Parallels

Parallels Business Automation Standard

Reseller's guide

Release 4.2

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Preface

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Typographical Conventions

Before you start using this guide, it is important to understand the documentation conventions used in it.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information	Example
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.	Go to the **System** tab.
	Titles of chapters, sections, and subsections.	Read the **Basic Administration** chapter.
Italics	Used to emphasize the importance of a point, to introduce a term or to designate a command line placeholder, which is to be replaced with a real name or value.	The system supports the so called *wildcard character* search.
`Monospace`	The names of commands, files, directories, and domain names.	The license file is located in the `http://docs/common/ licenses` directory.

Preformatted	On-screen computer output in your command-line sessions; source code in XML, C++, or other programming languages.	`# ls -al /files` `total 14470`
Preformatted Bold	What you type, contrasted with on-screen computer output.	`# cd /root/rpms/php`
CAPITALS	Names of keys on the keyboard.	SHIFT, CTRL, ALT
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another.	CTRL+P, ALT+F4

Feedback

If you have found a mistake in this guide, or if you have suggestions or ideas on how to improve this guide, please send your feedback using the online form at http://www.parallels.com/en/support/usersdoc/. Please include in your report the guide's title, chapter and section titles, and the fragment of text in which you have found an error.

About This Guide

This Guide describes the most important and frequently-used Parallels Business Automation - Standard working scenarios including initial settings for the system.

Note: The PDF-version of this Guide is an overview of the Parallels Business Automation - Standard overall functionality and is not to be used as a thorough howto. For details see context-sensitive HTML help (the Help link at the upper right corner of every screen).

Audience

This guide is addressed to Hosting Service Providers and helps both to evaluate the product and get acquainted with Parallels Business Automation - Standard.

CHAPTER 2

Meet the Parallels Business Automation - Standard

Parallels Business Automation - Standard is an end-to-end solution for hosting service providers (HSPs) and Internet Data Centers covering full life-cycle of HSP/IDC operations. Parallels Business Automation - Standard allows HSPs to drastically decrease the cost of operating hosting business while increasing revenues, developing new reseller channels, and improving usage of hardware and personnel resources.

In This Chapter

Browsers Compatible with Parallels Business Automation - Standard

The following browsers are fully compatible with Parallels Business Automation - Standard web-based tools:

- Firefox 3.6 and above
- Microsoft Internet Explorer 7 and above
- Safari 5.0 and above for Mac
- Google Chrome 8.0 and above

Note 1: Pop-up blocking in your browser should be disabled.

Note 2: Session and permanent cookies in your browser should be enabled.

Connecting to Parallels Business Automation - Standard Browser-Based Tools

To connect to the Parallels Business Automation - Standard tools, enter into your browser the Management Node hostname and append the tool index (`http://hostname/index`). If no tool index is specified, then nothing to be appended to open the tool:

Tool	Tool index
Public Site	
Online Store	
Provider Control Center	pcc
Reseller Control Center	rcc
Control Panel	cp
My Control Panel	mycp

The SSL protocol can be enabled separately for each of Parallels Business Automation - Standard web-based tools. The SSL configuration is available both in Provider and Reseller Control Centers.

Note: To connect to the My Control Panel, it is necessary to create a Container subscription, log in to the Control Panel, then create a user (if System Administrator Control Panel Application is installed inside Container) or a mailbox in multiple domains (if Workgroup Administrator Control Panel is installed inside Container). After this you can log in to the My Control Panel with the e-mail address as a login and a user regular password.

Parallels Business Automation - Standard Interface Features

Navigation

To use one or another Parallels Business Automation - Standard component or tool, please use the *namespace tree* located in the left pane.

Control Centers specific:

You can hide/display the namespace tree by clicking on the *slider* at the vertical bar that separates the left and the right parts of the screen.

When you start your Parallels Business Automation - Standard session, the path (chain of links) appears at the top of the screen. These links provide the "*breadcrumb navigation*" and show you the path to your actual location within the Parallels Business Automation - Standard. By clicking on these links, you can be one or more (depending on your location) levels up.

Main Screen

The right pane of Parallels Business Automation - Standard screen serves for operating components selected from the namespace tree. The main screen shows the Parallels Business Automation - Standard Directors' or Managers' *dashboards*, lists of objects, single objects' properties, or other related data.

Each Parallels Business Automation - Standard component (Director or Manager) has its own *dashboard*. Moreover, the Parallels Business Automation - Standard has its dashboard that may be considered as 30,000-foot view of tools and operations. So, a dashboard is the Parallels Business Automation - Standard component 'front-page' that provides you with the most important statistics and a place to start including:

- Shortcuts to the lists of objects.
- Information about the number of objects with separate counters for the objects in different states like Active Accounts, Accounts on Hold, Running Containers, etc.
- Shortcuts for the creation of new objects that fall into the functionality of Parallels Business Automation - Standard component selected.

To facilitate operating the lists of objects you can use:

- *Search* particular item within the list or *filter* the items by a particular property. The Search and filter bar is located at the top of each list.
- *Hide/Show* search and filter bars, action bars, tables and create/edit forms sections. Their hide/show status is retained throughout the session.
- *Change Sorting Order*. To this effect, click on the column-heading you want to sort by. In this case, the special pointer (small triangle) appears at the top of each column. This triangle indicates current sorting order: peak-up or peak-down for ascending and descending order respectively. Repeating click on the same link in column-heading changes sorting order from ascending to descending (and conversely) within single property.
- *Change List Size*. It is possible to set the listing to 20, 40, or 80 items per page. Appropriate links are above the list, to the right. Special links for viewing pages (page numbers, next,last) are also provided and you can find them both at the beginning and the end of the list.
- *Export lists to Excel*. Parallels Business Automation - Standard allows you to export data from any list in Parallels Business Automation - Standard to Excel, thus facilitating data operations. The information is exported from the whole list, not only from the visible part. For example, if you have set the listing to 40 items per page and the whole list includes 100 entries, you will get an excel format document covering 100 items. The ![icon] *Export to Excel* icon is located above and under the lists.
- *Set columns visibility*. You can choose the columns to be displayed in the list tables by clicking on the ![icon] icon above and under the list and enabling/disabling the corresponding entries in the drop-down menu. You are also allowed to set the columns order by drag-and-dropping the column titles.

In order to immediately bring the screen content in correspondence with actual state of affairs, you can *Refresh* the screen using the button located at the upper right corner of the screen.

The *Help* button located at the upper right corner of each screen shows the context-sensitive HTML help.

Screen ID is located at the upper-right corner of each screen. Screen ID allows to refer to a screen for customization purposes or in the problem report. In addition, each screen ID is a clickable link that leads the the Screens Viewer and allows getting a screen alias immediately.

Adding a Comment to the Parallels Business Automation - Standard Object

You can add a free-form comment to almost any of Parallels Business Automation - Standard object. To this effect click on the **Add comment** link at the upper-right corner of an object view form.

Parallels Business Automation - Standard Advantages

Parallels Business Automation - Standard includes everything a company needs to run a successful and profitable hosting business from advanced technology and tools to manage your servers and overall infrastructure to billing, sales channel management, and e-commerce application:

- *The full range of services supported:*

  - Domain registration
  - Plesk Domain hosting
  - Virtuozzo Container hosting
  - Parallels Plesk Control Panel and Parallels Plesk Sitebuilder licenses

  - Parallels Plesk Sitebuilder support
  - Dedicated servers for resellers
  - Dedicated or Co-location
  - Miscellaneous

- *Complete infrastructure management:*

  - Powerful Container management
  - IPs allocation and DNS administration
  - Flexible self-provisioning

  - Server-/client-side backups
  - Integrated trouble ticketing and External Helpdesks support
  - Maintenance automation and more

- *Integrated complete billing solution:*

  - Customizable online store
  - Country-specific accounting
  - Automated recurring invoicing
  - Private label resellers

  - Discounts, promotions, coupon codes
  - Taxation with tax exemption
  - Automated upgrades/downgrades
  - Customizable notifications and more

- *Credit Cards processing through over 30 payment gateways (new added monthly):*

  - integrated with fraud screening
  - flexible manual approval rules
  - refunds, reversals, credits

  - sensitive data is encrypted
  - delayed capture
  - CVV/AVS verification and more

- Bank transfer payments for German (DTAUS), Spanish (Norma 19), and Netherlands (ClieOp3) standards: flexible batch management with approval queues.

- *Domain registrations through over 25 domain registrars (new added monthly):*

- *Wide range of Operating Systems and Applications for Container hosting:*

  - Centralized management
  - Automated upgrades
  - Over 50 applications

  - Redhat, Fedora, Suse, Debian
  - Open-source and commercial applications
  - Game servers and more

- *Easy customization and integration*:

  - Customizable PHP based store
  - Notifications customization
  - Customizable menu items
  - Colors, logos, page content
  - Create your own plug-ins

  - Application templates creation guide
  - Powerful API
  - Advanced multi-language support
  - XML data export/import tools

- *Everything in one box!*

Parallels Business Automation - Standard Deployment Scenario

Parallels Business Automation - Standard can be successfully installed both on the physical server or (if you use the Parallels Virtuozzo Containers technology) in Virtuozzo Container.

The computer (or virtual server) that runs Parallels Business Automation - Standard is called Management Node in terms of Parallels Business Automation - Standard. The servers that run software that provides hosting services (run Virtuozzo Containers, Plesk Domains, or some other third-party software) are called Hardware Nodes or just Nodes. Parallels Business Automation - Standard administrator can connect to the Management Node via the Internet and guide the hosting business using the web-based interface.

Parallels Business Automation - Standard Hardware Requirements

Recommended hardware configuration is two or more computers for Hardware Nodes.

Note: Parallels Business Automation - Standard can work well with just one Hardware Node, but existence of two nodes increases availability of the hosting service. With two or more nodes one of them may be taken off-line for maintenance, replacement or upgrade with minimal disruption for the hosting service.

If you use Parallels Virtuozzo Containers, we recommend installing the Management Node software in a special service Container hosted on one of your Hardware Nodes. In this case that single computer shall meet both Hardware Node and Management Node requirements and you then need at least one workstation for system administrator to manage it.

However, you can have your Management Node as a separate computer.

Management Node requirements (if the Management Node is a separate computer)

- IBM PC-compatible computer with 2 GHz (or higher) Intel Celeron, Pentium, or AMD Athlon CPU;
- At least 1 GB of RAM;
- At least 40 GB of total disk space;
- Network card;

Virtuozzo Hardware Node Requirements

- IBM PC-compatible computer;
- Intel Celeron, Pentium II, Pentium III, Pentium 4, or AMD Athlon CPU;
- At least 128 MB of RAM;
- Hard drive(s) with at least 4 GB of free disk space;
- Network card (either Intel EtherExpress100 (i82557-, i82558- or i82559-based) or 3Com (3c905 or 3c905B or 3c595) are recommended).
- SCSI controllers:
  - Adaptec7xxx SCSI controller (including AHA 2940/3940/3944/29160);

- RAID controller based on the AMI MegaRAID chips (including DELL PowerRAID PERC2/PERC3).

Caution: For Athlon-based systems: It is not recommended to use computers with VIA chipsets.

Plesk Hardware Node Requirements:

The minimal hardware requirements for the Plesk installation are the same as those of the operating system intended to be used with Plesk.

Number of domains	Amount of RAM	Processor
100	256 MB	Pentium II
500	512 MB	Pentium III
1500	2000 MB	dual Pentium III
2000	4000 MB	dual Pentium IV

Sitebuilder Hardware Node requirements:

- RAM 256mb
- 30 Mb HDD space for Sitebuilder installation (+ 1 Mb per User's web site) - minimal configuration.
- CPU Celeron 1,7
- Ethernet 10 Mb

For more details (OS versions, additional software) please refer to the Sitebuilder Installation guide shipped together with the product.

Parallels Business Automation - Standard Users

The following Account types exist within Parallels Business Automation - Standard:

- **Provider** Account (only one Account of such type can exist). This Account is registered during Parallels Business Automation - Standard installation and it always has the ID=1. All registered persons that have role in Provider Account are considered as Provider staff members with particular access permissions to Parallels Business Automation - Standard Provider Control Center. The number of Provider staff members that can concurrently log in to the Provider Control Center is defined by the Parallels Business Automation - Standard license.

- **Reseller** Account. Reseller Accounts are registered using the **Account Director** > **Reseller Manager**. The number of Reseller Accounts is defined in the Parallels Business Automation - Standard License. All registered persons that have role in Reseller Account are considered as Reseller staff members with particular access permissions to Parallels Business Automation - Standard Reseller Control Center.

- **Customer** Account. Customer Accounts are being registered using the **Account Director** > **Customer Manager**. Customer Accounts can be of two types: **personal** or **business**. All persons associated with Customer Account have access to Parallels Business Automation - Standard Control Panels.

C H A P T E R 3

General Configuration of Parallels Business Automation - Standard

When you log in to the Parallels Business Automation - Standard Provider or Reseller Control Center first time, the Setup Wizard helps you to make the most important initial settings.

Please check the initial configuration of the Parallels Business Automation - Standard installation:

- Submit/edit the company name and sender e-mail address (messenger) used in notifications.
- Set data retention rules both for system events (on page 130) and logs (on page 27).
- Make the regional settings including the interface language, set the first day of week (monday or sunday), the default time zone to bound system events and logs, select the system-wide currency.
- Set up secure communications (turn on SSL, generate CSR, install signed secure certificate).

In addition, to facilitate the operations (like domain registration) performed on behalf of the default Provider account created in Parallels Business Automation - Standard (for Provider Control Center users only), it is necessary to check and adjust if needed, the contact information containing in the default Provider account.

Note: The special Getting Started checklist is provided for Resellers.

In This Chapter

Getting Started Checklist

This step-by step procedure helps setting up the Reseller Control Center.

➢ *To start selling hosting plans:*

1. Fill in all the contact data into the Reseller account profile to avoid any problem connected with contact data discrepancies when registering domains online. Click on your account name at the top of the Navigation tree in the left pane and edit the Company Profile and Contacts.

2. Check IP addresses availability in Service Director > IP Manager. If no IP addresses are available, contact your vendor.

3. Register a domain in the Service Director > Domain Manager and set it as the default one to allow your customers to create subdomains in this default domain. If something goes wrong with domains registration, contact your vendor.

4. Set up the billing system:

   a   Create Credit Terms that define the order of settlement with your customers and select the default credit terms to be applied by default to customers accounts created from your online store (Account Director > Subscription Manager).

   b   Optionally: create Discount Categories to be able to give the per-account discounts to your customers.(Billing Director > Discount Manager)

   c   Configure taxation.

   d   Configure payment methods processing in the Commerce Director.

5. Copy some Provider's hosting plans or create your own ones.

6. Configure online store and open it using the Commerce Director > Store Manager.

To view or process orders placed at your store, go to the Billing Director > Receivable. To view or pay Provider's invoices, go to the Payable section.

Selecting Regional Settings

To make regional settings, go to the **Configuration Director** > **Miscellaneous Settings** > **Regional Settings**.

The regional settings include:

- The language;
- The default time zone;
- The calendar settings (the first day of week);
- The system-wide currency.
- Selecting languages available for your customers to switch the interface.

Language

The **language** setting allows you to set the system-wide language of the Parallels Business Automation - Standard interface.

Default Time Zone

In respect to registration of the events that happen within the system, the Parallels Business Automation - Standard database is bound to GMT. This means that automatically-generated notifications and system messages (for example, about subscriptions expiration dates) may occur to be hardly understandable for the customers that reside in the other time zones.

Thus, the Parallels Business Automation - Standard provides an opportunity of setting different *time zones* for different Customers (or Resellers). This can be done during creation of a new Account or later. The special time zone can be set for each user associated with an Account. After this, all the time-related data (in Action Log, Event Manager, or automatically-generated notifications) will be bound to the User's time zone, without the need for him (or her) to recalculate time.

However, if most of your prospect customers will reside in the single time zone, it is quite reasonable to set default time zone for the newly registered persons.

First Day of Week

You can select the day a week starts. For example, this setting is used when setting the weekly time interval in the Billing Reports (on page 77) view.

Currency

You can set the system-wide currency (for all financial documents and Hosting Plan prices). Resellers can set the own currency and enter the cross rate between the Provider currency and Reseller currency. This feature is very useful for selling through international channels as well as having separate branches in different countries around the world.

> **Note**: Parallels Business Automation - Standard is a single-currency system. In other words automatic currency recalculations are not available. If you change the system-wide currency, you will have the unified currency sign, fractional part format, etc., however you will need to recalculate all prices manually. For example, most of domain-registration Plug-Ins support US Dollar only as an accounting currency. Thus, in order to update domain-registration prices correctly the system-wide currency should be US Dollar by prices update, otherwise the new prices will not be used in Parallels Business Automation - Standard billing.

Available Languages

Check the boxes next to language names to allow your customers to switch the interface into these languages. The list of languages in this section is comprised of the languages shipped within separate language packs with Parallels Business Automation - Standard kit and installed during the Parallels Business Automation system configuration.

Setting Up Messenger and S/MIME Signing for E-mail

Parallels Business Automation - Standard provides an opportunity to automatically generate and send e-mail notifications to Provider Administrator and other HSP staff members (for example, about resources overusage or nodes outages) or to HSP Customers (for example, if Subscription period is about to expire). The set of events that can be followed by e-mail notifications is read-only and defined in the Event Manager (on page 130). The component that automatically generates and sends e-mail notifications is called 'Messenger'. Notifications themselves may be configured for a certain number of events that take place within Parallels Business Automation - Standard system and tracked by the Event Manager.

Each message (including automatically generated ones) shall have the 'From' field. For automatically-sent messages (or notifications) the 'From' field should contain the sender name and e-mail of a messenger. In addition, you can enable or disable e-mail notifications sending and select the e-mail messages encoding (character set). Finally, you can configure e-mail messages S/MIME signing. To set the messenger, go to the Configuration Director > Miscellaneous Settings > E-Mail Setup.

Securing the Parallels Business Automation - Standard Tools Using SSL

Secure Sockets Layer (SSL) provides a level of security and privacy for those wishing to conduct secure transactions over the Internet. Introduced to the Internet market by Netscape Communications, the SSL protocol protects HTTP transmissions over the Internet by adding a layer of encryption. This insures that your transactions are not subject to "sniffing" by a third party.

SSL provides visitors of your website with the confidence to communicate securely via an encrypted session. For companies wishing to conduct secure e-commerce, such as receiving credit card numbers or other sensitive information online, SSL is essential.

Important: SSL Setup for Resellers

SSL certificate is generated per vendor domain name. For provider, this domain name is Management Node hostname, by default.

Resellers use the same domain as their provider until a reseller URL is not hidden. Thus, if a reseller with not hidden URL tries to generate an SSL Certificate request, the same domain as provider's one will be used. This can corrupt provider's SSL settings. That is why Parallels Business Automation - Standard does not allow SSL setup for resellers with not hidden URL - the SSL Setup item is not available in RCC menu in this case.

To make SSL Setup available for a reseller, provider should do the following:

1. Hide reseller URL to provide a reseller with own domain name, which makes it possible to generate an SSL Certificate for this reseller.

2. Make sure that Reseller Administrator permissions allow managing SSL. To this effect, go to the Configuration Director > Security Manager > Setup, select Reseller Permissions tab, and then select Reseller Administrator role. Open the Configuration Director > Miscellaneous settings item and make sure that the SSL Setup check box is selected. After this, SSL setup will become available for all resellers in Reseller Control Center.

Getting the SSL Certificate

For SSL to work a valid signed SSL certificate is required. Certificates are a standard way of binding a public key to a name. Public key encryption is a technique that uses a pair of asymmetric keys for encryption and decryption. Each pair of keys consists of a public key and a private key. The public key is made public by distributing it widely. The private key is never distributed; it is always kept secret. Data that is encrypted with the public key can be decrypted only with the private key. Conversely, data encrypted with the private key can be decrypted only with the public key. This asymmetry makes public key cryptography so useful.

You can generate a self-signed certificate and use it for some time until the certificate "signed" by a trusted external authority: VeriSign (http://www.verisign.com) or Thawte (http://www.thawte.com) will be ready.

Note: Netscape and Mozilla browsers automatically detect whether a website uses encryption of transmitted data or not (as for Internet Explorer, please encourage your website visitors who use IE to use Internet Explorer 5.0 or later). Thus, if you use a self-signed certificate, your website visitors will be notified that your website uses encryption, but the authority that signed a certificate is not recognized. So if you intend to conduct e-commerce at your website, it is better to obtain an SSL certificate signed by VeriSign or Thawte

To obtain the SSL certificate:

1. Generate Certificate Request in the **Configuration Director** > **Miscellaneous Settings** > **SSL Setup** > **Certificate Request** tab.

2. After the Certificate request is generated, you can do one of the following:

   ▪ Copy the Certificate Request and send it to the Certificate Authority to obtain the signed Certificate and import it later;

   ▪ Generate self-signed Certificate and use it for some time.

3. Restart Apache on your Management Node. Please note that in this case your Management Node will be not available for some time. So if you already have customers by the moment of importing the SSL Certificate, your customer's Containers will also become offline till Apache on your Management Node restarts.

Enabling SSL for Parallels Business Automation - Standard Tools

You can enable the SSL protocol separately for the Provider Control Center and Reseller Control Canter, Control Panels, website, and your online store.

To enable the SSL protocol, go to the **Configuration Director** > **Miscellaneous Settings** > **SSL Setup**. Select the the **Enable SSL** tab. You can enable the SSL protocol by checking the **Enable SSL in Parallels Business Automation** > **Standard Web Tools** boxes next to the name(s) of the web tools (Control Centers, Control Panels, store, etc.).

Setting the Statistics Storage Period

You can set how long both the resources usage statistics and events history will be stored in the Parallels Business Automation - Standard database in the **Configuration Director** > **Miscellaneous Settings** > **Data Retention**. The resource usage statistics retention cycle defines the timeframe for resource usage reports you can view.

The outdated statistics is removed automatically, once a day. In addition, at any moment you can manually remove the outdated statistics (use the **Tasks** tab on the **Data Retention** screen).

In respect to the resource usage statistics (on page 27), you can set:

- For how many last days to store the hourly statistics.
- For how many last months to store the daily statistics.
- For how many last years to store the monthly statistics.
- For how many last years to store the yearly statistics.

In respect to the action log, events history, and sent e-mail notifications you can set the period to store the data.

Customizing the Onscreen Help in Control Panel

Each screen of the Parallels Business Automation - Standard Control Panels is provided with a short onscreen help topic.

If needed, you can edit the onscreen help topics for each screen of the Control Panels your customers use. To this effect, login to the Control Panel (*yourcompany.com/cp*) using one of the logins of your Provider Account (as a staff member). In this case, on almost every Control Panel screen (excluding dashboards) a special "question-mark" icon appears at the upper right corner of the screen.

Click ⑦ at the screen you want to add a help topic for. The popup window with the help bar text appears. Type the text and click the **Update** button.

From the Provider Control Center you can hide or show the onscreen help and show/hide in the source HTML of each Parallels Business Automation - Standard screen the special metatags used to mark the Parallels Business Automation - Standard screen elements (called controls). Usage of these metatags is described in details in the *Parallels Business Automation - Standard SDK*.

Managing Your Data Center

The Service Director provides the tools for your Data Center management.

In spite of the fact that Parallels Business Automation - Standard operates the virtual-server farm, a *Data Center* should be understood in common sense, i.e., as a centralized storage facility to retain database information related to decision-making processes.

