="true"/>
        <add key="Debug" value="false"/>
        <add key="ServiceName" value="ShelbyNext Service"/>
        <add key="SleepTimeInMinutes" value="15"/>
    </appSettings>
</configuration>
```

If you change any of these settings, you need to restart the service for the change to take effect. It is also a good idea to change the service to start automatically every time you start windows.

Configure Service

To begin, access Computer Management (right-click Computer and click **Manage**). Click **Services** under Services and Applications and find **ShelbyNext Service** in the list of services. If this service does not appear in your list, call Support at (888) 697-4352 for assistance. Once you have located the service, make sure that the status is **Started** and the Startup Type is **Delayed Start.**
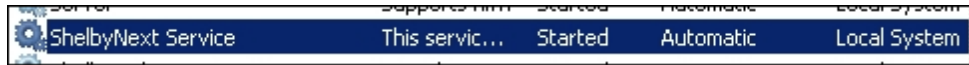

Note: If using Windows Server 2008 or Windows Server 2012, launch the Services Console by pressing the **Windows** key, typing "mmc compmgmt.msc", and pressing the **Enter** key.

If the service is stopped, open it and set the Startup Type to **Delayed Start** and then click the **Start** button. Once the service has successfully started, click the **OK** button.

Change the Windows Service Name

The name of the windows service can be changed, if needed. To begin, open a command prompt window as Administrator. Search for "cmd" and then right-click the "Command Prompt" result and select **Run as Administrator**. Your window should appear similar to the following screenshot:
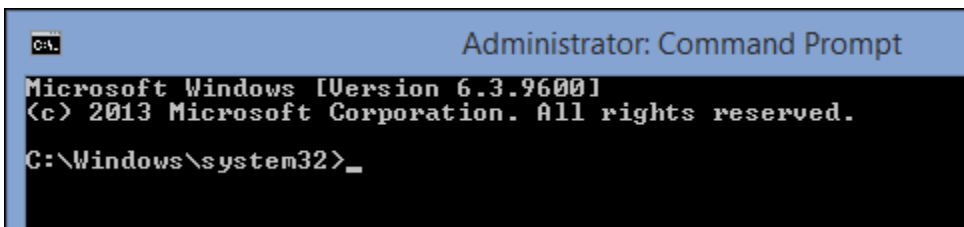
To change the name of the Agent service, you must first remove the service. Change the directory to the one where the agents are installed using the "cd" command. For example, with a default installation you can type the following and press the **Enter** key:

cd "C:\Program Files (x86)\ShelbyNext\Shelby Agent"

Type the following and press the **Enter** key to delete the existing service:

ShelbyNext Service.exe -uninstall

Open an Explorer window and browse to the Agent directory. Right-click the **Shelby.Agent.exe.config** file and choose to open it with a text editor such as Notepad. Locate the line shown below.

Change the **value** to whatever you want the service to be called. You can then **Save** and close the **Shelby.Agent.exe.config** file. Back in the Command Prompt window, type the following and press the **Enter** key to reinstall the Shelby Agent service:

shelby.agent –install

You will not receive a prompt in the Command Prompt window that the service was installed successfully. Follow the steps in the Configure Service section to verify the new service name shows up properly. Finally, start the service and set it to **Delayed Start**.

Note: Make sure to look for the new service name in the Services list.