An Administrator's Guide to Using Helm™

A guide for new administrators, to help with the initial configuration of Helm.

WebHost Automation Ltd
http://www.webhostautomation.com/
April 2006
Doc: HELM300.02.10

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About Helm and This Guide

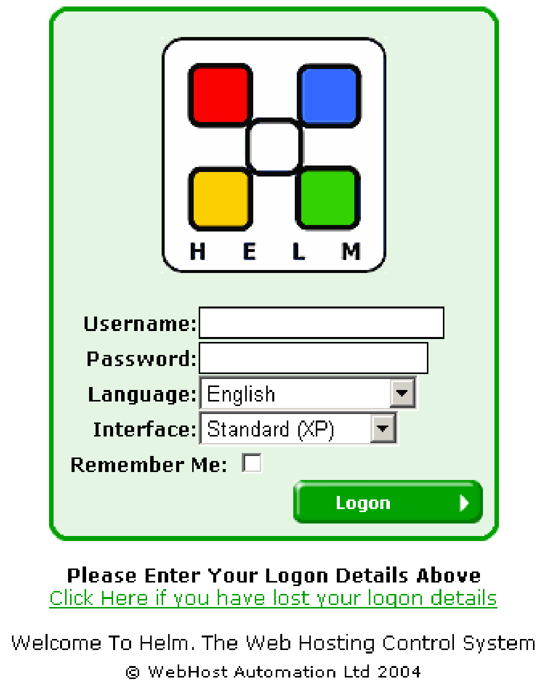
The Helm Web Hosting Control System is an extremely powerful hosting automation solution for Windows 2000 and Windows .NET servers. Helm is developed by WebHost Automation Ltd, a United Kingdom-based corporation. Their main website is:

http://www.webhostautomation.com

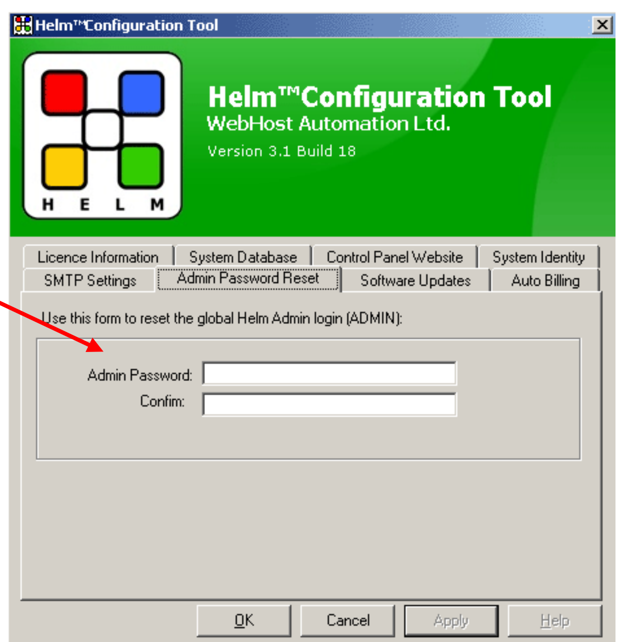
Please take some time to read over this guide. Doing so will make your experience as an administrator much more enjoyable and profitable. We have littered this guide with helpful screenshots and valuable step-by-step how-to procedures.

1.) Logging into Helm

Logging into the Helm control panel is very simple. Open a browser and go to the URL and enter your administrator username and password. There will **always** be a user with the username of "**Admin**". As mentioned in the Quick Install Guide, this should not be deleted. If you can't remember the password to this account, you can reset it in the Admin Password Reset section of the Helm Configuration Tool.

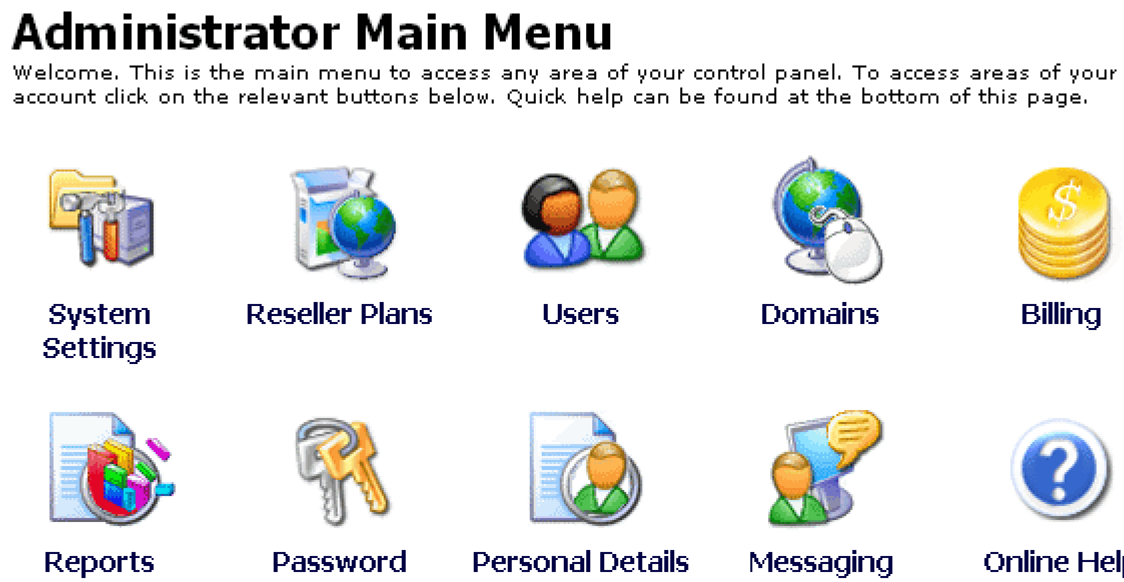


If you forget your login details, reset them in the Configuration Tool.



2.) Administrator Main Menu

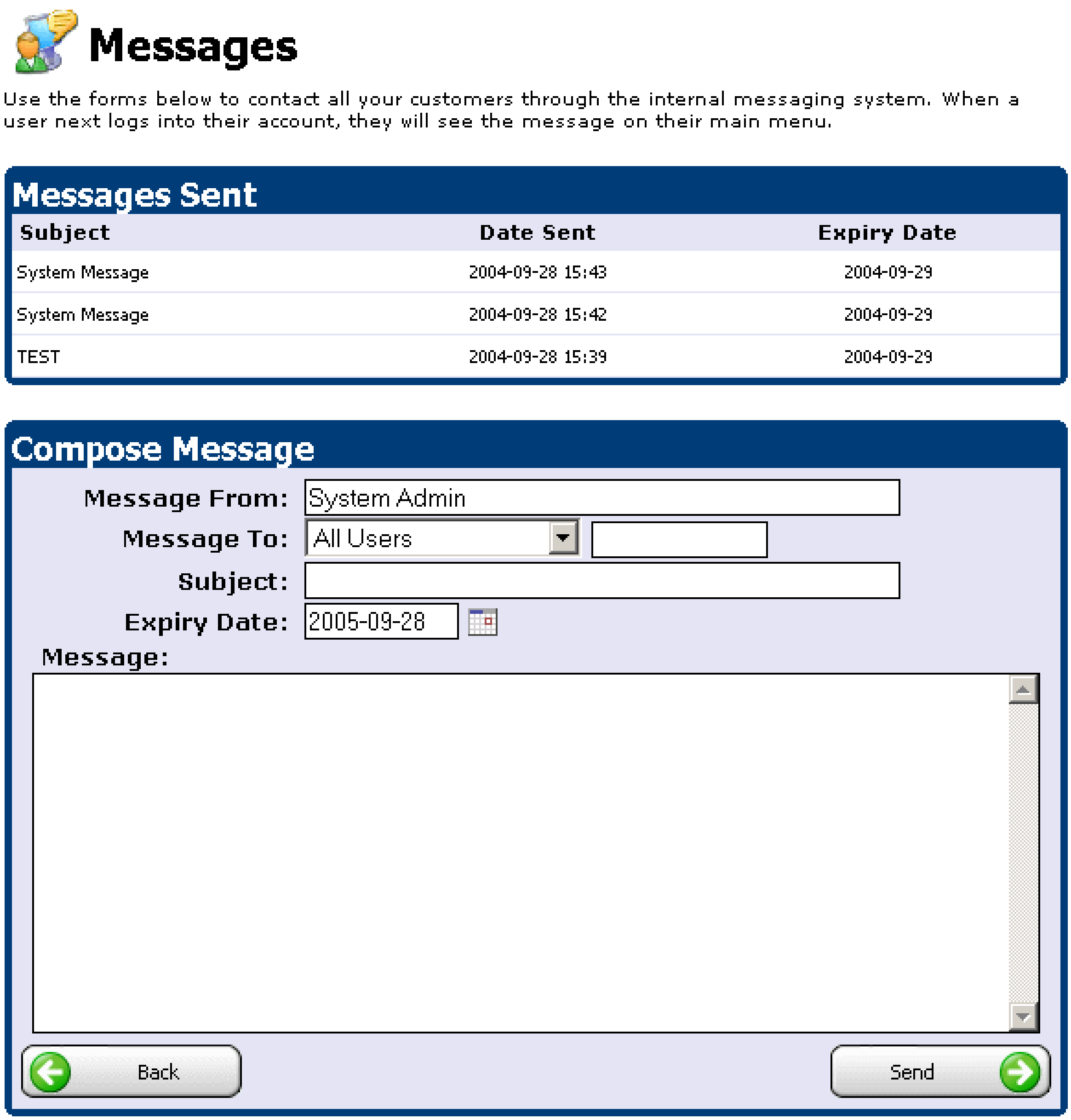
When you log into Helm, you will be presented with the following screen:



From here, you have the ability to completely administer Helm. As well as Administrator functionality, you can also manipulate both Reseller and User accounts. Below are details of the functionality available to you as an administrator. For Reseller and User functionality, please refer to the Helm Reseller Guide and Helm User Guide.

3.) Messaging

Helm gives you the ability to send out messages via its internal messaging system to your customers. You can choose to send them to All Users, All Resellers, or a specific user. Click “Messaging” from the Administrator Main Menu.



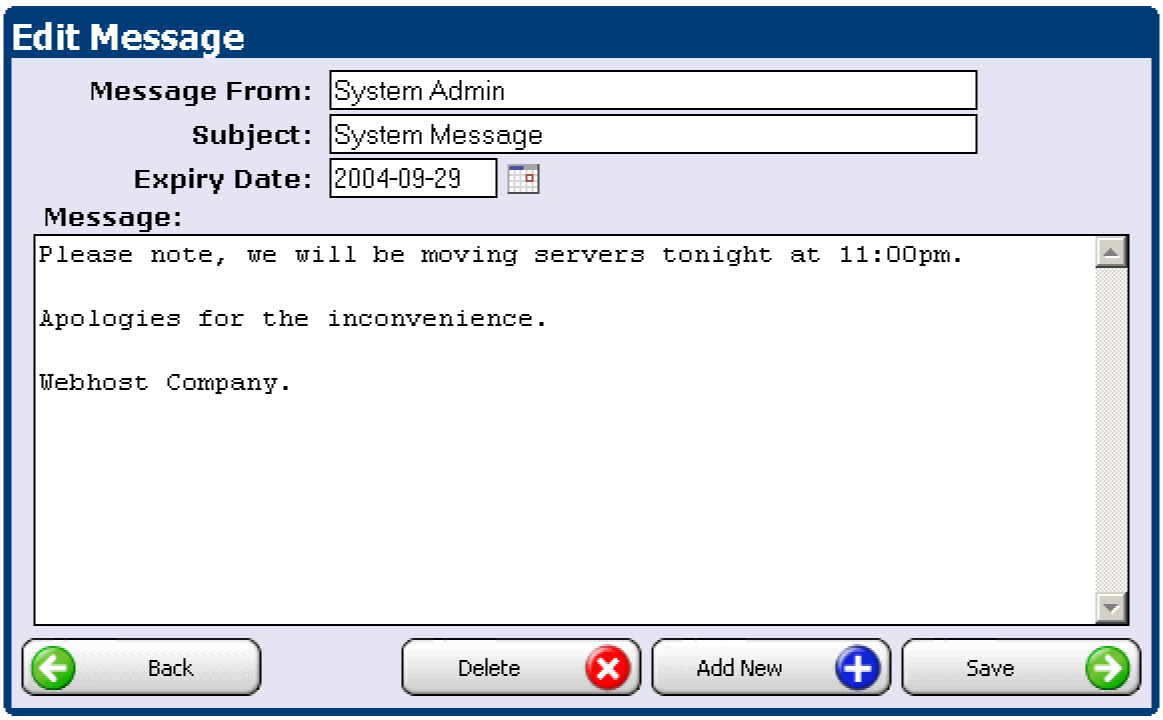
The Compose Message box lets you send a message out to a defined user or group of users. Write your message in the message field (maximum size of each message is 5000 characters). Type in who the message is from, and then select the recipient:

All Users: - This sends the message to all users, i.e. all customers of resellers on the system.
All Resellers: - This sends the message to all resellers on the system.

The Following User: -This sends the message to the user you specify in the box to the right of the dropdown box.

Enter a Subject and an Expiry Date (i.e. the date that the message is valid until – for the recipient's reference), and click "Send" to send the message.

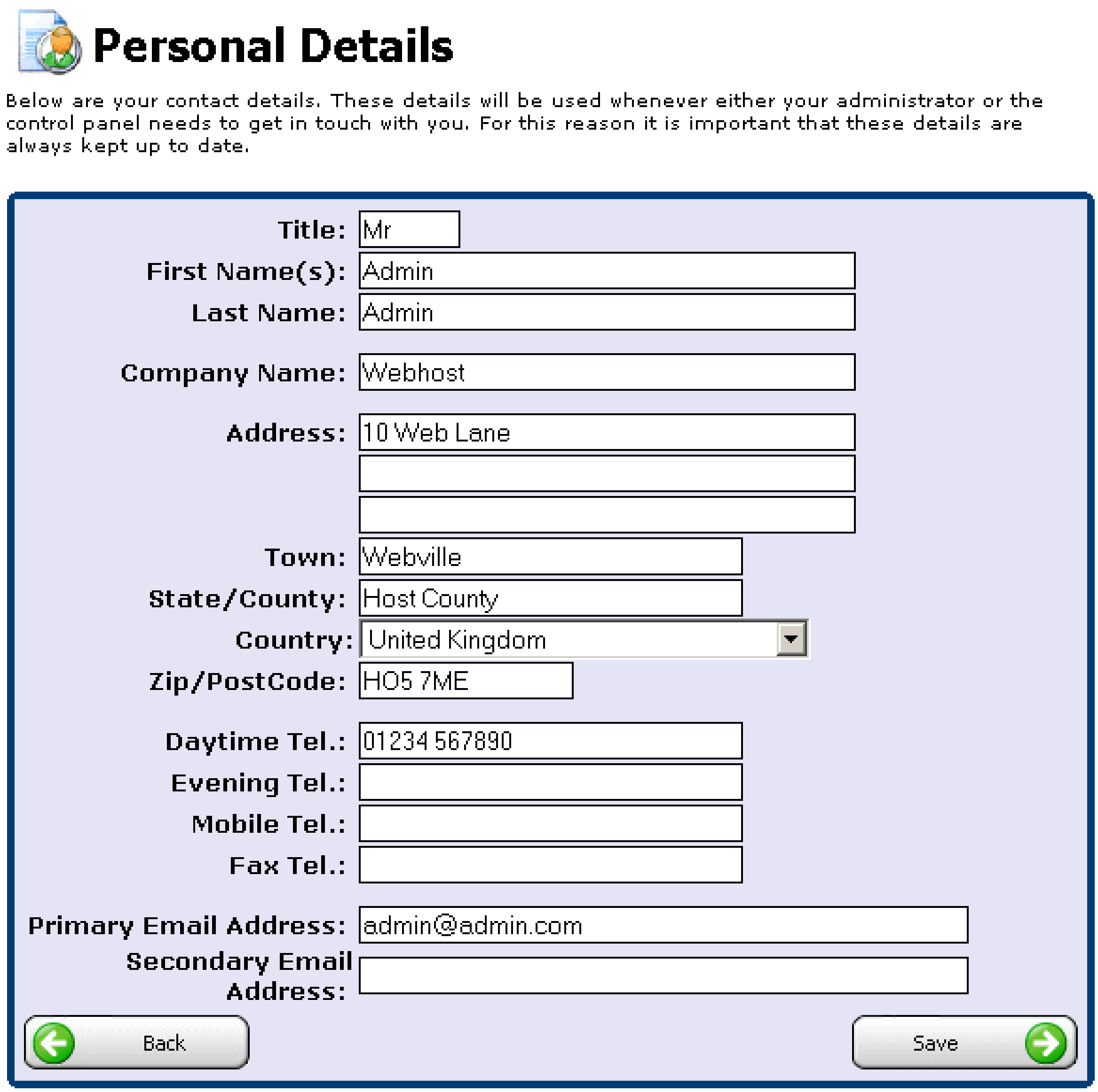
Helm also allows you to edit or delete messages that you have already sent. At the top of the screen you can see a list of previously sent message. Clicking one of these will open it up, and you can edit the message:



If you open a sent message, then edit it and click "Save", it will alter the message that is in the recipient's inbox, so if they haven't yet seen it then they will see the new one when they open it. Alternatively, you can choose "Delete" to delete the message from the inbox of all recipients. If you have finished looking at the message and don't want to make changes, click Add New to go back to the Compose Message Screen.

4.) Changing Your Personal Details

If you need to change your details for any reason, you can do this at the Administrator Main Menu as well. Simply click “Personal Details” and you will get taken to this screen:

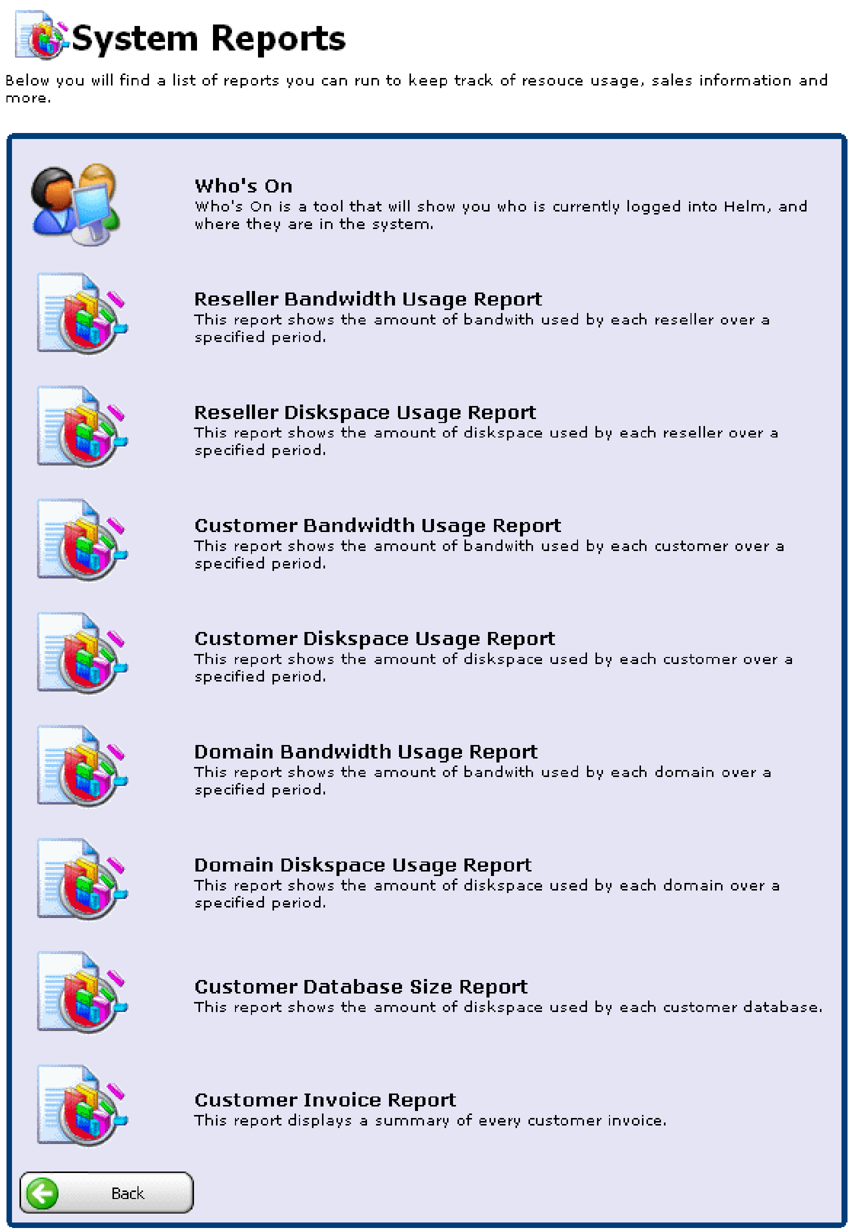


Alter the relevant details, and click “Save” to save them.