In general, Parallels Business Automation - Standard Data Center activity includes the following:

- DNS and IP addresses management.
- Servers management.
- Service level management.

In this chapter:

Supervising Service Level

The Service Level Manager provides a mechanism for checking the current resource utilization throughout Containers and Hardware Nodes. Using the **Service Director** > **Service Level Manager**, you can:

- View the both the current resources consumption and the resources usage history for every Container or every Hardware Node. Go to the **Service Director** - **Service Level Manager**. Select **Virtuozzo Container** or **Hardware Nodes**. For every Container or Hardware Node you an view the current resources usage (the **Current Values** tab) or resource usage history (**Statistics** tab). This feature is very useful if, for example your customer believes that some resource was under-delivered. In this case you can settle a customer's doubts by checking the total resource usage during a particular period and daily or hourly consumption for a given period of time.

- View traffic usage statistics for third-party dedicated servers.

- Set the thresholds in percents for disk space and traffic that when exceeded are reported into the list of Containers that are approaching limits. To this effect, go to the **Service Level Manager** - **Setup**. To view the list of Containers that have exceeded the threshold percentage of promised disk space and traffic, select **Container approaching limit**.

Note: When traffic or disk space usage for a Container approaches the limits set in the Service Level Manager, the corresponding event is registered by the Parallels Business Automation - Standard Event Manager (namely, *Traffic is nearly used up* and *Disk space is nearly used up*, to find these events, filter the list by the Subscription object type). Thus, you can attach an action to such events, for example, e-mail notification or SMS message to your staff member.

- Finally, you can configure traffic accounting by classes in the **Service Director** > **Service Level Manager** > **Traffic Classes**.

Viewing Log Files

During the normal course of work, it is often necessary to track all the actions performed within your Parallels Business Automation - Standard system. To view action logs, click **Action Log** on the left menu.

The Parallels Business Automation - Standard logs are stored on the Management Node in the `/var/log/hspc/hspc.log` file.

You can set the log level and log messages format in the **Configuration Director** > **Logging and Errors** > **Log Settings**.

Managing Hosting Plans

A hosting plan is a set of services you can sell. Depending on a hosting plan type, different types of services can be included in a plan.

When HSP creates hosting plans, they can make a hosting plan available for Resellers. In this case, Resellers can copy such hosting plans and set own prices. In addition, Resellers can create own hosting plans.

Hosting plans are managed under the **Billing Director** > **Product Manager** > **Hosting Plans**.

The list of hosting plans displays the following:

- **ID** - Numerical identifier, automatically assigned to a hosting plan in Parallels Business Automation - Standard database.
- **Title** - A hosting plan name used to refer to a plan in Parallels Business Automation - Standard. In HSPstore, hosting plans are referred by their titles.
- **Active** - Whether this plan is enabled for use (create subscriptions from Provider Control Center and/or sell.
- **Sell** - Green tick in this column indicates that services, based on this hosting plan can be sold by the Hosting Provider or by Resellers, red cross - that not.
- **Type** - a type of hosting services provided by a hosting plan.
- **Category** - Hosting Plan Categories are used to logically group hosting plans.
- **Trial** - whether a free trial subscription period is available for a hosting plan or not. Green tick means that a trial period is available, red cross - that not.
- **Subscriptions**. The total number of active subscriptions based on a hosting plan.

In This Chapter

Hosting Plan Types

The set of hosting plan types is read-only in respect to its composition, however Provider can rename the hosting types in a way that, for example, seems more descriptive. The names of hosting plan types are shown on the first step of hosing plan creation wizard.

To rename or view the hosting plan types available, go to the **Billing Director** > **Product Manager** > **Hosting Plans** > **Hosting Plan Types** tab. Then select the type and edit its name.

You can also make use of the multilingual conversion option to switch the language of the hosting plan type into the one you need.

Parallels Business Automation - Standard supports multi-lingual customization for a wide range of fields (website texts, hosting plan names and description, notification templates). You can enter and save texts in any of the languages installed over Parallels Business Automation - Standard. To select the language, click one of the buttons with language names tiled below the field you want to enter the text and enter the text in the language selected. For example, click **English** - and edit the English text, then click **German** (the English content will be saved and replaced with the German content in the same field) and edit the German text, and so on, for all languages you want to use in your store.

To restore the default hosting plan type name, click the **Reset to Default** button.

Note: It is possible to create the trial-only hosting plans (for the types of hosting the trial period is allowed for) and so-called one-time-fee hosting plans, which allow selling services or other goods without subscription creation and thus, without renewals.

Selling Licenses

Parallels Business Automation - Standard allows selling Parallels Plesk Control Panel, Parallels Plesk Sitebuilder, Parallels Virtuozzo Container, and some other types of licenses as a part of services included in the following types of hosting plans:

- Dedicated node.

- Dedicated Plesk server.

- Virtuozzo Container (in case a hosting plan includes the Plesk Server Administrator application). A Virtuozzo Container behaves like a Plesk server, but is not registered in Parallels Business Automation - Standard as a Plesk node.

- Plesk Server in Virtuozzo Container (Plesk Virtual Node). A Virtuozzo Container behaves like a Plesk server, and is registered in Parallels Business Automation - Standard as a Plesk node.

- Miscellaneous.

The special plug-in for licenses issuing (Parallels Key Administrator) that can be installed similarly to the other plug-ins makes it possible to request licenses on a customer order. The plug-in can be configured both for working in online and offline mode.

The requisites and keys necessary for Parallels Key Administrator (Parallels KA) to work online are issued by Parallels. Depending on a HSP needs, Parallels can issue a special key for a particular license class or for a number of license classes.

Tools for license services management are grouped under the Service Director > License Manager. The list of licenses classes available for the Parallels partner if shown under the License Manager > Licenses.

Selecting License Classes to Provide

A 'License Class' is a particular version of a particular licensed product. For example, Plesk 7.5 Reloaded (TM). Licenses are issued in the frame of a license class, starting from a single license and up to a license pack that includes several identical licenses.

After all the data necessary for new Parallels Key Administrator (KA) plug-in configuration is saved, Parallels Business Automation - Standard starts executing a special task that fetches the list of license classes allowed for this particular plug-in. Only after the list of license classes is fetched a KA plug-in is considered as configured and gets a 'Configured' status, i.e., ready for use. The list of license classes appears under the License Classes and Properties tab within a plug-in configuration settings.

The set of license classes is read-only in respect to the number of license classes, their composition and each class properties.

For offline Parallels Key Administrator (KA) plug-in configurations the set of license classes available is taken from the Parallels Business Automation - Standard database and in this case, the license classes list normally includes all license classes available at Parallels KA. For offline KA plug-ins you must manually select the license classes to sell, in accordance with the client agreement you have completed with Parallels KA.

For offline KA plug-in configurations the set of license classes available can be changed (for example, new classes can be added to the list) by installing a simple upgrade. The upgrade is developed and conducted by Parallels.

For online KA plug-in configurations the set of license classes available is fetched online after a plug-in is configured from the KA server and in this case, the set of license classes will automatically correspond to your KA client agreement, because it is checked by your client login and password. Online KA plug-in configuration allows updating the list of license classes online. In this case, if Parallels Key Administrator has started supporting new license classes, they appear in the list, and if some license classes support has been discontinued, such license classes are removed from the list. Existing configuration of license classes availability stays without changes. To update the list of license classes online, use the Reconfigure button located below the list of license classes.

You can enable a license class to make it possible to include the corresponding licenses in hosting plans and sell them. Please note that only enabled license classes can be included in hosting plans.

Each license class can include a variety of license types (for example, different number of domains for Plesk licenses), additional features, and additional keys. Additional keys are complementary licenses that can be sold together with license that belongs to a license class. A license class configuration with all its features and additional keys (if any) is visible from hosting plan settings, under the Licenses tab or at the 'Licenses' step in a hosting plan creation wizard.

> *To make licenses of a particular class available for sale:*

1. Select Service Director > License Manager > Plug-Ins. The list of all configured KA plug-ins appears on the screen.
2. Click on the name of the KA plug-in you would like to configure license classes for.

3. As the KA plug-in settings appear on the screen, click on the License Classes and Properties
    tab.

    Note: If you have selected a KA plug-in configured to get licenses online, the list of license
    classes can be updated online. To this effect, click the Reconfigure button located at the
    bottom of the list. Offline KA plug-ins do not have such a button.

4. Scroll the list of license classes that appears on the screen up to the end and click the Edit
    button.

5. To allow a license class for selling, check the box next to a license class name. To disable a
    license class for hosting plans, clear the box next to a license class name.

6. To save changes, click the Update button.

Adding Custom Services to a Hosting Plan

Hosting Plans *custom attributes* in Parallels Business Automation - Standard are additional services that can be provided in the frame of a hosting plan or special attributes used to specify a dedicated server configuration. A custom attribute consists of one option or a group of options that represent services or other parameters offered by a custom attribute.

Thus, a custom attribute can include some support services or allow selecting a particular disk size, RAM, or operating system for a dedicated server.

In addition, you can create Hosting Plans of a special Miscellaneous type designated for selling custom services (defined by custom attributes) only.

You can define one of the two ways a customer selects a custom attribute options:

Selectable. When subscribing to a Hosting Plan a customer can select one or more (or all) options available.

Exclusive. *Useful for dedicated server hosting plans.* When subscribing to a Hosting Plan a customer can select only one option from set available for a custom attribute. This selection type is convenient for custom attributes that define a dedicated server configuration. For example, you can create several attributes, each *defining a particular property of a dedicated server configuration* (hardware or software): Hard Disk, RAM, Processor, Operating System, etc.

The order of options as it is shown on the Parallels Business Automation - Standard screen can be used for resources upgrade and downgrade control:

Parallels Business Automation - Standard considers an attribute options listing order as resource-demanding sorting. The first option in list - less valuable, the last one - the most valuable. If subscriber changes an option into a less valuable, this will be considered as resource downgrade Order. You can allow or forbid resources downgrade for a subscriber.

Custom Attributes grouping:

To facilitate custom attributes management, you can group them into categories (for example, such categories as Hardware, Software, Miscellaneous). To create categories for custom attributes, go to the Billing Director > Product Manager > Custom Attributes and select the Custom Attributes Categories tab.

How to attach a custom attribute to a hosting plan:

1. Go to the Billing Director > Product Manager > Custom Attributes. Select a custom attribute, click the Edit button on an attribute screen and make the corresponding group available for the type of hosting which the hosting plan you want to attach an attribute belongs to.

2. Configure the hosting plans listing for the corresponding hosting plan type in the Commerce Director > Store Manager > Configure Store > Plan Listing tab. Make sure that the desired custom attribute is selected to be shown within Hosting Plans description.

3. From the set of Hosting Plan properties, select the **Custom Attributes** tab and attach the desired custom attribute to a Hosting Plan. In this case, you can also set the fee for this particular Hosting Plan. Since the process is quite similar to the last-but-one step of hosting plan creation wizard, please for more details refer to the beginning of this chapter.

Note: All Hosting Plan custom attributes created by you will be available for all of your Resellers. They can select them and customize. As soon as Reseller had customized an attribute, it becomes an internal attribute used by this Reseller only (as if a Reseller gets the own copy of an attribute), and such customization does not affect configuration of your list of attributes. Summarizing, Resellers can use your custom attributes as a kind of templates, but this does not restrict the ability for a Reseller to create new custom attributes, which initially are at their disposal.

Promoting Hosting Plans

Promotions are discount periods for sale of one or a several Hosting Plans which are periodically announced by Hosting Service Provider or Reseller. Each Promotion has a sales period (between Start date and End date) during which a Hosting Plan being promoted will include a certain discount valid during a certain Discount Period.

You can create promotions that include:

- Just a discount.
- Both a discount and waiving domain registration fee.

It is possible to create both the public promotions and promotions activated by a coupon code. Coupon codes allow your customers to gain additional discount at your HSPstore. A customer will be asked for a coupon code on the order review page at your HSPstore. You can create a coded promotion or add a code to an existing public promotion. Similarly, you can remove a code from the coded promotion to make it public.

In Parallels Business Automation - Standard promotions are being applied not per hosting plan, but from a promotion side, i.e., the list of hosting plans a promotion is applied to is the part of promotion properties. To apply a promotion to a Hosting Plan, go to the **Billing Director** > **Discount Manager** > **Promotions**. Create a promotion or select the existing one. Add hosting plans to the list of promoted plans.

Any hosting plan can have one public promotion and unlimited number of coupon-code promotions applied at the same time.

Allowing or Disallowing Upgrades to a Hosting Plan

Your customers can upgrade their current Hosting Plans to another ones using the Control Panel Upgrade Center. When a customer selects to change the current Hosting Plan, the list of Hosting Plans available is being displayed and he (or she) can select one.

➢ *To disallow upgrades to a Hosting Plan:*

1. Open the **Business Director** submenu on the Navigation tree and select the **Billing Manager**. The Billing Manager dashboard appears on the screen.

2. Click on the **Hosting Plans** link at the Billing Manager dashboard. The list of all Hosting Plans appears on the screen.

3. Select the needed Hosting Plan by clicking on its ID. The Hosting Plan **General Settings** appear on the screen.

4. Click the **Edit** button. The screen reloads with Hosting Plan **General Settings** for editing.

5. Mark the **Do not allow upgrade to this plan from Control Panel** checkbox to disallow customers to upgrade for this Hosting Plan. In this case, this Hosting Plan will not be shown for your customers in the Control Panel Upgrade Center. The customers will be able to only buy this Hosting Plan in your online store.

6. Click the **Save** button.

Calculations for the Hosting Plan Change

If your customer upgrades his (or her) Hosting Plan to another one (or to the same one, but to the longer subscription period) then the following is taken into account:

▪ The period of time a customer have used the old Hosting Plan. For example, if a customer had subscribed for one month and had used a Hosting Plan during 5 days, then the amount for the unused subscription period will be refunded at the pro-rated price.

▪ The new Hosting Plan billing rates and whether the setup fee is charged or not. The new Order is being created, and (depending the setup fee settings) this Order includes the subscription fee for the new Hosting Plan and may either include the full setup fee for the new Hosting Plan or (if the new Hosting Plan setup fee is higher) the difference between the new Plan and the old Plan setup fees, or may not include the setup fee at all.

Summarizing, if a customer upgrades his (or her) Hosting Plan:

▪ A customer is refunded (the credit adjustment for unused subscription period is issued).

▪ The Order for the new Hosting Plan is created.

▪ After the Order is paid, the customer's subscription is changed: now it includes the new services and starts from the date of upgrade.

C H A P T E R   6

Setting Up Billing System

This chapter describes how to set up Parallels Business Automation - Standard Billing System: prices and discounts, credit terms, taxation, fraud protection, credit card processing and other billing features and tools.

In This Chapter

Making System-Wide Billing Settings

The Parallels Business Automation - Standard provides the powerful and flexible billing system that allows:

- System-wide currency in the **Configuration Director** > **Miscellaneous Settings** > **Regional Settings**.

- Setting the starting reference numbers and both prefixes and suffixes for financial document numbers (invoices, orders, payments, adjustments, and payment requests) in the **Billing Director** > **Settings** > **Documents numbering**. This setting allows adjusting the Parallels Business Automation - Standard accounting to suit specific accounting requirements.

- Adding subscription periods in the **Billing Director** > **Settings** > **Subscription Periods**.

- Setting the mode of credit adjustments automated generation and invoices handling under **Billing Director** > **Settings** > **Invoice Settings**.

- Creating different discount categories in the **Billing Director** > **Discount Manager**.

- Creating and using Different credit terms that can be assigned per account and define the order of settlements in the **Account Director** > **Subscription Manager**.

- Flexible taxation (on page 38) with ability to use the EU Tax Exemption Code in the **Billing Director** > **Taxation Manager**.

- Ability to automatically apply unused customer payments. This setting can be allowed as a system-wide one in the **Commerce Director** > **Payment Processing** > **General Configuration** and later enabled or disabled for each particular offline payment.

- Configuring and enabling the fraud screening filters in the **Commerce Director** > **Anti-Fraud Manager**.

- Configuring the recurring billing in the **Commerce Director - Payment Processing** and **Commerce Director** > **Online Payments** > **Setup** with the fine-grained transactions approval tools.

Configuring Taxation

You can set different tax rates that can be applied automatically to orders total amount depending on a customer tax zone. The tax zone can be bound to a buyer's country (state) of residence or to a customer's account. In addition, you can create the default tax zone to define the tax rate for any of the countries you did not created a special tax zone. Tax zones can include several tax rates and it is possible to set the order of these tax rates application.

If taxation is enabled, you can configure the HSPstore to show prices taxed in accordance with a particular tax zone defined for HSP account. Or you can just show the net prices and the notification saying that the prices are taxed depending on the customer's individual Tax Zone.
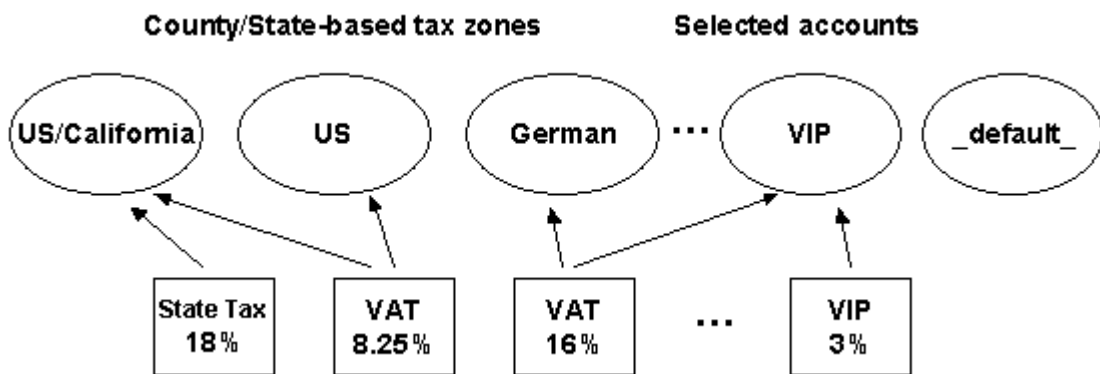
Figure 1: Configuring taxation.

It is also possible to use tax exemption for foreign customers, i.e., customers that specified in their account profile a country of residence other than your HPS company resides. To use tax exemption, it is necessary to enter the HSP VAT Number into the **Billing Director** > **Taxation Manager** > **Setup** form and enable tax exemption.

When tax exemption is enabled, the foreign customers can enter their own VAT Number into a customer account profile either from the Control Panel or during account creation in your HSPstore. In addition, you can manually enter VAT Numbers for your customers (in **Account profile** > **Financial Info** tab).

Note: Tax exemption affects business accounts only. Personal accounts (with a single contact) are subject to the relevant taxation settings.

To make taxation more secure and strict, you can set the orders processing in such a way that no transactions will be allowed until you manually verify and approve either both the customer's address (i.e., the tax zone) and VAT Number or one of them.

Note: For EU customers the VAT Numbers are always checked in respect to the correspondence of the VAT Number entered by a customer to the country of residence specified in a customer account profile. You can set the automated approval mode VAT Number for EU customers in case the check had shown that the code does correspond to the customer country of residence.

You can configure taxation in the **Billing Director** > **Taxation Manager**.

Configuring Fraud Protection

Parallels Business Automation - Standard provides a flexible rules-based anti-fraud system that allows configuring a wide range of checks and approvals. It is possible to configure specific checks for any stage of order placing, starting from a customer registration and up to an order confirmation.

Anti-fraud checks are configured by composing various sets of rules under pre-defined anti-fraud filters provided (for account registration, order placing, payment, etc.). Each rule uses one anti-fraud plug-in with pre-defined check result and defines an action or amount of fraud points to be scored in case an actual check result matches a result defined in a rule. The threshold fraud score is assigned to every anti-fraud filter and if the overall fraud score produced by rules included in a fraud filter exceeds a filter threshold score, a given operation (account registration, transaction, etc.) is declined.

The anti-fraud plug-ins include IP, e-mail, phone, and other black lists, open proxy check, payment method token validation, and a set of built-in plug-ins like phone/country, IP country, IP city check, and USA Phone.

To configure anti-fraud plug-ins, go to the Commerce Director > Anti-Fraud Manager > Anti-Fraud Plug-ins.

To configure anti-fraud filters, go to the Commerce Director > Anti-Fraud Manager > Anti-Fraud Filters.

Adjusting Anti-Fraud Plug-ins General Settings

The settings that are common for each plug-in (behaviour on check errors and availability for resellers) are grouped under the General Configuration tab in a plug-in properties. A plug-in availability for resellers can be also adjusted by using the controls provided for the list of anti-fraud plug-ins.

The most of non-configurable plug-ins have only General Configuration tab under their properties. You can both define the availability for resellers and check errors processing mode for such plug-ins and use these plug-ins in anti-fraud filters. Some of non-configurable plug-ins, for example, Phone Country, have a second tab called Plug-In Configuration, but this tab provides only the read-only list of data (for Phone Country this is the country codes formats), without the ability to change or add samples.

Pricing and Discounts

This section contains information on how to manage prices and discount.

Use the links below for reference on the following:

- How the total price for services is calculated.
- How to set credit terms for your customers (on page 41).

Setting Prices

Prices for the services you sell in your online store can mostly be set using the **Business Director** - **Billing Manager**. The only thing to do outside the Billing Manager is setting the original retail prices for domain registration (you can do this in the **Service Director** - **Domain Manager**). Domain registration retail prices should be first updated dynamically via domain plug-ins and and after this, you can set your own retail price for each top-level domain. And in hosting plans you can set the surcharge rate that is added to your own retail price.

Thus, after you have updated the domain registration prices, you can proceed with pricing:

- To create a Hosting Plan, go to the **Business Director** - **Billing Manager** - **Hosting Plans**. Setup and recurring fees for Container hosting plans are being set per plan individually (the **Billing Rates** tab in a hosting plan properties). And *resource usage rates* (for additional domain registration, IP address, disk space usage, etc) can be set as a system-wide values in the **Billing Manager** - **Settings** - **Default Prices** and adjusted per hosting plan (the **Billable Resources** tab in a hosting plan properties).

- You can add a custom sellable services (custom attributes to a hosting plan) in the **Billing Manager** - **Settings** - **Custom Attributes**. Custom attributes can be attached to hosting plans during creation or later.

The Parallels Business Automation - Standard provides the discounts management tools:

- Discounts that can be attached to accounts:
  - Discount categories. This is just the discount percent attached to a customer account.

- Promotions. The discount periods for sale of one or a several hosting plans. Each promotion has a sales period during which a hosting plan being promoted will include a certain discount valid during a certain discount period. To promote hosting plans, you can create different promotions in the **Billing Manager** - **Promotions** and define per promotion the list of hosting plan to be promoted. You can create both public promotions and promotions activated by a coupon code. If a coded promotion is applied to a hosting plan, a customer will be asked for a coupon code on the order review page at your online store.

Finally, if taxation is enabled, the total price for services you offer in your online store is calculated in accordance with the corresponding tax zone and if you use the EU tax exemption, with the personal customer's tax exemption code. For more details on taxation, see earlier in this guide (on page 38).

Setting Credit Terms

Credit terms regulate financial relations of Provider and customer or reseller in case a reseller purchases something for their own:

- Order validity period - the maximal period of time an open Order can stay in Parallels Business Automation - Standard. The order validity period starts when an initial order or a renewal order is created. After validity date an Order becomes cancelled automatically. It is not possible to re-open a cancelled order.

