

A Reseller's Guide to Using Helm

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About Helm and This Guide

The Helm Web Hosting Control System is an extremely powerful hosting automation solution for Windows 2000 and Windows .NET servers. Helm is developed by WebHost Automation Ltd, a United Kingdom-based corporation. Their main website is:

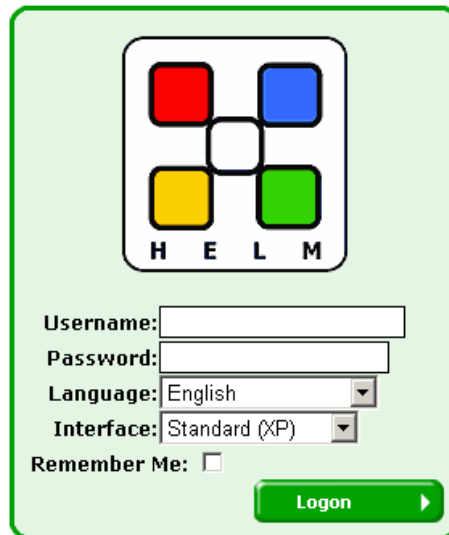
<http://www.webhostautomation.com>

Please take some time to read over this guide. Doing so will make your experience as a reseller much more enjoyable and profitable. We have littered this guide with helpful screenshots and valuable step-by-step how-to guides.

1.) Logging into Helm

Logging into the Helm control panel is very simple. Open a browser and go to the URL provided by your Helm administrator, and enter your username and password. If you can't remember your password, click on the "Click Here" link and a new password will be emailed to you.

Click this link if you forget your login details.



The login form features the Helm logo at the top, which consists of four colored squares (red, blue, yellow, green) arranged in a 2x2 grid with the letters H, E, L, M below them. Below the logo are input fields for Username, Password, Language (set to English), and Interface (set to Standard (XP)). There is also a Remember Me checkbox and a Logon button.

Please Enter Your Logon Details Above
[Click Here if you have lost your logon details](#)

Welcome To Helm. The Web Hosting Control System
© WebHost Automation Ltd 2004

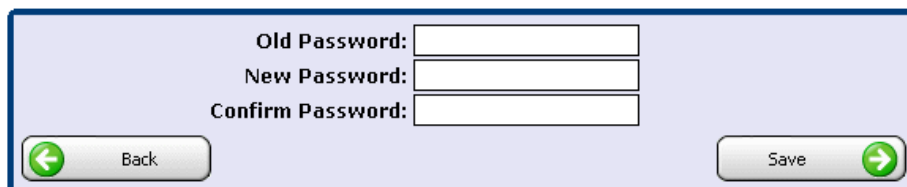
2.) Changing Your Password

The password you choose at the start of the installation might not be ideal. You might want to change this at a later date. We recommend that you change your password to a combination of letters and numbers at least 8 characters in length – which you can remember easily.

Changing your password is easy – just click on the "Password" icon and enter your old (current) password and then your new password. You'll also need to enter your new password again, as a confirmation.

Control Panel Password

Use the form below to change your control panel password. The change is instantaneous. The old password will become invalid immediately.



The form has three input fields labeled Old Password, New Password, and Confirm Password. At the bottom left is a Back button and at the bottom right is a Save button.



3.) Customizing Your Control Panel

Helm provides several areas to customize how the control panel will appear to your customers when they login. We recommend that you customize your control panel before proceeding and further. To begin the customization process, click on the "Account Settings" link. From there, you will find several icons and sub pages that we will explain in depth.

Reseller Main Menu

Welcome. This is the main menu to access any area of your control panel. To access areas of your account click on the relevant buttons below. Quick help can be found at the bottom of this page.



You will be taken to the Account Settings screen:

Account Settings

These account settings allow you to view and set features and functions for this reseller account.



Step 1: Global Settings

Click on the "Global Settings" icon to begin.

Sales/Support Emails: The global settings screen page allows you to enter specific email addresses for your sales and support departments.

Personal DNS: Under the personal DNS page, you can enter a personalized domain name to be used as name servers for all domains that your customers set up.

Tip – You will need to contact your Helm system administrator to enable support for your personal DNS servers.

Personalization: Using the Header/Footer HTML fields, you can enter custom HTML that will appear in the page headers/footers when your customers are logged in.

Tip – The links section takes specially formatted text and turns them into links along the left side bar of your customers' control panel. Links should be entered in the following format:

URL[Display Text]

e.g. `http://www.microsoft.com[Microsoft's Site]`

Using the same method, it's also possible to embed images in the links section. Example:

`http://www.microsoft.com[]`

Online Help / Internal Messaging Systems: By checking or unchecking the "Online Help" and "Internal Messaging System" you can disable or enable the online help and messaging systems for your customers.

After you have completed inputting your personalized global settings, click the "Save" button. Your information will now be committed to the database. Any changes you make will be immediately reflected the next time your customers log in to their control panel. Click on the "Back" button to return to the main "Account Settings" page.

Global Settings

The following settings are relevant to your account.

Contact Details:
 Support Contact Email:
 Sales Contact Email:

Personal DNS:
 Name Server Mask: *,

Personalisation:
 Header HTML:
 Footer HTML:
 Links:
 Format: URL[Display Text]
 Example: http://www.microsoft.com[Microsoft's Site]

Online Help
 Internal Messaging System

Step 2: Domain Settings – Customized Parking Page

By clicking on the “Domain Settings” icon you can input a custom HTML page that will be used as a “parking page for new accounts that your customers create. This parking page can provide helpful information to your customers about their account. For example, you could provide links to your support FAQs or your helpdesk.

To set up a customized parking page, simply check the “Add the following parking page to all new web sites” box and enter the HTML code of your page into the “Parking Page HTML” box. Once you have completed this, click the “Save” button.

Tip – You must click on the HOME link at the top of the page and then click on the “Account Settings” icon to continue onto Step 3.



Step 3: User Settings – Customized Welcome Letter

Welcome Message

The following form allows you to set up your welcome message which all new customers will receive once they sign up. If you have account vetting enabled the customer will receive this message once their account has been approved.

Dynamic Information: User's Last Name [v] [Insert]

Subject: Your New Hosting Account Details

Message Body:

```
Dear [UserFirstName] [UserLastName]:

Thank you for ordering hosting from SOMEHOSTINGCOMPANY.COM.

You can access our control panel at
http://cp.somehostingcompany.com

Your login details are as follows:

Username: [UserAccountNumber]
Password: [UserAccountPassword]

Thanks!
```

Delivery Settings:

- Send via Email from
support@somehostingcompany.com
- Send via Internal Message System
- Send Copy To The Following Email Address
support@somehostingcompany.com

Back [←] Delete [✖] Save [→]

Upon adding new user accounts to Helm, the control panel is capable of emailing your new customer a customized welcome letter with their account information. Click on the “User Settings” button and then the “Welcome Message” button to set up the customized welcome letter.