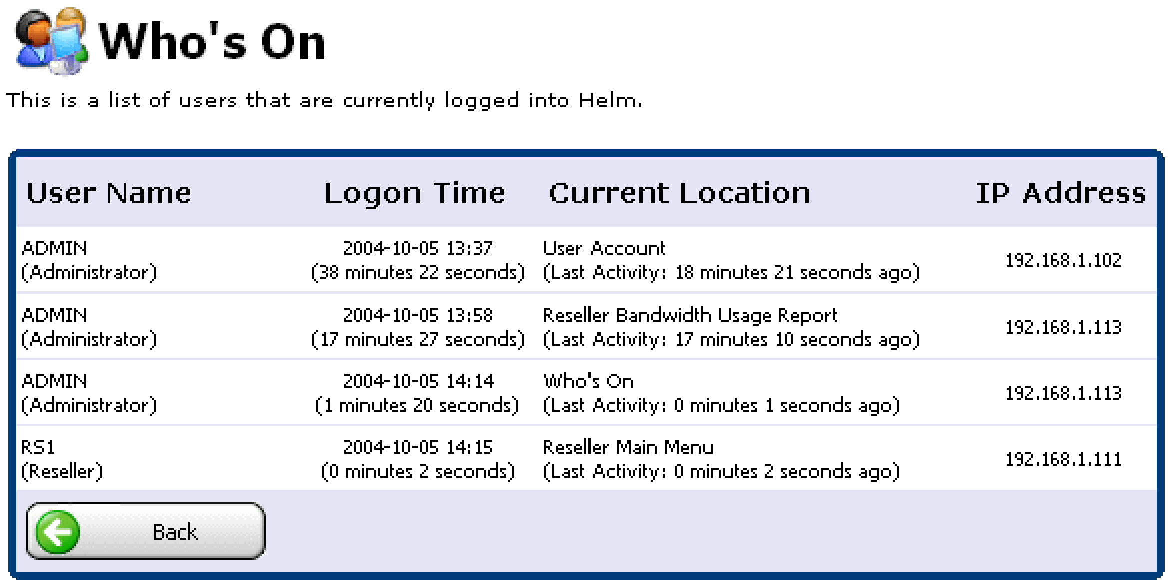
5.) Reports and Who's On

Helm gives you the ability to generate reports for reseller, customer and domain bandwidth, and customer, reseller and domain bandwidth, and also export these reports to Microsoft Excel. There is also the ability to see "Who's On" currently – i.e. see who is logged in to your control panel.

Click on the Reports icon on the Administrator Main Menu and you will be taken to the following screen:

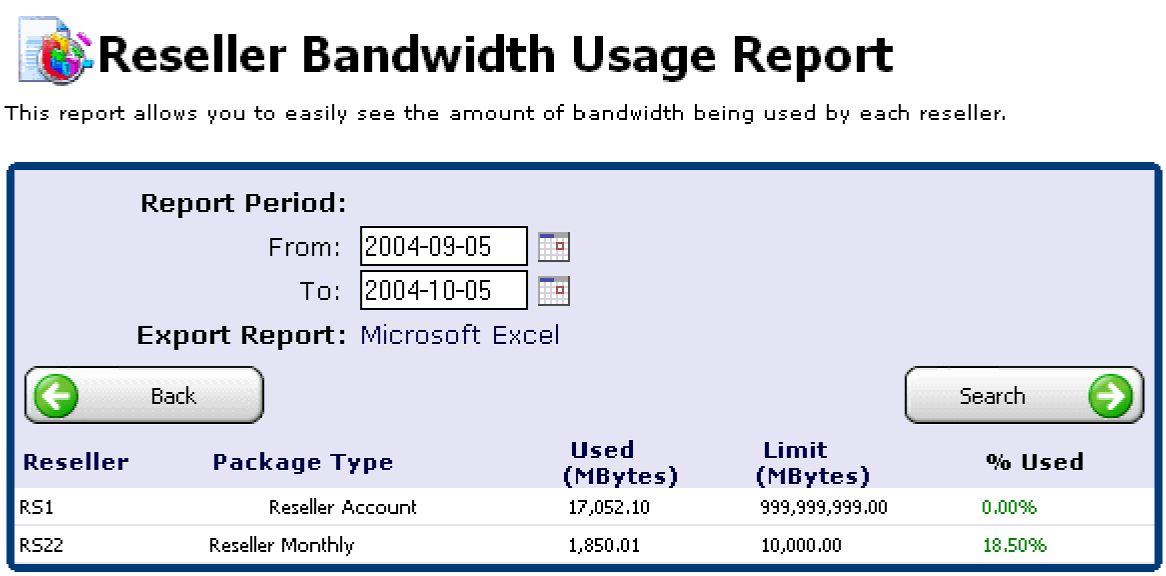


If you click on the “Who’s On” button, you will be able to see a list of users who are currently logged into the control panel. You can see their username, when they logged on, the part of the control panel they are currently in, and their IP:

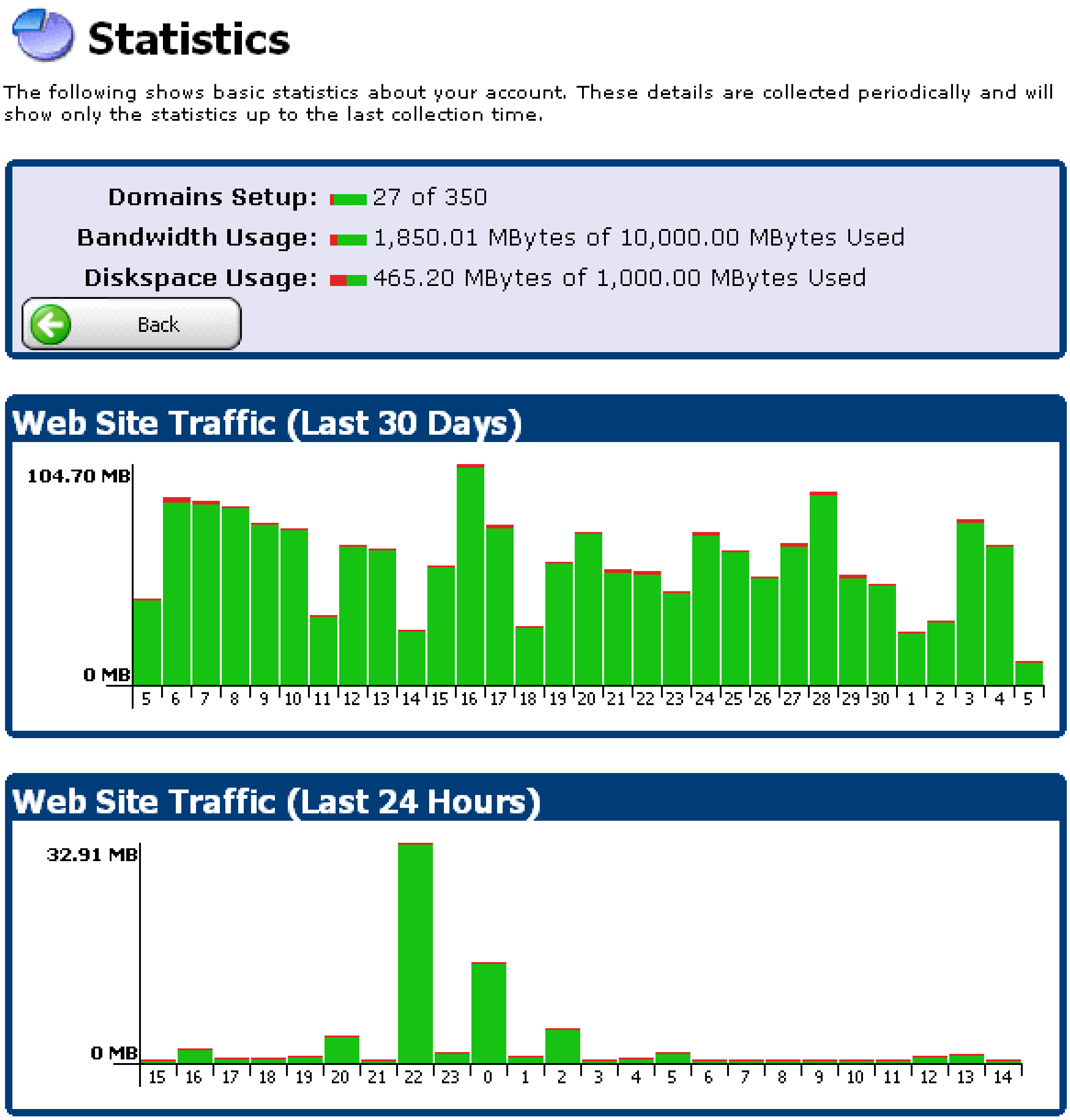


Clicking on one of them will take you to that user’s main menu.

You can also click on one of the reports to see the various bandwidth usages. For instance, if you clicked on Reseller Bandwidth Usage Report, you would be taken to the following screen:



In the above example, two packages are listed with the reseller account number, type of package that they use, and how much bandwidth (in Megabytes) they use along with a colour-coded percentage (green if it is under their limit and red if they have exceeded their limit). Clicking on one of these will take you to the graphical statistics for that reseller:



This is also accessible directly from the reseller and user level. More details about statistics can be found in the **Helm User Guide**.

With the bandwidth usage reports, it is possible to select the bandwidth period that you wish to view the report for. Simply type the date you wish to view or use the helpful calendar tool next to the date field, then click “Search”.

You can also export your reports to Microsoft Excel for your convenience, either as a saved Excel file, or you can open and view it in a web browser (if supported).

The **Diskspace Usage Report** works in a similar way to bandwidth, except that diskspace is not tracked over a period of time – the amount you see in the report, is the amount of diskspace that the reseller currently uses:

Reseller Diskspace Usage Report

This report allows you to easily see the amount of diskspace being used by each reseller.

Report Date: 2005-02-09

Export Report: Microsoft Excel

Back Search

Reseller	Package Type	Used (MBytes)	Limit (MBytes)	% Used
RS1	Hosting Company Reseller Plan	47.00	999,999,999.00	0.00%
RS2	Hosting Company Reseller Plan	0.00	999,999,999.00	0.00%
RS3	Hosting Company Reseller Plan	0.00	999,999,999.00	0.00%
RS4	Hosting Company Reseller Plan	0.00	999,999,999.00	0.00%
RS5	Hosting Company Reseller Plan	0.00	999,999,999.00	0.00%
RS6	Hosting Company Reseller Plan	0.00	999,999,999.00	0.00%

As with bandwidth, clicking on a reseller in the list will take you to the resource usage page for that reseller's package.

The **Domain Diskspace Usage Report** is similar too:

Domain Diskspace Usage Report

This report allows you to easily see the amount of diskspace being used by each domain.

Report Date: 2005-02-09

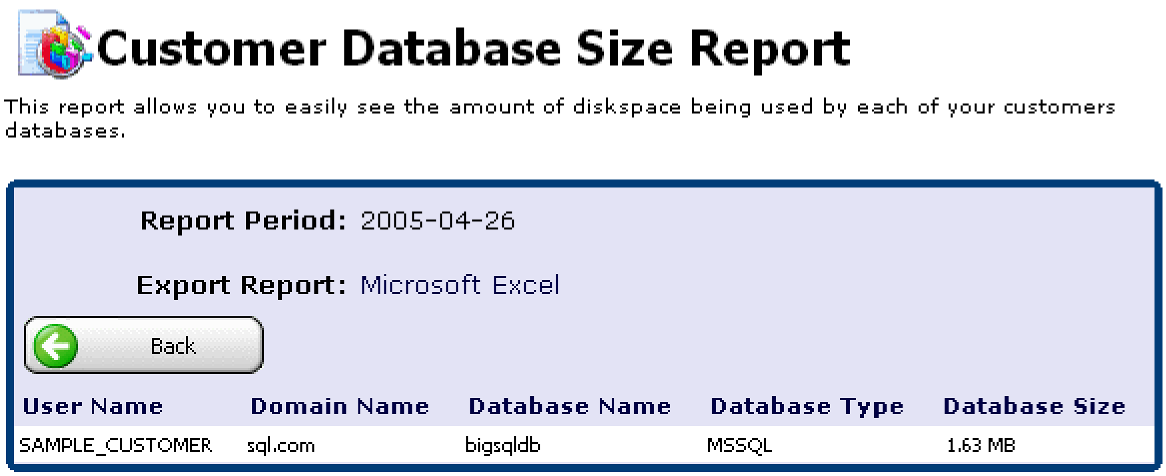
Export Report: Microsoft Excel

Back Search

Domain Name	Customer	Reseller	Used (Mbytes)
testdiskusage.com	UN1	RS1	47.00

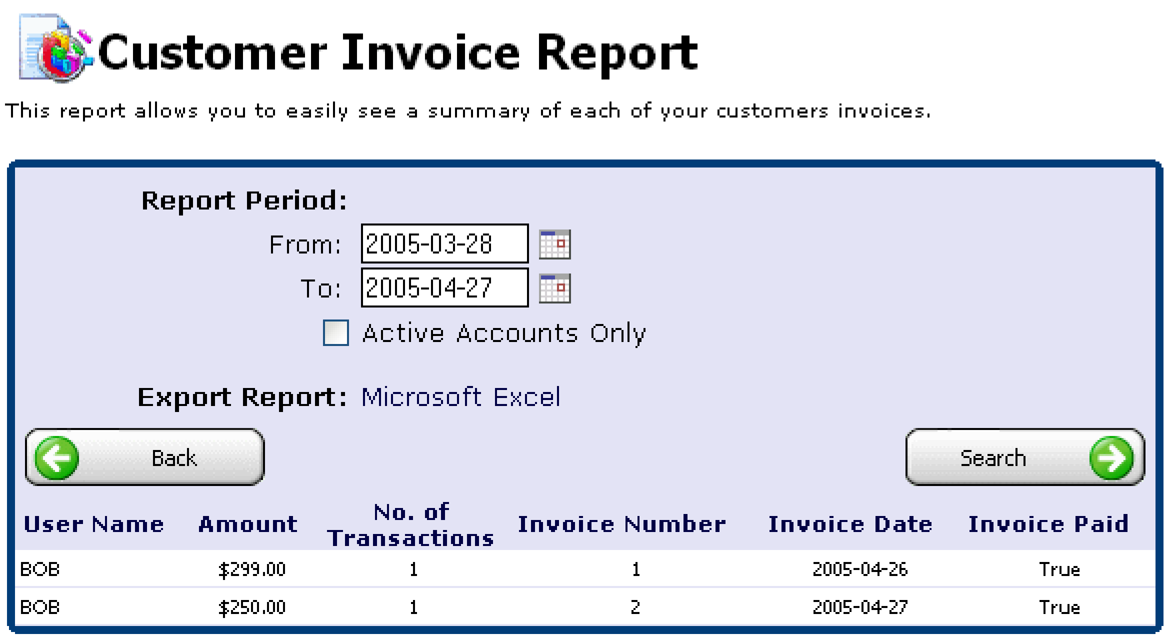
Clicking on a domain listed in the report will take you to the statistics page for that domain.

The Customer Database Usage Report works similar to the diskspace reports, except it monitors the size of databases that have been added through Helm for each customer. It lists the username of the database owner, the domain name the database has been added to, the name of the database, whether it is a MySQL, MSSQL or Access database, and its size. This is particularly useful in keeping track of customers who are using space and resources with massive databases:



Clicking on a domain listed in the report will take you to the page for that database.

The Customer Invoice Usage Report lets you view the invoices currently in each customer's account. It lists the username of the customer, the amount of the invoice and the number of transactions in it, the invoice number and date, and whether it has been paid. You can search by date, view only the customers whose status is set to "Active" in Helm, and you can Export to Excel (as with all other reports).

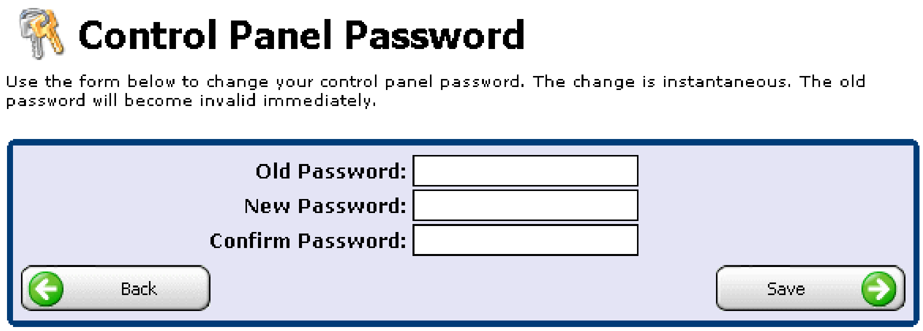


Clicking on an invoice listed in the report will take you to the invoice in that customer's account.

6.) Changing Your Password

If you wish to change your password when logged into Helm, then you can also do this here as well . We recommend that you change your password to a combination of letters and numbers at least 8 characters in length – which you can remember easily.

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



7.) Setting up Plans

Helm splits the way it offers services into two formats: plans and packages. A “**plan**” is a template, a way of creating a number of settings that can be bundled and offered to resellers. Each customer has an instance of that plan, which is called a “**package**”. Packages can be customised for each customer, whilst any alterations to the plan will affect all resellers that have packages which use that plan.

Example:

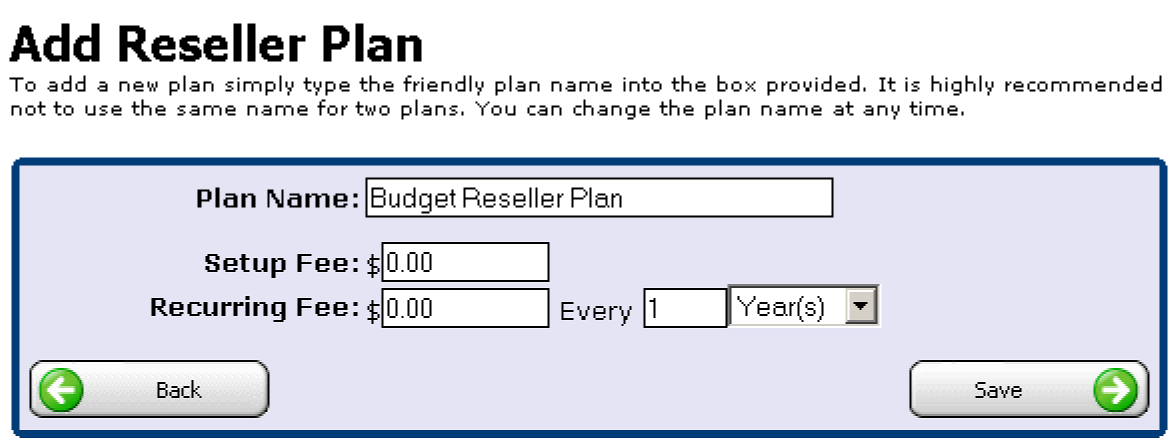
Administrator A sets up several hosting plans – Budget Plan, Normal Plan and Deluxe Plan. Resellers B and C then buy a package based on Normal Plan, whilst Reseller D buys a package based on Deluxe Plan. Administrator A then decides to alter the features offered with Normal Plan. Resellers B and C will see that their packages are affected, whilst Reseller D remains unaffected because the template his package is based upon is Deluxe Plan, which hasn’t been altered.

Creating Reseller Plans

The first thing you will want to do is to create plans to sell to your resellers. You can add resellers before adding plans, but most Helm users will want to set up their plans and packages before adding resellers. To add a Reseller Plan, go to:

Home > Reseller Plans

Choose Add New, and you will be taken to the plan details screen:

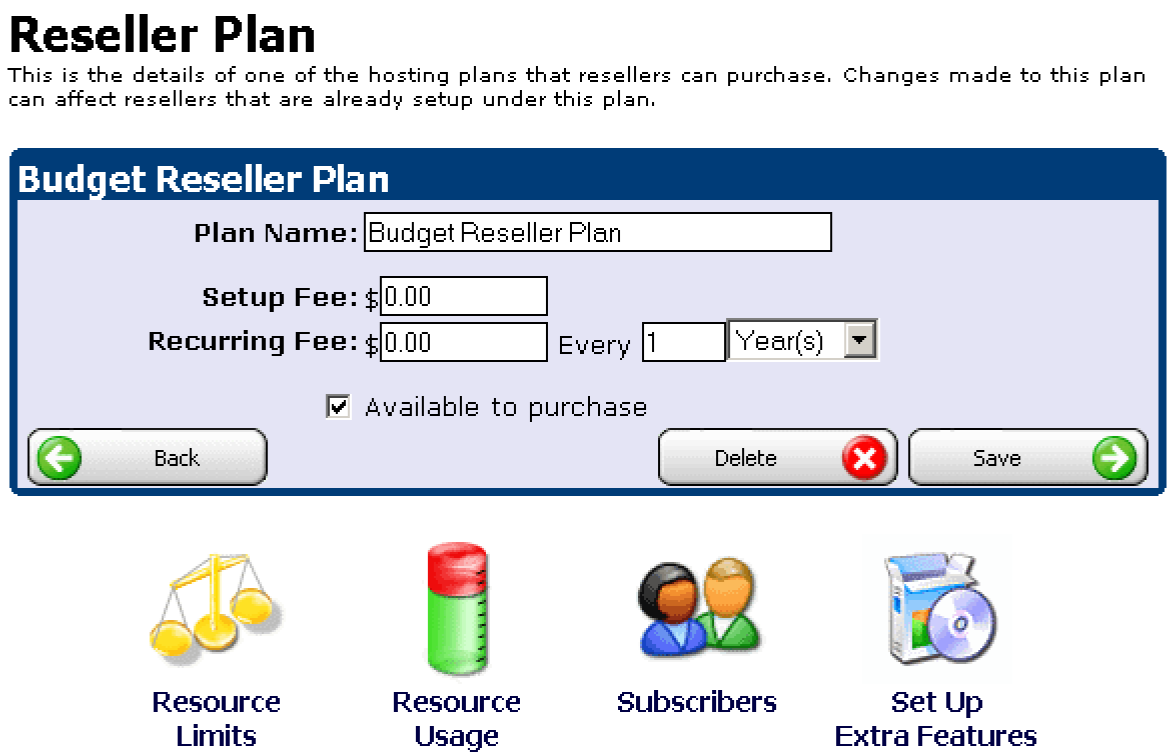


Plan Name:- You can specify the name of your reseller plan here. In this example, “Budget Reseller Plan” has been chosen.