- Invoice due period - the period of time during which an Invoice should be paid. The due period starts right after an invoice is generated. If an invoice is still not paid by the end of due period, such invoice becomes overdue and the overdue period for an invoice starts.

- Invoice overdue period - the period that starts after an Invoice due period is over. An Invoice is considered as overdue, however, the charged services are still provided during overdue period. After the overdue period is over, an unpaid invoice becomes cut-off and disabled for payment. However, the cut-off invoices can be reopened and paid.

- Charge rate - the penalty amount (percents of Invoice sum). Applied on yearly basis. Penalty is calculated during an invoice overdue period. For example, if charge rate is set to 365%, then daily charge equals to 1% of Invoice total sum per day. Charge rate is used to calculate the Overdue invoices amount.

- Minimal charge - minimal penalty amount, regardless actual penalty calculated in accordance with charge rate. Minimal charge is used for Overdue invoices amount calculation in case the charge rate amount is too small.

- Credit Limit - the maximal amount an account can owe a vendor. While a credit limit is not overdrawn, a customer orders are completed automatically, before payment is applied. When a credit limit is overdrawn, ordered services are provided only after a corresponding order is paid. A special event is provided in Parallels Business Automation - Standard when credit limit becomes overdrawn - event ID 23 'Account credit limit has been overdrawn'. Both customer and vendor receive notifications when such an event happens. The actions over subscription (put on hold, etc.) can be set specially in the Event Manager. Credit limit can be also set per customer account and in this case the credit limit set in credit terms will be overdrawn by the value set in account properties.

- Subscription expiration and termination terms:

  Grace period - the period that starts after a Subscription period expires. The grace period can be considered as additional chance for a debtor to renew his (or her) Subscription. During Grace period, a Provider already has the right to suspend services. After Grace period runs out, a Provider terminates Subscription. By default, the minimal Grace period is one day.

  Expiration period - the period of time an expired subscription is stored in the database. After an expiration period is over, a subscription is deleted, i.e., all the data related to a subscription is lost.

  Renewal order period - The period of time remaining before a subscription expiration date when a renewal order is generated. By default, the minimal duration of the order renewal period is one day.

  Subscription Termination Terms - the period of time a terminating subscription remains in the Account Director > Subscription Manager > Subscriptions > Termination Queue. It is possible to explicitly set the method of subscriptions termination for each of the available subscription periods and for trial subscriptions, three variants of termination method are available for each. To select the termination method, set the option button to one of the variants:

- **Terminate manually**. In this case a subscription will stay in the Termination Queue in the Terminating state until manual termination. This variant completely disables automated termination for a subscription.

- **Terminate automatically in a period**. This option allows specifying a particular period of time in days, months, or years during which a terminating subscription will stay in the Termination Queue. When this period is over, a subscription is terminated automatically. After the option button is set to this variant, select a termination period units (days, months, or years) from the relevant drop-down menu and then enter a period duration into the field next to the drop-down.

- **Terminate immediately**. This option allows terminating a subscription automatically, right after a subscription termination is requested. In this case, a subscription is even not placed into the Termination Queue.

Note: Please pay attention to selecting the default credit terms. This credit terms will be used for all accounts created by your customers during registration in your online store.

To add credit terms, go to the Account Director > Subscription Manager > Credit Terms.

Configuring Credit Card Payment Plug-ins

Parallels Business Automation - Standard offers a wide range of built-in modules (plug-ins) that provide an ability for you to accept online payments at your online store and process them with different online payment gateways. You just need to set up your Merchant Account at a payment gateway and then enter your Merchant data into the corresponding plug-in configuration form in Parallels Business Automation - Standard. The plug-ins set includes both plug-ins to real payment systems and the Dummy Plug-in (for testing purposes).

The following transaction types are implemented in Parallels Business Automation - Standard:

- *Sale* - a single-step transaction without pre-authorization. Money are just withdrawn from a card.
- *Credit* - refund after funds have been settled, i.e. a transaction data have been passed from a payment gateway to an acquiring bank.
- *Preauth* - a purchase amount is reserved at a card and authorization is needed to withdraw money and finish a payment.
- *PreauthReversal*' - a transaction is cancelled on the 'Preauth' stage, i.e., pre-authorized funds are released.
- *Capture* - the reserved amount was withdrawn after authorization.
- *Capture Reversal*' - a transaction was cancelled on the 'Capture' stage, but before funds are settled.

What Payment Plug-Ins are Available

Payment plug-ins are shipped as RPM modules independent from Parallels Business Automation - Standard functionality.

The full list of payment plug-ins shipped with Parallels Business Automation - Standard is available at Parallels official website http://www.parallels.com/en/products/hspcomplete/templates/payment/.

How to Configure a Payment Plug-In

After installation, a plug-in becomes available in Parallels Business Automation - Standard as a selectable type for a new payment plug-in configuration. To add a payment plug-in based on one of a standard configurations, it is enough to go to Commerce Director, proceed to Online Payments > Payment Plug-ins, click New Plug-In, enter a new plug-in configuration name and select a configuration type. After this, a plug-in configuration form appears on the screen. The only thing to do after this - fill the form and save the configuration. The number of plug-ins that can be added on the basis of the same standard configuration is not limited.

Activating Payment Plug-Ins and Making Them Available for Resellers

To use the configured payment plug-ins you should activate them for your store. In addition, it is possible to flexibly set payment plug-ins availability for Resellers: after a Provider allows a plug-in usage for a Reseller, this Reseller can register their own Merchant account and use a plug-in for their own e-commerce business.

In respect to payment plug-ins availability for resellers, each plug-in can be disabled or enabled globally (for all resellers) or a plug-in availability can be set as undefined and then a plug-in availability can be set in reseller account properties, under the Payment Plugins tab.

The list of payment plug-ins displays the following:

- **Name**. The title a Plug-In is referred to in Parallels Business Automation - Standard (typically, the plug-in name follows the name of a payment gateway or payment system).

- **Active**. If a plug-in is activated, then this payment system is available at your online store. You can activate and use any and up to all payment Plug-ins at the same time. Active (currently enabled) Plug-in can be selected by clicking on Plug-in title and then, after the Plug-in configuration appears, on the Mark as Active button. Green tick in this column indicates that a payment system plug-in is currently active.

Security With CVV and AVS

The Parallels Business Automation - Standard credit card payment Plug-ins provide the following security features:

- Card Verification Value code (CVV2) verification. CVV code is a three- or four-digit code which provides a cryptographic check of the information embossed on the card. The CVV code is not part of the card number itself. The CVV code helps ascertain that the customer placing the order actually possesses the credit/debit card and that the card account is legitimate. Each credit card company has its own name for the CVV code, but it works similarly for all popular card types. (VISA refers to the code as CVV2, MasterCard calls it CVC2, and American Express calls it CID);

- Address Verification Service (AVS). As part of every transaction processed, the customer's address and zip code (Billing Address) are sent to your processing network for AVS verification. The processing network returns an AVS "code" indicating whether the customer-provided information matches the information on file for the customer at their processing bank;

- Disabling automatic funds capture. This allows performing some additional credit card verification procedures prior to funds capture. In this case, pre-authorizing of a transaction will be performed and you will have to post-authorize the transaction manually from the payment gateway interface. This might be useful to avoid chargebacks if you have too much fraud on your site.

Note: For most of payment plug-ins available in Parallels Business Automation - Standard you can configure the list of credit card types to accept both in HSPstore and Control Panel. This list can be configured per payment plug-in. If a payment plug-in does not support this feature then such payment plug-in will accept all types of credit cards.

Configuring Bank Transfer Payment Plug-ins

Bank transfer payment plug-ins implemented in Parallels Business Automation - Standard allow direct debiting of bank accounts starting from corresponding orders and invoices issuing, and finally, generating batch files to be submitted to a bank and transactions approval.

Bank transfer payment plug-ins are shipped as RPM modules independent from Parallels Business Automation - Standard functionality.

The following bank transfer payment plug-ins are shipped with Parallels Business Automation - Standard:

- Dummy

- DTAUS

- Norma19

- Clieop3

After installation, a plug-in becomes available in Parallels Business Automation - Standard as a selectable type for a new payment plug-in configuration. To add a payment plug-in based on one of a standard configurations, it is enough to go to **Commerce Director**, proceed to **Bank Transfers** > **Payment Plug-ins**, click **New Plug-in**, enter a new plug-in configuration name and select a configuration type. After this, a plug-in configuration form appears on the screen. The only thing to do after this - fill the form and save the configuration. The number of plug-ins that can be added on the basis of the same standard configuration is not limited.

To generate a batch file, you should go to **Commerce Director** > **Bank Transfers** > **Documents**, select documents prepared for a particular bank (it is clearly shown how documents were created for which bank), then adjust the selection (exclude some documents from a batch) and generate a batch file. When a batch file is generated, it is being automatically saved on your local computer. Then you can manually submit a batch file to a bank.

After the batch file is approved (bank transfer performed), you should manually process documents included in a batch to start the purchased services provisioning.

Managing Online Store and Website

Store and website is presented as a set of *.php files that define both the website pages and store steps logic and some other related files and modules. The HTML templates (*.inc files) are provided for each store page. This makes website re-branding and customization much easier. Default files are always stay untouched since customized files are put into a special directory inside store folder. Customized files simply override the default ones. To get back to default configuration, you should move customized files from a special custom directory into some other location.

Important: Basic migration to a new PHP based store is performed during upgrade (such as keeping header/footer and pages the same), however site/store is to be carefully checked and corrected after upgrade is installed.

Note: By default, the full access to store configuration is available for Parallels Business Automation - Standard installation owner, i.e., for provider only. Resellers can use simple tools for store customization provided in web interface under the Commerce Director > Store Manager (open/close store, upload some files like logo, header/footer, etc.). Files uploaded using the File Manager provided under the Store Manager are placed into a special directory for custom files (see directory structure description below) and override the existing default settings for reseller store. However, provider can allow a reseller to have an own store installation, on a separate server, for example. This issue is up to provider policy and provider/reseller relations. Store installation at a separate server is described in Parallels Business Automation - Standard SDK.

The following store simple settings are made via web interface in Commerce Director > Store Manager:

- > Configure Store (on page 52):
    - Open or close store. (on page 52)
    - Adjust a store URL (on page 52).
    - Adjust hosting plans listing
    - Enter referrer question.
- > File Manager (on page 47):
    - Upload a default stylesheet file.
    - Upload website header and footer.
    - Upload site logotype.
    - Add offline payments conditions description.

User Agreement can be entered under the **Account Director** > **Customer Manager** > **Terms and Conditions**.

In this chapter:

Customizing Store Using File Manager

The File Manager integrated into the Store Manager is a quick-start tool for store customization. It allows performing a basic and simple customization of the store and go live as soon as possible.

Using the File Manager, provider can quickly upload some basic templates and images, and resellers can use the store File Manager as a place to start and a default tool to perform their own customization.

File Manager allows customizing the basic Store files and uploading a static content of vendor's website:

- **In the store root/ directory:**
  - Upload a default stylesheet file
  - Upload a favicon image - your marketing icon in your customers' browser address bars, favorites and tabs.
- **In the store templates/ directory:**
  - Upload website header and footer
  - Edit or upload an HTML website header
  - Add offline payment conditions description. To add or adjust the offline payments description, edit this file and save the changes.
  - Customize website pages preloader (a special popup that appears while site pages are being loaded).
- **In the store images/ directory:**
  - Upload site logotype `logo.gif`.
  - Upload the icon used by site pages preloader `loading.gif`.

In addition, it is possible to use SSI.

Customized default files are shown on Store pages and you can preview the Store by entering your server name (vendor management node hostname or reseller hiding hostname) into your browser.

To preview the site content, enter into your browser your server name with the following path appended:

> `/hspc/`*path_to_file*

where path_to_file must be replaced with an actual path to a file starting from customization root. For example, if you have created a custom `/site` directory and uploaded a `content.html` file, then to preview this content you must enter into your browser:

```
http://your_server_name/hspc/site/content.html
```

where `your_server_name` must be replaced with actual hostname of your Parallels Business Automation - Standard server.

You can add a standard store templates to your site pages using SSI.

For example, you can include the standard header and footer into your site page (index.html or index.shtml - you can use both extensions):

```
<html>
<head>
<title>My Index Page</title>
</head>
<body>
<!--#include virtual="templates/header.inc" -->
My Page Content
<!--#include virtual="templates/footer.inc" -->
</body>
</html>
```

Important notes regarding SSI: to preview SSI config please explicitly enter the page URL in your browser, do not use the link shown at the File Manager screen, because Apache does not actually process this content. Please remember that you cannot include customizable files that have not been customized yet, i.e., the files that are shown in *italic* font at the File Manager screen. To make it possible for a file to be included, you must edit it so it will be saved in your personal customization directory. Running executable modules using SSI directives is not possible.

By default, the File Manager screen shows the names of Store files and directories that can be customized. These names are not a real links, but only hints showing the Store files and directories names. Such a 'symbolic' links are shown in *italic* font. The italic font a file or directory is shown means that a file or directory have not been customized yet, so there is no real files in the customization directory `/var/opt/hspc-frontend/vendor/`*accountID*.

Note: The set of Store files available for customization is defined by vendor. Please refer to the Parallels Business Automation - Standard SDK (HTML or PDF document) for details.

To copy a default file into your customization directory, check the box next to a file name (directories cannot be edited) and click Edit. To save a default file in your customization directory, you do not need to change a file content. Just click OK and a file will be considered as customized and saved.

As soon as you customize the default files or edit them, the custom files or copies of default files are saved in the personal directory `/var/opt/hspc-frontend/vendor/`*accountID*. Customized files are shown in normal font.

Default files are not affected by customization performed using the File Manager. You can restore defaults simply by deleting custom files or directories. As the defaults are restored, files' and directories' names become shown in italic font again.

	Name ▲	Description	Size	Date
☐	📁 images			26-Jun-2006, 19:51
☐	📁 *templates*			
☐	📄 *stylesheet.css*	Stylesheet of PHP pages.	8.2 KB	23-Jun-2006, 14:39

📝 Edit 🔧 Properties 📋 Rename 📋 Copy 🔼 Move 📦 Pack 📋 Unpack ✖ Delete

Items 1 - 3 of 3

Items 1 - 3 of 3

Figure 2: File Manager. Images are customized. Other files are default.

Since the original default files cannot be renamed or customized, a default file with its original name (shown in italic font) appears each time you rename it.
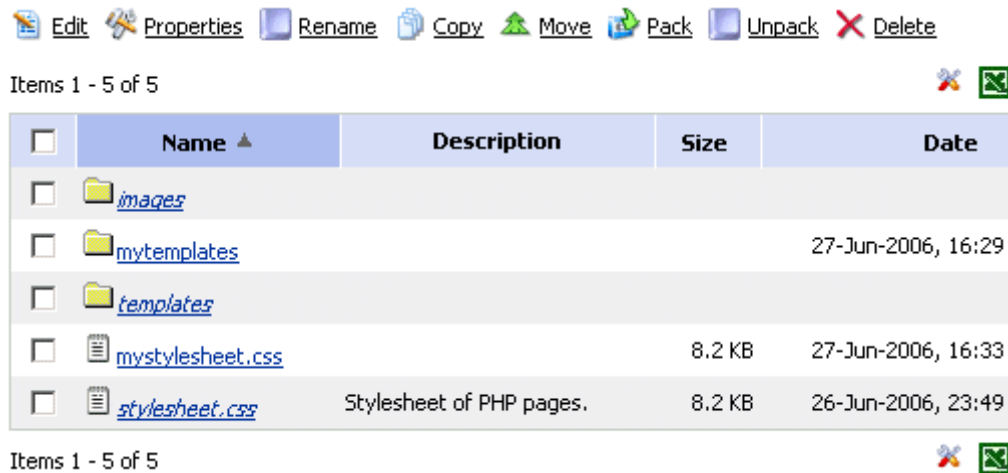
Figure 3: File Manager. Default file and directory have been renamed.

Files and directories names are built in the Store code and thus, it is critical for Store functionality that you follow the files and directories naming convention. As soon as you change the default name of customized file or directory, the File Manager detects that there is no customized file with correct name and immediately switches to the default file that always stays named correctly. At the screen it looks like a not customized default file or directory (name shown in italic font) has appeared, as this is shown on the screenshot above.

In respect to options and controls provided, the store File Manager is similar to an ordinary file manager, except for access permissions setup. Permissions are not needed here. User apache is set as files/directories owner by default and this ownership cannot be changed.

The list of files and directories displays the following:

- **Name**. The name of a file or directory.
- **Size**. A file size. For files without default location specified in customization.xml the Size and Date are not shown.
- **Description**. A file short description.
- **Date**. The date a file or directory has been modified the last time.

To open a specific directory click a directory name. The path at the top of the list shows the current location. To view a file contents, click on its name.

The buttons at the top of the files and directories list serve for the following actions:

- **Make Directory**. Add a new directory to your website under your current working directory;
- **Upload File**.Upload a file to your system;

➢ *To perform an action with a file or a directory:*

Check the box next to a file or a directory name and use controls:

- **Edit**. Edit a file contents.
- **Properties**. View file or directory size, file type, etc.

- **Rename**. Rename and/or move file or directory. Select a file or directory and click **Rename**. Enter the path and name of the new location of the file or directory, and click OK to save changes;

- **Copy**. Copy a file or a directory to another location. Select an object for copying then click **Copy**. You will be offered to select the destination and copying options.

- **Move**. Move a file or a directory to another location. Select an object for moving then click **Move**. You will be offered to select the destination and moving options.

- **Pack**. Pack a file or a directory. Select file(s) by selecting check-box to the left of file name. Then click **Pack**. You will be offered to select the packaging options.

- **Unpack**. Extract a file or a directory from an archive. Select file(s) then click **Unpack**. You will be offered to select the packaging options.

- **Delete**. Remove a file or directory.

➢ *To create a directory:*

1. Click the **Make Directory** button.

2. Fill the form that appears on the screen:

   a Type the directory name into the **Directory name** field.

   b Select the correct set of permissions using checkboxes. If you are not sure about permissions setup, then leave the default permissions.

3. Click the **OK** button.

➢ *To upload a file:*

1. Change the location to the directory you want to upload a file into.

2. Click the **Upload File** button.

3. Fill the form:

   a Enter the file name and location on your local computer in the **File to Upload** field. Or click the **Browse...** button to locate the file.

   b You can rename the file on uploading. Type the new file name in the **New file name** field.

Note: You can upload up to 15 files at once. To upload several files, select the number of files from the **Upload_files at once** drop-down menu and click the **Display** button. The required number of fields to enter file name(s) to be uploaded appears on the screen.

---

   c Specify the rules to be applied to the files to be uploaded in case other files are already exist in the destination directory. Set the option button to one of the following:

   - **Do not upload if a file with the same name exists in the destination directory** - to prevent overwriting existing files with a new ones in case exiting files have same names as new ones.

   - **Skip all the files that exist in the destination directory**. to prevent overwriting existing files with a new ones in case exiting files have same names as new ones.

   - **Overwrite all the files in the destination directory** - to overwrite files existing in destination directory in case these files have the same names as filed being uploaded.

4. Click the **OK** button to upload a file.

Configuring and Opening Store

The store **General Settings** screen displays the following:

- **Status**. Whether Provider store is
  - 🟢 **Open** (available for customers over the Internet) or
  - 🔴 **Closed** (not available over the Internet).
- **Allow offline payment in store and CP**. Whether offline payments are allowed in HSPstore and Control Panel:
  - ✖ - Not allowed
  - ✔ - Allowed
- **Site Settings**. The Store URL (the location where Store is currently installed).

➢ *To adjust Store General Settings:*

1. Click the **Edit** button
2. To open the store, check the **Store is open** box. To close store, clear this box.
3. To allow offline payments in store and Control Panel, check the **Allow offline payment in store and CP** box. To disallow offline payments, clear this box.
4. Enter the store URL into the **Store URL** field.
5. To save the changes, click the **Save** button.

C H A P T E R   8

Managing Accounts

There are three basic types of accounts:

- *Provider account* - the only one account of Parallels Business Automation - Standard installation owner - provider. Provider account always has the numerical identifier (ID) of 1. Registered users associated with Provider account are called staff members. If a staff member has a Role assigned in the provider account (which gives a particular access permissions to Provider Control Center tools) this user can log in to the Provider Control Center. Provider account profile can be edited from Provider Control Center > top menu item (account name). Click on the account name and select the Company Profile tab or Contacts tab.

- *Reseller accounts* - an accounts for provider clients that re-sell provider services. Registered users that are associated with reseller account and have a Role assigned in a reseller account are called reseller staff members and can log in to the Reseller Control Center with access permissions defined by a Role assigned. Reseller Accounts are managed under Account Director > Reseller Manager > Resellers.

- *Customer Accounts* - an accounts for provider or Reseller customers. Registered users that are associated with customer accounts and have Role assigned in a customer account can log in to the Control Panel. Customer accounts are managed using Account Director > Customer Manager > Customers. Customer accounts can be of the two types:

  - Personal Accounts are created for personal customers. Such Accounts hold customer personal info, billing settings, and contacts.

  - Business Accounts are created for companies. Such Accounts hold special contact information (special Administrative, Billing, and Technical contacts) in addition to all data included in personal Accounts.

Users are registered using the **Configuration Director** > **Security Manager**.

Roles for account users can be assigned in the **Configuration Director** > **Security Manager** > **Setup**.

Under the **Account Director** you can also manage customers' subscriptions (on page 86) and configure the built-in trouble ticket system (on page 125) or switch to one of the external helpdesks integrated with Parallels Business Automation - Standard.

Users

Users are registered persons. *Staff members* are users registered within the Provider or Reseller Account. A user can be assigned to only one account.

User Roles

Roles keep the set of pre-defined access permissions. Roles are assigned to users within Accounts.

Permissions

Permissions are assigned per Role, not per individual user.

In This Chapter

Selecting Regional Settings

To make regional settings, go to the **Configuration Director** > **Miscellaneous Settings** > **Regional Settings**.

The regional settings include:

- The language;
- The default time zone;
- The calendar settings (the first day of week);
- The system-wide currency.
- Selecting languages available for your customers to switch the interface.

Language

The **language** setting allows you to set the system-wide language of the Parallels Business Automation - Standard interface.

Default Time Zone

In respect to registration of the events that happen within the system, the Parallels Business Automation - Standard database is bound to GMT. This means that automatically-generated notifications and system messages (for example, about subscriptions expiration dates) may occur to be hardly understandable for the customers that reside in the other time zones.

Thus, the Parallels Business Automation - Standard provides an opportunity of setting different *time zones* for different Customers (or Resellers). This can be done during creation of a new Account or later. The special time zone can be set for each user associated with an Account. After this, all the time-related data (in Action Log, Event Manager, or automatically-generated notifications) will be bound to the User's time zone, without the need for him (or her) to recalculate time.

However, if most of your prospect customers will reside in the single time zone, it is quite reasonable to set default time zone for the newly registered persons.

First Day of Week

You can select the day a week starts. For example, this setting is used when setting the weekly time interval in the Billing Reports (on page 77) view.

Currency

You can set the system-wide currency (for all financial documents and Hosting Plan prices). Resellers can set the own currency and enter the cross rate between the Provider currency and Reseller currency. This feature is very useful for selling through international channels as well as having separate branches in different countries around the world.