Using the dropdown menu entitled “Dynamic Information”, you can insert dynamically generated content into your welcome letter. This feature is especially helpful for making your welcome letter seem personalized and thoughtful.

Subject: The email your user receives will contain this subject.

Message Body: This is the content of the email that your user will receive.

Send via Email From: The email your customers receive will be sent from this address. For example, it would be a good idea to enter your support or sales email address in this field.

Send via Internal Message System: Checking this box will also send the user a copy of the email message via the Internal Message system.

Send Copy To the Following Email Address: Checking this box and entering a valid email will “carbon copy” the email address you enter with all welcome emails automatically sent out by



Helm. Enabling this feature is helpful as it lets you have a record of the information that gets sent to your customers.

After making all of your changes, click the "Save" button to save your changes. This will take you back to the "User Settings" main page. To continue customizing your account, go back to the "Account Settings" area by going to the "Home" page and then click the "Account Settings" button.

Tip – Make good use of the Dynamic Information - be sure to include your customer's username and password!

The screenshot shows a form with several fields. A dropdown menu is open, displaying the following options: "User's Account Username", "User's Account Password", "User's Title", "User's First Name", "User's Last Name", and "User's Company Name". The "User's Account Username" option is currently selected. Other visible fields include "User's Last Name" with a dropdown arrow and an "Insert" button, and a text input field containing "Your New Host". The form also contains some placeholder text like "User's Account Password", "User's Title", "User's First Name", "User's Last Name", and "User's Company Name". There is also a "TINGCOMPAN" label on the right side of the form.

Step 4: Global DNS Settings

The Global DNS Settings page allows you to create DNS zone file configurations that will be applied to all domains set up under your reseller account. For instance, you could create a "cp" record that could point to Helm itself, this way your users could use <http://cp.domain.com> to access Helm.

From the Account Settings page click on "Global DNS Settings" then click on the "Add New" button. Leave the record type as "A (Host Record)". In the record name, enter "cp". In the record data field, enter the IP address of your Helm control panel. If you do not know the IP address of your control panel, ask your hosting provider for this information. For our example, let's assume the IP address of the control panel is 192.168.1.100. You would therefore enter "192.168.1.100" in the record data field. Clicking the "Save" button will take you back to the main Global DNS Settings page.

Tip – Be sure the information you enter at this screen is accurate. Inputting incorrect information could cause major issues in the future. If you are not sure what IP addresses to use – [ask your host!](#)

Add DNS Record

Use the form below to add a new DNS record to the domain's DNS zone. Click the 'Save' button to submit the form.

The screenshot shows a form titled "Add DNS Record". It contains the following fields: "Record Type" (A (Host Record)), "Record Name" (cp), "Record Data" (192.168.1.100), and "Record Preference" (0). There is a note "* MX records only" next to the preference field. At the bottom, there are "Back" and "Save" buttons with arrows.



4.) Adding Your Hosting Plans

As a Helm reseller, you must create your own hosting plans to offer to your customers. Before you begin with this section, we recommend completing the "Helm Hosting Plan" worksheet found on the next page. This worksheet is an aid that will help you define what hosting features will be included in each of your hosting plans. After completing the worksheet, click on the "Hosting Plans" icon to continue.

Reseller Main Menu

Welcome. This is the main menu to access any area of your control panel. To access areas of your account click on the relevant buttons below. Quick help can be found at the bottom of this page.



4.a) Helm Hosting Plan Worksheet

<i>Main Plan Information</i>					
Plan Name:					
Setup Fee:					
Recurring Fee:					
Plan Name:					
<i>Basic Quotas</i>					
Plan Name:					
Plan Name:					
Plan Name:					
<i>Web Quotas / Options</i>					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					
<i>Email Quotas</i>					
Plan Name:					
Plan Name:					
<i>FTP Quotas</i>					
Plan Name:					
<i>DNS Options</i>					
Plan Name:					
<i>Stats Quotas</i>					
Plan Name:					
<i>Database Quotas</i>					
Plan Name:					
Plan Name:					
Plan Name:					
Plan Name:					



Adding Your Hosting Plans (Continued)

Step 1: From the control panel home page, click on the "Hosting Plans" icon.

Step 2: Click on the "Add New" button.

Step 3: At the "Add Hosting Plan" screen, enter the Plan Name, Setup Fee, Recurring Fee and frequency. Click the "Save" button. At this point, your plan has been added to Helm, but you still need to define the many different quota options.

Add Hosting Plan

To add a new plan simply type the friendly plan name into the box provided. It is highly recommended not to use the same name for two plans. You can change the plan name at any time.

- 3a) Enter plan name
- 3b) Enter pricing info
- 3c) Click "Save"

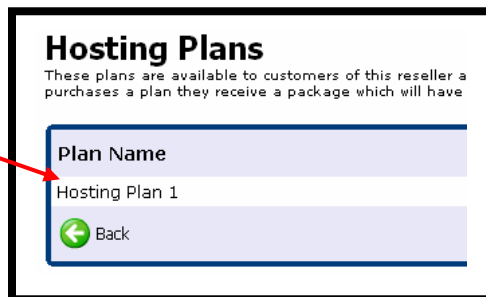
Plan Name:

Setup Fee:

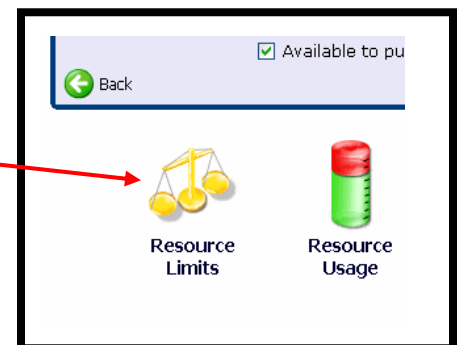
Recurring Fee: Every Year(s)

Step 4: Click on the package you just created, then click on the "Resource Limits" icon.

Click here!



Click here!



Step 5: At the Plan Resource page, enter the number of domains, the amount of bandwidth and the disk space included with the hosting plan. Click the "Save" button.

Plan Resources

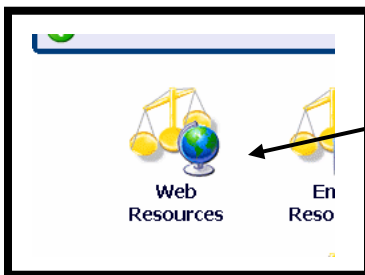
Below are the resources that have been assigned to this plan. All packages that created from this plan will inherit the values below.