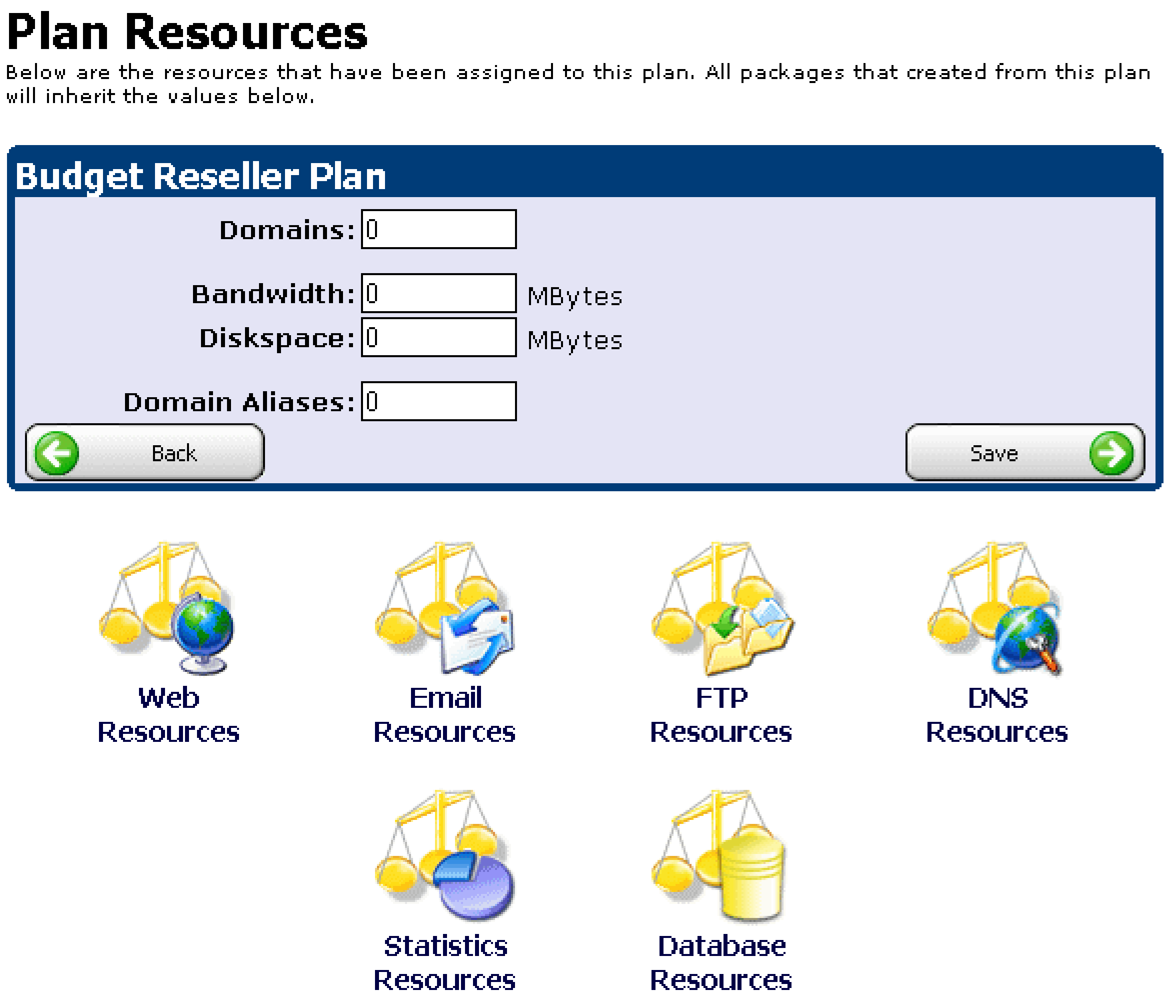
Setup Fee:- This is a one off payment that gets charged to the reseller upon them purchasing a plan.

Recurring Fee:- This is a regular payment that gets charged over a customisable period of time.

For the purposes of this example, the fees have been set to 0. Click Save to save the plan. You will see the plan has been created, with the number of packages under that plan as 0. Click the plan, and you will be taken to the Reseller Plan screen, where you can customise your plan and set up customers of that plan (i.e. resellers):



You now need to assign the resources you created earlier to this new plan. Click Resource Limits, and you will be taken to the Plan Resources screen:



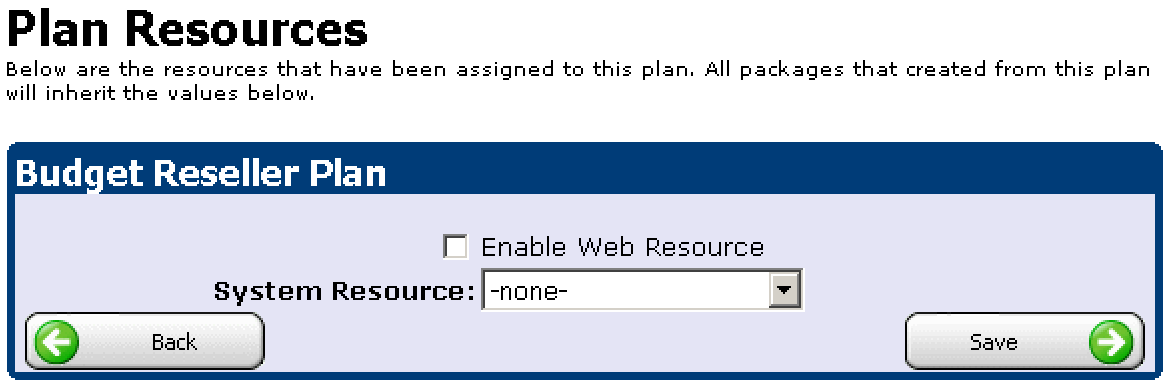
Domains:- This is the number of domains that the reseller has available to sell to his customers. For this example, the number of domains will be set to 50.

Bandwidth:- This is the amount of bandwidth the reseller is allowed to spread over his customer base. For this example, bandwidth will be set to 1000MB.

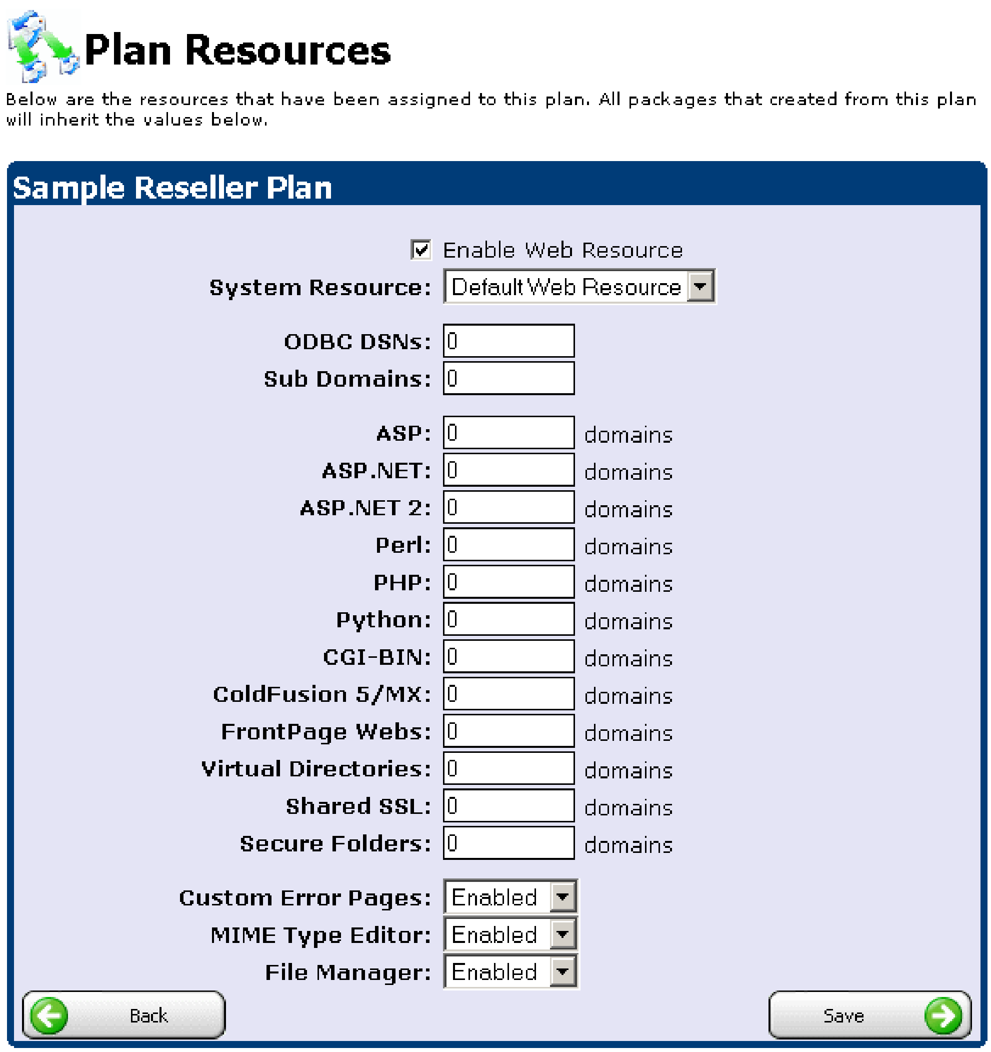
Diskspace:- This is the amount of diskspace the reseller is allowed to spread over his customer base. For this example, diskspace will be set to 1000MB

Domain Aliases:- This is the number of domain aliases the reseller has available to sell to his customers. For this example, the number of aliases will be set to 100.

You now need to set the plan to use each of the relevant resources you have created. To do this, click one of the resources (for example, Web Resources). You will be taken to the menu for that resource within the plan:



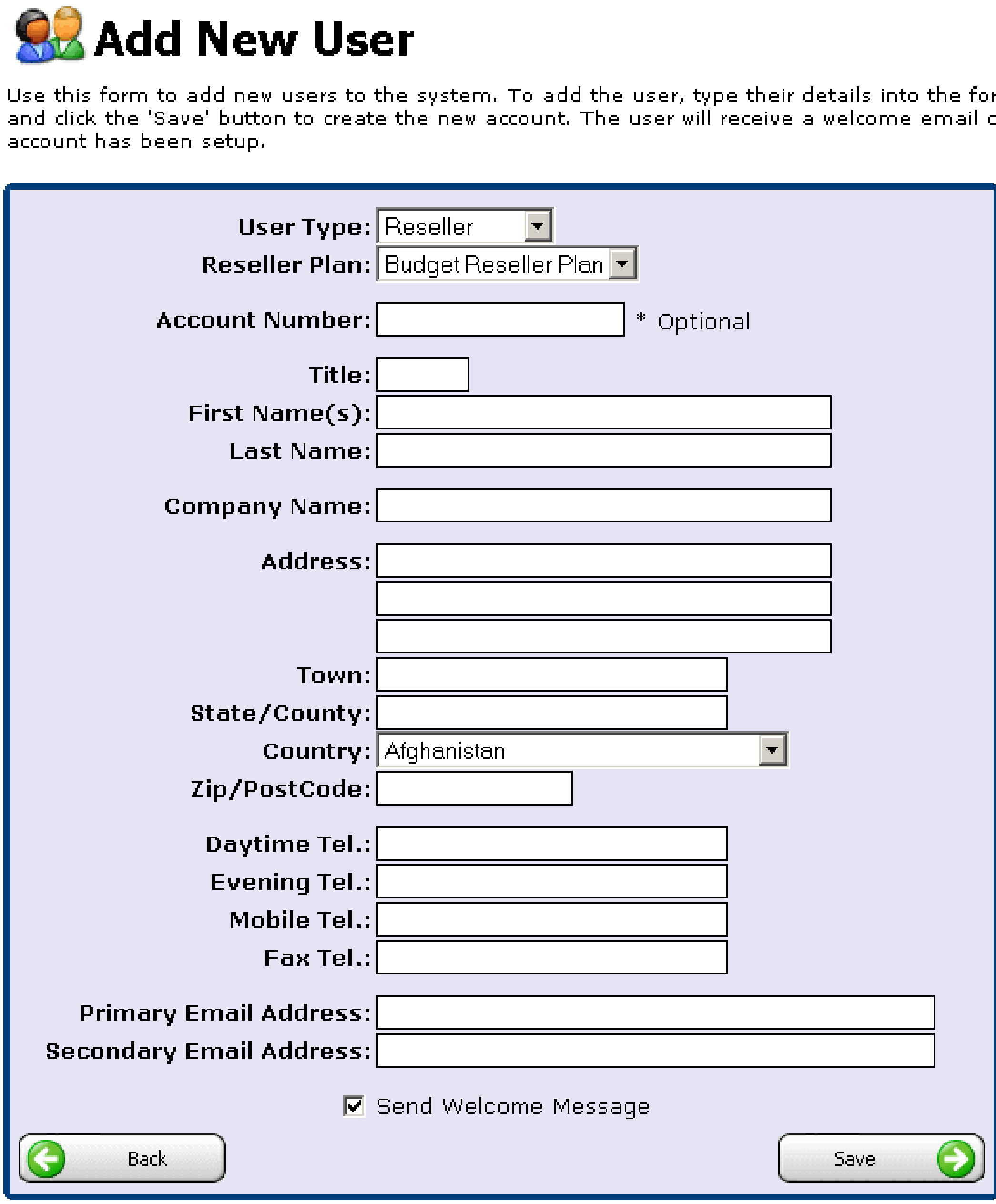
You will see that the resource is disabled, and no resource has been selected. Simply check the Enable Web Resource box, and choose the resource from the dropdown box, and click Save. You will be presented with a number of new options that you can configure. For this example, these will be left untouched.



Click Back to go back to the main Plan Resources menu. **You now need to do the same for each of the other 3 resources – FTP, DNS and Mail**. Enable and select the resource for each, and save them along with any features you want to add. For the purposes of this example, the following settings were also saved:

- 50 FTP accounts
- 50 POP3 accounts

Once you have the reseller plan set up, you can add a reseller. On the Plan Resources, click Back and then click Subscribers. There are no subscribers to the plan yet, so click Add New to add a Reseller:



Fill in the reseller's details (the plan that they are assigned to can be chosen at the top) and click Save. This reseller is now assigned to an instance of that plan (i.e. a package) and can start creating users, and setting up their business.

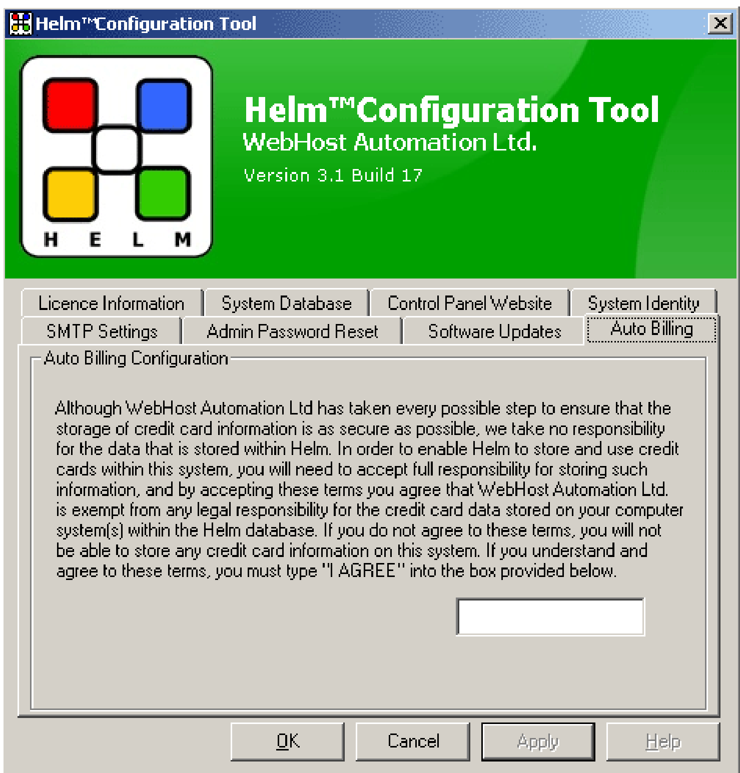
For more information, please refer to the Helm Reseller Manual.

8.) Billing Settings and Card Payments

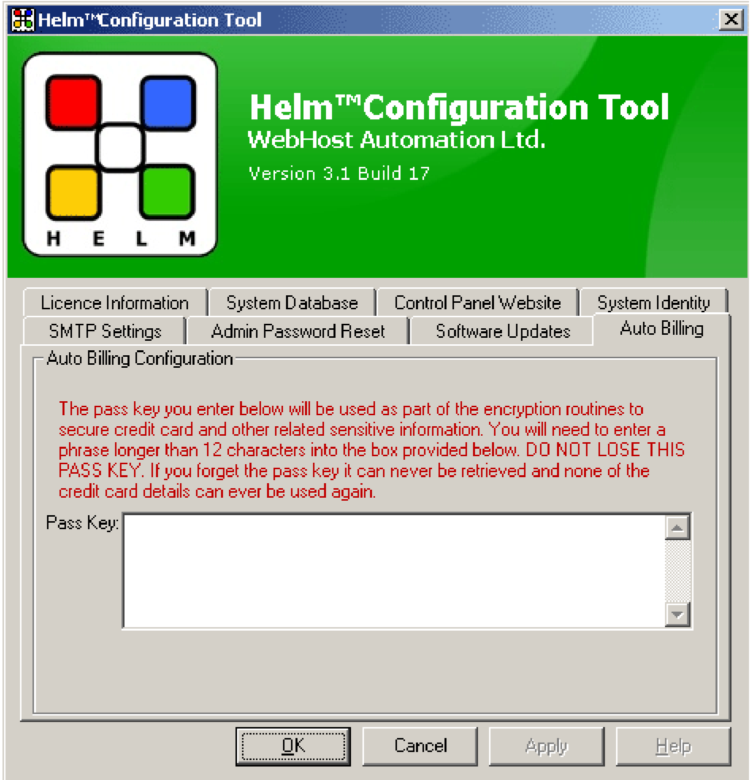
Terms and Conditions for Storing Card Details

The latest version of Helm supports auto-billing, which allows you to store and charge your customers' credit and debit cards automatically, by allowing them to store their card details in the database. If you wish to use this facility, you first need to do the following:

1.) Open up the Configuration Tool and choose the "Auto Billing" tab. Read and agree to the terms and conditions, and then type I AGREE into the box provided, and click "Apply".



2.) You will now need to choose a passkey with which any stored card details will be encrypted. This needs to be at least 12 characters and should be memorised. If you lose this key in future, you will not be able to recover any encrypted credit card details, should your server's registry become corrupt or lost.



Once done, you now need to set up Helm so that it will accept your customers' card details.