Note: Parallels Business Automation - Standard is a single-currency system. In other words automatic currency recalculations are not available. If you change the system-wide currency, you will have the unified currency sign, fractional part format, etc., however you will need to recalculate all prices manually. For example, most of domain-registration Plug-Ins support US Dollar only as an accounting currency. Thus, in order to update domain-registration prices correctly the system-wide currency should be US Dollar by prices update, otherwise the new prices will not be used in Parallels Business Automation - Standard billing.

Available Languages

Check the boxes next to language names to allow your customers to switch the interface into these languages. The list of languages in this section is comprised of the languages shipped within separate language packs with Parallels Business Automation - Standard kit and installed during the Parallels Business Automation system configuration.

Creating Accounts

Customer accounts can be created both from the Control Center and by customers, from your online store. Reseller accounts can be created only manually, from the Control Center.

To create a new Customer Account, go to **Account Director** > **Customer Manager** and click the **New Account** button.Fill the form that appears.

The **New Account** Form includes the following sections:

General Info:

- Account type - select by setting the radio button to personal or business. In the case if you select business Account type, the Company name should be indicated;
- Status - select from drop-down menu the current status (Active or On Hold) of the Account being created. Active status means that full range of operations may be performed within Parallels Business Automation - Standard on behalf of this Account. On Hold status means that an Account is out of service. Active status is offered by default.

Customer Administrator:

Account cannot be created without registration at least one User associated with this Account. Since Customer Accounts provide only one Role, Customer Administrator name, e-mail address, and password should be entered. This e-mail and password should be used to log in Parallels Business Automation - Standard Control Panels on behalf of this Account.

Please, pay attention on the **Time Zone** menu. Since the Parallels Business Automation - Standard database is bound to GMT, Parallels Business Automation - Standard logs may occur to be hardly-understandable for persons those reside in the other time zone. Thus, you can select the needed time zone, so that the User being registered (in this case, Customer Administrator) may understand logs (and other system messages) without the need to recalculate time.

Billing Information:

- Discount category - a discount to be applied to Invoices generated for this Account.
- Credit Terms - settlement order for this Account: due period, credit limit, subscription expiration terms, etc. Credit terms are created under **Account Director** > **Subscription Manager**.
- Credit Limit - maximal debt allowed for this Account. Credit Limit is normally defined in the frame of Credit Terms. However, if needed you can define a special credit limit for this particular account. To this effect, clear the **Use value of Credit Limit defined in Credit Terms** box and enter the special credit limit value into the **Credit Limit** field.
- Billing Day - the day of month when a customer is charged.

Tax exemption

To get tax exemption, your customers can enter their own VAT Number either from the Control Panel or during account creation in your HSPstore. In addition, later you can manually enter the **VAT Number** for your customers (**Account profile** > **Financial Info** tab).

To make accounting more secure you can set the manual approval mode for VAT Number and address. Three statuses can be assigned to a customer address or VAT Number:

- *'Not Checked'* status is assigned by default to customer's address and VAT Number. In this case, if you have set taxation to secure mode, transaction is not allowed.
- *'Approved'* status allows transaction and further processing of customer's order.
- *'Rejected'* status forbids order processing.

Address and Phone:

Customer contacts to send Invoices and solve other problems connected with services provided.

Click the Next button to proceed. For business Customer Accounts, it will be offered to indicate special contacts for administrative, billing, and technical issues.

By default the Customer Administrator named on previous step is responsible for administrative issues. You can assign separate persons responsible for billing and technical issues. However, if you consider it reasonable to set one contact for all, check Same as administrative contact checkbox(es). Click the Save button to create new Account. The list of all Customer Accounts will be displayed.

Assigning a Tax Zone

You can set different tax rates (on page 38) that can be applied automatically to orders total depending on the customers' country of origin (buyer's tax zone) indicated in his (or her) Account profile.

In general, taxation in Parallels Business Automation - Standard is a system-wide setting that affects Provider (or Reseller) accounting in general. You can create several tax rates, then add several tax zones (each including the specific combination of tax rates). After this, taxes will be calculated in accordance with the buyer's country indicated in his (or her) account profile.

However, if needed, you can assign the individual tax zone to accounts. To this effect, open the account details and edit its General Settings.

Note: You can create the default Tax Zone to define the tax rate for any of the countries you did not created the special Tax Zone.

You can enter your own VAT Number (if you have such) and enable (or disable) the tax exemption depending on your needs.

Your customers can enter their own VAT Number either from the Control Panel or during account creation in your HSPstore. In addition, you can enter the VAT Number for your customers (Account profile -> Financial Info tab).

To make accounting more secure you can set the manual approval mode for VAT Number and address. Three statuses can be assigned to a customer address or VAT Number:

- "*Not Checked*" status is assigned by default to customer's address and VAT Number. In this case, if you have set taxation to secure mode, transaction is not allowed.
- "*Approved*" status allows transaction and further processing of customer's order.
- "*Rejected*" status forbids order processing.

Granting Discounts per Customer Account

Discounts in Parallels Business Automation - Standard are separate objects included in the Billing manager settings. A discount includes the percentage of discount given and the scope of fees this discount is applied to:

- Setup fees. This is the minimal sum to be paid when a customer subscribes for services, without respect to a subscription period selected.
- Subscription fees. This is the sum being paid for services provided during a subscription period.
- Application fees. This is the price for optional or additional Applications being installed in customer's Container.
- Resource overusage. In the case if a customer exceeds the resource-usage limits allowable for Container purchased (for example, disk space or traffic), the resource-overusage Invoice is being issued at the end of subscription period.
- Domain Registration. The price for a new domain registration.

Thus, first you create one or more discounts in the Billing Manager - Settings and then you can go to an account profile (Financial Info tab) and assign a discount.

The discounts that can be assigned to customers (and enterprise customers) accounts are called Discount Categories.

Adjusting Account Balance

To change an account balance, you can enter the credit or debit adjustments. To add an arbitrary payments, your customers and resellers can enter Payment Requests.

Adjustments are used for Accounts' balance adjustment. For example, Credit Adjustment is applied if a customer was overcharged (to increase the Account balance), and Debit Adjustment is applied if a customer ordered additional services (increase the billed sum and decrease Account balance).

Automated applying of credit adjustments can be set in the same way as for offline payments: when you add a credit adjustment, you can check the **Apply this payment automatically to future orders and invoices** box.

And when you add a debit adjustment, the list of payments and credit adjustments with unused positive balance is offered (if any), so you can select the document to pay a debit adjustment right away.

Note: Credit adjustments are not accounted in the collected cash report.

To add an adjustment, do one of the following:

- Go the the **Billing Director** > **Receivable** > **Documents** > **Adjustments** tab.
- Go to the **Account Director** > **Customer Manager** > **Customers**, select an account and then select the **Billing History** tab.

Viewing the Account Billing History

All the documents that affect the account balance (invoices, both debit and credit adjustments, payments) can be viewed in the account profile, under the **Billing History** tab.

C H A P T E R 9

Managing Receivables

This chapter advises how to handle customers orders, invoices issued for your customers, adjustments, and customers payments, - all documents that contribute in your hosting company balance.

In This Chapter

Understanding Parallels Business Automation - Standard Billing Workflow

The scheme of pre-pay for services provided is implemented within the Parallels Business Automation - Standard system. However, you can provide services on credit as well (create a subscription manually from Provider Control Center and set "Apply changes immediately" in the Commerce Director > Payment Processing).

➤ Initial Purchase

➤ Upgrade

Figure 4: HSPcomplete billing - basic workflow.

If a subscriber exceeds the quote of paid resources stated by Subscription, the Invoice for resource overusage is being automatically generated.

Viewing and Operating Receivables

Your hosting company balance is the sum of all your customers and resellers account balances. A customer or a reseller account balance is calculated as a total sum of all payments and credit adjustments with a total amount of Invoices, Orders, and Debit Adjustments deducted.

Positive account balance means that an account owner has a certain overpayment, so Provider owes services (or money) to a customer. Negative account balance means that a customer or a reseller owes money to Provider. Zero account balance means that neither Provider, nor a customer do not owe money to each other.

Your hosting company balance does not reflect your earnings. It just shows whether your customers owe money to you or you owe money to your customers. Your actual revenue is shown in Billing Reports (on page 76).

To view the total balance, select **Receivable** from the **Billing Director** submenu and then click **Balance** on the **Receivable** submenu.

The balance information is grouped under the three tabs:

- **Total Receivable** shows the following:
    - **Total balance**. The sum of all your customers and resellers account balances
    - **Accounts total balance**. The sum of all customer accounts balances.
    - **Reseller's total balance**. The sum of all reseller accounts balances
- **Balance per Account**. All customer accounts listing with balance shown for each account.
- **Balance per Reseller**. All reseller accounts listing with balance shown for each account.

When you are browsing an account profile, you can view balance under the **Financial Info** tab. You can adjust accounts balance by entering credit adjustments or credit invoices (increase) or debit adjustments (decrease).

To view receivables, go to the **Billing Director** - **Receivable** - **Documents**. For your convenience, documents are grouped into separate lists, by types:

- **Orders** - the documents that include information about Hosting Plans or additional services ordered by customers. Orders are generated automatically, either when a subscription renewal is needed (for an automated renewal the special settings can be configured for a subscription) or after a customer places an order in an online store or in the Control Panel Upgrade Center.
- **Invoices** - invoices are generated automatically after paying the corresponding Orders, or manually. Manual creation of invoices is possible in two cases:
    - When a Provider creates an **Abstract Invoice** that is not bound to any order, for example to charge a customer for some additional services.

- When a Provider creates a so-called **Credit Invoice** that allows increasing a customer account balance by refunding customer previous payments with explicit specification of services that were refunded or discounted. Credit invoices work in the same way as credit adjustments, but are accounted in billing reports and have the same numeration (IDs) as all the other invoices. Credit invoices balance is always a negative value since credit invoices are typically issued for refunds, though credit invoices increases accounts balance.

- **Payments** - off-line and online payments for hosting services. An Order can be paid by several payments;

- **Adjustments** - adjustments are used for Accounts' balance adjustment. For example, Credit Adjustment is applied if a customer was overcharged (to increase the Account balance), and Debit Adjustment is applied if a customer ordered additional services (increase the billed sum and decrease Account balance).

- **Payment Requests** - requests from customers that want to put some amount on their account balance, without respect to existence of any unpaid documents. Payment Requests allow customers to enter a credit card or a bank account payment that can be used in future. For a payment to be added, a Payment Request must be manually approved by Provider. Having been approved, a credit card payment request originates a new online payment and a bank account payment request originates an offline payment.

On each document details page you can download its PDF printable version by clicking on the **Download PDF** button.

Orders and Invoices can be paid both offline and online, both manually from the Provider Control Center and by a customer (by a credit card or a bank account) from the Control Panel.

The documents intended to be paid by credit cards or bank accounts call for specific processing and thus, they are not only enlisted in the list of all receivables, but also grouped separately, in the Commerce Director -Online Payments (on page 67) or Bank Transfers (on page 68) lists under the Commerce Director.

Managing Statements

A Statement reflects the current balance for particular Customer Account. A Statement is being generated once a month.

To view the list of all Statements, select Billing Director > Receivable > Documents > Statements.

To view a Statement details, click on its ID or Date.

Statement details include three tabs:

General Settings

Statement General Settings include the following information:

- Account name and Statement generation date;
- Start and End date. The start and end date of the accounting period the statement was generated (by default, the accounting period is one month);
- Beginning balance. Account balance by the start date;
- Current charges. The total sum billed during the statement period;
- Payments. Total paid during the statement period;
- Non-overdue charges. Unpaid charges that were not past due yet

To view the Statement Invoice in printed form, click the Show for Printing button. The Statement in printed form will be displayed in popup window.

Documents

The list of all financial documents used to generate this Statement. You can drill to documents' properties by clicking on their ID or type.

Notifications

Click the Send button to send Notification. Similarly to Invoice notifications, the fields of the Form displayed are filled automatically: e-mail address to send a Notification and Account name are taken from Parallels Business Automation - Standard database (Account properties), .the notification subject is filled by the Billing Manager. If needed, you can adjust it.

If all fields contain the correct information, click the Send button to confirm the address and send the Statement.

Processing Offline Payments and Changing Payment Method

Orders intended to be paid offline are collected in the **Billing Director** > **Receivable** > **Documents** > **Orders** list.

You can enter an offline payment from the **Billing Director** > **Receivable** > **Documents** > **Payments**. When you enter a payment, you will be automatically offered to apply this payment to the unpaid order (or invoice or debit adjustment, if such exist for a given account)

In some cases to fasten the Order payment process (or if you have an arrangement with the Account holder), you can select the payment method and pay an Order online or apply existing payments. To this effect select an order and click the **Details** tab. Then click the **Change Payment Method** button. The list of all payment methods available appears on the screen. You can pay by the credit card (use the existing one if any or enter a new one), a bank account or you can pay offline using both the new offline payment or credit adjustment or the existing ones.

Processing Documents Paid by Credit Cards

Parallels Business Automation - Standard provides the flexible tool for credit-card paid orders and invoices control and processing. All the orders intended to be paid by credit cards are grouped in the single repository under **Commerce Director** > **Online Payments** > **Documents**.

If a Subscription was created for some customer by HSP staff member from Provider Control Center, then an order will be placed in the **Billing Director** > **Receivable** > **Documents** list.

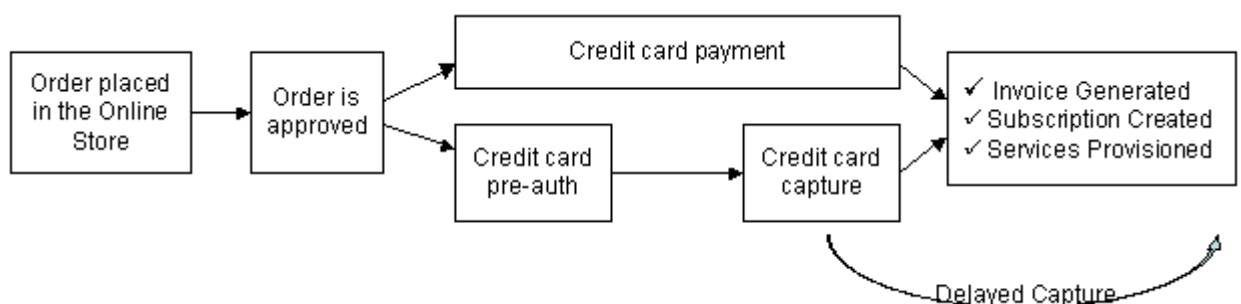*Figure 5: Credit cards processing.*

Processing Documents Paid by Bank Transfers

All receivables are grouped in a common list, including documents intended to be paid by bank transfers.

However, the special set of tools for bank transfers management is provided. For example, from the common list of receivables it is possible to view or pay (by changing a payment method) any of documents that are not included in a batch file yet. But in order to generate a batch file you should turn to the Batches module under the Billing Director > Bank Transfers.

Parallels Business Automation - Standard supports two bank account types:

- Norma 19
- DTAUS

To start accepting bank transfer payments, you need to configure bank transfer plug-ins (on page 45) properly.

The scheme of bank transfers processing implemented in Parallels Business Automation - Standard is the following:

1. Customer places an order in the online store or upgrades his (or her) subscription from the Control Panel or places a payment request to increase account balance or pays a resource overusage invoice and selects the bank account payment method.

2. The document is automatically placed into the Documents to be Batched list under the Commerce Director > Bank Transfers > Documents.

3. Parallels Business Automation - Standard automatically sorts documents by bank account types (Norma 19 or DTAUS), and you can compose a batch in one click. If an open batch exists, and some more documents intended to be paid by the same bank account type appear, Parallels Business Automation - Standard offers to append these documents to an existing batch. You can also manually add or remove documents to or from an open batch.

4. After a batch is composed, you can generate a batch file to be submitted to a bank to process a transfer. When a batch file is already submitted to a bank, you can start services provisioning before an official bank response is received. It is possible to set the automated services start after batch file is generated or manual approval, transaction decline penalty, and automated approval of pending transactions (Commerce Director > Bank Transfers >Setup).

5. When you receive the bank response, you can manually approve the documents or check the automatically processed documents and if needed, close invoices or payments in case a transaction was declined by a bank.

Refunding Documents Paid by Credit Cards

The processed orders (i.e., money captured and the subscription is created) can be refunded via the corresponding invoice. To refund the processed order (such orders have the "Complete" status), go to the Commerce Director > Online Payments Documents > Processed Documents list and select an order. As the order details appear, in the General Information part of the form click on the order ID and then click the Payment History tab. The corresponding invoice(s) appear. Click on the invoice ID and as the invoice details appear, click on the Refund button.

When you refund the completed invoice, you can select an action that will follow the refund. To select an action under the corresponding subscription, account, or credit card used to pay an invoice, set the option button to one of the variants available for each object:

- Action to be applied to subscription:
  - Leave unchanged
  - Put on hold
  - Terminate
- Action to be applied to account:
  - Leave unchanged
  - Put on hold
  - Delete
- Action to be applied to credit card:
  - Leave unchanged
  - Disable credit card

Recreating Orders With Updated Tax Rates

If you use taxation in Parallels Business Automation - Standard (on page 38) and by the moment when the customer's order is already calculated but not paid yet (i.e., the corresponding invoice was not generated), the taxes have been changed, it is possible to recalculate the order (i.e., recreate it). If recalculation is needed, you will be prompted when trying to approve or pay an order and the Recreate button will appear on the screen showing an order details.

Issuing Invoices Manually

In general invoices in Parallels Business Automation - Standard billing are generated automatically, when orders are being paid or in case a subscriber uses resources (e.g., traffic) over the limits stated in his (or her) subscription.

However, it is possible to issue invoices manually, for example, to bill a subscriber for some custom or additional services that cannot be provided in the frame of a subscription upgrade or if there is the need to adjust a customer account balance.

Generally, an invoice issued for a customer account decreases this account balance by an invoice total amount.

However, if it is necessary to increase an account balance, an invoice can be used as an accountable replacement of a credit adjustment. Such an invoice is called a *credit invoice*.

To add an arbitrary invoice or a credit invoice, open the Billing Director submenu and select Receivable. Click Documents on the Receivable submenu. As the lists of receivables appear on the screen, select the Invoices tab.

Reopening Cutoff Invoices

After the period of time during which an Invoice should be paid is over, and an invoice is still not paid, such an Invoice becomes overdue and penalty (overdue charge) is imposed; in this case an additional Overdue Invoice is issued, however, the charged services are provided during some time called the *overdue period*. When the overdue period is over, an invoice becomes *cutoff*.

Both the due and overdue periods are defined in the Credit Terms (on page 41) assigned to an Account.

The cutoff invoices are disabled for payment. However if needed, a cutoff invoice can be reopened and paid. To reopen a cutoff invoice, please go to the Billing Director > Receivable > Documents. Select an invoice you want to reopen and after an invoice details appear, click the Reopen Invoice button.

After an invoice is reopened, you can pay it at this described earlier in this guide (on page 67).

C H A P T E R 1 0

Managing Payables in Reseller Control Center

Payable section of the **Billing Director** in the Reseller Control Center is designed for management of Reseller's financial documents connected with settlements with HSP. As soon as Reseller receives payment for services provided, or orders HSPs services, an Invoice from HSP is automatically issued. The Invoice total sum is calculated in accordance with Reseller's partner discount (if any) assigned to a Reseller by HSP.

Payable section includes the same items as Receivable. Financial Documents management is similar to **Receivable**.

Within **Payable** screen you can view the list of all documents or select specific document type: orders, invoices, payments or adjustments. In addition, you can view the balance. Similarly to **Receivable**, three subsections of Payable section are available within the Navigation tree:

- Balance;
- Documents;
- Statements.

In This Chapter

Viewing Balance of Reseller Account Payable

All Reseller Account balance statistics in the Reseller Control Center are calculated automatically by the Billing Manager. Payable Balance reflects the current state of Reseller Account. In this case, the positive balance means that a certain overpayment exists in respect to Invoices issued by HSP. Negative balance means that total balance of HSP Invoices exceeds total sum of payments made by Reseller. Zero balance indicates that the total sum of your payments equals the total sum of HSP Invoices.

To view Reseller Account balance in the Reseller Control Center click on the **Balance** link on **Payable** submenu.

Payable-balance screen displays the following:

- **Total balance** - Reseller Account balance calculated on the basis of existing financial documents (Invoices, Adjustments, and Payments) generated by HSP and paid by Reseller. Positive value means that total sum of Reseller payments exceeds the total sum of Invoices and Debit Adjustments issued by HSP. Zero balance means that your payments sum equals to the total sum of Invoices and Debit Adjustments issued by HSP. Balance below zero means that the total sum of unpaid Invoices and/or Debit Adjustments issued by HSP exceeds the total sum of payments received from you by HSP.
- **Events**. Last and next Statement generation date (statements are generated one time per month). Statement is a detailed reference about account balance and operations during a billing period.

Increasing Reseller Account Balance

A reseller can increase their account balance by an arbitrary amount. In this case, the amount offered by default equals to the amount a reseller owes to Provider.

➢ *To increase a reseller account balance:*

1. Select **Billing Director** > **Payable** > **Balance**.
2. Click the **Make Payment** button.
3. On the opened screen select the payment method, enter the payment total.
4. Click the **Make Payment** button. At this moment the Payment Request is sent to Provider. After a Provider approves a Payment Request, the reseller payment will be accepted and resulted in a new online (if credit card payment method was used) or offline (if bank account payment method was used) payment counted for reseller. After this, such a payment can be applied to Provider invoices.

Managing Financial Documents Issued by HSP

The Documents section within the Billing Manager Payable allows Reseller to view his (or her) Orders and Payments, view Provider Adjustments, and pay Provider Invoices.

➢ *To view the list of all payables:*

1. Click Documents on the Payable submenu.

2. Similarly to receivables, two variants of working with documents are available: you can get the particular document by clicking on its name or ID in the general list, or you can work with particular category of documents (Orders, Invoices, Payments or Adjustments, - click appropriate tab).

The list of payables displays the following:

- ID and Type (click to drill to document properties);
- The date a document was issued by HSP;
- Total sum;
- Balance (unpaid part for Orders, Invoices, and Debit Adjustments, or unused part for Payments and Credit Adjustments);
- Added by. The name of a person who initiated creation of the given financial document. Let us consider an Invoice, for example. Say, a customer visited your online store, ordered services, and paid for these services. In this case, HSP automatically issues an appropriate Invoice for you (the sum paid by your Customer minus Reseller partner discount (if any). Then, in this column you will see the name of a customer (as it indicated in appropriate Customer Account profile).

Managing Orders

To view the list of all Orders placed by you, click on the same tab at the top menu. To drill to Order details, (or to pay or cancel an Order), click in its name or ID.

Order details are grouped into two sets (click on appropriate tab in the top menu to view):

- General information (Details) includes the following additional information: Order validity date, subscription name (for server subscriptions), comment (typically, short description of services ordered), the name of customer that placed an Order (click to see details), and itemization of services ordered. For open Orders, here you can pay it online or cancel it manually (i.e., before validity date).
- Payment History - An Invoice generated in accordance with the given Order. Here you pay this Invoice online (if needed).