5a) Enter quotas

5b) Click Save

Step 6: Click on the "Web Resources" button. Fill out this screen according to the options you decided upon earlier when you filled out the worksheet. Click the "Save" button when you have completed this form. Click "Back" to return to the Plan Resources page.

Tip – FrontPage Webs: If the plan's quota includes 2 domains total, and 2 FrontPage Webs, and FrontPage-based sites set up will come out of both the FrontPage Webs quota and the domains quota. Thus, allowing the user to set up FrontPage Webs will not allow them to set up more domains than allowed by the maximum number of domains.



6a) Click on the "Web Resources" icon

Plan Resources

Below are the resources that have been assigned to this plan. All packages that created from this plan will inherit the values below.

6b) Enter quota information.
6c) Save settings.
6d) Click "Back".

Step 7: Repeat Step 6 for Email Resources, FTP Resources, DNS Resources, etc.

5.) Setting up Extra Features

One of the nice functions of Helm is that it allows you to define additional features (more disk space or data transfer, for example) that your users can provision through their control panel - without your interaction!

From the control panel home page you can access the Extra Features section by going to:

[Hosting Plans](#) > [Choose a Hosting Plan](#) > [Set Up Extra Features](#)

Once you are at the Extra Features screen, you will see a list of any features you have already configured. There will also be an "Add New" button that you can click to create extra features. Upon clicking on the "Add New" button, you will be presented with the "Add Extra Feature" screen.

Description: The description of the feature – this is what your customer will see when ordering new features (e.g. 50MB Additional Disk Space).

Resource Type: The type of resource you would like to sell. For example, extra disk-space or extra data transfer. Or you could create a feature that would enable PHP on the customer's site.

Quantity: This field is only used for features that start with "Extra" in the dropdown list. For example, if you want to sell 50MB of additional disk space, you would select "Extra disk-space (MB)" as the Resource Type and enter 50 in the quantity field.

Setup Fee: This is a one time fee that will be charged to the customer for "setting up" the additional features. Set this field to 0 if you would like the setup to be free.

Recurring Fee: Here you enter the recurring fee and term (how often the fee recurs). If you would like to provide this feature for free, set the recurring fee to 0.

Available to Purchase: If this box is not checked, your customer will not be able to purchase this feature. This box is useful if you start offering a new feature, but then decide to stop offering it. When you stop offering it, you would simply uncheck the "available to purchase" option.

Add Extra Feature

This form allows you to add a new extra feature to the selected plan. The extra feature will be available to purchase by customers that purchase the plan.

The screenshot shows the 'Add Extra Feature' form with the following details:

- Plan Name:** Hosting Plan 1
- Description:** 50MB Additional Disk Space
- Resource Type:** Extra Diskspace (MB)
- Quantity:** 50 (Note: *Only valid for 'Extra' resources)
- Setup Fee:** \$5
- Recurring Fee:** \$10 Every 1 Month(s)
- Available to purchase
- Shared across all plans
- [Back](#) (left arrow)
- [Save](#) (right arrow)





Shared Across All Plans: This feature is especially useful if you have standard extras that you would like to offer across all of your hosting plans. For example, if you have a standard rate for additional disk space and data transfer, you would only have to input this feature once and then you could check "shared across all plans".

After you have inputted your additional feature(s), click on the "Save" button to continue.

Extra Features

The following are features that can be purchased by customers that own packages that are based on this plan.

Plan Name: Hosting Plan 1

 Back Add New 

Description	Setup Fee	Recurring Fee	Available
50MB Additional Disk Space	\$5.00	\$10.00 Every Month	Yes
1GB Additional Data Transfer	\$0.00	\$5.00 Every Month	Yes
1 Additional Web Site	\$0.00	\$10.00 Every Month	Yes



6.) Billing Your Customers

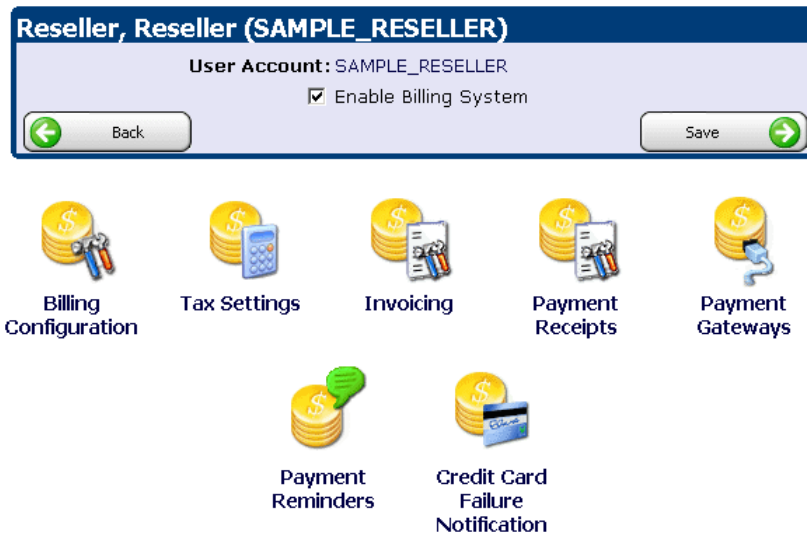
Helm has an integrated billing system that can bill your customers for you. Using Helm's billing system is optional; it's possible to disable the entire system. If you do opt to use the Helm billing system, it is customizable and should be able to meet your needs. The following items can be customized:

- Currency Symbol
- Tax Rate
- Tax Name
- Number of days "early" that a customer can be invoiced.
- Invoice subject
- Invoice sent from specific email address
- BCC invoices to specific email address
- Invoice Header
- Invoice Footer

The billing system is capable with interfacing with many payment gateways, and is also capable of providing your customers with the option of paying via Cheque or Bank Transfer. The following payment gateways are supported:

Billing Settings Menu

This is the main billing settings menu. From this location you can access all settings that affect billing.



- 2Checkout
- WorldPay
- ProPay
- PayPal
- Authorize.NET
- LinkPoint
- NoChex
- SecurePay
- ProTx
- Moneris eSelect Plus

Helm's billing system automatically creates the necessary invoice and emails the customer a copy of the invoice. The invoice instructs the user to login to the control panel so that they can remit payment.

In addition to automatically sending the invoices to your customers, you can configure HELM to send your customers payment notices before and after the invoice due date. For example, you



could send your customers a daily payment reminder before their payment due date, and then after their due date, you could configure HELM to send out letters in an escalating fashion that warn your users their account is past due and maybe suspended for non payment, etc if they don't remit payment.



7.) Automated Billing

Helm now has the ability to support automated billing via the use of online payment gateways, and can safely store the credit card details of your customers which will allow for a much smoother transaction, and takes the hassle out of billing for both your customers and yourself. Whether this is enabled or not is dependent on your Helm administrator.