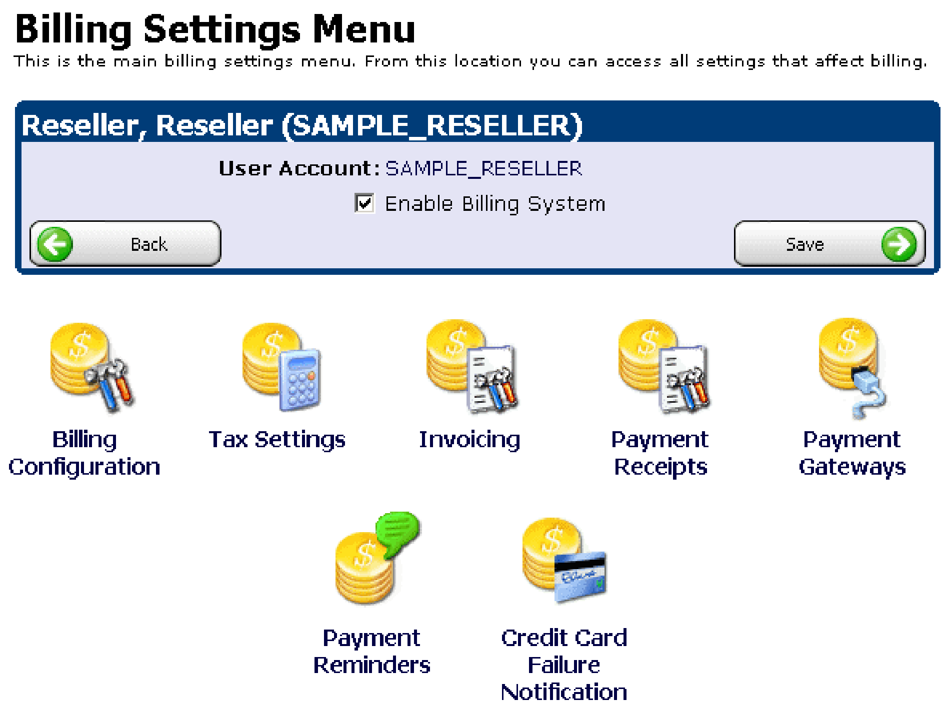
Current Supported Online Payment Gateways

Helm supports the following online payment gateways for automated billing:

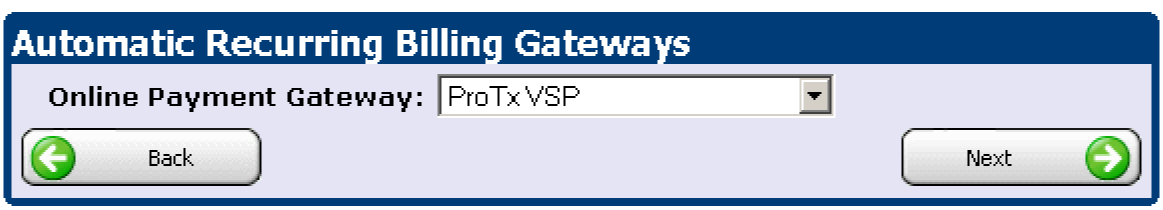
- **Authorize.Net**
- **ProTx VSP**
- **Moneris eSelect Plus**
- **LinkPoint Secure**
- **psiGate Gateway**
- **eWay EPayment**
- **SecurePay (USA)**
- **E-xact Transactions**
- **Velocity Pay**

To set one or all of these up for your reseller to use, go to:

Home > Billing > Billing Settings



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

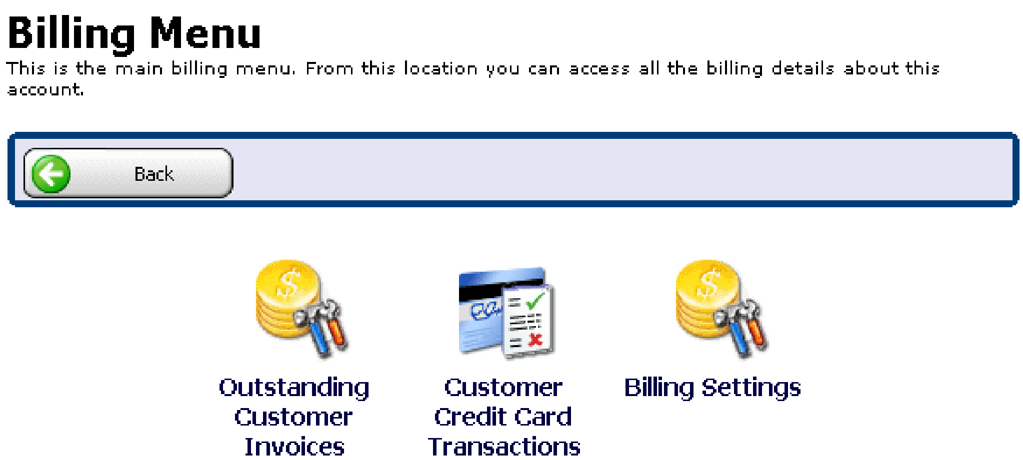


There is separate documentation for each of the supported gateways. To integrate one or more of them into Helm, please refer to the relevant documentation at:

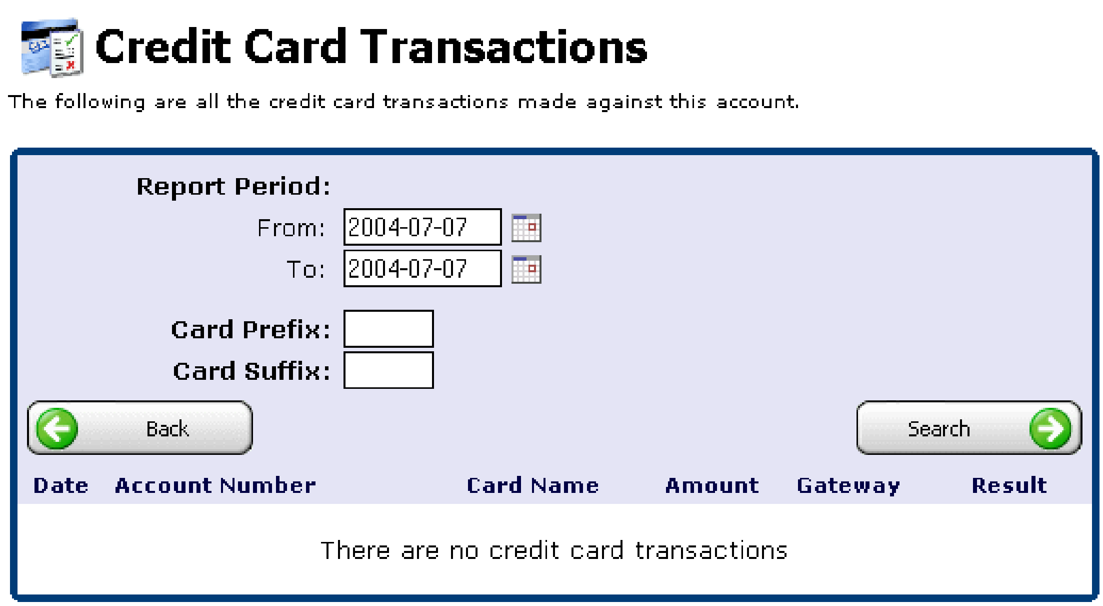
http://www.webhostautomation.com/webhost-304#AutoBilling

Credit Card Transactions

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



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



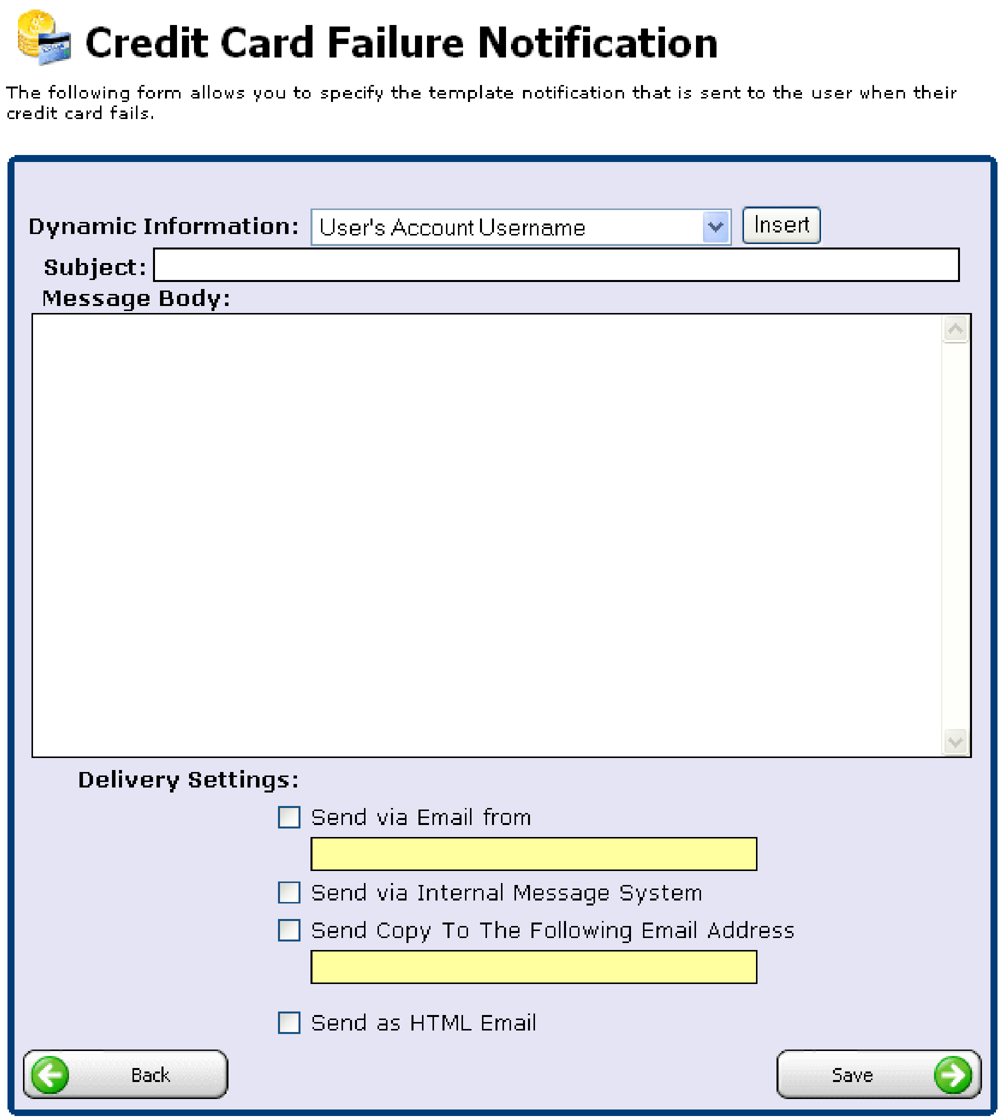
The transactions within the Report Period are listed. These include the date attempted, account number used, the friendly name of the user’s card, the amount the transaction was for, the gateway used, and whether the transaction was successful (if not, a reason for the failure is given).

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

Credit Card Failure Notification

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

Note:- This will only get sent out AFTER the “CC Failure Retry Limit” of a payment gateway is reached. This is to prevent your resellers from being inundated with failure notifications if you have set a large retry limit.

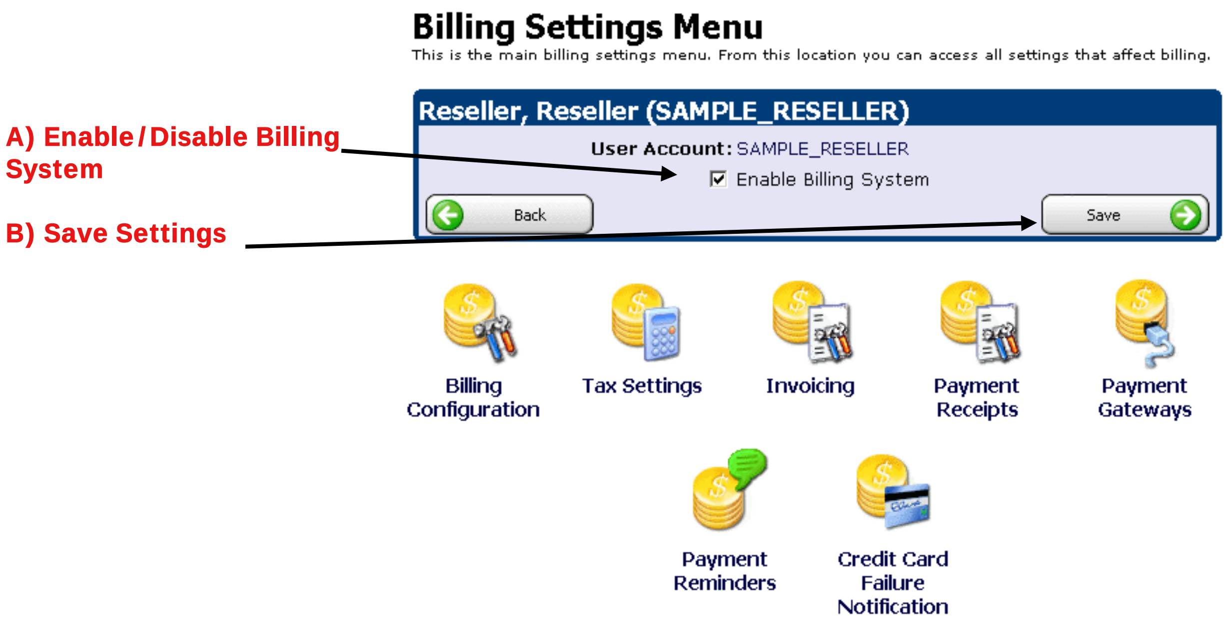


As with most other custom notifications, you can choose:

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

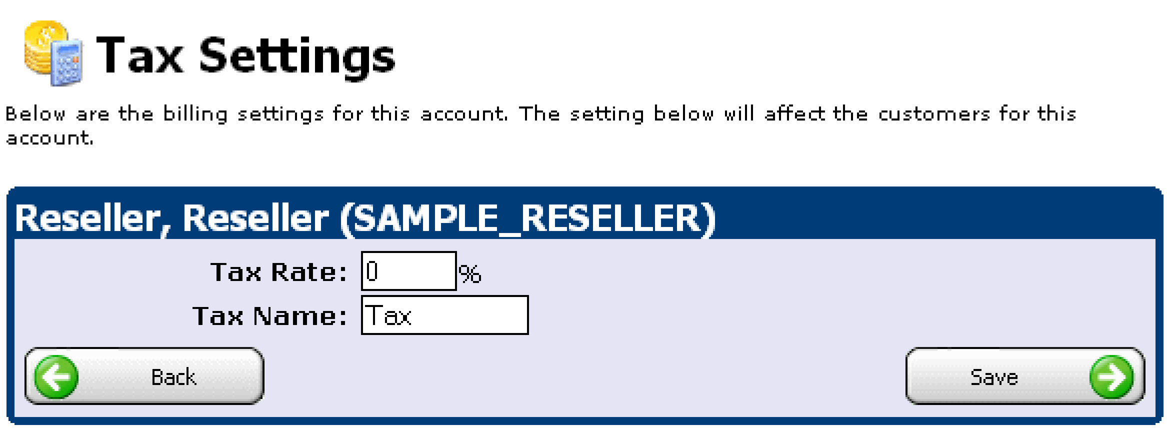
9.) Other Billing Settings

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



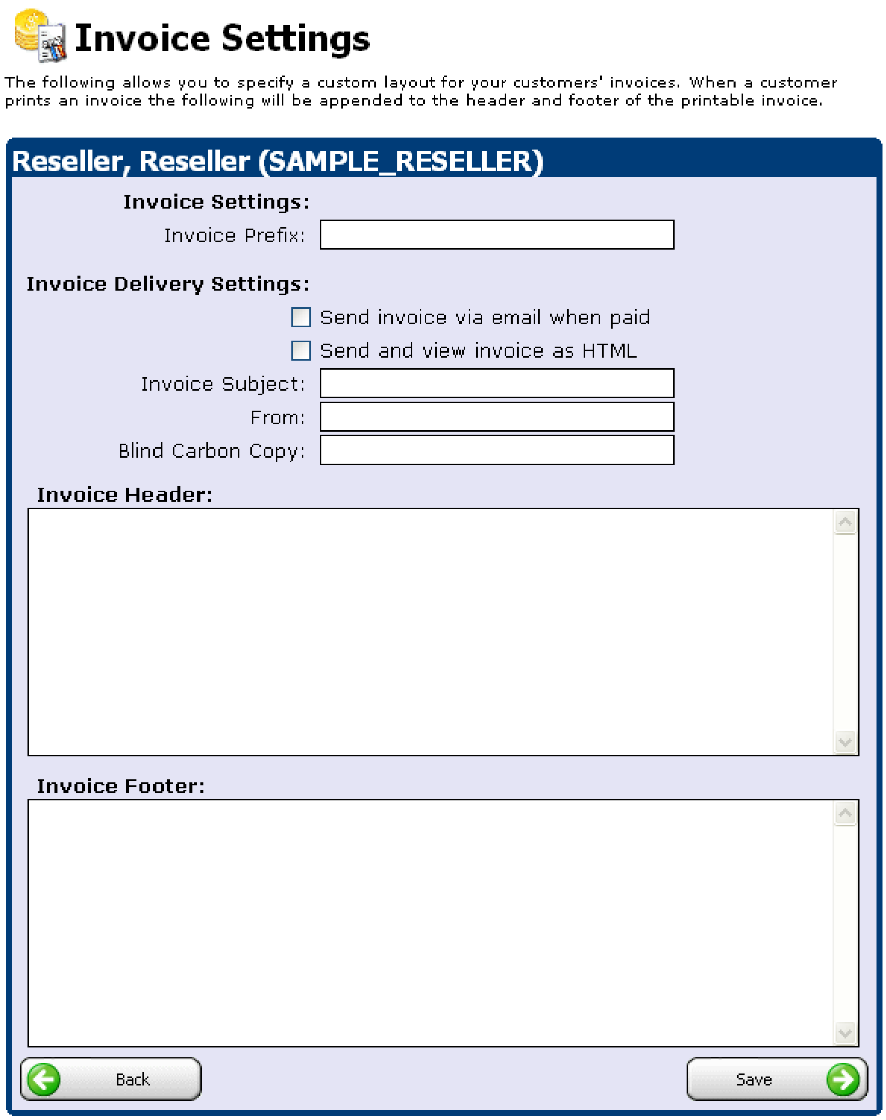
Tax Settings

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



Invoice Settings

Clicking on the "Invoice Settings" icon will bring you to a page where you can enter your invoice settings. You can opt to either have the invoice sent or not sent by checking or unchecking the "send invoice via email" box. You can also input an invoice prefix, custom invoice subject, 'from' address, and blind carbon copy address so that you can also have a copy of the invoice emailed to you for your records. Additionally, you may also input custom HTML invoice headers and footers:

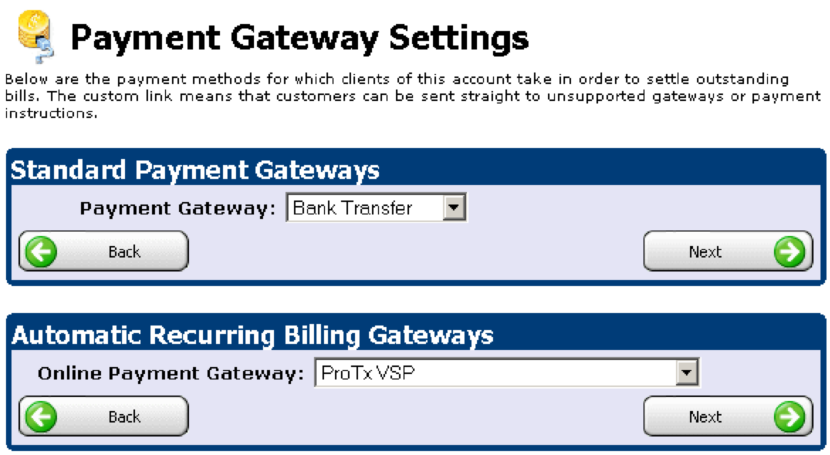


After entering your settings, click "Save" to make sure all of your settings have been saved and then click the "Back" button to return to the main "Billing Settings" page.

Payment Gateway Configuration

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

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

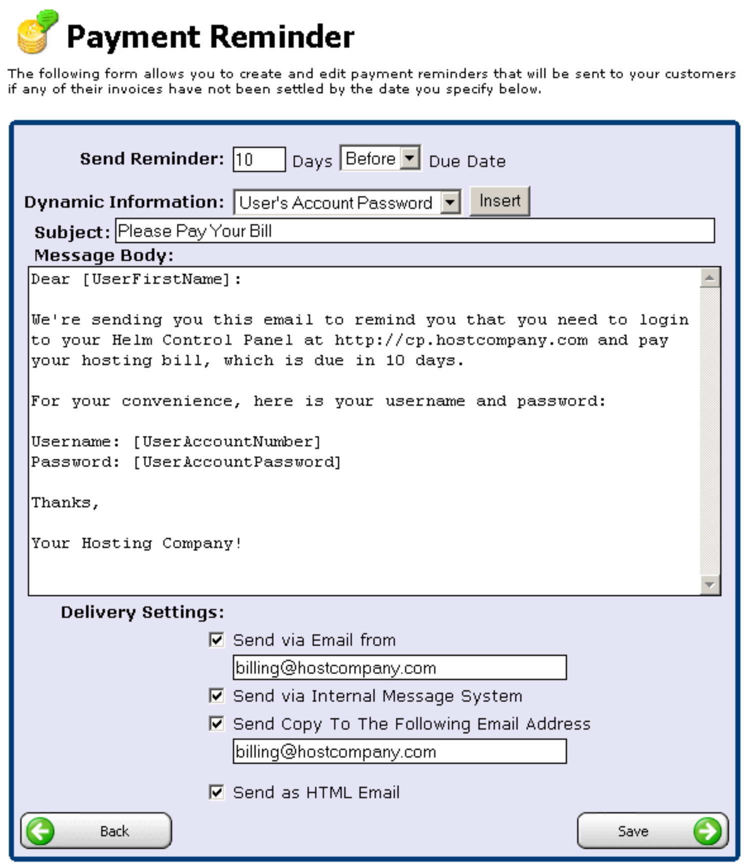


After inputting your payment gateway details, click "Save" to save your settings. Click on the "Back" button to return to the main Billing Settings page.

Payment Reminders

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

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



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

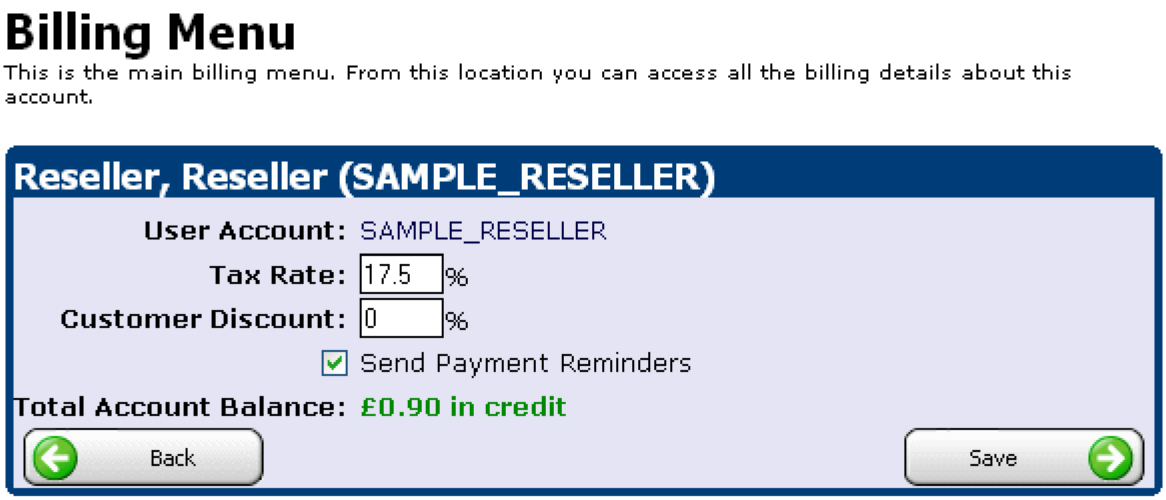
Send via Internal Message System: Checking this box will also send the user a copy of the email message via the Internal Message system.