Let us consider online payment. Hosting Service Provider selects and enables an actual online-payment system to be used for settlements between Reseller and HSP. Thus, after clicking the **Pay Online** button, you will be offered to proceed with online payment (the name of processing center, for example, VeriSign or WorldPay should be displayed as a button title). On the next step, you will be offered either to select a one of your credit cards saved at HSP side (if any) or to enter a new credit card. In the case if a payment was processed successfully, Confirmation screen will be displayed.

Paying HSP Invoices

As soon as Reseller obtains payments from his (or her) customers for services provided, HSP automatically issues appropriate Invoice (the sum paid by a Reseller's customer minus Reseller partner discount, if any).

In addition, there is one more case when HSP automatically issues Invoices with nonzero balance for a Reseller. It depends on the order of applying Subscription-changes set by HSP (apply changes immediately or only after payment received). If changes are being applied immediately, then if a Reseller orders a new Container or upgrades existing Subscription, the following actions are performed:

- Appropriate Order is being created;
- Services are provided immediately, on credit;
- In accordance with an Order, and Invoice is being automatically issued.

Invoice properties include three tabs:

- **Details**. The same info as showed in the general list, but you can drill to Account properties and Subscription details by clicking on their names. In addition the services ordered are itemized. To view the Invoice in printed form (for open Invoices only), click the **Show for Printing** button. To pay an open Invoice online, click the **Pay Online** button. The procedure of is similar to Orders (see above in this Section);
- **Paid by**. The list of documents (if any) applied to an Invoice. You can drill to the properties of these documents by clicking on ID or name;
- **Notifications**. Here you can view the e-mail Invoice notifications sent to you by HSP.

Please note that when processing Payables, you also can pay an Order or an Invoice in part. To this effect, you should pay offline (for example by check) and explicitly indicate a document this payment should be applied to. In addition, you can you can allow its automatic applying to Orders or Invoices (to this effect, mention that while entering this Payment a HSP staff member should mark the **Auto payment** checkbox). In this case, if you order services at HSP, you will be offered to use existing payment(s) with positive balance. In the case if offline payment sum exceeds the total sum of the paid document, the positive balance of your offline payment will be displayed in the common list (Payments tab) as soon as HSP staff member enters this payment.

Viewing Payments

The list of Payments within Payable section includes all payments (online and offline) applied to Provider Invoices. To view all payments, click on the **Payments** tab at the top menu. To view detailed info about a Payment, click on its ID. Payment properties include two tabs:

- **Details**. Here you can see the same info as in the general list. However, you can drill to the detailed info about your staff member that was logged in Parallels Business Automation - Standard when this Payment was added. In addition, you can see, whether this payment was set to '**Auto Payment**' (green tick indicated that yes).
- **Paid Documents**. This tab allows viewing the list of documents (Invoices or Orders) the given Payment was applied to by HSP staff member.. In this case, you can drill to properties of each paid document (if any) by clicking on its Name or ID.

In this case, you cannot apply payments with nonzero balance (only Provider staff member does). You only can view details and track payments balance.

Viewing Adjustments

The list of Adjustments within **Payable** section includes Adjustments to Reseller Account balance made by HSP staff members. Similarly to payments, this is just for your information. Thus, you can track the Adjustments balance.

Viewing Statements Issued by HSP

A Statement reflects the current balance for your Reseller Account. Statement is generated regularly (and automatically) once a month. To view the list of all Statements generated for Reseller Account, click **Statements** on the **Payable** submenu. In this case, Statements' details are the same as for Payables (on page 66).

C H A P T E R   1 1

Viewing Billing Reports

This chapter advises how to view and manage billing reports.

In This Chapter

Accounting Reports

The detailed accounting reports provide the following information:

- The Revenue Report provides all the revenue information.
- Revenue per Plan provides the information about revenue per each hosting plan.
- Revenue per Promotion summarizes revenues per promotion (applied to hosting plans) a provider or a reseller has been got for a selected period of time.
- Revenue forecast allows generating the revenue forecast for selected period os time on the basis of existing subscriptions.
- The Collected Cash report provides information about the amount collected.
- Sign-Up/Go-Away Report presents the rate of new and lost subscriptions for selected period of time.
- The Aged Account/Receivable report groups all the invoices issued for your customers' accounts and sorts these invoices by their age (both non-overdue and overdue).

All reports include the Total presentation and Details. The Total tab allows viewing the total revenue report for a particular period of time or for all hosting plans (for Sign-Up/Go-Away report). The Details tab presents revenue report by particular billing documents. Some reports (for example, Revenue per Promotion and Revenue per Plan) include a third tab Revenue per Promotion or Revenue per Plan where you can filter the report down to a particular promotion or hosting plan.

To view the revenue summary, go to the Billing Director > Report Manager.

The Reports summary screen is roughly divided into two parts:

The revenue both for previous and current months and total amount are shown in the right part of the screen: - Revenue. The total sum of all invoices (both paid and unpaid) minus the total sum of credit adjustments applied to invoices for the given period of time. - Cash Collected. The total sum of all payments (both online and offline) received for the given period of time. - Non Overdue. The total sum of all unpaid, non-overdue invoices issued for the given period of time. - Overdue. The total sum of all overdue invoices issued for the given period of time.	And in the left part you can find links to all the three types of revenue reports mentioned above.

C H A P T E R   1 2

Managing Payment Methods

Parallels Business Automation - Standard supports two payment methods:

- Credit card. A customer pays by a credit card and a payment is being processed in real time by one of the credit card systems available in Parallels Business Automation - Standard via configurable plug-ins.

- Bank transfer. A customer pays using a bank account and appropriate order is being created. Bank Account orders then can be grouped into a batch to generate a batch file to be submitted to a bank.

This chapter describes how to manage customer credit cards and bank accounts saved in Parallels Business Automation - Standard.

In This Chapter

Configuring Encryption for Payment Methods

Both credit cards and bank accounts private data must be stored encrypted. To use credit cards, it is not necessary to store cards data in Parallels Business Automation - Standard, but if you are planning to process delayed payments, credit cards data must be saved. As for bank accounts data, it is always must be saved in Parallels Business Automation - Standard to make it possible to generate batch files containing the transactions data to be submitted to a bank.

The payment methods private data saved in Parallels Business Automation - Standard is encrypted with public key and after this, to perform transaction, you need a secret key to decrypt it. Parallels Business Automation - Standard allows generating two key pairs - to use the second one if the first key pair is lost. If you already have a key pair saved somewhere, you can upload it.

To upload or generate a new key pair, go to **Commerce Director** > **Payment Processing** > **Secure Storage**. Select the **Keys Management** tab.

To enter a secure key temporarily, select the **Secure Key** tab. In this case, you can define the period of time the key will be still stored in the Parallels Business Automation - Standard so that you could process several transactions instead of one.

How a Payment Method Can be Added

A credit card or a bank account can be saved in the Parallels Business Automation - Standard system in one of the following ways:

1. From Provider or Reseller Control Center, by a staff member:

   - From Account properties - **Payment Settings**.

   - From the general list of payment methods (**Commerce Director** > **Online Payments** or **Bank Transfers**).

   - When your staff member enters a credit card or bank account requisites when changing payment method for a document.

2. From Control Panel, by a customer (**Account Summary** > **Payment Methods**).

3. From your online store, when a customer pays an Order.

Note: For most of credit card plug-ins available in Parallels Business Automation - Standard you can configure the list of credit card types to accept both in HSPstore and Control Panel. This list can be configured per payment plug-in. If a payment plug-in does not support this feature then such payment plug-in will accept all types of credit cards.

Managing Recurring Payments

Recurring Billing tools provided in Parallels Business Automation - Standard allow you to charge your customers on a recurring basis, automatically. Recurring billing makes it possible to set up regularly scheduled payments, such as subscription fees.

The order of payment methods usage for recurring payments in Parallels Business Automation - Standard is the following:

1. Check the payment amount in respect to the maximal amount to be paid recurrently.(Commerce Director - Payment Processing - General Configuration).

2. Check the payment amount in respect to the minimal amount to be paid online. (Commerce Director - Payment Processing - General Configuration).

3. Check for credit cards allowed for recurring payments and in OK status.

4. If no applicable credit cards found, check for the applicable bank accounts (allowed for recurring payments and in OK status).

For recurring billing to work, customers credit card or bank account data must be stored in Parallels Business Automation - Standard database, so billed amount can be automatically withdrawn from a customer credit card or bank account without the need for you to enter a payment method requisites.

Thus, the first thing to do to set up the recurring billing, is making it possible to store credit cards and bank accounts in Parallels Business Automation - Standard, i.e., secure storage configuration (on page 79).

Then, you need to make sure that payment methods data will be saved in Parallels Business Automation - Standard:

▪ Special setup is needed. Credit cards are not necessarily must be stored in Parallels Business Automation - Standard to make payments (some payment plug-ins redirect payers to payment gateway web payment pages and a payment can be submitted directly, beside Parallels Business Automation - Standard). But to use recurring billing with credit cards, you must set credit cards processing to save credit cards data in Parallels Business Automation - Standard database (Commerce Director > Payment Processing > Secure Storage > General Settings).

▪ No need for additional settings. Bank accounts data is being always saved as soon as the secure storage is configured, since one-step payments by bank accounts are not possible. Bank accounts requisites are to be included in transaction requests (batch files) that can be generated only manually, and it takes some time to compose a batch, so if a bank account requisites were not saved - a transaction request cannot be submitted to a bank.

Finally, to make recurring billing more secure, you can impose some restrictions for payments being processed recurrently: amounts to be processed, number of attempts to pay a document recurrently, etc. (Commerce Director > Payment Processing > General Configuration).

Managing Credit Cards

Provider can add, remove, suspend customer credit cards in Parallels Business Automation - Standard. The types of credit cards to accept are set per credit card plug-ins.

How to Start Accepting Credit Cards

The Parallels Business Automation - Standard provides the set of plug-ins, which allow establishing connection with payment gates and accept online payments in the HSPstore.

To configure the payment plug-ins, you need to register an account (or sign up) at corresponding online payments processing center and obtain the necessary data (merchant ID, the processor URL, etc.). After this, you can go to the Commerce Director > Online Payments > Payment Plug-ins and fill the simple form to enable a plug-in.

The types of credit cards to accept can be selected per payment plug-in (if a plug-in configuration allows this).

To process online payments and use the recurring billing, you need the credit cards data to be saved in the Parallels Business Automation - Standard database. Thus, it is necessary to e*nable credit cards data encryption:*

> The credit cards private data saved in Parallels Business Automation - Standard is encrypted with public key and after this, to perform transaction, you need a secret key to decrypt it. Parallels Business Automation - Standard allows generating two key pairs - to use the second one if the first key pair is lost. If you already have a key pair saved somewhere, you can upload it. To to generate or upload the key pair, go to the Commerce Director > Payment Processing > Secure Storage and select the Keys Management tab.

To secure transactions, you can enable the SSL protocol (on page 23) for your online store.

Note: To simplify PCI DSS compliance, we recommend to use tokenized payments by means of Sage Pay, PayPal Adaptive, or Authorize.Net CIM payment plug-ins.

You can also *configure fraud screening*. To configure and enable fraud screening, go to the Commerce Director > Anti-Fraud Manager. Fraud screening includes both pre-configured (country-code) and configurable (black e-mail, phones, etc.) checks.

Setting Transactions Approval and Processing Mode

The settings made for credit cards affect credit cards only. Bank transfers are processed manually or in accordance with the special settings, but without the direct connection with bank, so the batch processing is not subject to online payments processing.

You can set the mode of online payments processing in the Commerce Director > Online Payments > Setup:

- **Payment processing and subscription creation are performed automatically**. The least secure setting. All online Orders will be both charged and processed automatically and placed in the Processed Documents list in the Commerce Director > Online Payments > Documents.;

- **Payment processing and subscription creation require manual approval**. The most secure option. If this checkbox marked, and a customer uses a credit card at your HSPstore to pay for services ordered, the new credit card properties are always being saved (without respect to the 'Credit Card Processing' setting) and the appropriate Order will be always placed into the 'For Approval' list. Thus, you can view the new Orders that were intended to be paid using new credit cards and examine the new credit cards properties. This allows you to keep the non-trusted users out of Parallels Business Automation - Standard and prevent the fraudulent transactions.

- **Payment processing occurs automatically, but subscription creation requires manual approval**. In this case, the needed sum will be automatically withdrawn from customer credit cards, but all new Orders will be placed in Documents for Approval list, and your staff member will need to approve Orders manually to provide services to a customer;

  Note: Manual approval both for credit card and Order processing option cannot be enabled unless online-payment Plug-in supports automatic payments ('Automatic payments supported' is ticked on a plug-in details view screen). Automatic payment feature is a Plug-in feature and it cannot be enabled or disabled using Parallels Business Automation - Standard web interface. On the other hand, if this option is enabled, it is impossible to select a payment Plug-in that does not support pending payments.

- Enable or disable the **automated funds capture** for transactions performed. You can enable or disable this feature separately for new orders and both for renewal and upgrade orders - to enable automated funds capture, check the relevant boxes. Disabling the automated funds capture allows performing some additional credit card verification procedures prior to funds capture. In this case, pre-authorizing of a transaction will be performed and you will have to post-authorize the transaction manually. This might be useful to avoid chargebacks if you have too much fraud on your site.

  Note: Disabling automated funds capture makes sense only if the payment plug-in supports preauthorization (the option Preauthorization enabled is available at the plug-in setup screen and this option is ticked). In this case, transactions will be processed as follows: payment gateway gets transaction request and preauthorizes it; then transaction status is returned to PBAS. If preauthorization finished successfully, the document is placed to Commerce Director > Online Payments > Documents > Waiting for Capture list; open order details and capture money. If preauthorization is not finished and Auth Call is needed, the document is placed to Commerce Director > Online Payments > Documents > Waiting for AuthCall list; open order details and submit authorization code to release transaction and capture money.

- Select the CVC code storage policy. The CVC code is a three- or four-digit code, which provides a cryptographical check of the information embossed on the card. The CVC code is not part of the card number itself. The CVC code helps ascertain that the customer placing the order actually possesses the credit/debit card and that the card account is legitimate. To select the CVC, set the option button to one of the following:

  - **Do not save the Credit Card validation code (CVC)**. You can check this box if you do not to save the CVC codes together with the other credit card data.

  - **Save the Credit Card validation code (CVC) for future transactions**. You can check this box to save the CVC codes together with the other credit card data.

Note: If you enable the CVC saving it will be necessary for you to enter the CVC code when saving a credit card in PBAS database (the **CVV2 or CVC2 code** field will appear at the **New Credit Card** form both in Control Center and in online store).

  - **Keep the Credit Card validation code (CVC) till first successful transaction**. Set the option button to this if you want the CVC code to be saved only till a successful payment is performed by a credit card. For example, if you add a credit card manually and do not pay with this card right away, the CVC code will be stored till the first successful payment.

Managing Bank Accounts

Parallels Business Automation - Standard provides the opportunity of storing bank accounts data in the Parallels Business Automation - Standard database and batch processing of bank transfers. When a customer places an order at your online store and selects a bank account as a payment method, this bank account is automatically saved. The corresponding order is recognized by Parallels Business Automation - Standard billing system by a payment method type and placed into the queue of documents awaiting for grouping into a batch.

All documents intended to be paid by bank accounts are then automatically recognized by bank account types and can be grouped into batches automatically, by one click.

All bank accounts saved in Parallels Business Automation - Standard database can be found under the **Commerce Director** > **Bank Transfers** > **Bank Accounts**. In addition, bank accounts registered for a Particular Parallels Business Automation - Standard account are enlisted in an Account properties, under the **Payment Settings** tab.

It is also possible to save new bank accounts manually and change bank account settings that define an account status in Parallels Business Automation - Standard (availability for payments).

Note: Your customers will be offered to use their bank accounts saved in Parallels Business Automation - Standard database in HSPstore, to pay online for the services ordered.

How to Start Accepting Bank Transfers

To accept bank accounts payments in your online store, you need the following Parallels Business Automation - Standard configuration:

- Encryption (on page 79) for bank accounts private data to make it possible to store bank accounts in Parallels Business Automation - Standard database.
- Bank account payment plug-ins (on page 45) set up and activated.
- The SSL protocol enabled (on page 23) for your online store.

Adding Bank Account Manually

To add a bank account manually, do one of the following:

- Open the list of bank accounts in Commerce Director > Bank Transfers > Bank Accounts. Click the New Bank account button. Select an account type and fill the form that appears.
- Go to the Account Director and select a customer or a reseller account. Click the Payment Settings tab on the account properties set and then click the New Payment method button. Select the payment method type (Bank account) and fill the form.

Changing Bank Account Attributes in Parallels Business Automation - Standard Database

➢ *To edit a bank account attributes:*

1. Select a bank account by clicking on its ID or Name (i.e., on a bank account number).

2. Click the Edit button on a bank account screen that appears.

You can change the following attributes:

- **Account holder name** - the name of person who officially holds a bank account.
- **Status**. A bank account status can be changed into one of the following:
  - **Unchecked**. An account is active and available for payments, but it was just saved in Parallels Business Automation - Standard database and no successful transactions were yet performed using this account. After a successful transaction an unchecked bank account status automatically becomes OK.
  - **OK**. An account is active and available for transactions. At least one successful transaction was performed using this account.
  - **Disabled**. An account is temporarily not available for payments. A bank account can be disabled either manually, by editing its profile or automatically, if
  - **Expired**. A bank account is not available for payments since its registration period has expired. This status can be assigned by Provider only manually.
  - **Error**. A bank account is unavailable for payments since its data is incorrect or Provider suspects that an account data can be incorrect. In this case, Provider manually assigns the Error status to an account.

- **Allow payment by this payment method.** Whether a bank account can be selected as a payment method or not. Green tick in this column means that an account is allowed for payments, red cross - that payments using this account are not possible. This is a separate setting and it is not related to an account status as well as status is not related to this one.

- **Use this payment method for recurring billing.** If an account is used for recurring billing, it is automatically selected as a payment method for recurring payments like automatically generated renewal orders, for example. Green tick in this column means that an account is used for recurring payments, red cross - that not. Parallels Business Automation - Standard automatically selects for recurring payments the first account found in database that has the OK status and allowed for payments.

- **Customer IP.** A customer host IP address. When a bank account is added, this IP address is taken from a customer account profile. This IP address is detected and saved when a customer logs in to store or registers in store with this account. You can change a customer IP address for a bank account.

Viewing Transaction Log

The transaction log includes the detailed data about all online transactions (successful or failed) performed within Parallels Business Automation - Standard.

To view transaction log for online payments, go to the Commerce Director > Online Payments > Transaction Log.

To view transaction log for bank transfers, go to the Commerce Director > Bank Transfers > Transaction Log.

Removing a Payment Method

A payment method (credit card or bank account data) can be removed from the Parallels Business Automation - Standard database only manually. This can be done in one of the following ways:

1. From Provider Control Center, by HSP staff member:

   - From Account properties - Payment Settings.

   - From the general list of payment methods (Commerce Director > Online Payments or Bank Transfers).

2. From Control Panel, by a customer (Account Summary > Payment Methods).

To remove a payment method data, select a payment method and click the Delete button.

CHAPTER 13

Managing Subscriptions

Subscriptions are generated automatically after a customer pays for the services ordered. Depending on a customer needs, you can:

- Enable the automated renewal-order generation (on page 89) (or you can generate the renewal order on demand at any moment).
- Re-send to a customer a subscription notification (on page 93)
- Restart a subscription grace period (on page 91).
- Synchronize a customer system with subscription terms.
- Activate a dedicated server subscription (on page 92).
- Upgrade dedicated server subscriptions.

In This Chapter

Understanding Subscription Types and Statuses

A subscription type corresponds to the type of hosting plan it was based upon. In Parallels Business Automation - Standard, you can view the general list of subscriptions and separate lists - for server subscriptions (dedicated, Virtuozzo Container types and Plesk Shared or Client) and for domain subscriptions (just domain registration); to this effect, click the corresponding tabs above the subscriptions list.

➢ *To view a subscription state or manage a subscription:*

1. Open the **Account Director** submenu and select the **Subscription Manager**.

2. Click **Subscriptions** on the **Subscription Manager** submenu. The list of all subscriptions appears on the screen. To drill to a subscription details or manage a subscription, click on a subscription ID.

The list of subscriptions displays the following:

- **ID**. A subscription numerical identifier assigned automatically or - this setting is available for Provider only - in accordance with the subscription starting ID set manually.

- **Subscription name**. The Container or dedicated server hostname or domain name for Plesk subscription, or just domain name for domain-registration subscriptions.

  Note: Miscellaneous subscriptions provide custom and non-hosting services like additional support etc, so there cannot be any hostnames in this case. Thus, in order not to leave blank cells for miscellaneous subscription types in the **Subscription name** column the name of hosting plan a subscription is based upon is shown. The link in this column leads not to a hosting plan settings, but to the subscription properties, similarly to the other subscription types.

- **Hosting Plan Type**. The type of hosting provided by a hosting plan a subscription is based upon (Dedicated, Virtuozzo Container, Plesk Client, etc.). You can filter the list of subscriptions down to the particular hosting type.

- **Hosting Plan**. The name of a hosting plan a subscription is based upon.

- **Account Name**. The name of an account owning a subscription.

- **Status**. Subscription current status. A subscription statuses are changed automatically and depend on the services provisioning:

  - **Pending** - An Order was paid, appropriate Invoice was generated. Services were not provided in full scale, for certain reasons. You should process an order manually (click the **Process Order** button on the order details screen) to retry services provisioning.

  - **Active** - An Order was paid, an Invoice was generated. Ordered services were provided;

  - **On Hold** - all operations in respect to a subscription are temporarily suspended. A Subscription can be brought into 'On Hold' status automatically, for example in the case if renewal Order was not paid and in rare cases, if a customer Account was brought into 'On Hold' state;

- Graced - A subscription had expired, and a renewal Order was not paid yet. However before a a subscription will be deleted, a customer may be granted with some additional time called grace period (e.g., several days) to pay an order and renew a subscription. The grace period duration can be defined in Credit Terms. A customer or a provider can upgrade a graced subscription to another hosting plan in the same way as for an active subscriptions.

- Expired - A subscription had expired. However in this case, the grace period can be restarted by Provider.

- Deleted - all operations in respect to a Subscription are impossible. To delete a subscription, click the Terminate button at Subscription General Settings.

- Terminating - this status occurs in case the delayed subscription termination (termination period) is configured. Termination period is set in Credit Terms and defines how long the expired subscription or a subscription that have been manually terminated by provider or reseller stays in database.

- Start Date. The starting day of a subscription period.
- End Date. The last date of subscription period.
- Trial. Whether the services included in a subscription are provided for free during the trial period, or not: green tick in this column means that a subscription is trial, red cross - non-trial. The trial period can be set per hosting plan (for all hosting types excluding dedicated hosting and Plesk server in Container). Provider can create the special trial-only hosting plans.

Renewing Subscriptions

It is not possible for your customer to subscribe for a year and pay each month, for example. When a customer purchases a hosting plan, he (or she) prepays for a certain subscription period. When subscription period expires in a few days, and the renewal order is still absent, a customer receives an e-mail notification.

You can determine, how many notifications will be sent to a customer (you can set up to 20 different notification periods i.e., the periods of time before subscription expiration date when a customer receives a notification). This can be done by customizing the Credit Terms associated with customer Account.

Your customers can make the renewal settings for their subscriptions via the Control Panel. But a customer may yet miss the subscription expiration date. To avoid the undesirable termination of a subscription, you can enable the automated creation of the renewal order. Moreover, if needed, you can create the renewal order at any moment.