Current Supported Online Payment Gateways

Helm supports the following online payment gateways for automated billing:

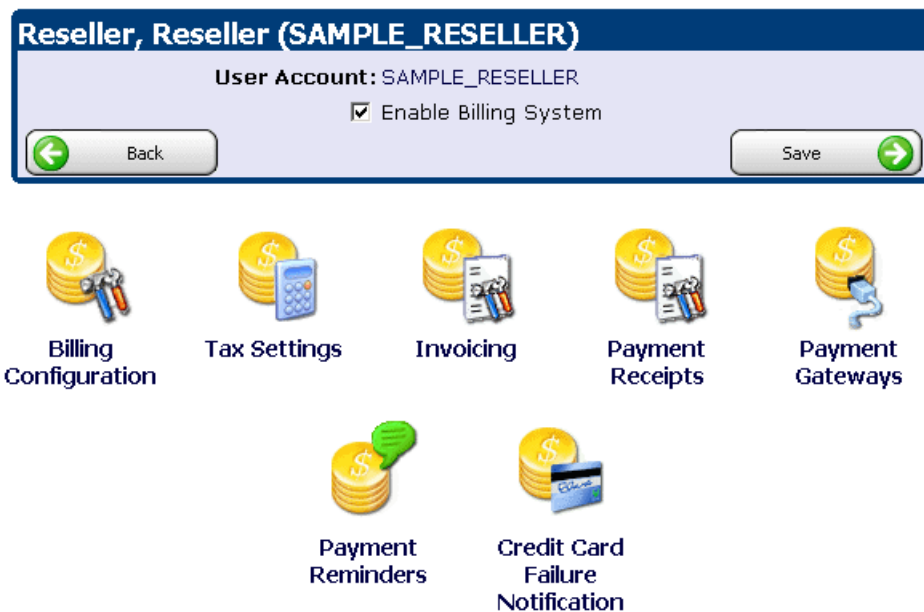
- **Authorize.Net**
- **ProTx VSP**
- **Moneris eSelect Plus**

To set one or all of these up, go to:

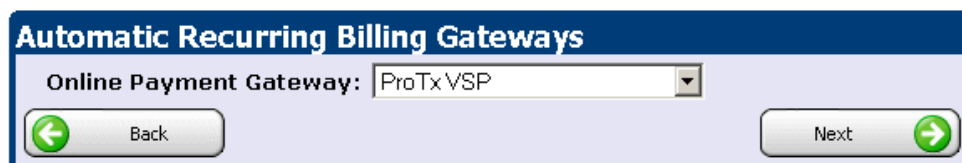
[Home](#) > [Billing Menu](#) > [Billing Settings](#)

Billing Settings Menu

This is the main billing settings menu. From this location you can access all settings that affect billing.



Choose "Payment Gateways" from this screen. Now, select the payment gateway you wish to enable from the Automatic Recurring Billing Gateways list, and click Next.



ProTx VSP

Below is the Gateway Settings page for ProTx VSP, which you will need to customise as appropriate:



Payment Gateway Settings

Below are the payment methods for which clients of this account take in order to settle outstanding bills. The custom link means that customers can be sent straight to unsupported gateways or payment instructions.

Automatic Recurring Billing Gateways

Online Payment Gateway: ProTx VSP

Enabled:

CC Failure Retry Limit:

Payment Description:

ProTx VSP Protocol:

ProTx DLL Path:

Vendor Login Name:

Sub-Merchant ID:

Purchase URL:

Preauth URL:

Refund URL:

Currency Code:

Enabled:- Check this box in order to make this gateway available for your customers to use.

CC Failure Retry Limit:- The number of times (after the initial attempt) that Helm will try and pay the gateway. For instance, if this is set to 3 then Helm will attempt to contact the gateway a total of 4 times.

Payment Description:- The description that your customers will see for this gateway. One useful feature here is if you put the variable [creditcardname] into the payment description, Helm will replace this variable with the "friendly" name of the user's card. E.g. you could put "Payment by [creditcardname]" in this field.

ProTx VSP Protocol:- A required field which is submitted to the ProTx gateway. This is actually a version number of a ProTx protocol that they use – and hence may change at a later date. If this is the case, ProTx should inform you of the new version number.

ProTx DLL Path:- The location of the ProTx DLL file. You will get sent this DLL when you sign up for a ProTx account. The path to this file can be altered as necessary to wherever you wish.



Vendor Login Name:- The login name provided to you by ProTx.

Sub-Merchant ID:- A ProTx-specific field – should be set to 1.

Purchase/Preauth/Refund URL:- Links to the relevant ProTx gateway pages. These are already filled in and don't need to change.

Currency Code:- The currency that the account is being paid in. It has to be supported by one of the VSP accounts, e.g. "EUR", "USD", "GBP", etc.

Once you have entered the relevant details, click the "Save" button to save them. You now need to choose which credit/debit cards you will accept to use with this gateway.

Adding Cards to ProTx VSP

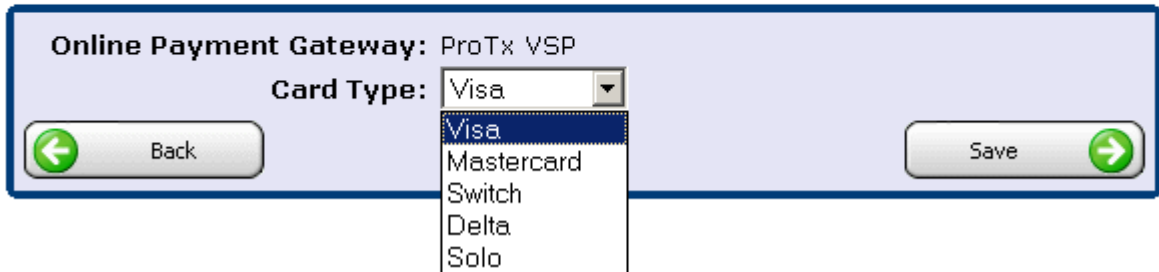
Credit/Debit Cards Supported by ProTx:

- **Visa**
- **Mastercard**
- **Switch**
- **Delta**
- **Solo**

On the Payment Gateway Settings screen, you will see that it currently displays "There are no credit card types assigned to this gateway". Click Add New to add one:

Add Card Type

You can use the form below to allow a card type to be assigned to the online payment gateway so that customers may use that particular type of card when making purchases. A card type can only be assigned to a single gateway at any one time.