Send Copy To the Following Email Address: Checking this box and entering a valid email will "carbon copy" the email address you enter with all emails automatically sent out by Helm. Enabling this feature is helpful as it lets you have a record of the information that gets sent to your users.

Send as HTML Email: Check this box if your message is in HTML format, and you wish to send this email in HTML format.

Disabling a Payment Reminder for a Reseller

If you don't want a specific reseller to be sent a payment reminder when the billing task runs, then you can disable reminders for that reseller. Simply select the Reseller from the list in Helm, and click Billing. You will be taken to the main Billing Menu:

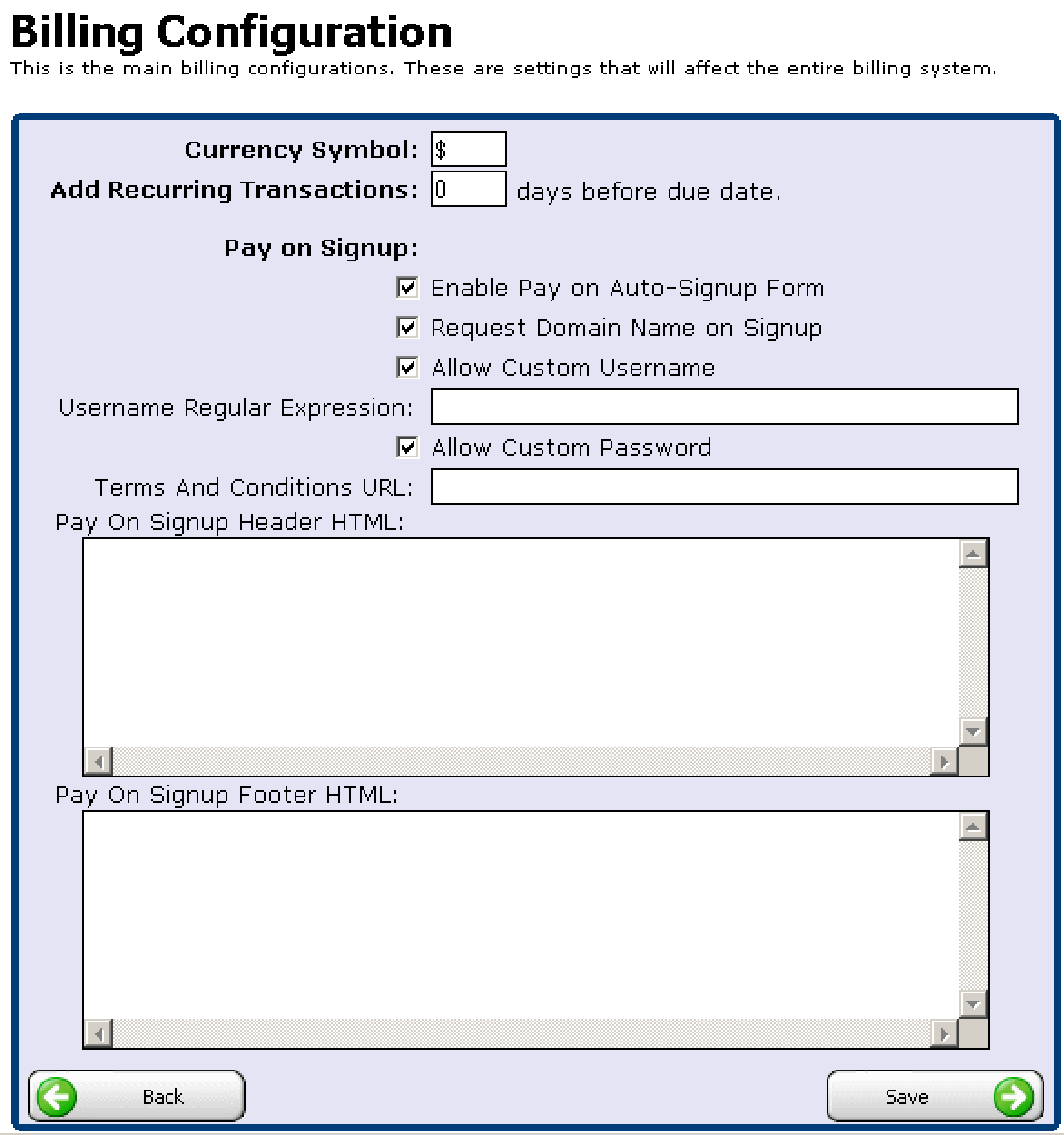


At the top, you will see a check box for "Send Payment Reminders". Simply uncheck this and click "Save" and this reseller will no longer receive payment reminders.

10.) Auto-Signup Script

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

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



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

[HELM INSTALL FOLDER]\Helm\Control Panel

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

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

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

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

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

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

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

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

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

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

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

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

Upon completion of this form, you can access (and link to) the auto-signup page like this:
http://YourControlPanelURL/autosignup.asp?adminaccnum=admin

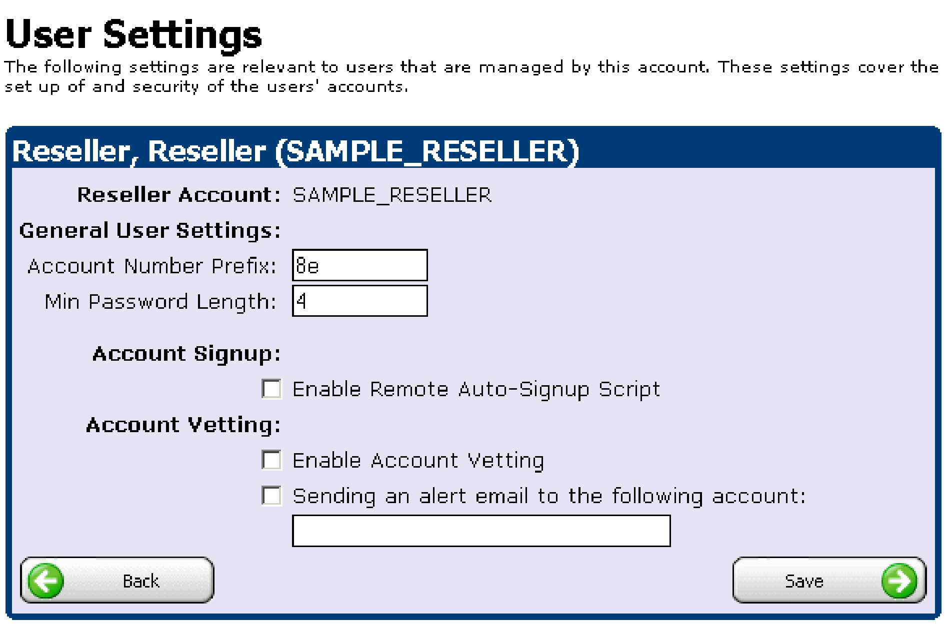
11.) Normal Signup Script

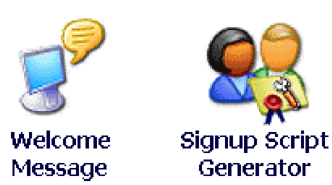
The Auto-Signup script means that your customers will have to pay before their account is generated. This might not be ideal for some of your customers (for instance, the ones paying by bank transfer or cheque), or those that have signed up for free accounts. In these instances, it may be preferable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

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

User Settings

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





Account

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

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

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

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

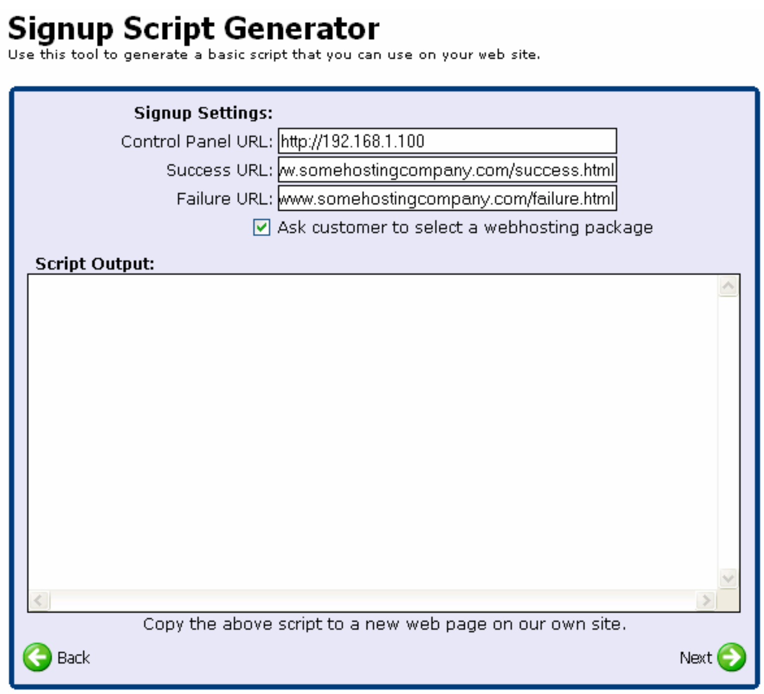
Signup Script Generator

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

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

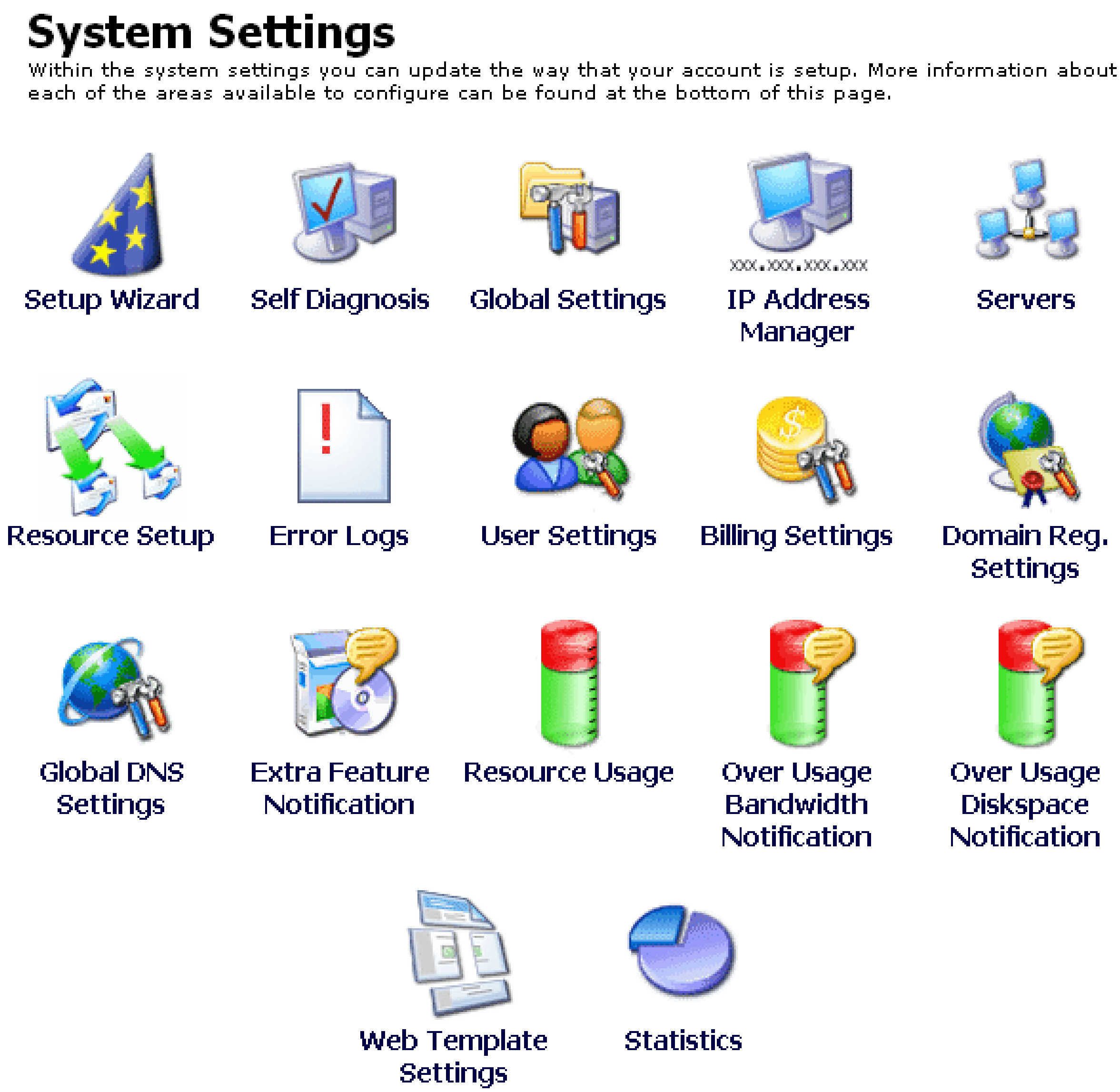
Step 3: Click Next.

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



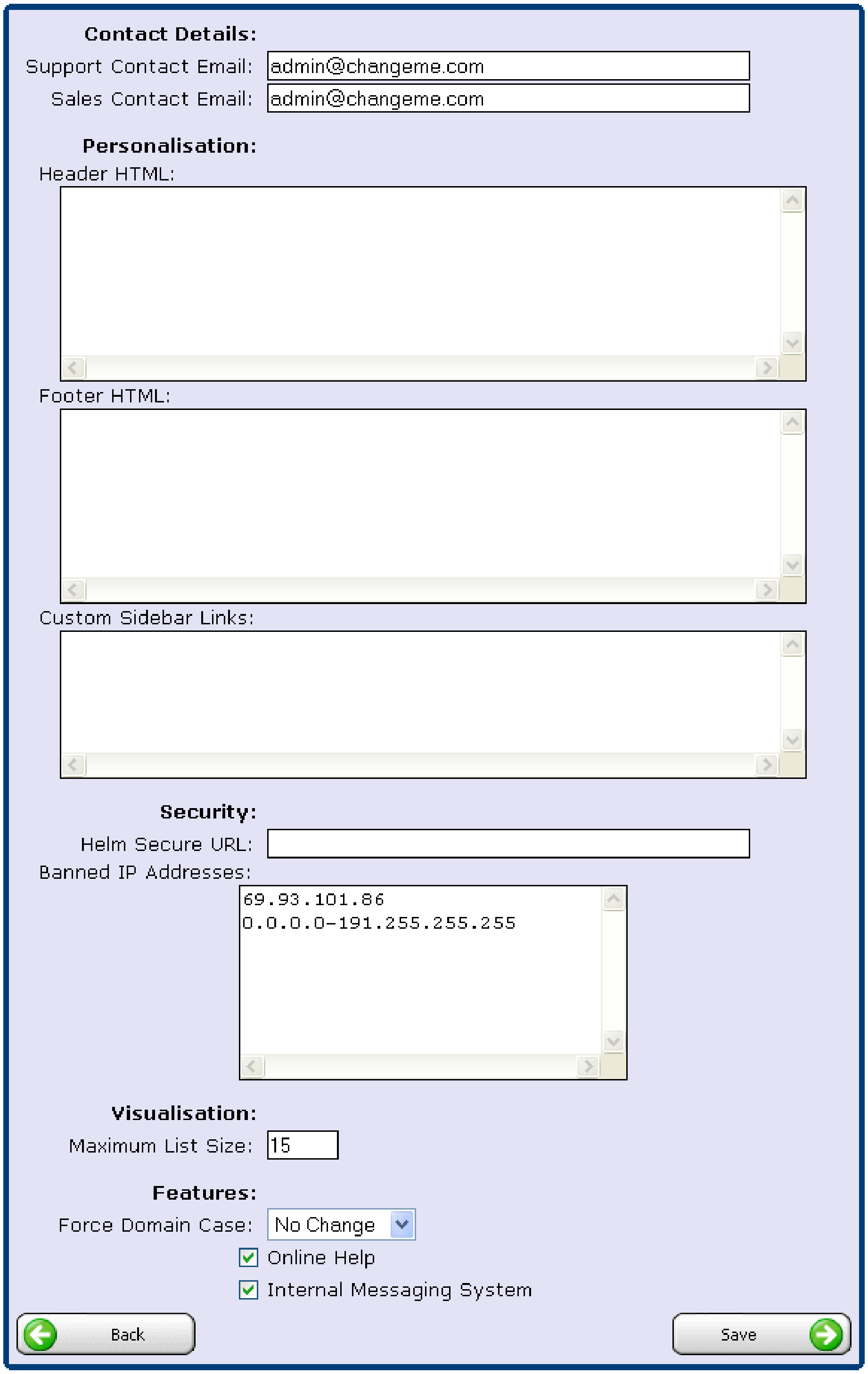
12.) Customizing Your Control Panel

Helm provides several areas to customize how the control panel will appear to your customers when they login. We recommend that you customize your control panel before proceeding any further. To begin the customization process, click on the "System Settings" icon from the Administrator Main Menu. From there, you will find several icons and sub-pages that are explained below.



Step 1: Global Settings

Click on the “Global Settings” icon to begin:



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

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

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

```
URL[Display Text]
```

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

Using the same method, you can embed images in the sidebar links section. Example:

```
http://www.microsoft.com[<img src=http://Microsoft.com/logo.gif>]
```

Helm Secure URL: Use this to specify the Helm Control Panel URL that you want to use in order to use a secure site (https). With this set, Helm will be able to switch from http to https automatically on pages that will require it, such as billing. An example of a secure URL you can enter here is:

https://www.mywebhostingpanel.com

Banned IP Addresses: Helm gives you the ability to ban specific IPs from accessing the control panel. Simply enter any IPs you want to ban from getting to the Helm login screen, and click Save to save them. You can put one IP or range of IPs on each line – an example can be seen in the above screenshot.

Force Domain Case: You have three choices here for deciding how to view domain names in Helm – "No Change" allows a person to enter them in lower or upper case; "Upper Case" forces the domain names into upper case; "Lower Case" forces the domain names into lower case.

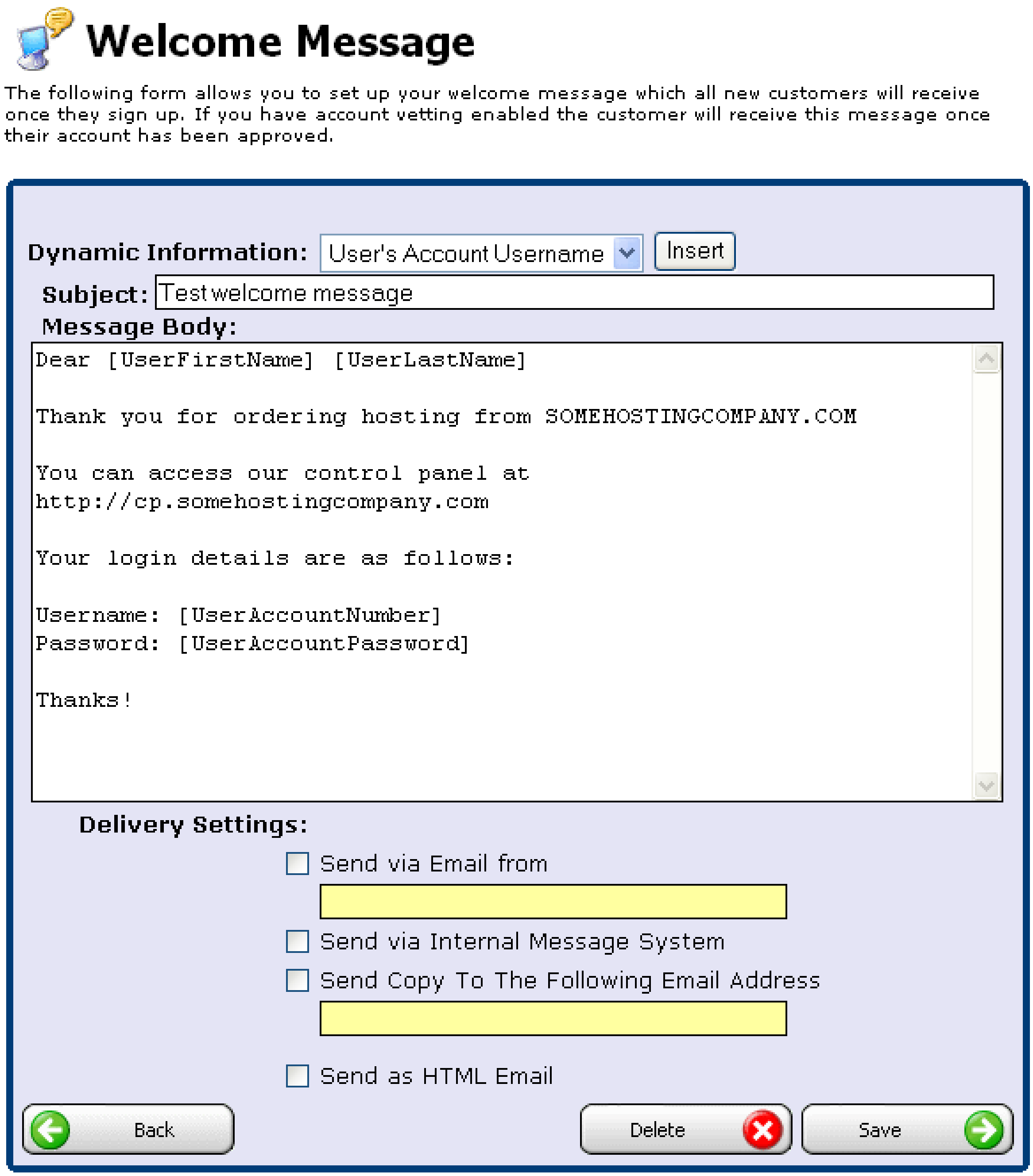
Maximum List Size: Here you can set how many items in each list you want to view on pages that have lists. For example, on the domains page you may have 20 domains. If you set the Maximum List Size to 20, then you will be able to view all the domains on one page. If you set it to 10, it will be split over 2 pages, and so on. This affects ALL lists in Helm, including lists of users, etc.