Note: Your customers can have several accounts and several subscriptions registered for each account. You can view all the subscriptions registered for a given account by selecting the Account Director > Customer Manager > Customers - and then select an account. Click the Subscriptions tab among the account properties. And you can view the list of all subscriptions existing in your Parallels Business Automation - Standard system in the Subscription Manager > Subscriptions.

In respect to renewing a subscription, you have two main options:

- Enable the automated generation of a renewal order. In this case, the renewal order will be generated before the subscription expiration date, in accordance with the renewal order period defined in the credit terms and for the subscription period and fee defined by you in the subscription renewal settings. To adjust a subscription renewal settings, click the Edit button on a subscription properties screen.
- Generate a renewal order manually. And in this case, you can do one of the following:
  - Generate the renewal order in accordance with the existing subscription period, i.e., just repeat the previous order (period and price).
  - Generate the renewal order for another pre-defined subscription period. To this effect, you should click the Generate Renewal Order button and select one of the pre-defined subscription periods, which are currently available for the Hosting Plan a given subscription was created.
  - Generate the renewal order for the custom period at the pro-rated price calculated for the pre-defined subscription period selected. In this case, you should click the Generate Renewal Order button, select one of the pre-defined subscription periods as this described above and select the custom date of subscription expiration.

Renewing Delegated Domains Registration

When subscribing for web hosting (server subscription), your customers are offered to specify a hostname for their Container or Plesk domain (or client). To this effect, they can do one of the following:

- Register a new domain name (or create a subdomain in the domain hosted by you, i.e., in your default domain)
- Transfer to Parallels Business Automation - Standard name system a domain registered elsewhere.
- Delegate to Parallels Business Automation - Standard name system a domain registered elsewhere (DNS hosting).
- Use a domain pointer, i.e., assign a domain name registered elsewhere to a new hosting without delegating this domain to Parallels Business Automation - Standard DNS.

In case the DNS hosting or domain pointer is used, no no separate domain subscription is created - DNS hosting or a domain pointer service is just added to the customer Order. Thus, since no Domain subscription is created, the expiration date for such domains is unknown for Parallels Business Automation - Standard, and renewing of such domain is up to a customer. At the same time, a hosting subscription can be renewed automatically. If a customer forgets to renew his (or her) domain, he (or she) may get the running Container that is not accessible by its hostname.

To avoid possible problems connected with delegated domains registration renewal or renewing domains used as domain pointers, you can create a separate Domain subscription for such domains and specify in this subscription a domain registration period expiration date. In this case, the domain registration can be renewed automatically by Parallels Business Automation - Standard or a customer will be notified that his (or her) domain registration period expires soon and the appropriate renewal Order is already created.

> **Warning:** Before creating a domain subscription for a domain, you must manually transfer the needed domain to your Reseller Account at appropriate Registrar.

After a domain is transferred to your Reseller Account, you can create a Domain Subscription in your Parallels Business Automation - Standard Provider Control Center (go to the Service Director - Domain Manager, select a domain and click the Create Subscription button).

Note: Domain pointers must be first registered in Parallels Business Automation - Standard, to create a zone file for such domains and after this, you can transfer such a domain and create a subscription.

Managing Subscription Grace Period

In case a subscription had expired (or a grace period is about to expire), you can restart the grace period manually. To this effect, go to the **Account Director** > **Subscription Manager** > **Subscriptions**. Select the subscription and then click the **General Settings** tab. Then click the **Restart Grace Period** button.

Activating Dedicated Server Subscription

To activate the Dedicated subscription go to the Service Director > Servers Manager > Dedicated Servers.

Dedicated server subscriptions can be activated only manually.

Say, you have created and offered in your store the dedicated hosting plan for such a server. When a customer places and pays an order for this hosting plan, the subscription is automatically created in Parallels Business Automation - Standard. This subscription is in the Pending state, because it awaits for particular dedicated server assignment.

In hosting plans, dedicated servers configuration is defined by custom attribute values specified for a hosting plan (on page 33).

When you assign a dedicated server to a subscription, Parallels Business Automation - Standard automatically checks every item of a corresponding order in respect to an ordered server configuration and in case an ordered configuration does not match an assigned server configuration, Parallels Business Automation - Standard warns you. In this case, you can check the available dedicated servers configuration, if needed, upgrade or downgrade one of them to match the ordered configuration, then adjust the dedicated server registration parameters in Parallels Business Automation - Standard or register a server and after this, try to activate a dedicated subscription once again.

Advanced custom attributes system and dedicated servers configuration auto-check during subscription activation considerably facilitates dedicated hosting provisioning:

▪ All third-party servers in your data center can be accounted and registered in Parallels Business Automation - Standard database in accordance with servers actual location and configuration.

▪ Automated server configuration check during dedicated subscription activation facilitates dedicated servers assignment and servers accounting.

▪ Automated billing for dedicated hosting upgrade: You can specify a dedicated server configuration in hosting plan and allow a customer to select each parameter within a certain range during initial purchase and later order upgrade or downgrade for his/her dedicated server by selecting one or another option in a corresponding custom attribute (disk space, RAM, etc.).

If a hardware Node was not registered yet, then register it. Select a *Hardware Node* and edit its General Settings: assign an owner account and create a subscription (or assign a server to existing subscription).

If an assigned server configuration does not match an ordered configuration, Parallels Business Automation - Standard allows assigning a server anyway, but leaves a server in Not Synchronized status till a server configuration will be brought in correspondence with an ordered configuration.

Sending Subscription Notification

When a Subscription is created, an automatically generated notification is being sent to a customer's e-mail address indicated in his (or her) Account profile.

To make sure that a customer will receive the notification, you can re-send the subscription-creation notification at any moment and to any e-mail address. Before re-sending, you can edit the notification message (on page 130). To this effect, please select the **Subscription has been created** event from the Event Manager Settings.

To send the subscription creation notification, go to the **Account Director** > **Subscription Manager** > **Subscriptions**. Select a subscription and then click the **General Settings** tab. Then click the **Send Invitation** button.

Changing a Customer Billing Day

You can change the customers billing date on customer's request. The customer billing date is changed on Account basis (i.e., it affects all subscriptions associated with customer Account). Open the **Account Director** submenu, select **Customer Manager** and click **Customers**. The list of customer Accounts appears on the screen. Select the Account you need. As soon as the Account properties appear on the screen, click the **Financial Info** tab and select **Edit**. In the Billing day field, type the new billing date (the day of a month ranging from 1 to 31). Click **Update** to save changes.

If the billing day was set to 31st and there are only 30 days in the next billing month - customer will be billed on the last day of the next month - on 30th. If there are 31 days in the month - customer will be billed on 31st day.

A renewal Order will be generated in advance - before the Billing day. This is controlled by Notification Period set in the customer's Credit Terms.

A Subscription end date will be aligned according to the new Billing Day after 1-2 billing cycles (the billing cycle equals to one month, by default).
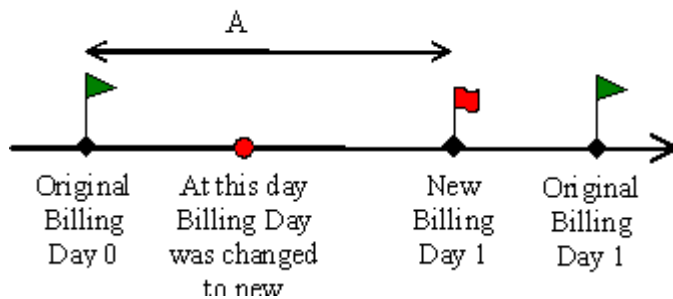
Traffic usage will be prorated. We assume that a customer consumes the monthly traffic evenly. We assume that customer was supposed to use (A/month) x (Monthly Traffic) of the network traffic up to the new billing date.
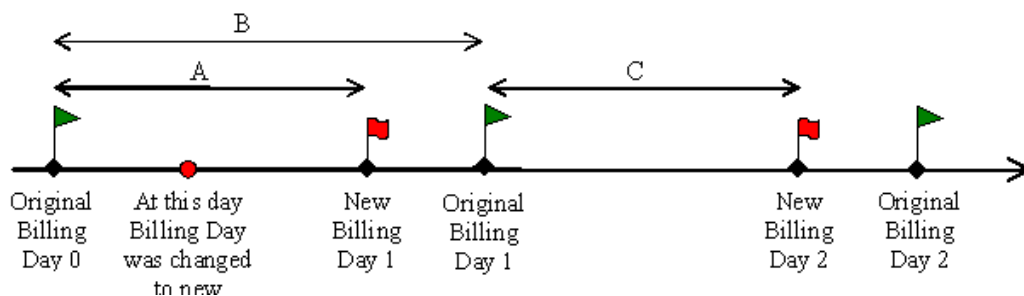

Monthly subscription fee also will be prorated. When customer signs up - he (or she) prepays the period B.

- After changing the billing day - on New Billing Day 1 - a customer will be charged the prorated fee (C/B) x (Subscription Fee) for the next period. If C is too short (C/B < month), then we immediately charge a customer for the next month.

- On the New Billing Day 1 Parallels Business Automation - Standard will generate the Invoice for the traffic over-usage occurred between Original Billing Date 0 and New Billing Day 1. We assume that customer was supposed to consume (A/month) x (Monthly Traffic).

- Then on New Billing Day 2 a customer will be charged the full subscription fee for the period the t corresponds to the New Billing day 2 and traffic over-usage occurred between New Billing Day 1 and New Billing day 2.

Application charges will be calculated in the same way as subscription fee.
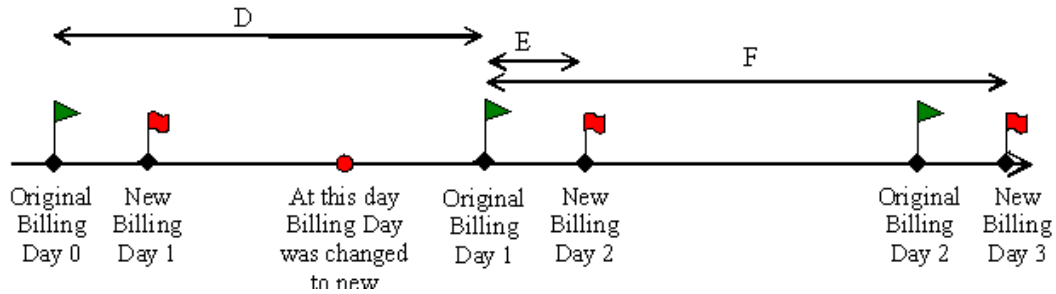
- On the Original Billing Day 1 Parallels Business Automation - Standard will generate the invoice for the traffic over-usage occurred between Original Billing Day 0 and Original Billing Day 1. Also it will charge the customer's card prorated subscription fee: (F/D) x SubscriptionFee

- On the New Billing Day 2 Parallels Business Automation - Standard will generate the invoice for the traffic over-usage occurred between New Billing Date 2 and Original Billing Date 1. We assume that customer was supposed to consume (E/month) x MonthlyTraffic.

- On the New Billing Day 3 Parallels Business Automation - Standard will perform usual charges.

Application charges will be calculated in the same way as subscription fee.

C H A P T E R   1 4

Managing Containers

This Chapter focuses on Containers (Containers) management including Container creation (and other operations with Containers), and Containers upgrade.

To list/manage Containers, go to the **Service Director** > **Virtuozzo Manager** > **Container**.

The list of Containers displays the following:

- **ID** - Unique numeric identifier, assigned to the Container in Parallels Business Automation - Standard
- **Hostname** - Container hostname
- **IP Address** - Current Container IP address
- **Node** - Hardware Node on which Container is currently hosted. You could change it by using Migrate operation
- **Account** - The name of an Account a Container is associated with
- **Trial** - Whether a customer can try this Container for free during certain period of time. Trial period is being set during Container creation by your staff member. Green tick in this column indicates that trial period is allowed, red cross - that not.
- **Status** Container status. Click the "Refresh" button at the top of the screen to make sure the status displayed up-to-date. All Container statuses are described in details later in this guide.

To operate Containers (on page 107), use controls at the bottom of the screen.

In This Chapter

Managing Both OS and Application Templates for Containers

Parallels Business Automation - Standard provides the special applications management tool that simplifies applications provisioning into Containers and applications versioning management. These tools are grouped under the **Service Director** > **Virtuozzo Manager** > **Applications**.

Basic Notions

This Section includes definitions of the basic notions connected with Applications management in Parallels Business Automation - Standard.

What is a Template

A Template is a set of packages prepared to be installed inside Container. Usually it is just a set of RPM packages for RedHat-like systems.

There are two types of templates in Parallels Business Automation - Standard:

- OS template is an operating system snapshot taken immediately after installation.
- Application template is a set of repackaged RPMs optionally accompanied with configuration scripts

In respect to templates management (both Application Templates and OS templates), Parallels Business Automation - Standard interface follows actual templates location. For better understanding, let us consider how templates are stored on Management Node and Hardware Nodes.

All templates are stored on Management Node in template root directory /vz/template. This directory is being automatically created during the first installation of template (OS template or Application template - it does not matter).

On Hardware Nodes, all templates are stored in the same way (`/vz/template` is root template directory). The only difference is that the special `/vz` partition is created on Hardware Nodes.

Base Directory

Base directory groups templates of the same applications with different original versions or different template versions.

For example, if you click the **Applications** link at the **Application Director** dashboard, you will see the list of Application groups, i.e., base directories. Each base directory may include several versions of the same Application - package sets.

Note: The Application Director allows managing Applications both by groups (base directories) and versions (separate package sets).

Package Set

A package set is a separate version of an Application.

Application

An application is a particular software product included in a package set.

Synchronizing Templates With Hardware Nodes

The Hardware Nodes tab under on the application properties page allows viewing the list of all Hardware Nodes an Application is synchronized with. If at least one version of a particular Application is not synchronized with a Hardware Node, the red cross will be displayed in Synchronized column. To synchronize a package set (i.e., synchronize missing package sets) with Hardware Node, check the box next to a Hardware Node name and click the Synchronize button.

Important: You can upload to the Management Node the Virtuozzo for Windows templates only in the .efd format.

To create Containers, OS templates and Applications templates must be installed on a Virtuozzo node that hosts Containers. Templates installation is called synchronization. Templates are distributed on Hardware Nodes as RPM packages, unpacked, and installed.

➢ *To register a template on a Hardware Node:*

1. Go to Service Director > Virtuozzo Manager > Nodes > <Node>.

2. Click OS Templates/Applications. The list of all OS/applications templates installed on the Hardware Node appears on the screen.

3. Click the Synchronize button.

4. Click Refresh at the top of the page to update the system information.

Note: You can only synchronize OS templates for Parallels Virtuozzo Containers for Windows versions no older than the 3.5 release.

A template status in the templates list table tells about a template availability and existence on a Hardware Node:

▪ Registered. A template RPM is absent on a Management Node, but this template configuration file exists in Parallels Business Automation - Standard database.

Note: A template in a Registered state cannot be synchronized with other Hardware Nodes since a template RPM is missing and a template cannot be installed. To make a template installation on Hardware Node(s) possible, a template RPM must be installed on a Management Node first. Then a template status becomes Installed and its distribution on Hardware Nodes becomes possible.

▪ Installed. Both a template configuration file and a template RPM exist on a Management Node. A template can be distributed onto any of registered Hardware Nodes.

▪ Synchronized. A template configuration file and a template RPM exist on a Hardware Node. A template RPM is unpacked, i.e., a template is installed on a Hardware Node.

Note: If a template was installed on a Hardware Node manually, then Management Node knows nothing about this and keeps a template status as not synchronized. To let the Management Node know about an actual template status, go to the Service Director > Virtuozzo Manager > Nodes, and select the Hardware Node. Click on Applications ot OS templates tab. Check the box next to a template name and click the Update Synchronization State button.

Application Template Properties

Two types of Applications can be managed in Parallels Business Automation - Standard as templates:

- Commercial applications. Applications packaged by Parallels. Parallels can have an agreement with the ISV to distribute the application and in this case customers will obtain the license from Parallels. If Parallels does not have an agreement with ISV - application could be installed into Container, but customers should contact the ISV to obtain the license;

- Open source applications packaged and supported by Parallels. To provision these applications into the customer's Containers, HSPs should obtain the license for support of the open source applications from Parallels.

Click Service Director > Virtuozzo Manager > Applications to view the list of all applications available (i.e., uploaded or installed). The list displayed includes not the Applications themselves, but BaseNames - general names of templates' groups that may include several versions of the same Application.

To install a new Application (or an Application upgrade), click the Install Application button and follow the wizard.

Click on the Application group name to view the list of Application versions available.

Application group details include the following tabs: Package Sets, Containers, Hardware Nodes, Upgrade Containers, and Upgrade Hosting Plans. We describe the designation of each tab in details.

Application Package Sets (Versions)

The Package Sets tab allows you to operate with particular version of Application (let us refer to it as to a package set) including installation and upgrading Containers and Hosting Plans. The common list of package sets includes the following information about each version of selected Application:

- ID and name (in this case, this is the actual name of an Application);

- Version - the version of Application template;

- Is this Application available for installing inside Containers (green tick in Enabled column) or not (red cross);

- Status. An Application may have the following statuses:

  - Uploaded - the first step of installation was passed. Parallels Business Automation - Standard system examined the Application template and stores the Application template properties in the database;

  - Scheduled - an Application was scheduled for installation (i.e. the installation process was placed in the queue);

  - Installing - Installation is in process;

  - Installed - Application installed.

Caution: In the case if you uploaded the Application template from your Management Node, and this template remains in Uploaded state, do not delete the RPMs. Otherwise, it will be impossible to install a template later.

In order to install another version of the selected Application, click on Install Package Set button and follow the wizard.

To view detailed information click on Application template ID or name.

Applications Provisioning Inside Containers

The Containers tab under the application properties allows viewing the list of Containers with at least one version of particular Application installed. You can view Container properties (by clicking on its ID or hostname) and perform all operations under Container as described in this guide (on page 107). Thus, if you click on Container ID or hostname, you will be automatically redirected to Container details, Applications tab. Here you can also install new Applications inside Container or uninstall existing Applications.

Application Categories

For better manageability, Applications can be grouped into Categories. Three default Application categories exist: Applications, Access tools, and Control Panels. You can create as much additional Application Categories as you consider convenient.

To create a new Application Category, select Service Director > Virtuozzo Manager > Setup > Application Categories tab. Then click the New Category button.

Enter the Category name, type the description. Click the Save button to add a new Application category.

In order to group Applications into Categories, you need to get back to an Application details (namely, General Settings).

Removing Application Template from Hardware Node

If you want to uninstall an Application, you can get an error message, because some Containers may use this Application at this moment. However, you can force the uninstall. Please, be attentive, in this case you may get some problems with your Containers.

Upgrading Containers

Hosting Plans upgrade options for a package are the same as for single package set. However, Container sample, i.e., the list of Containers displayed in popup window described earlier in this guide (on page 99) is different. In this case, you will be offered to select Containers with at least one package set from the available ones being installed. Again, you can select a particular package set to be installed in Containers selected for upgrade (special drop-down menu provided).

Upgrading Hosting Plans

Upgrade options are the same as for single package set.

However, Hosting Plans sample, i.e., the list of Hosting Plans displayed in popup window for selection, is different. In this case, you will be offered to select Hosting Plan(s) that include at least one package set from available ones. Again, you can select a particular package set to be included in Hosting Plan(s) selected for upgrade (special drop-down menu provided).

To add a new (not upgrade) Application to a Hosting Plan, please go to the **Billing Director** > **Product Manager** > **Hosting Plans**.

OS Templates

To view the list of all OS templates available, select **Service Director** > **Virtuozzo Manager** > **OS Templates**.

The common list of OS templates (package sets) includes the same information about each OS template as for Applications package sets (on page 99).

In order to view the list of package sets available, click on OS template ID or name.

Package sets management and upgrade options are the same as for Application templates.

Managing Container Applications Upgrades

Container applications are managed and billed by package sets. A package set includes all versions of a particular application (i.e., the set of application templates). This means that if an application is included in a hosting plan, then absolutely all versions of this application a HSP can offer are available for customer who subscribes for a hosting plan, without the need for a customer to pay any additional fee for a new version of an application since all versions are included in the setup and recurring fee set for an application package set. So, after an application package set is purchased, all further actions within a package set (upgrades or downgrades) are not billed. Customers can also downgrade applications to earlier versions, and this does not result in any special chargebacks or fees.

When a new version of one or another application appears, this is registered as an Parallels Business Automation - Standard system event tracked by the Event Manager. If an e-mail notification action is attached to this event, an e-mail notification is automatically sent to all customers subscribed for the corresponding package set. Customers can select whether to install a new version or not.

Note: You can allow customers to disable or enable e-mail notifications for particular events. If notifications management is allowed for some event, a customer can see the Notification Settings icon in the My Account zone of the Control Panel. A customer can click on this icon, get the list of events allowed and check or clear box(es) next to event names to receive e-mail notifications for an event or not. To allow a customer to subscribe or unsubscribe for e-mail notifications on a particular events, go to the Configuration Director > Event Manager > Events, select an event, on an event settings menu click the General Settings tab and check the Customer can control receiving notification for this event box. You can also edit the set of events a customer receives notifications on per account basis.

Creating More Application Templates

Parallels Business Automation - Standard is shipped with several OS templates and a number of Application templates that can be installed using Application Director.

However, if you need more Applications to be available for installation inside Containers, or an update needed to already installed Application template, you can use special command-line tool (vzpkgcreat utility) to create the needed templates or template-upgrades.

For detailed instructions on templates creation, please refer to the appropriate document ("Creating Application Templates" guide) available together with the other Parallels Business Automation - Standard documentation at the Documentation screen within your Provider Control Center.

Setting Up Both Trial Containers and Containers Backups Creation

To improve the efficiency and reliability of Parallels Business Automation - Standard, you can create the trial Containers for your customers and create Containers backups.

You can set up the conditions both the trial Containers and backup settings on per Hardware Node basis. To this effect, go to the **Service Director** > **Virtuozzo Manager** > **Setup** > **Trial Container Setup** tab.

Note: You can create backups both for Containers on Parallels Virtuozzo Containers for Linux and Windows platforms. Backups can be stored either on the remote server or on a server that hosts a Container.

Backups Management

> *To view the list of all Container backups (or manage backups):*

Select **Service Director** > **Virtuozzo Manager** > **Backups**.

The list of backups displays the following:

- Backup Container ID and Hostname;
- Backup creation date;
- Location (Hardware Node name);
- Size;
- Backed up Container current status.

You can view the detailed information about backed up Container by clicking of its ID or hostname.

From interface standpoint, Container Backups management is rather similar to Container management. Different operations under Container backups can be performed using the Action Bar at the bottom of the screen.
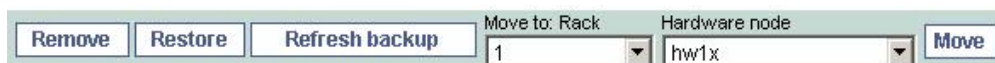
The Action Bar includes controls for Container backups management. You can remove, restore, refresh (replace old backup with a new one), or move backups from one Hardware Node to another.

In order to perform an operation under backup, you should select it (check the checkbox opposite backup ID) and click the appropriate button at the Action Bar. In the case if you intend to move backup to another Hardware Node, you should select a Backup, and then select the target Rack and/or Hardware Node from pull-down menus and after this, click the Move button.