Choose a card from the dropdown menu and click Save. This will get added to the supported cards that your customers can pay with. Repeat this action for as many cards as you wish to support:



Automatic Recurring Billing Gateways

Online Payment Gateway: ProTx VSP

Enabled:

CC Failure Retry Limit:

Payment Description:

ProTx VSP Protocol:

ProTx DLL Path:

Vendor Login Name:

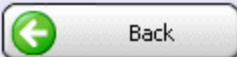
Sub-Merchant ID:

Purchase URL:

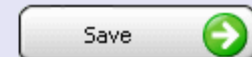
Preauth URL:

Refund URL:

Currency Code:



Back



Save

Assigned Card Types

Card Type



Visa



Mastercard



Switch



Add New

To remove any cards from a gateway, simply select them from the list, then in the new screen choose "Delete". Once completed, click "Back" to return to the Payment Gateway Settings page.



Authorize.Net

Below is the Gateway Settings page for Authorize.Net, which you will need to customise as appropriate:

Payment Gateway Settings

Below are the payment methods for which clients of this account take in order to settle outstanding bills. The custom link means that customers can be sent straight to unsupported gateways or payment instructions.

Automatic Recurring Billing Gateways

Online Payment Gateway: Authorize.Net AIM

Enabled:

CC Failure Retry Limit:

Payment Description:

Authorize.Net Login Id:

Authorize.Net Version:

Gateway URL:

Enabled:- Check this box in order to make this gateway available for your customers to use.

CC Failure Retry Limit:- The number of times (after the initial attempt) that Helm will try and pay the gateway. For instance, if this is set to 3 then Helm will attempt to contact the gateway a total of 4 times.

Payment Description:- The description that your customers will see for this gateway. One useful feature here is if you put the variable [creditcardname] into the payment description, Helm will replace this variable with the “friendly” name of the user's card. E.g. you could put “Payment by [creditcardname]” in this field.

Authorize.Net Login ID:- The login name provided to you by Authorize.Net.

Authorize.Net Version:- The current version of Authorize.Net being used. If this gets updated, Authorize.Net should contact you.

Gateway URL:- Link to the relevant Authorize.Net gateway page. This is already filled in and doesn't need to change.

Once you have entered the relevant details, click the “Save” button to save them. You now need to choose which credit/debit cards you will accept to use with this gateway.



[Adding Cards to Authorize.Net](#)

Credit/Debit Cards Supported by Authorize.Net:

- **Visa**
- **Mastercard**
- **American Express**
- **Diners Club**
- **JCB**
- **Discover**

You can add and remove these cards as appropriate, in the same way as outlined for the ProTx gateway above.



Moneris eSelect Plus

Below is the Gateway Settings page for Authorize.Net, which you will need to customise as appropriate:



Payment Gateway Settings

Below are the payment methods for which clients of this account take in order to settle outstanding bills. The custom link means that customers can be sent straight to unsupported gateways or payment instructions.

Automatic Recurring Billing Gateways

Online Payment Gateway: Moneris eSelect Plus

Enabled:

CC Failure Retry Limit:

Payment Description:

Store API Token:

Store Email Address:

Moneris URL:

Moneris Request DLL:

Moneris Purchase DLL:

Moneris Preauth DLL:

Moneris Refund DLL:

Enabled:- Check this box in order to make this gateway available for your customers to use.

CC Failure Retry Limit:- The number of times (after the initial attempt) that Helm will try and pay the gateway. For instance, if this is set to 3 then Helm will attempt to contact the gateway a total of 4 times.

Payment Description:- The description that your customers will see for this gateway. One useful feature here is if you put the variable [creditcardname] into the payment description, Helm will replace this variable with the "friendly" name of the user's card. E.g. you could put "Payment by [creditcardname]" in this field.

Store API Token:- The API token provided to you by Moneris.

Store Email Address:- The email address you have with Moneris.

Moneris URL:- Link to the relevant Moneris gateway page. This is already filled in and doesn't need to change.



Moneris Request/Purchase/Preauth/Refund DLL:- Paths to the relevant DLLs stored on your machine, which you will have obtained from Moneris. The path to these files can be altered as necessary to wherever you wish.

Once you have entered the relevant details, click the "Save" button to save them. You now need to choose which credit/debit cards you will accept to use with this gateway.

Adding Cards to Moneris eSelect Plus

Credit/Debit Cards Supported by Moneris:

- **Visa**
- **Mastercard**
- **American Express**
- **Diners Club**
- **Discover**

You can add and remove these cards as appropriate, in the same way as outlined for the ProTx gateway above.

8.) Adding Cards for Payment

Now that you have set up the gateways and credit cards ready for your customers to use, you will want to set up a credit card of your own so that you can pay for your reseller account, and any other purchases you may make through Helm.

To do this, choose Billing from the Home menu:

Billing Menu

This is the main billing menu. From this location you can access all the billing details about this account.

Total Account Balance: \$1,000.00 due

 Back



Make Payment



Manage Credit Cards



Account Statements



Recurring Payments



Outstanding Customer Invoices



Customer Credit Card Transactions



Billing Settings

You now need to add credit card details to Helm so that you can start paying for your account. Choose "Manage Credit Cards" from the Billing menu. The next screen will tell you that you have no credit cards currently set up, so click "Add New".

Add Credit Card

This form allows you to add a credit card to this account.



Friendly Name:

Card Type:

-  Visa
-  Mastercard
-  American Express
-  Switch


On this screen, you can specify what card type you want to pay with, and the friendly name you wish to call it. It is **highly recommended** that you choose a relevant name instead of My Credit Card (which is default). For instance, in the above example "My Visa Card" is chosen for Visa. Relevant names are important if you are planning on adding several cards to the system. Once you have chosen the name and type of card, click "Next".



Add Credit Card

This form allows you to add a credit card to this account.

Friendly Name:

Card Type:  Visa

Card Details:

Card Number:

Valid From Date: /

Expiry Date: /

Security Code:

Card Holder Details:

Name on Card:

Address:

Town:

County/State:

Country:

PostCode/Zip:

Default Credit Card

You will be presented with the above screen. Some points of note:

Security Code: This code is the last 3 digits on the signature strip of your card. Some cards will ignore this, but some need it.

Default Credit Card: Checking this box will make Helm automatically select this credit card for any future payments, so if there are a choice of cards under your account this is the one that will be used.

Enter the relevant details for your card, and click "Save" to save them:




Credit Card Details

These are the details for a credit card in this account. Click on 'Delete' to remove the credit card.

The Credit Card Has Been Updated

Friendly Name:

Card Type:  Visa

Card Details:
Card Number: 4444xxxxxxxx1111
Valid From Date: /
Expiry Date: /
Security Code: xxxx

Card Holder Details:
Name on Card:
Address:
Town:
County/State:
Country:
PostCode/Zip:

Default Credit Card

Once saved, the credit card number will be blanked out except for the prefix and suffix. The security code is also blanked out.