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

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

Step 2: User Settings – Customized Welcome Letter

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



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

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

Message Body: This is the content of the email that your reseller will receive. This accepts HTML, if you wish to send a HTML email. Remember to check the “Send as HTML Email” box in this case.

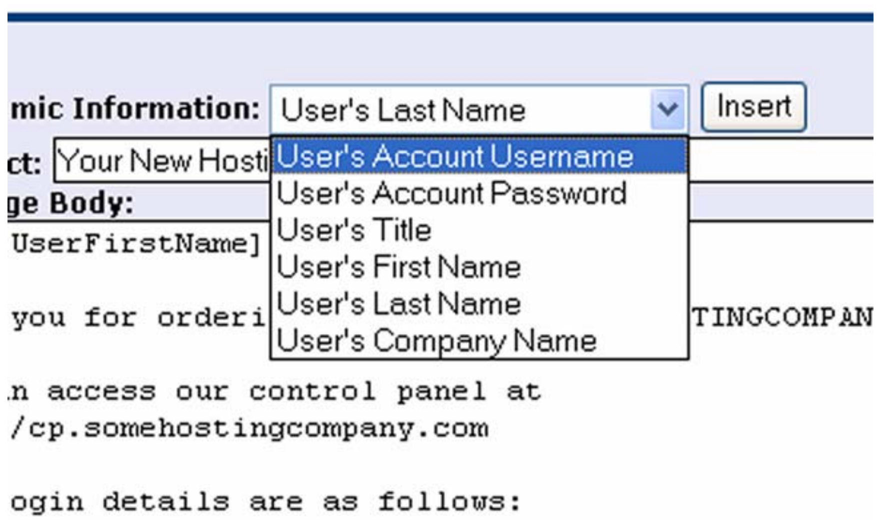
Send via Email From: The email your resellers receive will be sent from this address. For example, it would be a good idea to enter your support or sales email address in this field.

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

Send Copy To the Following Email Address: Checking this box and entering a valid email will “carbon copy” the email address you enter with all welcome emails automatically sent out by Helm. Enabling this feature is helpful as it lets you have a record of the information that gets sent to your resellers.

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

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

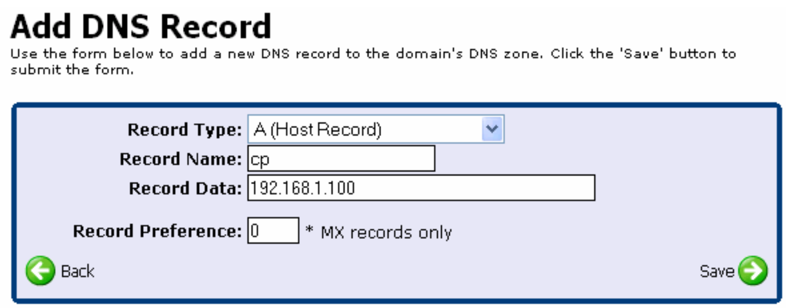


Step 3: Global DNS Settings

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

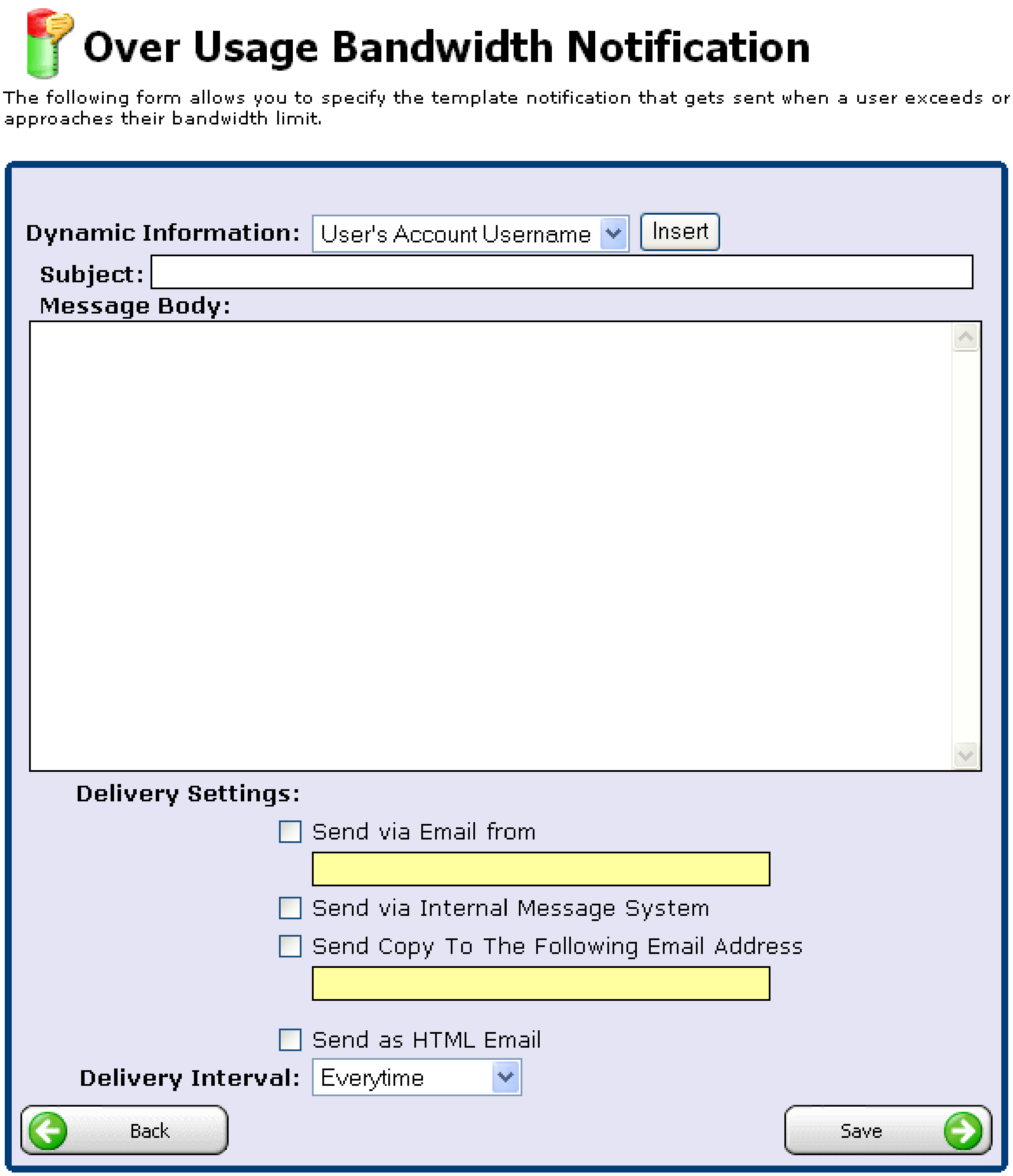
From the Account Settings page click on "Global DNS Settings" then click on the "Add New" button. Leave the record type as "A (Host Record)". In the record name, enter "cp". In the record data field, enter the IP address of your Helm control panel. For our example, let's assume the IP address of the control panel is 192.168.1.100. You would therefore enter "192.168.1.100" in the record data field. Clicking the "Save" button will take you back to the main Global DNS Settings page.

Tip – Be sure the information you enter at this screen is accurate. Inputting incorrect information could cause major issues in the future.



Step 4: Over Usage Bandwidth Notification

Helm gives you the ability to send out notifications to your resellers if they go over their allotted Bandwidth. Click the "Over Usage Bandwidth Notification" icon to go to the following screen:



NOTE:- The over usage notification email will be sent out if, during the scheduled running of the bandwidth collector, it is found that the reseller's bandwidth usage exceeds (even by the smallest amount) the bandwidth that has been assigned to them.

Dynamic Information: Using this dropdown menu, you can insert dynamically generated content into your notification. This feature can be used to personalise the notification email to your reseller, similar to the welcome message.

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

Message Body: This is the content of the notification that your reseller will receive. This accepts HTML, if you wish to send a HTML email. Remember to check the "Send as HTML Email" box in this case.

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

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

Send Copy To the Following Email Address: Checking this box and entering a valid email will "carbon copy" the email address you enter with all emails automatically sent out by Helm. Enabling this feature is helpful as it lets you have a record of the information that gets sent to your resellers.

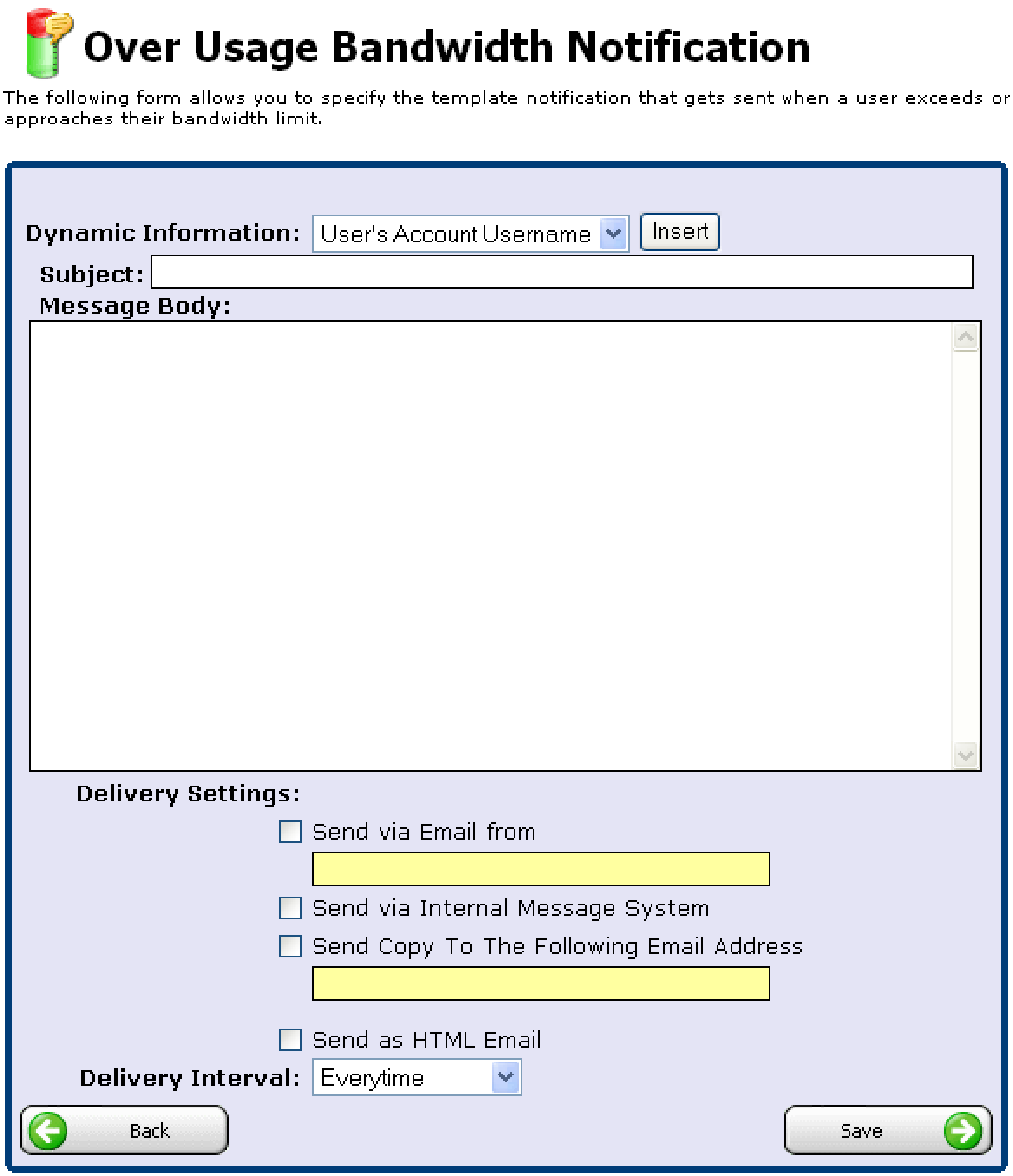
Send as HTML Email: Check this box if your message is in HTML format, and you wish to send this email in HTML format.

Delivery Interval: Choose the frequency that you want the notification to be sent out:

Everytime – this will send the notification every time the bandwidth collector is run.
Everyday – this will send the notification once per day (assuming the bandwidth collector is run at least once per day).
Every other day – this will send the notification every other day (assuming the bandwidth collector is run at least once per day).
Every week – this will send the notification once per week.

Step 5: Over Usage Diskspace Notification

Helm gives you the ability to send out notifications to your resellers if they go over their allotted Diskspace. Click the “Over Usage Diskspace Notification” icon to go to the following screen:



NOTE:- The over usage notification email will be sent out if, during the scheduled running of the bandwidth collector, it is found that the reseller’s diskspace usage exceeds (even by the smallest amount) the diskspace that has been assigned to them.

Dynamic Information: Using this dropdown menu, you can insert dynamically generated content into your notification. This feature can be used to personalise the notification email to your reseller, similar to the welcome message.

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

Message Body: This is the content of the notification that your reseller will receive. This accepts HTML, if you wish to send a HTML email. Remember to check the “Send as HTML Email” box in this case.

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

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

Send Copy To the Following Email Address: Checking this box and entering a valid email will “carbon copy” the email address you enter with all emails automatically sent out by Helm. Enabling this feature is helpful as it lets you have a record of the information that gets sent to your resellers.

Send as HTML Email: Check this box if your message is in HTML format, and you wish to send this email in HTML format.

Delivery Interval: Choose the frequency that you want the notification to be sent out:

Everytime – this will send the notification every time the diskusage collector is run.
Everyday – this will send the notification once per day (assuming the diskusage collector is run at least once per day).
Every other day – this will send the notification every other day (assuming the diskusage collector is run at least once per day).
Every week – this will send the notification once per week.

13.) Web Template Settings

Website Templates are ready-made design products that can be used as a basis for fast and high-quality web design. Through Helm, you have the ability to sign up as an affiliate with **TemplateMonster.com**. As an affiliate, you can then benefit from up to a 20% commission on sales of web templates that users purchase through Helm.

How It Works

As an administrator, you set up a free account with TemplateMonster.com through Helm.
You will receive an email asking for confirmation, and then you're done! From then on, you can make money in one of two ways:

1.) If your resellers enable Web Templates in Helm so that their customers can purchase them, but choose not to sign up for an affiliate account themselves, then all sales will be linked directly to your account – and you will make 20% commission on all templates bought by your resellers' customers.

2.) If your resellers enable Web Templates in Helm and decide to become an affiliate themselves, then all sales will be linked to the reseller account, and then to yours.
This means that the reseller will get 20% commission on all sales, but you will get 25% of the reseller's commission.

Example of commission based on an end user spending $50 on a web template

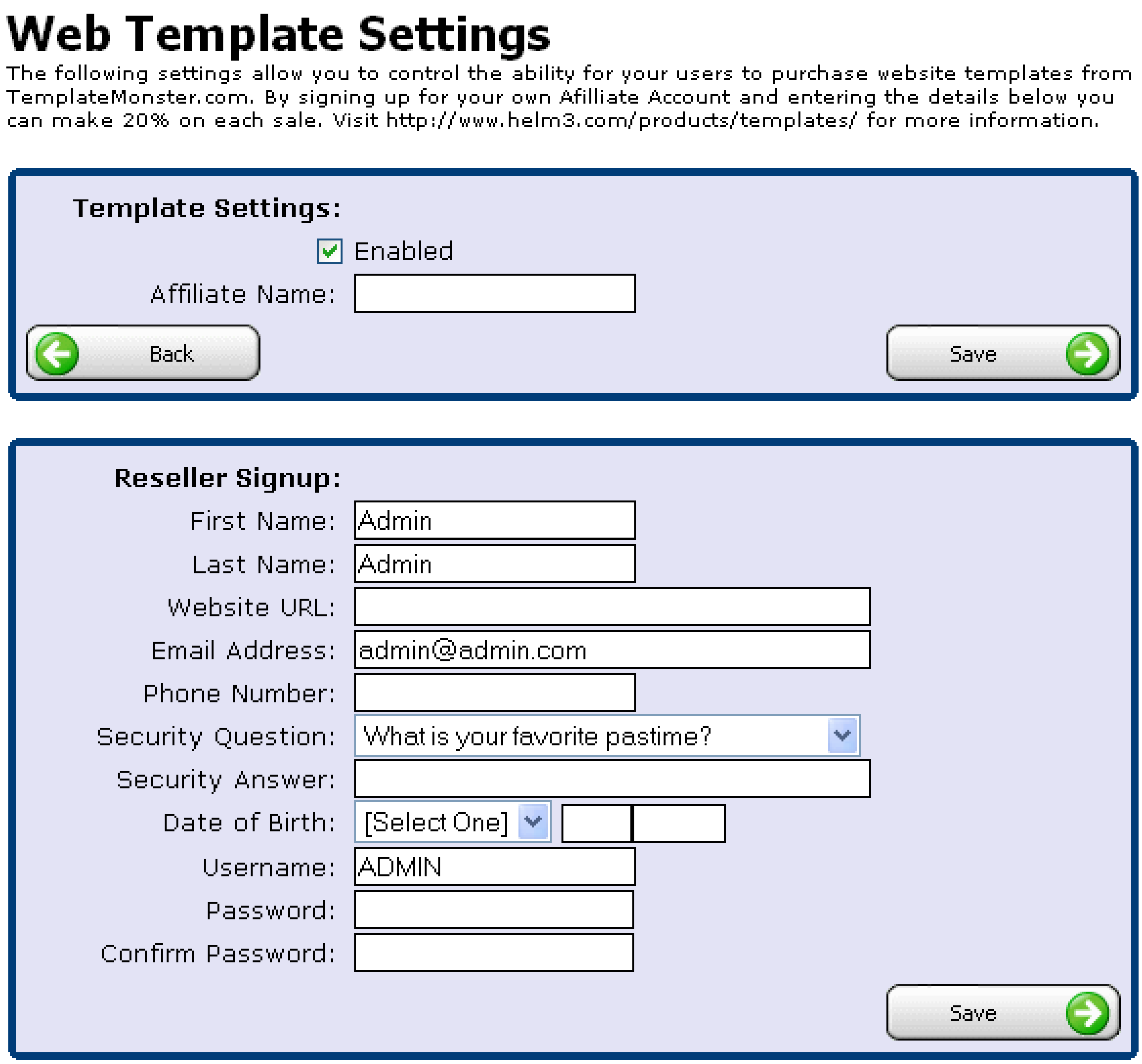
	Administrator	Reseller
Reseller not affiliate	$10 commission	-
Reseller affiliate	$2.50 commission	$10 commission

As you can see – even with your resellers as affiliates, you can earn commission on sales that they make.

Read on to find out how to signup as an affiliate and start earning commission!

Signup for an Affiliate Account

From the System Settings Menu, click the Web Template Settings link to get taken to the following page:



To get started, check the Enabled box. If this box is checked, then the Web Template Settings icon will appear in the account of your resellers and they can then choose to sell Web Templates to their customers. In the Affiliate Name box, you will enter the affiliate username you choose when becoming a TemplateMonster Affiliate. This is the account that will be credited with commission on template sales made through Helm. In order to get signup and get an Affiliate Name, simply fill out the Affiliate Signup section underneath and click “Save”. This will then take you to the TemplateMonster site where you will be asked to confirm your details, or pick a new username if the one you chose is already selected.

Once completed, you’re done! You’ll now get commission from the sale of templates to your resellers’ end users.

14.) Error Logs

In the case of a misconfiguration within Helm, you may be presented with a general error message. This error message is significantly expanded within the Helm Error Logs that can be found here:

[Helm Install directory]\Helm\Logs\Error

Each log is dated, so you can easily see the latest log you need to look at.