Note: You can perform group operations by selecting several backups.

Backups management on per-Container basis is possible by viewing Container details (via Backups tab).

Creating Container

Containers can be created in one of the following ways:

- Automated Container creation after a Hosting Plan has been purchased in HSPstore;
- Manual Container creation by Provider Administrator.

➢ *To create a new Container:*

1. Select Service Director > Virtuozzo Manager > Container.

2. Click the New Container button.

3. Follow the wizard:

4. Select the Container owner and platform:

    - Set the option button to one of the Account types: Reseller or Provider. If the Container is created for non Provider Account, appropriate Order is being automatically generated.

    - Select the OS to be installed in Container from the Platform drop-down menu.

5. Click the Next button. You will be offered to specify the subscription period (if you had selected the non Provider Account as the Container owner) and Container settings:

    - Subscription period. You can select it from drop-down menu (1, 3, 6, 12, or 24 months). In addition, you can specify a certain trial period for the new Container (i.e., the period of time a customer can use this Container for free);

    - Hardware Settings, i.e., the order of assignment of the new Container to a Hardware Node (automatically or manually).

      In case of automatic assignment, the Parallels Business Automation - Standard automatically checks the following:

      - less loaded Hardware Node will be selected (by weighted assessment);

      - total number of unused licenses for selected Container class on the selected Hardware Node will be checked. If no unused licenses will be detected, then the next from less loaded Hardware Node will be checked;

- if there are no Hardware Nodes with the needed Container Class licenses, then the Parallels Business Automation - Standard will create a new Container on the less loaded Hardware Node and notify a Provider Administrator about exceeding the allowable number of Container Class Licenses;

In case of manual assignment of the new Container to a Hardware Node, the Provider Administrator can select one of the Hardware Nodes himself (or herself). Thus, the Parallels Business Automation - Standard automatically checks the following:

- Hardware Node resources will be checked. In the case if a Hardware Node is loaded and cannot provide the required resources, then Container registration will be blocked with appropriate status message displayed.

- Container Class Licenses number will be checked. In the case if no unused Licenses detected, the Parallels Business Automation - Standard system will create new Container and notify a Provider Administrator about exceeding the allowable number of Container Class Licenses

- Select the hosting plan that will define the Container configuration and QoS settings . Click the Select button next to the Select Hosting Plan field and select the hosting plan from the list that appears in the popup window. On the further steps of the wizard you will be offered to adjust the Container configuration defined by the hosting plan you have selected.

- Other Settings. Key in the Container root password. If necessary, add a comment.

- Finally, you can enter a free-form comment into the Comment field.

6. Click the Next button. You will be offered to edit the Container QoS parameters within the allowable range defined by the hosting plan you have selected before.To change or view the full list of QoS parameters, click the Show Advanced Options. button (click Hide Advanced Options to be back to the basic QoS parameters). After you make the necessary changes, click the Next button to proceed with Container domain(s) creation.

7. You can create several hostname(s) for the new Container in the selected domains of the Account selected before (step 4) or in the Provider's domain (type the hostname into the Hostname field and select domain from the drop-down menu). By default, three textboxes are shown so you can create up to three hostnames (of course, this does not restrict the ability for you to use only one textbox and create only one hostname). If you want to create more than three hostnames, select the number of hostnames from the Create drop-down menu and click the Display button. The screen reloads with the selected number of textboxes and you can create as many hostnames as you need.

8. Click the Next button. The form for IP addresses allocation appears on the screen.

9. Define the IP addresses assignment: If you set the option button to Assign static IP addresses automatically, the Parallels Business Automation - Standard system will check the maximal allowed number of IP addresses for the Container class included in the selected Hosting Plan. Exceeding of maximal number of IP addresses is not allowed and in this case you will get an error message. If you set the option button to Assign static IP addresses manually you can set more IP addresses than allowed for Container class (Hosting Plan). Use Add and Remove buttons to add (assign) or remove (cancel assignment in the case of mistake) IP address respectively. In the case if several IP addresses were assigned manually, you can force using one of IP addresses (set it as default one). To this effect, select IP address (click) and click the Set as Default button.

10. Click the Next button. The list of all Applications available in the Parallels Business Automation - Standard appears on the screen, the applications included in the hosting plan you have selected for this Container are checked.

11. Check the boxes next to Applications' names to select the Applications to be installed inside the new Container.

> If you do not see some of the Applications (that were installed as you can recall), please, check   the   following:
> (i) Whether the OS template defined in the hosting plan selected for this Container is compatible with the missing Applications. Note that Parallels Business Automation - Standard Control Panels and the most of the other applications are not available for SuSe or Debian Containers. For such Containers only the Parallels Power Panel and SSH are available.
> (ii) Whether the default prices were set for all Applications installed. All Applications used in custom Containers must have the preset default prices since these prices are used for Customer Account Balance recalculation in case of Container upgrade. Though, if an Application was installed without setting the default prices, you can do this in Product Manager Settings.

12. Click the Next button. The review screen appears.

13. The review screen shows you all the Container parameters. You can click the Back button to return to any of the Container creation steps.

14. Click the Finish button. The Container creation procedure starts. The list of all Containers appears on the screen. At the bottom of the screen you can see the Status Bar. You can click on the Show link at the Status Bar to see the system messages and view the Container creation progress in real-time.

Operating Container

You can operate any Container directly from the Container listing screen by using controls above the list and at the bottom of the screen. You can select more than one Container environment to operate by checking several boxes next to Container IDs.

- "New VE" button at the top of the screen - Creates a new Container, either based on some hosting plan, or completely custom.

- "Start" - Starts selected Container(s). The Start operation can be performed under Containers in the Stopped or in the Booting status. In the first case the previously stopped Container becomes Running. In the latter case, an Administrator forces Container start to provide hosting services on credit.

- "Stop" - Stops (shuts down) selected Container(s). The Stop operation is used for temporal stopping of Containers that were in the Running state.

- "Create" - Creates selected Container(s) (creates the private file area on disk, prepares the ordered environment for running, often performed automatically). The Create operation is used for Containers in the Ordered state. In this case a Container becomes Stopped after creation.

- "Destroy" - Selected Container(s) will be physically deleted from disk. The logical information about these Containers will still be kept for accounting purposes.

- "Backup" - If backups are allowed, saves a Container private area on one of the Hardware Nodes (server-side backup).

- "Migrate" (above the list)/"Move"(at the bottom of the screen) - Selected Container(s) will be physically moved to the Hardware node selected.

  Note: In Reseller Control Center the Move option is not available if Containers selected for migration are hosted on servers that do not belong to a Reseller.

- The Repair (on page 108) operation - Restarts selected Container(s) in Repair Mode, allowing you to fix any problems. The Repair mode allows getting the file access to a Container data if a Container is out of order.

To configure a virtual environment, just click on its name, and a screen with configuration settings will open.

➢ *To operate Containers:*

1. Select Service Director > Virtuozzo Manager > Container.

2. Select the Container to operate: check the box at the Container you want to operate (to select all Containers check the checkbox at the column heading).

3. Click the relevant button at the Action bar located above the list and at the bottom of the screen. The operation starts.

Note: If you have more than one Hardware Node, then you can migrate a Container from one Hardware Node to another. To migrate a Container from one Hardware Node to another, select a Container as described above, then select the Rack and the target Hardware Node from the relevant menus at the Action bar and click the Move button.

Repairing Container

The repair operation is used to recover a Container (for example, if a Container fails to start). A Container can be brought to the Repairing status from the Stopped status only. A Container in Repairing status can be only brought in Stopped status again or Destroyed. All the other operations are not available in this case, so you have the file access only.

When Container passes in the Repairing state, the special temporal Container with the same hostname as the broken one is being created. The private area (containing private, non-shared data) of the broken Container is being mounted to the special */repair* directory in the temporal Container.

➢ *To bring a Container in the repair mode:*

1. Select **Service Director** > **Virtuozzo Manager** > **Container**.

2. Select the Container to repair: check the checkbox next to the Container you want to repair.

3. Click the **Repair** button. The operation starts. At the very bottom of the screen you can see the **Status Bar**. You can click on the **Show** link at the **Status Bar** to see the system messages and view the operation progress in real-time. You can refresh the screen to see the actual Container status.

Note: You can access the Container in the **Repair** state via ssh.

➢ *To access a Container in the Repair state via ssh:*

1. Select **Service Director** > **Virtuozzo Manager** > **Container**.

2. Click on the Container ID or hostname. The Container properties appear on the screen.

3. Select the **General Settings** tab. The Container general settings appear on the screen.

4. Click the **Edit** button. The screen reloads with the Container general settings for editing.

5. Reset the Container root password: type and retype the Container root password.

6. Click the **Update** button.

7. In the command line, type: `ssh root@VE_IP_address`. Replace the `VE_IP_address` with the actual IP address you want to enter.

8. When prompted, type the password you have set for the user root.

9. As soon as you log in, change the working directory into the `/repair`.You have entered the broken Container.

10. Recover Container data.

➢ *To start a Container from the repairing mode:*

1. Select **Service Director** > **Virtuozzo Manager** > **Container**.

2. Select the repairing Container: check the checkbox at the Container you want to start.

3. Click the **Stop** button at the Action bar located at the bottom of the screen. The operation starts. You can refresh the screen to see whether the Container status had changed into Stopped.

4. Select the Container again: check the checkbox at the Container you want to start.

5. Click the **Start** button.

C H A P T E R   1 5

Managing Domains

Domains can be registered or transferred both from the Control Center (by Provider or Reseller) and from Store or Control Panel, in accordance with orders placed by customers.

Domain name length allowed for registration via Parallels Business Automation - Standard is from 1 character and up to 63 characters.

The list of domains displays the following:

- **ID**. A domain numerical identifier assigned automatically in Parallels Business Automation - Standard database.
- **Domain**. Domain name.
- **Account**. The name of an account a domain is registered for.
- **Added by**. The name of a registered person (user) a domain has been registered.
- **Registrar**. The name of domain registration plug-in a domain has been added into Parallels Business Automation - Standard. **Registered Elsewhere** means that a Registrar is unknown and thus the automated domain renewal is not possible for a domain.
- **Exp. Date**. A domain registration expiration date. For domains registered elsewhere the expiration date is unknown and thus stated as "Unlimited".
- **Status**. A domain current status:
    - **Unregistered** - domain is not registered yet and thus is not available for service.
    - **Registered** - domain is considered as registered and thus can be used for services. This status can be used both for domains with Registrar known and domains registered elsewhere. In the latter case, it is supposed that a domain is really registered since a user that has added a domain has stated this.
    - **Registering** - domain registration in progress.
    - **Transfering** - domain transfer in progress.
    - **Error** - error occurred during domain registration or transfer.
    - **Renewing** - domain renewal in progress.
    - **Zone is starting** - Domain zone is being configured in PBAS. This status occurs if DNS zone startup is set to "Before domain registration" for this TLD. This option is designed to meet the requirements of some registrars, which start checking a customer name servers right after a domain registration request is received. In this case, if a customer have his/her name servers not configured properly by the moment of domain registration order placement, a registrar sends an error response. If domain zone is started before sending domain registration request to Registrar, a domain normally gets the statuses: **Unregistered** > **Zone is starting** > **Registering** > **Registered**.
    - **Terminating** - information about domain is being removed from Registrar. This status occurs after a domain termination request is sent from PBAS to Registrar. The status is shown till the response about successful termination is received from Registrar.

- **Terminated** - information about domain is removed from Registrar, domain registration terminated. This status occurs for a very short time and then a domain becomes "Registered elsewhere".

In This Chapter

Configuring Domain Registration Plug-Ins

For the fresh Parallels Business Automation - Standard installation, Parallels Inc. offers a set of plug-ins for establishing a connection with the domain registrars, so you just have to key in the necessary information into simple forms. Please note that in this case, you should open the Account with the registrars where you want to register your domains and receive your own logins, private keys and other data, depending on the Registrar's internal rules.

Domain registration plug-ins are shipped as RPM modules independent from Parallels Business Automation - Standard functionality.

After installation, a plug-in becomes available in Parallels Business Automation - Standard as a selectable type for a new domain registration plug-in configuration. To add a domain registration plug-in based on one of a standard configurations, it is enough to go to Service Director > Domain Manager > Plug-ins, click New Plug-in, enter a new plug-in configuration name and select a configuration type. After this, a plug-in configuration form appears on the screen. The only thing to do after this - fill the form and save the configuration. The number of plug-ins that can be added on the basis of the same standard configuration is not limited.

Note1: The Parallels Business Automation - Standard installation owner defines the set of domain registration plug-ins available for each reseller.

The list of domain registration plug-ins (to domain registries and registrars) shipped with Parallels Business Automation - Standard is available at the Parallels official website (http://www.parallels.com/en/products/hspcomplete/templates/domain).

Note2: If you are planning to use OpenSRS services for the online domain registration, then Port 55000 for OpenSRS (horizon.opensrs.net) should be opened on the Management Node. In the case if you intend to use eNom services for the online domain registration, then Port 80 for eNom should be opened on the Management Node (the host should be agreed with eNom).

Please, make sure that the RPM packages necessary for online domains registration are installed (refer to the Parallels Business Automation - Standard Installation Guide).

You can view the Plug-in lookup state in the Domain lookup mode field of the Plugin Setup window. The mode may be as follows:

- registrar API is used for lookup (green indicator)
- WHOIS lookup is used; all plug-in's TLDs are assigned to some WHOIS (green indicator)
- WHOIS lookup is used; and some TLDs are not assigned to any WHOIS (yellow indicator); TLDs which are not assigned to WHOIS servers are listed in 'Comment' field
- WHOIS lookup is used; no TLDs are assigned to WHOIS servers (red indicator)

Note: Many registrars accept requests from known hosts only and require that you specify the client IP address (i.e, your Management Node IP address) in your account profile. Please, clarify this issue with registrars' support before you start using a domain plug-in.

Important: The ability for resellers to use the own configuration of domain plug-ins is defined in Reseller Configuration. Reseller Configuration can be assigned in reseller account General Settings.

Registering a Domain from Control Center

> *To register a domain:*

1. Open the Service Director submenu on the Navigation tree and select Domain Manager.

2. Open the Domain Manager submenu on the Navigation tree and select Domains. The list of all domains registered in Parallels Business Automation - Standard appears on the screen.

3. Click the New Domain button. The domain registration wizard starts. Roll-back is possible on any step of the wizard. Just follow instructions.

4. Select the account a domain is to be registered for. If you want to register a domain for one of your customers or resellers, set the option button to an account type and click the Select button next to this account type. Choose an account from the list that appears in the popup window. To add a domain for your provider account, set the option button to your account name.

   Note: Only domain registered for HSP Company (for Provider Account) can be set as default. Please, make sure that at least one domain is registered within your Parallels Business Automation - Standard system for Provider Account.

5. Set the option button to what you are going to do:

   - Register a new domain(s)
   - Transfer an existing domain
   - Add registered domain.

Managing a Domain Zone File

The DNS data is represented as DNS records in a zone data file, and these files are handled by the name server. There are a number of different kinds of DNS records, each suited to a specific kind of data.

The set of records in a zone file defines a domain properties and allows locating over the Internet all of the sub-names and/or computers containing under the organizational domain name.

C H A P T E R 1 6

Managing SSL Certificates

The main purpose of SSL certificate is to establish the identity of website through a trusted third party (the issuer of the certificate). Certificates are issued by Certificate Authorities.

The certificate plug-ins implemented in PBAS support the ability of private key and CSR generation. The ability for customers to generate Certificate Signing Reguest in online store is set up in SSL hosting plans.

Note: Internationalized domain names (IDNs) are not supported for SSL certificates genetation.

In This Chapter

Configuring SSL Certificates Plug-Ins

The ability of establishing connection to Certificate Authority (CA) is implemented in PBA via a pluggable module (plug-in) that stands as a template and thus allows creating a number of configurations.

Parallels Business Automation - Standard provides a number of SSL plug-ins, so you just have to key in the necessary information into simple forms. Please note that in this case, you should open the Account with the CAs you want to provide SSL certificates from; receive your own logins and other data.

SSL plug-ins are shipped as RPM modules independent from Parallels Business Automation - Standard functionality.

After installation, a plug-in becomes available in Parallels Business Automation - Standard as a selectable type for a new SSL plug-in configuration. To add an SSL plug-in based on one of a standard configurations, it is enough to go to **Service Director** > **SSL Manager** > **Plug-ins**, click **New Plug-in**, enter a new plug-in configuration name and select a configuration template. After this, a plug-in configuration form appears on the screen. The only thing to do after this - fill the form and save the configuration. The number of plug-ins that can be added on the basis of the same standard configuration is not limited.

The Parallels Business Automation - Standard installation owner defines the set of domain registration plug-ins available for each reseller.

Important: The ability for resellers to use the own configuration of SSL plug-ins is defined in Reseller Configuration. Reseller Configuration can be assigned in reseller account **General Settings**.

Managing SSL Certificates Provisioning

SSL certificates provisioning flow is the following:

- Customer places SSL certificate order.
- Provisioning starts. The SSL plug-in sends the certificate issue request to Certificate Authority (CA).
- CA sends the approver e-mail to customer. The purpose of this is confirmation of customer domain and finally, approving of SSL certificate issuing. Approver e-mail address is specified for Certificate Signing Request (CSR) and the address should be in the domain specified for CSR. Approver e-mail is typically not related to customer account contacts, thus PBAS does not know about approver e-mail processing.
- Approver e-mail contains confirmation link. Customer clicks this link to be redirected to CA page, where customer confirms domain name and approves certificate. CA starts SSL certificate issuing.
- Depending on the SSL plug-in settings, the plug-in starts checking certificate status either right after the request is sent to CA or one or more days later. Check is performed every hour (by design, cannot be changed) and lasts one or more days depending on the plug-in settings and certificate status.
- Certificate status check stops the error is passed by CA (certificate status becomes **Error**) or check period is over, or success (certificate status becomes **Issued**). The certificates provisioning log is available under **Service Director** > **SSL Manager** > **Transactin Log**.
- The ready SSL certificate is sent to customer to his/her approver e-mail address.

Note: If certificate gets the **Error** status, go to **Service Director** > **SSL Manager** > **SSL Certificates** and select a certificate (click on its ID). Here you can re-send certificate issuing request or re-check certificate availability at CA. This option is available only if SSL certificate is in Error status.

For **Issued** SSL certificate it is possible to resubmit CSR, re-generate private key and re-issue SSL certificate. In this case, new certificate will be issued on renewal date only. Contacts are also updated on certificate renewal only.

All SSL certificates are shown under **Service Director** > **SSL Manager** > **SSL Certificates**.

The certificates list displays the following:

- **ID**. Certificate numerical identifier. Click to view the certificate details or re-issue, or edit certificate details.
- **Domain Name**. Domain name the certificate is issued for.
- **Account**. Name of the account the certificate is ordered or issued for.
- **Purchase date**. The date when the certificate has been ordered.
- **Expiry date**. The date when the certificate expires. Auto-renewal settings are configured per SSL plug-in.
- **Status**. Certificate current status (passed by the SSL plug-in, updated in real time):
  - **Ordered**. Certificate order is placed, certificate issue request is not sent to CA yet.

- **Pending**. Certificate issue request is sent to CA. Waiting for approval from customer.

- **Issued**. Certificate successfully issued.

- **Error**. Error occurred during certificate issuing. Click on the Details link to know the source of problem.

- **Expired**. Certificate is expired.

Editing or Re-Issuing Certificate

To upload new SSL certificate or resubmit CSR, or change other details, click the **Edit** button. New certificate is issued on renewal date only.

For certificates that have **Error** status it is possible (depending on the kind of error):

- If certificate availability check fails, the **Recheck availability** button is shown. Customer order is **Completed** in this case, but certificate is absent. Click the button to recheck certificate availability and try to fetch it. If certificate availability check period is not over, then the plug-in starts periodical check every hour till check period is over. If check period is over, the plug-in checks certificate availability only one time.

- If certificate issuing fails, then the **Try issuing again** button is shown. Customer order is **Pending** in this case. Click the button to resend certificate issuing request to CA.

- The **Cancel order** button is used to cancel the uncompleted certificate. This does not cancel order.

For certificates in **Pending** status:

- The **Resend approver email** button is shown. It allows resending approver e-mail to customer.

For certificates in **Issued** status (issued using SSL plug-in that sends SSL certificate to customer by e-mail only, for example such as OpenSRS):

- The **Resend certificate email** button is shown. It allows requesting Certificate Authority to resend SSL certificate to customer by e-mail.

For Active VeriSign SSL products it is possible to request VeriSign Web site malware scan:

- If you use VeriSign Trust Seal at your website, then malware scan is daily initiated for your website by VeriSign. To request a not scheduled scan, click **Request on demand scan**. Successful malware scan is required to keep the VeriSign Trust Seal at your website. If successful malware scan is not available, then VeriSign Secure Seal is displayed instead.

SSL certificate **General** settings screen displays the following (the fields shown for Issued SSL certificate:

SSL Certificate Properties:

- **Domain**. Domain name the certificate is issued for.
- **Status**. Certificate current status:
  - **Ordered**. Certificate order is placed, certificate issue request is not sent to CA yet.
  - **Pending**. Certificate issue request is sent to CA. Waiting for approval from customer.
  - **Issued**. Certificate successfully issued.

- **Error**. Error occurred during certificate issuing. Click on the Details link to view problem details.

- **Expired**. Certificate is expired.

- **Canceled**. Certificate provisioning has been canceled by provider due to an Error occurred during certificate issuing.

- **SSL Product**. The type of SSL certificate.
- **SSL Plugin**. The name of SSL plug-in used to issue the certificate.
- **Approver Email Address**. The e-mail submitted by customer for CSR. Customer receives confirmation link to this e-mail and later - the certificate.
- **Server Software Type**. The type of web server.
- **Account**. The name of the PBAS account the certificate is ordered or issued. Click the link to view the account details.
- **Subscription**. Numerical identifier of PBAS SSL subscription. Cick the link to view the subscription details.
- **Subscription period**. SSL certificate subscription period.

SSL Certificate Dates:

- **Purchase date**. The date when the certificate has been ordered.
- **Expiry date**. The date when the certificate expires.

SSL Certificate Signing Request:

The information used for CSR generation, CSR itself and SSL certificate text:

- **Common Name (domain name)**. Domain name the certificate is issued for.
- **Email Address**. The e-mail submitted by customer for CSR. Customer receives confirmation link to this e-mail and later - the certificate.
- **Organization Name**. Name of organization that will use SSL certificate.
- **Organizational Unit Name**. Name of organizational unit that will use SSL certificate.
- **Locality (City)**. Customer city.
- **Country**. Customer country.
- **Bits**. RSA private key length.
- **Private Key**. RSA private key body.
- **Certificate Request (CSR)**. CSR body.
- **The contact data from the SSL certificate body are current**. The field shows whether the contacts submitted for CSR generation was not changed (Yes, current), or was updated (No, not current).
- **SSL Certificate body**. SSL certificate text.

Extended Attributes:

The information asked from the customer depending on SSL product type. The data varies depending on certificate type. Typically, organization name and contacts are asked. Additionally, specific data can be asked.

For VeriSign SSL products the VeriSign Trust Seal with Seal-in-Search can be enabled. This is done by means of extended attributes.

The VeriSign Trust Seal is a dynamic, animated graphic that displays on Web pages secured by VeriSign SSL Certificates and Web sites authenticated by VeriSign. When users click the VeriSign seal, it opens a VeriSign-generated verification page containing information about your organization, the status of your malware scan, and SSL Certificate details (if you are an SSL customer).