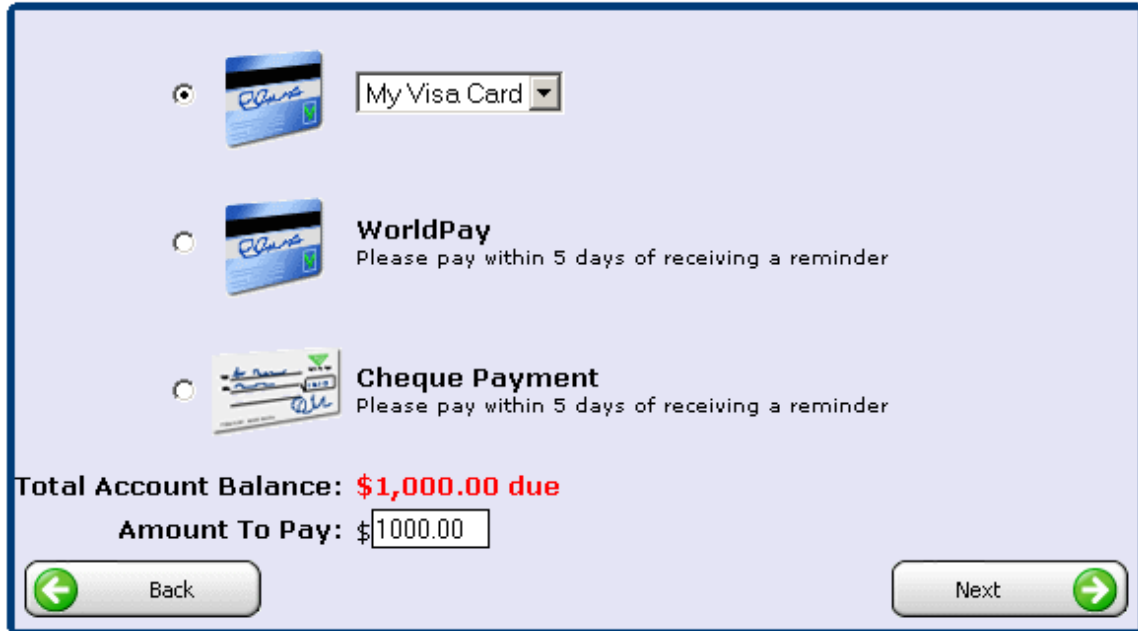


9.) Making a Payment

Now that you have entered your credit card details into Helm, you have the ability to pay off outstanding debts on your account. From the Billing menu, choose "Make Payment"

Make Payment

Use the forms below to make a payment on your account.



The screenshot shows a payment selection interface. At the top, there are three radio buttons for payment methods: 'My Visa Card' (selected), 'WorldPay', and 'Cheque Payment'. Each method has a small icon and a note: 'Please pay within 5 days of receiving a reminder'. Below the options, the 'Total Account Balance' is displayed as '\$1,000.00 due' in red. Underneath, the 'Amount To Pay' is shown as '\$1000.00' in a text input field. At the bottom, there are two buttons: 'Back' with a left arrow and 'Next' with a right arrow.

Your balance will be shown, along with an "Amount To Pay" field which automatically fills in the full amount. If you wish to pay less than this, simply change the value in the box. You will also see several payment methods, which may vary depending on your administrator. Assuming that the administrator has given you the ability to pay by card, you can use this option. Choose a card from the dropdown box that you wish to use to pay the amount.

When you click "Next" Helm will attempt to pay the amount specified using the card you have selected. Helm will contact the gateway, and if the payment is successful you will see the following message:

The payment has been successfully taken

If you have any errors during this stage, refer to your administrator who will be able to identify the cause of them.



Credit Card Transactions

When a customer purchases something through an online gateway, the transaction gets recorded in the Billing section.

Billing Menu

This is the main billing menu. From this location you can access all the billing details about this account.





- Click on the "Customer Credit Card Transactions" icon from the Billing Menu and you will be taken to the transactions screen:



Credit Card Transactions

The following are all the credit card transactions made against this account.

Report Period:
From: 
To: 

Card Prefix:
Card Suffix:

Date	Account Number	Card Name	Amount	Gateway	Result
There are no credit card transactions					

The transactions within the Report Period are listed. These include the date attempted, account number used, the friendly name of the user's card, the amount the transaction was for, the gateway used, and whether the transaction was successful (if not, a reason for the failure is given).



You can change the Report Period using the handy calendar icons to choose the dates you wish to view. You can also search for specific cards, by choosing the **Prefix** (first 4 numbers of the card) or the **Suffix** (last 4 numbers of the card).

Credit Card Failure Notification

You can specify a notification that will get sent to your resellers if a credit card payment fails. Choose "Credit Card Notification Failure" from the Billing Settings menu.



Credit Card Failure Notification

The following form allows you to specify the template notification that is sent to the user when their credit card fails.

The screenshot shows a web form for configuring a credit card failure notification. It includes a 'Dynamic Information' section with a dropdown menu set to 'User's Account Username' and an 'Insert' button. Below this is a 'Subject' text input field and a large 'Message Body' text area. The 'Delivery Settings' section contains four checkboxes: 'Send via Email from' (with a yellow input field), 'Send via Internal Message System', 'Send Copy To The Following Email Address' (with a yellow input field), and 'Send as HTML Email'. At the bottom, there are 'Back' and 'Save' buttons with green arrow icons.

As with most other custom notifications, you can choose:

- The email address it gets sent from
- Whether it's sent via the Internal Message System
- Whether you want a copy sent to another email address (for instance, yours).
- Whether you want to send it in HTML format.



10.) Auto-Signup Script

Helm now gives you the ability to set up an auto-signup script that your customers can use to purchase through you, and pay via credit card.

From the Billing Settings menu, choose "Billing Configuration". You will be presented with the following screen:

Billing Configuration

This is the main billing configurations. These are settings that will affect the entire billing system.

Currency Symbol:

Add Recurring Transactions: days before due date.

Pay on Signup:

- Enable Pay on Auto-Signup Form
- Request Domain Name on Signup
- Allow Custom Username

Username Regular Expression:

- Allow Custom Password

Terms And Conditions URL:

Pay On Signup Header HTML:

Pay On Signup Footer HTML:



This screen simply allows you to customise the AutoSignup.asp page that can be found in the following folder:

[HELM INSTALL FOLDER]\Helm\Control Panel

Using this form will make it much easier for your customers to sign up for a hosting account. When they sign up they will be assigned a dummy hosting plan, dummy user, and (if chosen) a dummy domain.

Currency Symbol:- The currency symbol is the symbol that the customers will see when viewing transactions and invoices for their billing accounts. Changing this will not affect the system except in what currency figures are displayed as. Alter the value in this text box to suit your needs, and click the 'Save' button to save the changes.