By taking the error message presented in the logs, you can search for a solution within the WebHost Automation knowledgebase located here:

http://support.webhostautomation.com/?_a=knowledgebase

15.) Setting up Extra Features

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

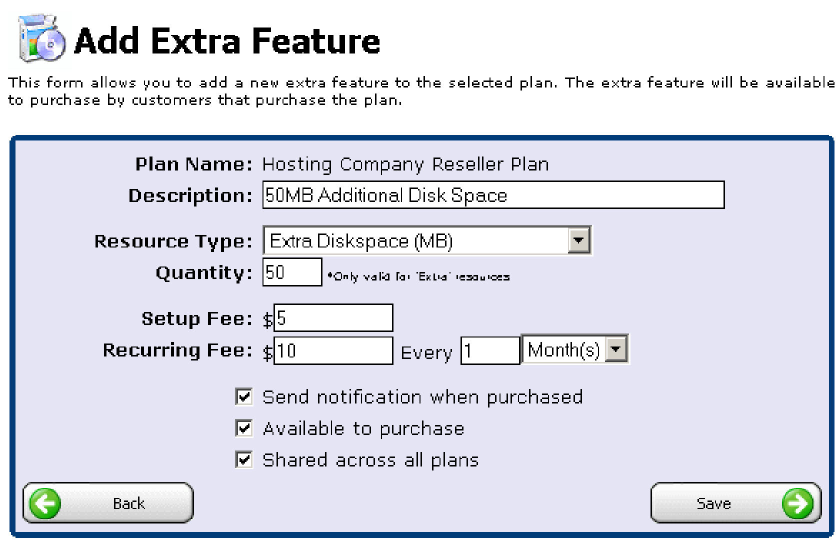
From the control panel home page you can access the Extra Features section by going to:

Home > Reseller Plans > RESELLER PLAN [pick the one you wish to add extra features to] > Set up Extra Features

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

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

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



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

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

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

Send notification when purchased: If this is checked, then whenever one of your users purchases an extra feature, any message you have set up in Extra Feature Notification will be sent to them (see below for details on setting up Extra Feature Notifications).

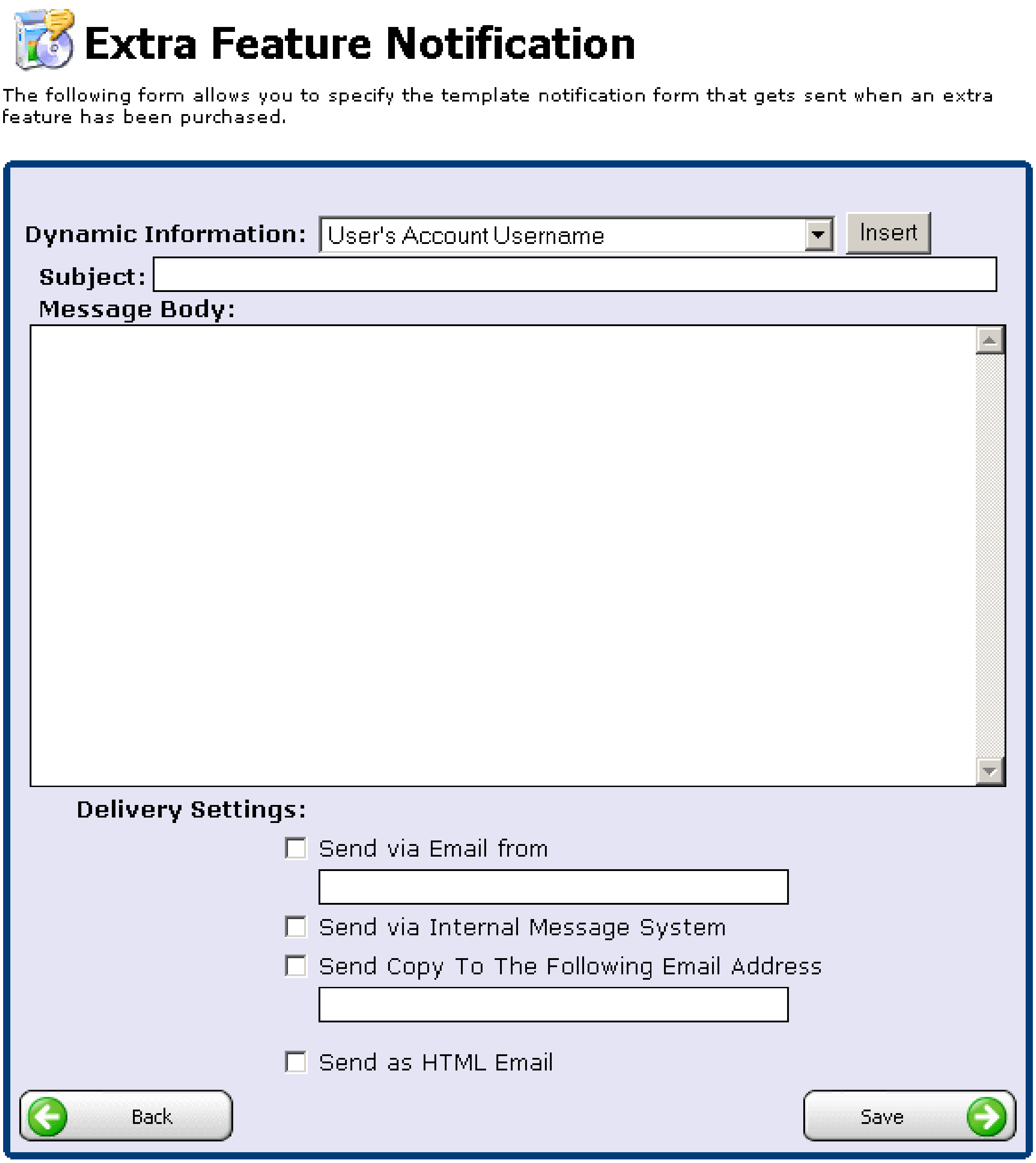
Available to Purchase: If this box is not checked, your reseller will not be able to purchase this feature. This box is useful if you start offering a new feature, but then decide to stop offering it. When you stop offering it, you would simply uncheck the "available to purchase" option.

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

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

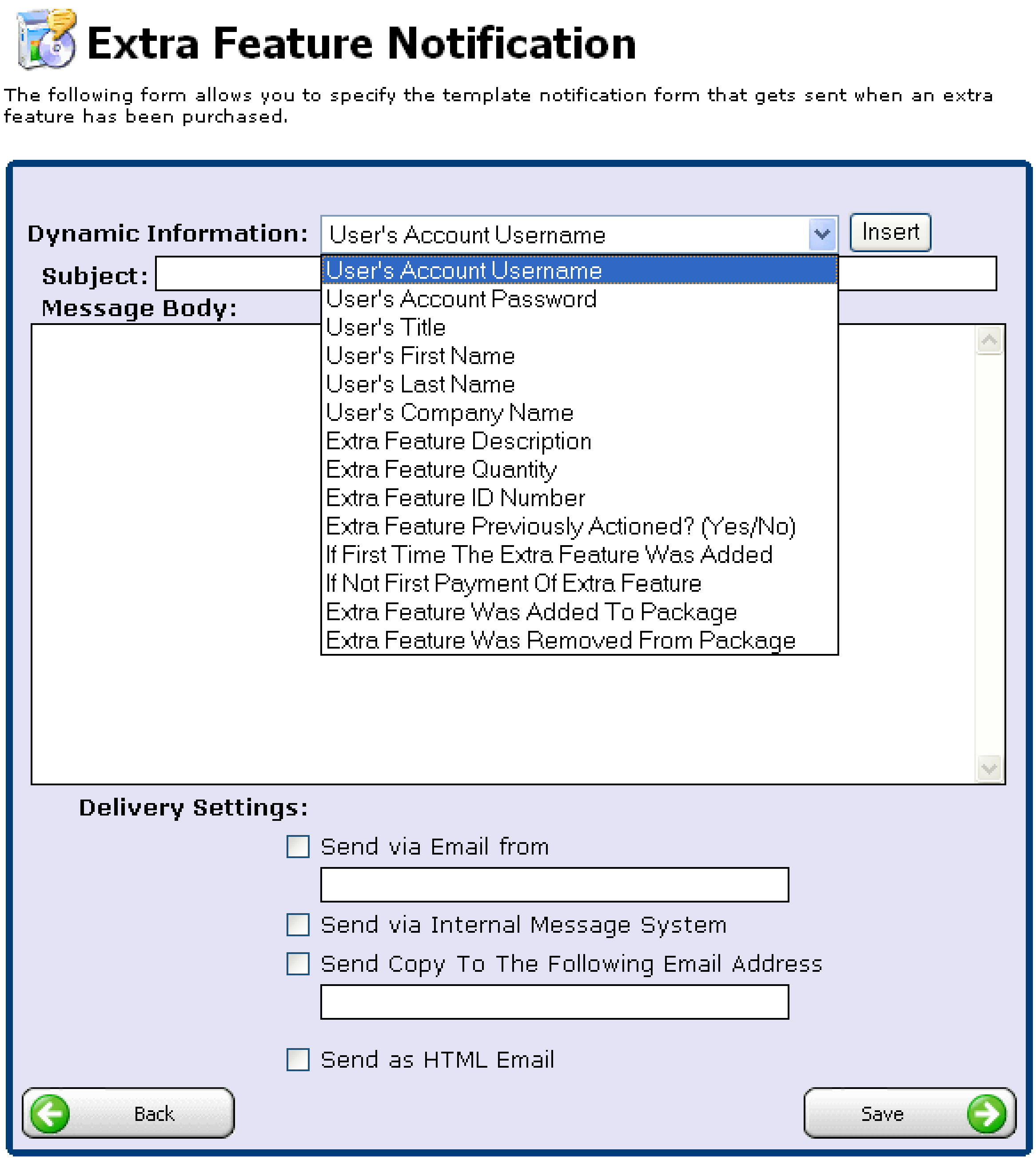
15.a) Extra Feature Notification

Helm gives you the ability to send out notifications to your resellers when they purchase an Extra Feature. From the Account Settings page, click the “Extra Feature Notification” icon to go to the following screen:



NOTE:- The extra feature notification email will be sent out as soon as a reseller purchases an extra feature from you.

Dynamic Information: Using this dropdown menu, you can insert dynamically generated content into your notification. This feature can be used to personalise the notification email to your reseller, similar to the welcome message.



Choosing any of the dropdown items will insert them in the message body, and when the message is sent out the variables will be replaced by actual values. The exceptions are as follows:

- **Extra Feature Previously Actioned (Yes/No):** Choosing this will add to the message whether the item has already been added to the account or not. For instance, if it is a custom feature that is paid for on a recurring scale (e.g. every month), then the first time the message goes out, Actioned will be marked as “No”, because the item will not have been set up. Future messages will be marked as Yes, because the item will have been added previously.

- If First Time The Extra Feature Was Added: This is similar to the previous choice, except two tags are inserted into the message, [IfNewPurchase] and [/IfNewPurchase]. This allows you to put a custom message in between those tags that will be displayed if that condition is met, i.e. that this is a new feature being added to the package. For example:

[IfNewPurchase] This is the first purchase of this extra feature. [/IfNewPurchase]

If this condition is not met, the message will not be displayed – so you can set up just the one Notification message and not have to alter it each time, because Helm will only display the information relevant at the time of sending.

- If Not First Payment of Extra Feature: This is the opposite of the "If First Time" option. Again, two tags are inserted into the message, [IfNotFirstPayment] and [/IfNotFirstPayment]. This allows you to put a custom message in between those tags that will be displayed if that condition is met, i.e. that this is a recurrence of a feature that has already been added to the package. For example:

[IfNotFirstPayment] This is a recurrence of a feature already on your account. [/IfNotFirstPayment]

Again, if this condition is not met, the message will not be displayed.

- Extra Feature Was Added To Package: This uses tags as per the previous two, and the message in the tags will be displayed if the condition is met, i.e. if an Extra Feature has been added to the package. For Example:

[IfAdded] This extra feature has been added to your account. [/IfAdded]

- Extra Feature Was Removed From Package: Similar to the last option, but for removal instead of addition. Again, the message in the tags will be displayed if the condition is met, i.e. if an Extra Feature has been removed from the package. For Example:

[IfRemoved]This extra feature has been removed from your account. [/IfRemoved]

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

Message Body: This is the content of the notification that your user will receive. This accepts HTML, if you wish to send a HTML email. Remember to check the "Send as HTML Email" box in this case.

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

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

Send Copy To the Following Email Address: Checking this box and entering a valid email will "carbon copy" the email address you enter with all emails automatically sent out by Helm. Enabling this feature is helpful as it lets you have a record of the information that gets sent to your users.

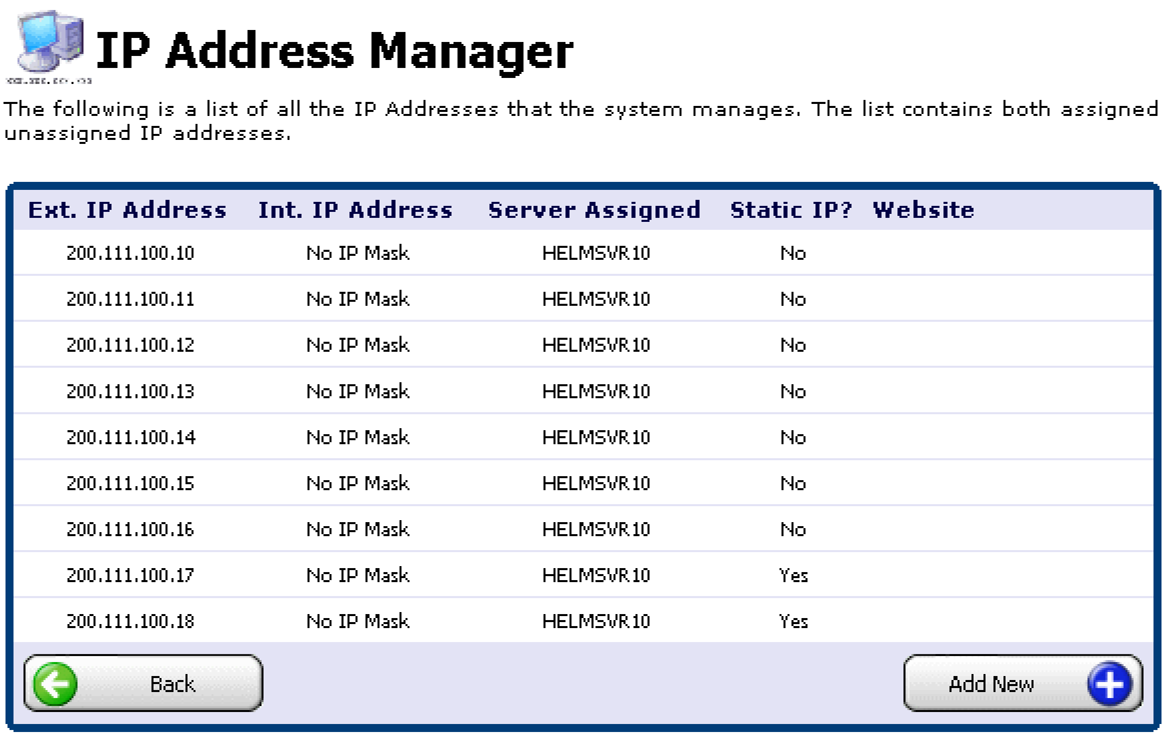
Send as HTML Email: Check this box if your message is in HTML format, and you wish to send this email in HTML format.

16.) IP Address Manager

Helm gives you the ability to add new IP addresses and assign them to servers within Helm. For instance, assume you have just recently added 10 IPs to your server and want to use them. In Helm, you need to go to:

Home > System Settings > IP Address Manager

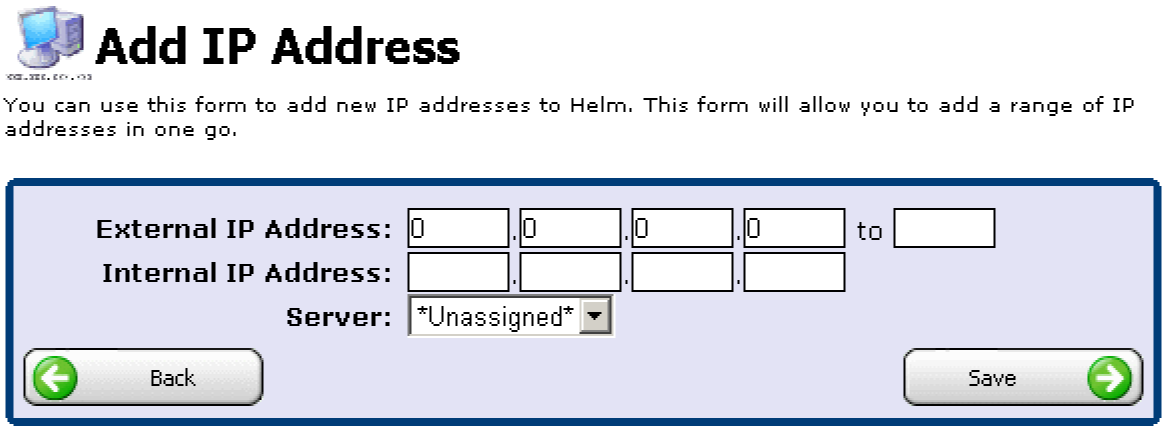
You will be presented with the following screen:



Ext. IP Address	Int. IP Address	Server Assigned	Static IP?	Website
200.111.100.10	No IP Mask	HELMSVR10	No	
200.111.100.11	No IP Mask	HELMSVR10	No	
200.111.100.12	No IP Mask	HELMSVR10	No	
200.111.100.13	No IP Mask	HELMSVR10	No	
200.111.100.14	No IP Mask	HELMSVR10	No	
200.111.100.15	No IP Mask	HELMSVR10	No	
200.111.100.16	No IP Mask	HELMSVR10	No	
200.111.100.17	No IP Mask	HELMSVR10	Yes	
200.111.100.18	No IP Mask	HELMSVR10	Yes	

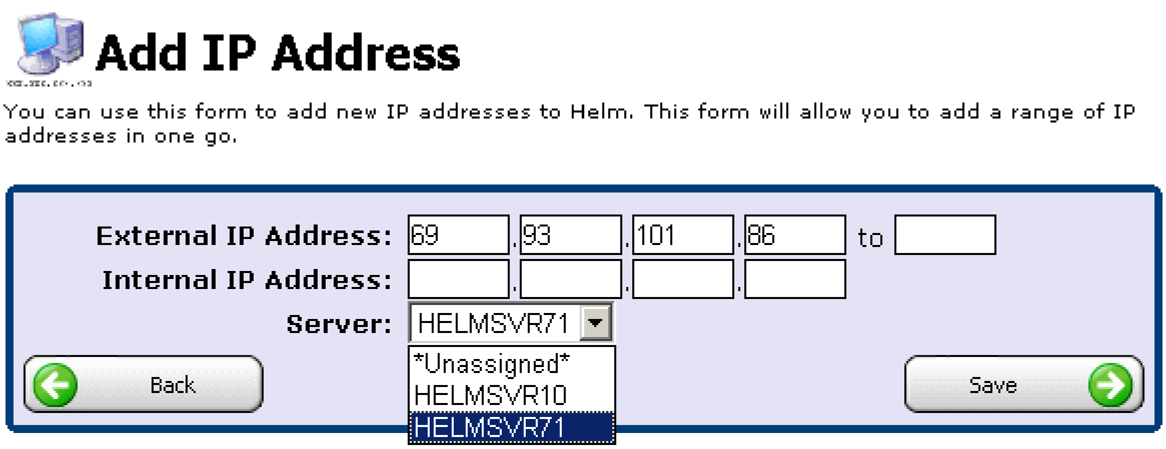
In here you will see a list of IPs that Helm has knowledge of, the servers they are assigned to within Helm, the Internal IP mask assigned to them (where applicable), and whether they are static or not.

Now, let us assume you want to add some IPs to your server(s) in Helm. Click Add New. You will be presented with the following screen:



If you are using an external network or a NAT based network, then just enter the External IP Address. If you are using an internal network, then enter the External IP address and the Internal IP address that masks it.

From the dropdown box, choose the name of the server that you want to assign the IP to. It may look something like this:



Once done, click Save. The IP is now assigned to your server.

16.a) Adding blocks of IPs

For adding blocks of IPs (for instance 69.93.101.86 – 69.93.101.99), simply enter the IP in the above screenshot, and in the “to” box, put 99. Helm will then add all IPs in this range.

16.b) Making an IP dedicated/static

If you want to make an IP dedicated (static), then once you have added it into the IP Address Manager, simply find the IP you want to make static and click it:

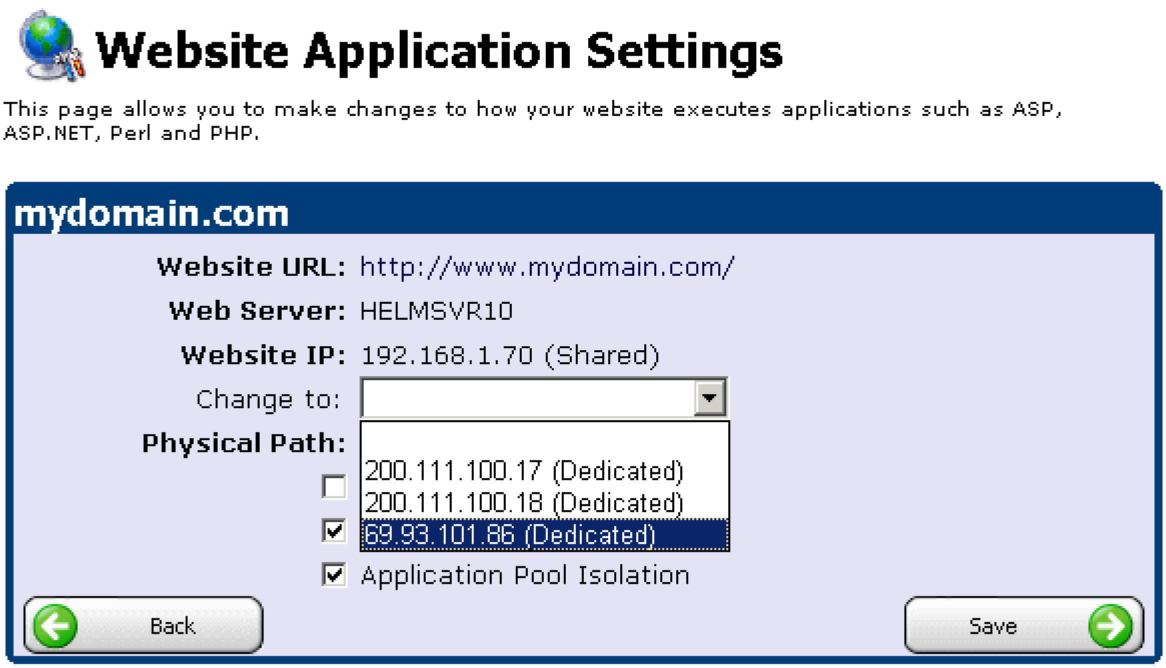
The above screen will be displayed. Simply check the “Static IP Address” box and click Save to make that IP static.