To get the VeriSign Trust Seal script, click Edit and then put a tick in the check boxes:

- **Seal in search** - Initiates request to VeriSign for Trust Seal script with Seal-In-Search. If you tick this check box, the **Trust seal** check box will be ticked as well and it's not possible to disable it till **Seal in search** is enabled. This happens because Seal-in-Search is a part of VeriSign Trust Seal. Seal-in-Search displays the VeriSign Trust Seal next to trusted links in search results.

- **Trust seal** - Initiates request to VeriSign for Trust Seal script. This option can be enabled without Seal in search enhancement.

The VeriSign Trust Seal script is sent to the e-mail where your VeriSign SSL certificate have been sent.

For more details about VeriSign Trust Seal, look at the VeriSign website (http://www.verisign.com).

Managing Certificate Contacts

The contacts submitted for SSL certificate are taken from customer account profile: administrative, technical, and billing contacts.

The account contacts used for SSL certificate are *copied only once* at the moment when customer places SSL certificate order. From this moment, SSL contacts become a kind of a contacts snapshot used for SSL only.

Changes made to the customer account contacts do not affect SSL contacts. Similarly, changes made to SSL contacts do not affect account contacts.

Contacts update for SSL certificate is supported on certificate renewal only. If contacts are updated during subscription period, this update is saved in PBAS database only. On SSL certificate renewal, the latest SSL contacts version is sent to Certificate Authority.

Viewing SSL Certificates Transaction Log

SSL certificates transaction log shows the results of certificate status checks performed by SSL plug-ins.

Transaction log displays the following:

- **ID**. Numerical identifier of task. Click to view details.
- **Account name**. Name of the PBAS account the task has been performed.
- **Certificate ID**. Numerical identifier of SSL certificate assigned in PBAS.
- **Domain Name**. Domain name the certificate is issued for.
- **Operation**. The name of operation performed over a certificate.
- **Date**. THe date and time when the operation has been performed.
- **Status**. Short description of operation result (if relevant) and current status of the certificate:
    - **OK**. Certificate issued successfully.
    - **Error**. Error occurred during certificate issuing. To get details, click on operation ID.
    - **Not issued yet**. Certificate issuing is in progress.
    - **Retrying**. Certificate re-issuing is in progress.

C H A P T E R   1 7

Managing Plesk Clients and Domains

Plesk is comprehensive Virtual or Physical Webserver management software formally known as Plesk Server Administrator (PSA). For more information about Plesk, please see on the Web (http://www.parallels.com/en/products/plesk).

Parallels Business Automation - Standard allows:

- Establishing connection with Plesk boxes by means of the simple registration of Plesk Hardware Node in the Parallels Business Automation - Standard.
- Creating and selling Plesk hosting plans.
- Accepting and processing orders on Plesk services using the Parallels Business Automation - Standard billing.
- Creating Plesk domains and Plesk Clients manually, from the Control Center on the basis of existing Plesk Domain or Plesk Client hosting Plans.
- Provisioning Plesk services on Plesk servers.
- Managing Plesk Applications vault. Parallels Business Automation - Standard automatically fetches the information about Plesk applications on all registered Plesk nodes and Provider can manually add new applications and register both new applications and existing ones in Parallels Business Automation - Standard, which allows selling these applications in the frame of Plesk domain hosting plans.
- Moving all Plesk domains existing on a Plesk node to another IP address by reassigning a Plesk node IP address.

Connection to Plesk nodes is established via the special agent software - Plesk Agent. Thus, before registering the Plesk node in Parallels Business Automation - Standard, it is necessary to install the Plesk Agent to a Plesk node. And when you register a Plesk node in Parallels Business Automation - Standard, you need to install the Plesk agent to the Plesk Node and after this, go to the Infrastructure Manager and specify the IP address of the Plesk node you are registering and the Plesk node administrator's password.

Customers that have subscribed on Plesk hosting at your shop get the Parallels Business Automation - Standard Control Panel to manage their domains, but with the Plesk functionality and real access to the Plesk server. Customers subscriptions can be managed from the Control Center using the Parallels Business Automation - Standard billing (renewal settings, paying orders, putting subscription on hold, notifications, etc.).

Note: Parallels Business Automation - Standard and Plesk use different name servers. Plesk domains purchased in Parallels Business Automation - Standard store are managed by Parallels Business Automation - Standard DNS servers, while DNS files are created and stored on Plesk DNS server according to Plesk internal DNS templates. Certain DNS records are initially created and stored on the Parallels Business Automation - Standard DNS server, according to the DNS template specified for the corresponding Parallels Business Automation - Standard hosting plan. Changes to domain zone files in the Plesk panel are partly applied to the DNS files stored on Parallels Business Automation - Standard DNS server. DNS files created on Plesk and Parallels Business Automation - Standard DNS files get automatically synchronized, except for SOA, PTR, and NS records, which are stored on Parallels Business Automation - Standard name server and are not modified.

You can set up the conditions for Plesk Domains in Service Director > Plesk Manager > Setup.

C H A P T E R   1 8

Marketing and Affiliate Programs

This chapter describes how you can add new affiliate programs and assess the efficiency of adverts placed at your partners' websites and linked to your HSPstore.

In This Chapter

Configuring your Store to Collect Referrals Statistics

Referrals allow you to collect useful information about the efficiency of your advertising media. Thus, you can place at your HSPstore a question like "How did you know about us?" and enlist your advertising media (TV, Internet, etc.). The question will be displayed at the **Place Order** page at the HSPstore. Thus, as your customers will provide responses, you can collect useful statistics. To add the referral question and the list of referrals, go to the **Commerce Director** > **Store Manager** > **Configure Store** and select the **Referrals** tab.

Similarly to referrals, this allows you to collect the detailed information regarding efficiency of your web adverts. However, Parallels Business Automation - Standard provides the specialized marketing tools.

C H A P T E R   1 9

Support and Administration

This chapter describes the tools that are used to provide support and administration, that is Trouble ticket system, Problem Viewer, Screens Viewer, Mass Mailer, as well as settings and operations related to these tools.

In This Chapter

Trouble Ticket System

Parallels Business Automation - Standard provides an integrated trouble ticketing system that allows reporting and answering customers' problems directly through the interface and by e-mail.

If you do not want to use the built-in trouble ticket system or you need some additional helpdesk features not supported by the built-in system, you can use one of the external helpdesks integrated with Parallels Business Automation - Standard:

▪ Cerberus Helpdesk or

▪ Kayako SupportSuite.

The API provided (see the Parallels Business Automation - Standard SDK for details) allows you to integrate more external helpdesks.

It is possible to switch between the Parallels Business Automation - Standard trouble ticket system to an external helpdesk system on-the-fly in the **Account Director** > **Support Manager** > **Setup** > **General** tab.

Configuring Parallels Business Automation - Standard Trouble Ticket System

The Provider Control Center allows processing problem reports that came from provider's customers, posting tickets for their customers accounts, and viewing trouble tickets posted by customers of your resellers.

The Reseller Control Center allows resellers to process trouble tickets posted by their customers and post trouble tickets to their provider.

Parallels Business Automation - Standard allows using either the built-in Ticket System or an external HelpDesk.

How It Works

Provider or reseller can configure the Trouble Ticket System in such a way that customers are able to submit trouble tickets both directly from the Control Panel web-based interface and send problem reports via e-mail. E-mail reports are automatically converted into corresponding trouble tickets.

Trouble tickets are managed and grouped by the following attributes:

▪ One attribute defined by a customer. This is the problem subject or *category*.

▪ Two attributes defined by provider:

  ▪ *Priority* of problem (e.g., normal, high, etc.). Note that when you enable the Trouble Ticket System, you should select the default priority that will be assigned to all new tickets posted by customers. Later you can view the ticket details and assign another priority to a ticket.

  ▪ *Queue* to place a problem report (e.g., new, on hold, etc.). Similarly to priorities, you should select the default queue to place all new tickets posted by customers. Later you can move a ticket to another queue.

Assigning Problem Reports Watchers

After a problem report is posted, provider or reseller can assign a trouble ticket to one of their staff members and set one or more problem watchers from their staff members. In case a ticket status changes, a watcher receives an e-mail notification sent to a staff member contact e-mail specified in his/her Parallels Business Automation - Standard user profile. In addition, it is possible to specify several internal e-mail addresses to send watcher notifications.

Trouble Ticket System Initial Setup

To use the Trouble Ticket System, you should make some initial settings, which are necessary for the Trouble Ticket System to work, namely:

- Create and enable one or more ticket categories (roughly pre-defined problem subjects) . Customers will select one or another category when placing a problem report from the Control Panel. Thus, it's better to have at least six categories, one per each zone of the Control Panel: for example: system, site, account/billing, etc.
- Create and enable at least one ticket priority.
- Create and enable at least one ticket queue.

To set up the Trouble Ticket System, please go to the Account Director > Support Manager > Setup. The Trouble Ticket System settings are grouped under several tabs:

- General. Here you can enable or disable the Trouble Ticket System or allow adding new tickets for your customers. In addition, you can switch the Trouble Ticket System to an external Helpdesk.
- Queues. Click to add a queue or reassign the default queue.
- Categories. Click to add a category or enable/disable the existing ones.
- Priorities. Click to add a priority or reassign the default priority.
- Mail Gates. Click to configure one or more mail addresses to receive trouble tickets via e-mail.

Configuring E-Mail Notifications About Rejected E-Mail Problem Reports

A problem report posted via e-mail can be rejected if:

- A Mail Gate a report was addressed to appears to be disabled by the moment a report was received.
- A Mail Gate is active, but The Trouble Ticket System is disabled globally.
- A Mail Gate is active and the Trouble Ticket System is enabled, but set to disallow posting new problem reports by customers.

The corresponding events for all the three cases were added. You can go to the Configuration Director > Event Manager and configure e-mail notifications for each event.

Managing Trouble Tickets

To view or process the trouble tickets, go to the Select Account Director > Support Manager > Trouble Tickets.

In Provider Control Center trouble tickets are grouped into two lists, under two tabs:

- To Provider. This is the list of problem reports posted by provider's customers and resellers. Provider can move these tickets between queues, change and categories and priorities, add comment (both visible or invisible for customer), close or reopen tickets, and reassign trouble tickets to staff members.
- To Resellers. This is the list of problem reports posted by customers of resellers. Provider can just view these tickets and supervise the tickets processing.

In Reseller Control Center trouble tickets are also grouped into two lists, under two tabs:

- From Customers. The list of trouble tickets posted by reseller customers. Reseller can process these tickets in the same way as provider manages trouble tickets posted by his customers.
- To Provider. This is the list of trouble tickets posted by reseller to provider. Reseller can add and process tickets in the same way as customers from the Control Panel.

Using the Problem Viewer

The Problem Viewer provides the maximum of a problem details that is possible without access to the Parallels Business Automation - Standard code. To this effect, you need to get the problem ID and submit it to the Problem viewer.

To use the Problem Viewer, select Configuration Director > Logging and Errors > Problem Viewer.

Using the Screens Viewer

Each of the Parallels Business Automation - Standard screens has the unique numerical identifier that consists of five numbers divided with point. The screen ID is shown at the upper-right of each screen.

Your customers may specify the screen ID in their problem reports (e.g., "... the problem occurred in System zone, mail management, screen ID is the following...") . And you can just submit the screen ID to your Screens Viewer and get the path to the needed screen. This helps you to locate the problem and solve it more quickly. To locate a screen, go to the Configuration Director > Logging and Errors > Screens Viewer.

Managing Parallels Business Automation - Standard Objects Description Templates

A description template is a piece of text describing one of Parallels Business Automation - Standard objects (a financial document like an order or an invoice, an account, or a subscription) in HTML or text format composed from plain text and placeholders.

Placeholders are special expressions, which, having been inserted in the text, are replaced with the actual values when a template is used for an actual object description.

A description template can be inserted into e-mail notifications in the same way as the other placeholders. In addition, a description template is used for printer-friendly formatting of documents (shown after clicking the Show for Printing button below a document details) and generating an object description in PDF format to be attached to an e-mail notification, so a customer could have a description well formatted for printing. That is why description templates in Parallels Business Automation - Standard are called *Print Forms*.

Note: If a subscription is not yet created for an Open order, the subscription name is not shown in printable view when you click Show for Printing though the @@order.subscription_name@ placeholder is used in a Printable Form.

The print form benefit an@@order.subscription_name@d its main difference from an ordinary placeholder is that you can edit it, change formatting, and create as many print forms as you need. Print forms are automatically fetched by the Event Manager for the corresponding e-mail notifications. For example, you have created the print form for an invoice description. Then, when you go to Event Manager, select some event that involves an invoice and try to attach an e-mail notification as an action to this event, you will see that the placeholder for the corresponding print form is shown in the list of placeholders (so you can paste it into a message body) and this print form can be attached to an e-mail notification as a PDF file.

To facilitate creation of new print forms and give you a place to start, the default set of print forms describing the basic financial documents is provided. The default print forms can be edited, but cannot be deleted since they are used by default to generate the printer-friendly formatting of financial documents like orders, invoices, adjustments, etc.

To create a print form or manage the existing ones, go to the Configuration Director > Miscellaneous Settings > Print Forms.

Managing Events

Parallels Business Automation - Standard provides an opportunity of tracking particular events that happen within the system and configure actions to be performed in connection with each event including both e-mail and Instant Messaging (SMS) notifications and other actions (including scripts execution).

The tools for events management are grouped under the **Configuration Director** > **Event Manager**.

The **Event Manager** submenu provides the following options:

- **Event Log**. All events (from the set of events tracked in Parallels Business Automation - Standard) happened. Here you can view the events listing, look at a particular event details, know out a subscription an event is connected with, and, since the Parallels Business Automation - Standard allows attaching different actions to each event replay an action that already was performed when an event have happened.

  The list of logged events displays the following:

  - **ID**. Event type numerical identifier assigned automatically in Parallels Business Automation - Standard.

  - **Object**. The type and unique ID of an object involved in the event.

  - **Event type**. The event name, which shortly describes the event point.

  Note: You can narrow the list of events down to specific event type or object type events or those having a particular status using the filter option. You can also search the event by its unique object ID.

  - **Completed**. This is the date of the event completion.

  - **Status**. The status of the event (processing or completed).

- **Actions**. The list of all actions that can be attached to events.
- **Events**. The list of events tracked by Parallels Business Automation - Standard with the ability of attaching actions to these events.
- **Instant Messaging**. Here you can configure such actions as SMS notifications to be attached to different events. You can configure the instant messaging plug-in and specify mobile phone numbers to send notifications.
- **Notification Settings**. Here you can enable or disable sending financial notifications to your customers.

For the fresh Parallels Business Automation - Standard installation, you have the list of Events with default Action (and e-mail notification) assigned to each Event. You can customize default Actions or add new ones. SMS notifications can be configured separately in order to send SMS messages to HSPc and their staff members mobile phones.

Selecting Different Events for Different Types of Objects

In addition, it is possible to set a specific action for a particular object type involved in an event. For example, in respect to events that happen with subscriptions (e.g., a subscription period has ended, or a subscription was created), you can set a special action for each type of subscription (dedicated, Plesk, Virtuozzo Container, etc.) as well as for a subscriptions in general, without respect to a subscription type.

Setting Conditions for Events Execution

You can also limit an action execution by certain conditions, which can be configured by clicking the **Edit Conditions** button on an action view screen accessed via **Configuration Director - Event Manager - Actions - Action name**. In this case, the action set for a subscription in general will be performed in all cases satisfying the condition set (if any) and actions attached to a specific types of subscription will be performed only if such is defined. For example, you can set an e-mail notification for a subscription-related event in general, a script execution or an action for each particular type of subscription or an action execution on a subscription conditioned by a certain due period.

Note 1: Mind that the conditions set for an action will jointly limit this action execution. To apply several conditions one by one to an action, you need to create more similar actions and limit each of them by the appropriate condition.

Note 2: When setting conditions for events that involve traffic and disk space usage limitations, for example, "64 The disk space is nearly used up" or "65 The traffic is nearly used up", the values of traffic or disk space used is ALWAYS SET IN KB.

Notifications and scripts can be configured using **Configuration Director** > **Event Manager** > **Events**. Here you can also look at the list of events being tracked. Note that you can repeat any action connected with a particular event. To this effect open the event details (click on an event name) and repeat one or all of the actions.

You can also allow customers to disable or enable e-mail notifications for particular events. To this effect, go to the **Configuration Director** > **Event Manager** > **Events**, select an event and edit event settings.

To view the events history, go to the **Configuration Director** > **Event Manager** > **Event Log**.

Note: The number of Events to be stored in the Event Log may be set in Configuration Director > Miscellaneous Settings > Data Retention.

Using the Mass Mailer

Using the Mass Mailer you can send the massive e-mail notifications to your resellers and customers.

Note: If needed, you can re-send the mass mail.

To send a mass mail, go to the Marketing Director > Announcement Manager > Mass Mailer.

Using the Maintenance Mode for your Hardware Nodes

If you need to take a certain hardware node offline for maintenance or upgrade you can bring a Hardware Node into a special maintenance mode that temporarily disables management of Containers or Plesk domains hosted on this Hardware node from the Control Panel.

To bring a node into the maintenance mode, go to the Service Director > Plesk Manager > Nodes or Virtuozzo Manager > Nodes. Select a Hardware Node and edit its general settings.

Note that you can compose a Mass Mailer (on page 132) for customers on that specific Hardware Node.

Managing the User Password Strength

You can set up the length and other strengthening features for passwords used to log in to Parallels Business Automation - Standard Control Centers and Control Panels. The password enhancement also sets the rules for Container users passwords.

The idea is simple: try to prevent users from choosing passwords that could be guessed by "Crack" by filtering them out. To set the passwords strength, go to the Configuration Director > Security Manager > Setup.

Updating Parallels Business Automation - Standard

The Up2date Manager is a useful and simple tool that allows you to check whether your Parallels Business Automation - Standard version is up-to-date and receive information about the available Parallels Business Automation - Standard updates and hotfixes.

The Up2date Manager examines the Parallels Business Automation - Standard version at your side and connects to the Parallels Business Automation - Standard update server. If there are any updates available for the Parallels Business Automation - Standard version you are currently using, you will immediately get the information about the latest updates. Keeping your Parallels Business Automation - Standard version up-to-date helps you to increase the system stability and performance.

Having been switched on, the Up2date Manager once a week automatically connects to the Parallels Business Automation - Standard update server and collects information about available updates and presents this information to you. However, If needed, you can run this check manually at any time.

In addition, the Up2date Manager provides two more options:

- Available plug-ins. The list of all plug-ins available with the currently installed Parallels Business Automation - Standard version.

- Service Monitor. Monitor the status of services critical for Parallels Business Automation - Standard functionality.

➢ *To view the available Parallels Business Automation - Standard updates:*

1. Open the Configuration Director submenu on the Navigation tree and select the Up2Date Manager. The Up2date Manager dashboard appears on the screen.

In the right part of the Up2date Manager dashboard you can see the list Parallels Business Automation - Standard updates available for the Parallels Business Automation - Standard version you are using, the last check date, and whether the automated up-to-date check is enabled or not. And in the left part of the Up2date Manager dashboard there are shortcuts used to switch on or off the automated updates check and to check for updates manually.

The Up2date Manager dashboard displays the following:

Up2date Manager	

Up2date status	Whether you use the latest Parallels Business Automation - Standard version or updates are available.	Check Now	Click on this link to check for available updates immediately. You can do this without respect to Up2date Checker status.
		Disable (or Enable) - Depending on the current Up2date Checker Status	Click on this link to turn on or turn off the automated weekly upgrades check.
Available version	The latest Parallels Business Automation - Standard version available at the update server.		
Installed version	The currently installed Parallels Business Automation - Standard version.		
Date of Last Check	The date when updates were checked last time.		
Up2date Checker Status	Whether the automated updates check is performed (Enabled) or not (Disabled).		

Available Plug-ins		
Ready for install.	The total number of plug-ins available.	Plug-ins. The link to the list of plug-ins available.
Ready for upgrade.	How many plug-ins can be upgraded. In other words, for how many plug-ins updates are available.	

| Service Monitor | | |

Running	How many of vital services are running	Services. The link to the list of services
Stopped	How many of vital services are stopped	History. The link to the vital services check history.

C H A P T E R   2 0

Parallels Business Automation - Standard Internal Licensing

The Parallels Business Automation - Standard License is a file that contains specific data.

For Parallels Business Automation - Standard tools to work the Parallels Business Automation - Standard license file is needed on the Management Node. This license can be easily installed via the Parallels Business Automation - Standard Provider Control Center web-based interface.

PBAS license can be of two types:

- **Lease**. Issued for 1 month. Should be updated monthly. A lease license is updated automatically online, however manual update is also possible. Generally, the license remains the same, only a license version is incremented with each update. Lease license may also include a **Shared Revenue Contract**; According to this Contract, PBAS monthly fee is calculated depending on provider monthly revenue.
- **Purchase**. Issued for a year or longer period. No updates performed. When a purchase license expires, a new license is issued.

Note: The trial Parallels Business Automation - Standard license is shipped together with the Parallels Business Automation - Standard distribution.

To provide hosting services, the licenses that are specific for each hosting type (Virtuozzo, Plesk) should be installed on appropriate Hardware Nodes.

In This Chapter

Installing License Certificates

The Parallels Business Automation - Standard distribution includes the trial Parallels Business Automation - Standard License that is auto-installed. The trial License has the limited validity period, but it allows making the initial configuration of the Parallels Business Automation - Standard.

The permanent Parallels Business Automation - Standard license is installed manually from Provider Control Center.

Note: To provide hosting services, the licenses that are specific for each hosting type (Virtuozzo, Plesk) should be installed on appropriate Hardware Nodes.

To install PBAS license:

1. Open **Configuration Director** > **License Manager** > **Parallels Business Automation - Standard Licenses** submenu on the Navigation tree. The PBAS license settings are displayed.

2. Click **Install License**. The Install License form is displayed. Fill the form:

   - Click **Browse** next to the **Path to the license certificate** field. Locate the license file.

     OR

   - Paste the license file content into the box.

3. Click **OK**.

C H A P T E R   2 1

Getting Technical Support

Parallels provides installation assistance for Parallels Business Automation - Standard. Assistance with installation is offered via e-mail. The full information about Parallels Business Automation - Standard support and Parallels Business Automation - Standard documentation in HTML format is available at our website (http://www.parallels.com/en/products/hspcomplete/docs/).

In This Chapter

An Overview of Parallels Technical Support

Parallels Support will attempt to answer any relevant questions you may have before the installation process is initiated. This includes the following:

- Pre-requisites list;
- Hardware compatibility;
- Software compatibility.

Questions for Technical Support

In most cases, support team must rely on customer observations and communications with the customer in order to diagnose and solve the problem. Therefore, the detailed problem report is extremely important. Please, do mention the following:

- Symptoms of the problem;
- When the problem began including the circumstances of the failure;
- Any changes you made to your system;
- Other information that may be relevant to your situation, such as the installation method;
- Specific hardware devices that may be relevant to your problem.

How to Send Support Questions

Please, send your questions to support team by http://www.parallels.com/support/request/ .

If you need to contact us - information about phone numbers, contact persons and office addresses is available on the contact page at `http://www.parallels.com/en/contact/`.

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