Add Recurring Transactions:- This is how many days before the payment due date new transactions should be added to customers accounts. For example, if this is set to '30' days then customers will have renewal fees appear in their billing 30 days before their due date. This allows customers to have plenty of time to make a payment before a deadline. Alter the value in this text box to suit your needs, and click the 'Save' button to save the changes.

Enable Pay on Auto-Signup Form:- Checking this box allows you to activate the functionality to accept credit card signups from your customers. Without this, the signup form will not accept credit card details.

Request Domain Name on Signup:- Checking this box allows your customers to specify a domain name they wish to have added to the dummy user account that gets set up under their reseller account.

Allow Custom Username:- Checking this box allows the user to choose their own username for their account, instead of being assigned a random user account name.

Username Regular Expression:- This field allows you to enter a regular expression, to specify the types of usernames that you don't wish to allow. Some examples of regular expressions are:

^RS = prevents the addition of usernames beginning with RS.
^(RS|HELM) = as above, but beginning with RS or HELM.
[A-Z]{4}[0-9]{3} = specifies the username **MUST** begin with 4 letters and end with 3 numbers (e.g. ABCD123)

Allow Custom Password:- Checking this box allows the user to choose their own control panel password. You can use this instead of sending them a random password out.

Terms and Conditions URL:- This field allows you to add the link to your Terms and Conditions page to the signup script page.

Pay on Signup Header HTML:- Here you can enter custom HTML to make the signup page header similar to the theme of your own website.

Pay on Signup Footer HTML:- Here you can enter custom HTML to make the signup page footer similar to the theme of your own website.

Upon completion of this form, you can access (and link to) the auto-signup page like this:

<http://YourControlPanelURL/autosignup.asp?adminaccnum=admin>



11.) Other Billing Settings

From the home page, click on "Billing" and then "Billing Settings" to access the settings for the billing system. On the main "Billing Settings" pages, you can also choose to enable or disable the billing system. Once chosen, click on the "Save" button before proceeding to any of the other pages.

Billing Settings Menu

This is the main billing settings menu. From this location you can access all settings that affect billing.

A) Enable/Disable Billing System

B) Save Settings

Reseller, Reseller (SAMPLE_RESELLER)
 User Account: SAMPLE_RESELLER
 Enable Billing System
 Back Save



Tax Settings

If you click down to the "Tax Settings" page, you can configure the tax rate that will be applied to your customers. You can also input the name of the tax that will appear on the invoice (e.g. – Sales Tax, or VAT). Click the "Save" button to save your settings, and then click the "Back" button to go back to main Billing Settings page.

Tax Settings

Below are the billing settings for this account. The account.

Tax Rate: 0 %
 Tax Name: Tax
 Back



Invoice Settings

Clicking on the "Invoice Settings" icon will bring you to a page where you can enter your invoice settings. You can opt to either have the invoice sent or not sent by checking or unchecking the "send invoice via email" box. You can also input an invoice prefix, custom invoice subject, 'from' address, and blind carbon copy address so that you can also have a copy of the invoice emailed to you for your records. Additionally, you may also input custom HTML invoice headers and footers. After entering your settings, click "Save" to make sure all of your settings have been saved and then click the "Back" button to return to the main "Billing Settings" page.

Payment Gateway Configuration

Before customers can submit payment through Helm, you must configure Helm to interact with any payment gateways that you subscribe to. Although somewhat misleading, you also can configure Helm to accept payment via Bank Transfer and Cheque under the payment gateways page.

After clicking on the "Payment Gateways" icon, you will be presented with a drop down list of the different gateways that HELM supports. To proceed, select the payment gateway you would like to enable and then click the "Next" button. Depending on the payment gateway you choose, you will have to input a variety of information. In most cases, the information you are inputting will be provided to you by your payment gateway company. After inputting your payment gateway details, click "Save" to save your settings. Click on the "Back" button to return to the main Billing Settings page.



Payment Gateway Settings

Below are the payment methods for which clients of this account take in order to settle outstanding bills. The custom link means that customers can be sent straight to unsupported gateways or payment instructions.

Standard Payment Gateways

Payment Gateway:

Automatic Recurring Billing Gateways

Online Payment Gateway:



Payment Reminders

Now, the only thing left to configure are your payment reminders. Clicking on the "Payment Reminders" icon and then clicking the "Add New" button will take you to the form where you can setup a payment reminder.

The payment reminder screen is nearly identical to the welcome letter screen. A helpful feature is that the payment reminders can also include your customers' username / password so that your customers can login to their control panel easily and pay their bill promptly.

Payment Reminder

The following form allows you to create and edit payment reminders that will be sent to your customers if any of their invoices have not been settled by the date you specify below.

The screenshot shows a web form for configuring a payment reminder. At the top, there is a field for "Send Reminder" set to "10" days "Before" the "Due Date". Below this is a "Dynamic Information" section with a dropdown menu set to "User's Account Password" and an "Insert" button. The "Subject" field contains the text "Please Pay Your Bill". The "Message Body" is a large text area containing a pre-written email template. The template starts with "Dear [UserFirstName]:", followed by a paragraph explaining the reminder and providing a URL to the HELM Control Panel. It then lists the user's username and password as "[UserAccountNumber]" and "[UserAccountPassword]" respectively. The message ends with "Thanks, Your Hosting Company!". Below the message body is the "Delivery Settings" section, which includes three checked checkboxes: "Send via Email from" (with a text field containing "billing@yourhostingcompany.com"), "Send via Internal Message System", and "Send Copy To The Following Email Address" (with an empty text field). At the bottom left of the form is a "Back" button with a left-pointing arrow, and at the bottom right is a "Save" button with a right-pointing arrow.

[Show QuickHelp](#)



12.) Adding New Customers

Helm provides two ways to add your new customers. You can setup your customers manually from within Helm or customers can signup using the auto-signup script. Before adding customers, it's necessary to setup your web hosting plans, as described earlier in this document.

Step 1: Entering Customer Information

To get started, click on the "Users" icon from the home page and then click on the "Add New" button. You will now be at the "Add New User" form.

We recommend entering the username you would like to assign to the user in the "Account Number" field. If you leave the account number field blank, Helm will generate a random username and assign that to your customer. Entering a specific username into the account number field will ensure that your customer receives a username they can easily recall.

After completing the form, click on the "Save" button to continue. Clicking on this button will cause two things to happen – the user will be added to the system, and the user will also be emailed the welcome letter you created earlier. From this point, there's a few different routes we can take, depending on how you would like to setup your customer's account.

Reseller, Reseller (SAMPLE_RESELLER)

Reseller Account: SAMPLE_RESELLER

Account Number: * Optional

Title:

First Name(s):

Last Name:

Company Name:

Address:

Town:

State/County:

Country: United States of America

Zip/PostCode:

Daytime Tel.:

Evening Tel.:

Mobile Tel.:

Fax Tel.:

Primary Email Address:

Secondary Email Address:

Send Welcome Message

The first option is to simply let the customer receive the login information in their email. The customer will login to Helm and then be able to purchase a hosting plan and setup the domain name to their liking. The second option is to actually complete the process of selecting a plan and creating the domain name so that the customer doesn't have to.



Step 2: Choosing a Plan and Adding the Domain

Please follow the procedure outlined below to choose a package for your user and setup their domain name.

Step 1: Enter the user's username in the "Search Users" box and click on the green arrow to perform the search. You will now effectively be seeing what your customer sees when they login.

Step 2: Click on the "Packages" icon and then click the "Add New" button to subscribe your customer to a hosting package. In the package name field simply enter a friendly name that will help your customer identify the package from any other hosting packages they may have. Select the appropriate plan from the "Web Hosting Plan" drop down. Click the "Save" button, which will take you back to the main "Packages" page.

Add Package

Use the form below to add a new package to this account. To add domains to your account you will first need to add a package below.

A) Enter Package Name

B) Click Save

Step 3: Now click on the Package that you just created, change the account status to "Active" and click Save.

Packages

Below is a list of the packages that have been : click on the package name. To add a new pack

A) Click Package

Package Name	Type
Test Company Web Site	Hosting P
Back	
Package Search Package Status	



B) Change the account status to "Active"

C) Click Save

Package Details
 This is the main menu for your package. You can access the domains that have been setup within this package, view what resources have been used by this package or add more features using the buttons below.

Test Company Web Site

User Account: TESTUSER
 Reseller: HANDYTEST
 Friendly Name: Test Company Web Site
 Hosting Plan: Hosting Plan 1
 Account Status: Pending Payment

Active
 Payment Due
 Pending Payment

Back Delete Save

Step 4: Now click on the Domains icon and then click the "Add New" button.

Step 5: Choose the type of registration you would like to use:

Add Domain

The form will allow you to set up a new domain for this account. You will taken through a small number of steps. Click the 'Back' button at any time to step backwards through the steps.

User Account: SAMPLE_CUSTOMER
 Package: Sample Hosting Package

Domain Registration:

- No registration or transfer required
- Please register this domain
- Please transfer administration of this domain

Back Next

Step 6: Enter the domain name and click "Save". Your customer's account has now been completely set up.

Add Domain

The form will allow you to set up a new domain for this account. You will taken through a small number of steps. Click the 'Back' button at any time to step backwards through the steps.

User Account: SAMPLE_CUSTOMER
 Package: Sample Hosting Package

Domain Registration: No registration or transfer required

Domain Name: www. .com

Back Save

Tip – The main FTP username is the same as the domain name. For example, if the domain name is yahoo.com, the FTP username is yahoo.com. The password is the same as that user's

control panel password at the time of creating the domain. If the control panel password is immediately changed, the FTP account password will still be the old control panel password.

Tip – If you setup FrontPage Extensions on a domain, the username to access their site via FrontPage is domain.com_fp. Using the same example as above, the username would be yahoo.com_fp.

Resending a Welcome Message

Another useful feature is the ability to resend welcome messages to your customers at any time (for example if you signed up customers before. To do this, simply choose the customer and in their information bar at the top of the screen, simply click the Resend Message link to resend the welcome message:



Click Here!



13.) Normal Signup Script

The Auto-Signup script means that your customers will have to pay before their account is generated. This might not be ideal for some of your customers (for instance, the ones paying by bank transfer or cheque), or those that have signed up for free accounts. In these instances, it may be preferable to use the normal signup script. Helm creates a HTML form you can place on your site and use to automatically signup customers. If using this feature sounds attractive to you, please read on because there are a couple of caveats.

The first caveat is that users who signup through the signup script are assigned a random username that's a combination of the prefix you define in the user settings and an incremented number. The second caveat is that once a user signs up using the signup script, they still need to login to the control panel, pay their bill using a specified payment gateway, and then setup their domain. While this process isn't exactly complicated, less knowledgeable Internet users may find the process overwhelming to start with.

User Settings

After logging into the control panel, click on the "Account Settings" icon and then click on the "User Settings" icon. There are a few things we need to enable at the "User Settings" screen before proceeding.

User Settings

The following settings are relevant to users that are managed by this account. These settings cover the set up of and security of the users' accounts.

Reseller, Reseller (SAMPLE_RESELLER)

Reseller Account: SAMPLE_RESELLER

General User Settings:

Account Number Prefix:

Min Password Length:

Account Signup:

Enable Remote Auto-Signup Script

Account Vetting:

Enable Account Vetting

Sending an alert email to the following account:



Welcome
Message



Signup Script
Generator



Account Number Prefix: This field is where you can input a custom username prefix that will be used for the customer's signup with the auto signup script.

Min Password Length: This field serves a dual role. First, it acts as a password policy, in that when your users change their password they will have to make their password at least as long as the length you specify. The other role that it serves is that when Helm emails out passwords to customers automatically, the passwords will be randomly generated and will be the length you specify here.

Enable Remote Auto-Signup Script: If this auto-signup is not enabled, the script that Helm generates will not work.

Account Vetting: With account vetting enabled, whenever a new user is added to the system (either manually or through the auto signup script) an email alert is sent to the email address specified. You then have to login to Helm and mark the account as approved. If vetting is not enabled, all accounts are created – including those through the auto signup script. Customers are free to login to their account and add their domain name, without any verification.

Signup Script Generator

Step 1: Click on the "Signup Script Generator" icon.

Step 2: In order to generate the signup script, Helm requires just two pieces of information from you – the success URL that users should be directed to after their account has been added successfully, and the failure URL that users should be redirected to if there is a problem with setting up their account. Also, you have the option of asking your customer to select a web hosting package.

Step 3: Click Next.

Step 4: Helm has now generated the signup script for you. The code that Helm generates is standard HTML code, which means that you should be able to copy it, and then add the look and feel of your existing website to the Helm form very easily.

Signup Script Generator

Use this tool to generate a basic script that you can use on your web site.

The screenshot shows a web-based form titled "Signup Script Generator". It has a light blue background and a dark blue border. The form is divided into two main sections: "Signup Settings:" and "Script Output:".

Signup Settings:

- Control Panel URL:
- Success URL:
- Failure URL:
- Ask customer to select a webhosting package

Script Output:

Below the settings is a large, empty text area for the generated script. At the bottom of the form, there is a instruction: "Copy the above script to a new web page on our own site." and two buttons: "Back" (with a left arrow) and "Next" (with a right arrow).