16.c) Assigning a dedicated/static IP to a domain

If you have a dedicated IP and want a domain to run on it, simply do the following. Go to:

Home > Domains > Domain to be placed on dedicated IP

From the Domain menu, click Website Settings. You will see the shared IP that the domain is currently assigned to, and you will also see a dropdown box labelled “Change To:”



Choose the dedicated IP you created earlier from the dropdown box (as above) and click Save. This will place the domain on this dedicated IP in IIS.

17.) Application Isolation Pools

NOTE:- The following feature is ONLY available if you are running Windows 2003 Server with IIS 6. It is not available on systems running Windows 2000 Server.

Helm gives you the ability to offer domains with their own Application Pool. This is an administrator-only feature, and is enabled at the Service level, and then on individual domains. Application Isolation is an extremely useful feature, especially for .NET sites. Benefits of Application Isolation include:

Reliability. If one application fails, it shouldn't affect other applications. Additionally, it should be possible to specify unique recovery actions for different applications.

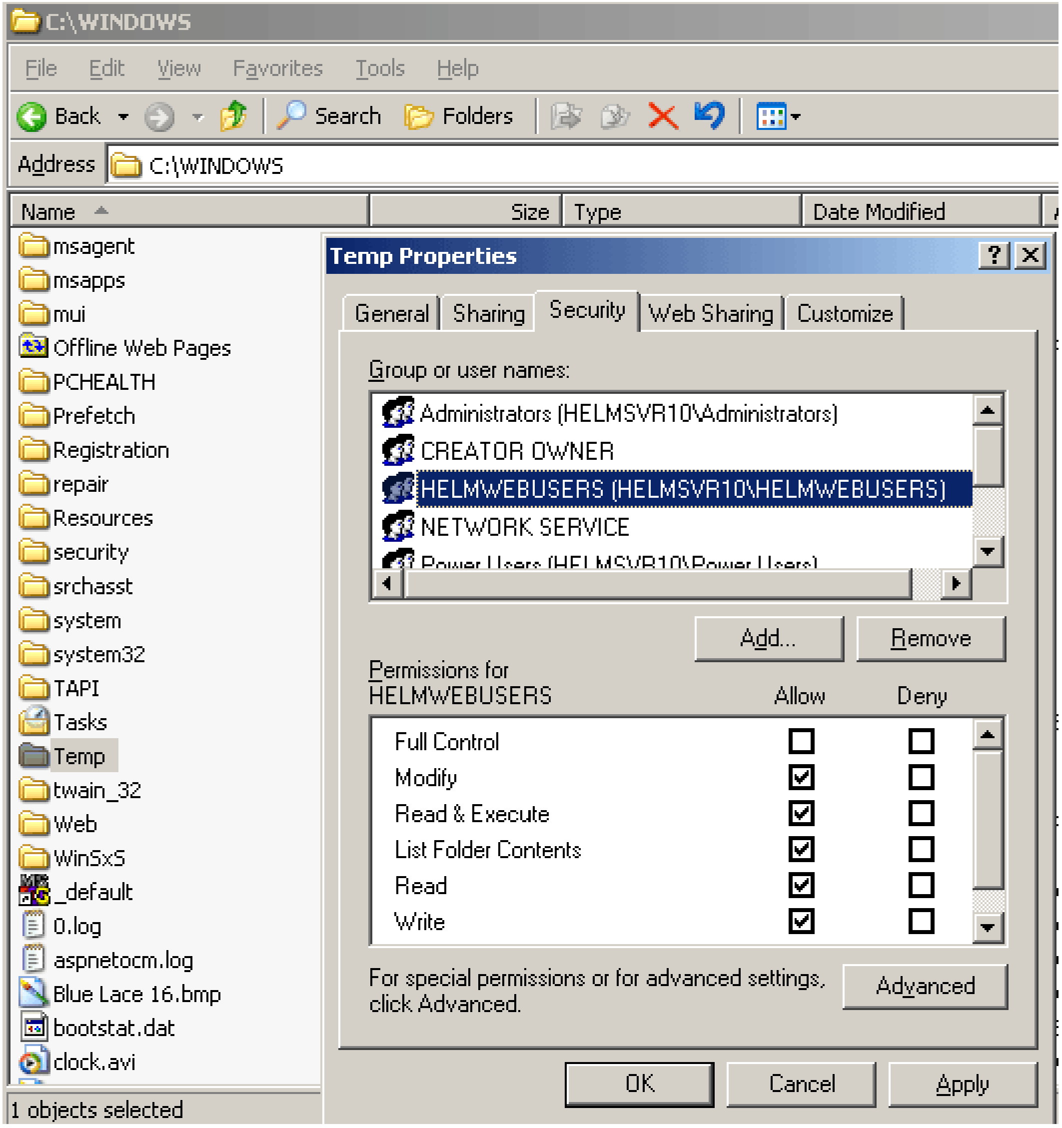
Security. If one application is running malicious code from an attacker (possibly even the application author), other applications are insulated from the effects of the malicious code, and effective barriers are in place to keep the attacker from crossing into another application's space.

Performance. One application that over consumes resources should not affect the availability of other applications. On the other hand, applications that require additional resources should be able to allocate those resources on demand.

To set up Application Isolation, follow the below steps.

1.) You need to first make sure that the correct permissions are set in Windows. Go to the C:\Windows folder and right-click the "Temp" folder and choose Properties. Click the Security tab, and choose Add.

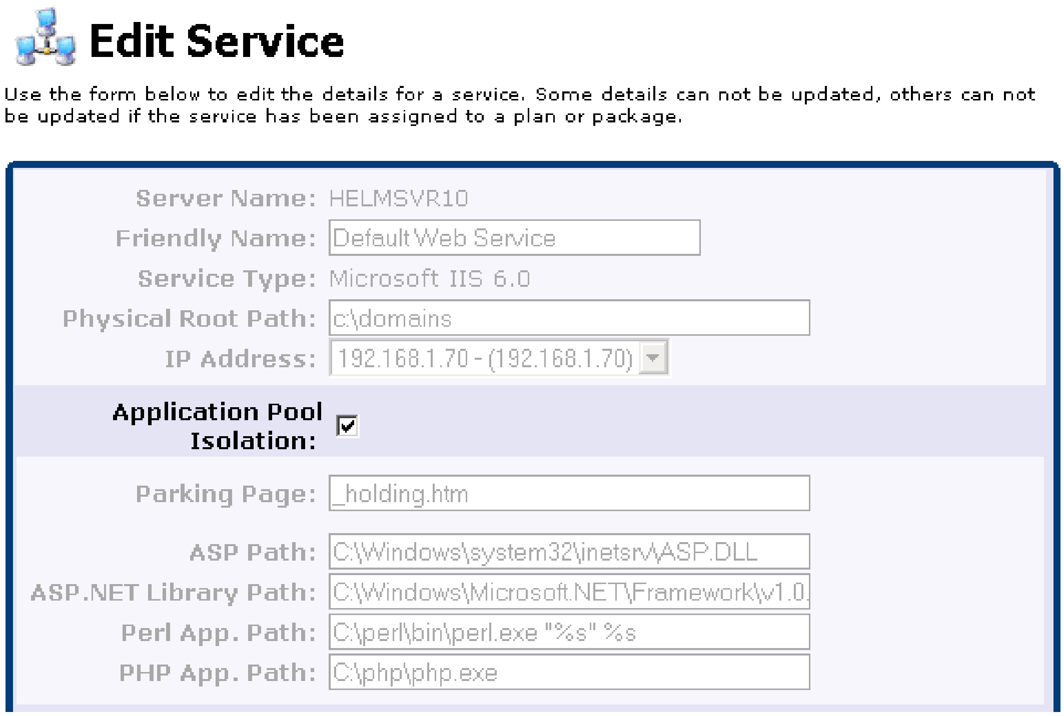
Type "HELMWEBUSERS" and choose "Check Names". This should pick up the group. Click OK, and then assign "Modify" permissions to the group and click Apply. You should see a screen similar to the following:



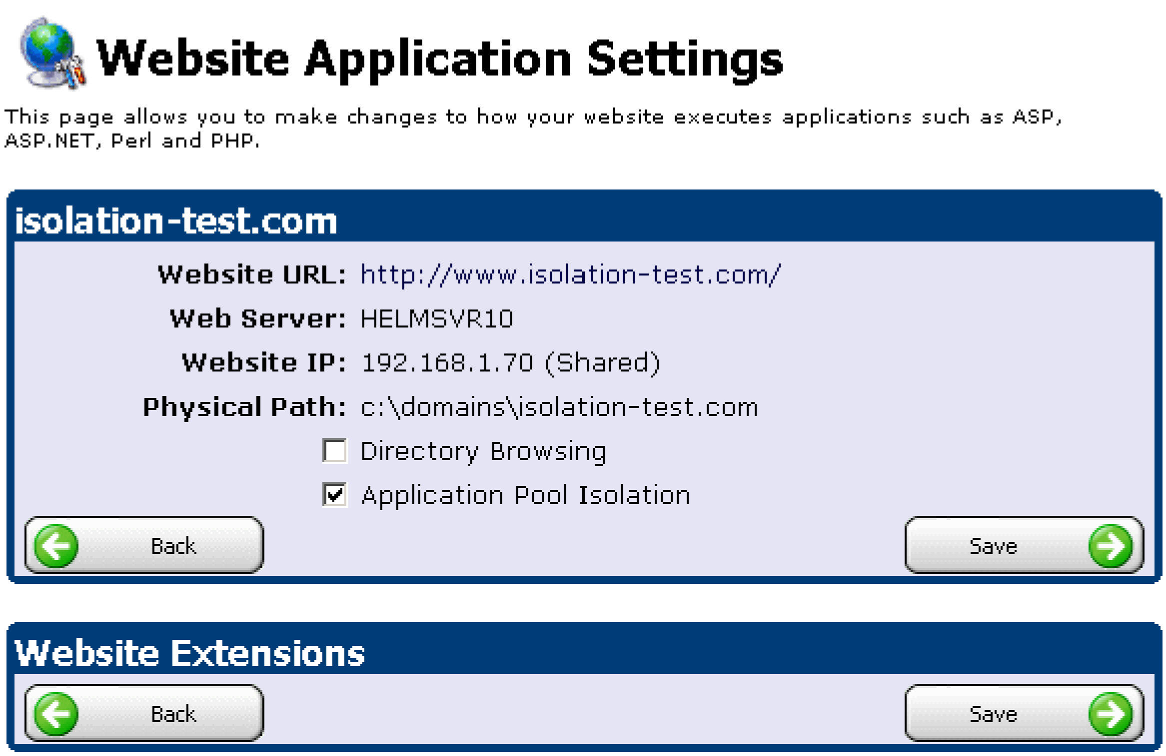
2.) Go to your Web Service setting in Helm:

Helm > System Settings > Servers > YOUR SERVER NAME > Web Service

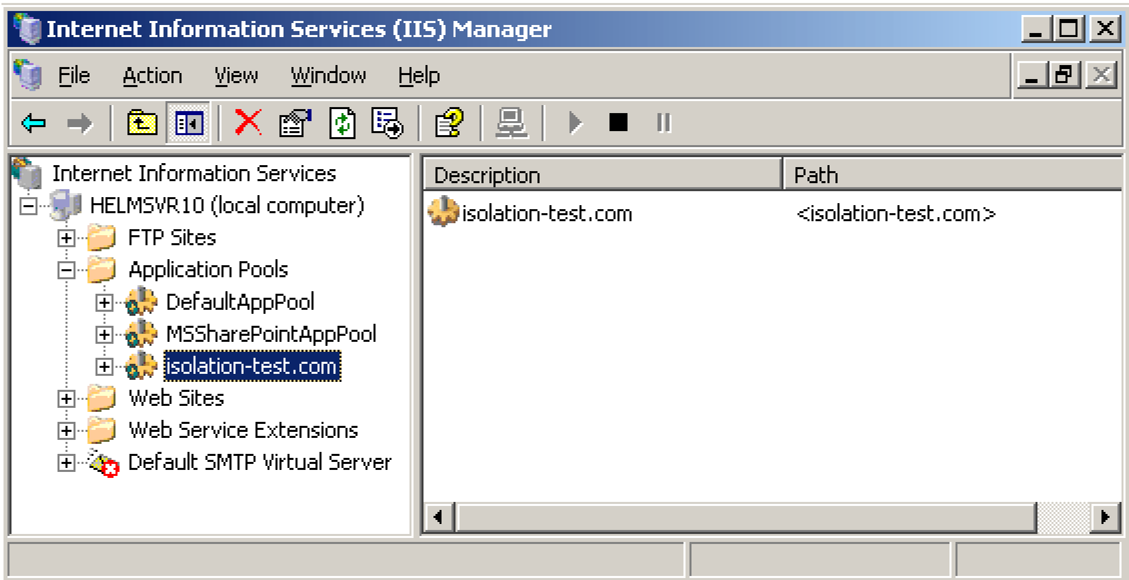
You will see a box entitled “Application Pool Isolation” – check this box to turn on Application Pooling:



Now, whenever a domain is created, it will be put into its own Application Pool. For example, the domain “isolation-test.com” was created. If you go into a domain’s Website Settings after it has been created, you can see that it has been isolated:



Also, if you go into IIS and click on the Application Pools folder, you can see the newly-added domain there:



If you want to remove a particular domain at any time from its own Application Pool, you can simply uncheck the box in Website Settings and click “Save”. This will put the domain into the shared “DefaultAppPool” in IIS.

Once an Application Pool is assigned to a domain, it should work correctly. However, if you get an error that says “**Service Unavailable**”, you will need to refer to this Microsoft article:

http://support.microsoft.com/Default.aspx?id=842493

18.) Password Protected Directories

Helm supports the ability to set up password protected directories, via integration with 3rd party applications. There are two applications that Helm integrates with in order to allow this: **IIS Password** and **URL Protector**. Before you can offer password protected directories, you need to install and configure one of these two applications. The installation instructions for these applications can be found on the product websites. The relevant guides to configure these with Helm are found below:

IIS Password:

http://download.webhostautomation.net/IISPassword/docs/IIS%20Password%20Configuration%20Guide.pdf

URL Protector:

http://download.webhostautomation.net/URLProtector/docs/URL%20Protector%20Configuration%20Guide.pdf

Once you have installed and configured one of the above applications, you are ready to set up secure folders on a domain.

Full instructions on how to do this can be found under the "Secure Folders" section of the Helm User Guide:

http://download.webhostautomation.net/Helm/docs/Helm%20User%20Guide.pdf

19.) ASP.NET Pages

In order to make ASP.NET pages work on domains that you have created through Helm, there are a couple of simple steps that you need to have taken.

1.) First make sure that ASP.NET is installed on the sites you want to server ASP.NET pages. You can do this through Helm - choose the Domain, and click Website Settings. Then make sure the ASP.NET box is ticked, and choose Save.

2.) Next, make sure the path to ASP.NET on your machine is correct in Helm. Open up IIS, right-click the Web Sites folder, choose Properties, choose the Home Directory tab, then click the Configuration button. In the new window that opens up, look at the path that the **aspx** and other .NET extensions are pointing to.

On an IIS 5 machine (Windows 2000 Server) they should point to C:\WINNT\....
On an IIS 6 machine (Windows 2003 Server) they should point to C:\WINDOWS\....

However, if you have altered the paths for the ASP.NET installation yourself, they may be different.

Also check the full path and make sure that the .NET framework folder that is being pointed to actually exists. For instance, it may be pointing to the v1.0.3705 framework folder, whereas the v1.1.4322 framework folder is the one that is actually in use.

In any case, if these are incorrect, then go to the web service in Helm here:

Home > System Settings > Servers > Your Server > Web Service

Check that the ASP.NET field points to the correct path.

3.) If all this is correctly set up, then make sure that the **Domains** folder that you are creating your domains in has the "**NETWORK SERVICE**" user on it with read and execute permissions only. You can see the location of your **Domains** folder by looking here:

Home > System Settings > Servers > Your Server > Web Service

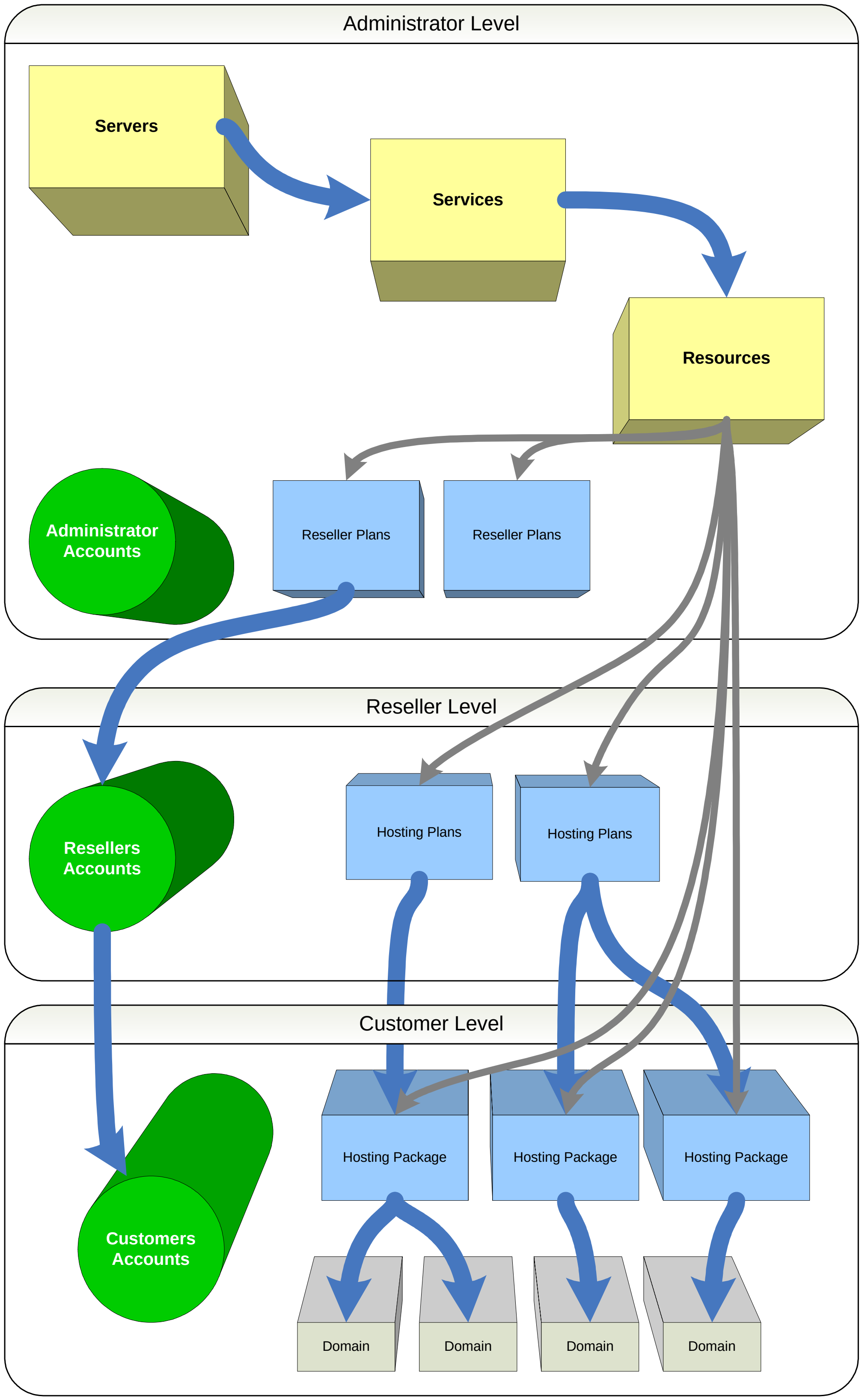
The location is the “Physical Root Path” field.

20.) Helm API

Helm 3 has an API that you can develop against. Full details and documentation for the API can be found at the following website:

http://www.webhostautomation.com/development/helm3/api/

21.) Simplified Helm Schema



22.) Contacting WHA Support

WebHost Automation Ltd. offer the ability to raise support tickets for problems you have that are not covered in our documentation or Knowledgebase. Support will only be offered if you have an appropriate support contract with us. You can raise tickets here:

http://support.webhostautomation.com/?_a=tickets&_m=submit

When raising a support ticket, please be as descriptive and precise as possible:

- Include all relevant error logs and errors received.

- Explain precisely the steps you took that caused the error including what you expected to happen, and what actually happened.

- Include any necessary domains or users on which the error occurs. Supply all relevant details for us to be able to replicate the problem.

- Include server and Helm access/login details if they will be required to recreate the problem.

- If you have found any relevant knowledgebase articles that you have tried which have not fixed the problem, please list these.

- Also list anything else you have tried to fix the problem, which failed.

Taking a few extra minutes when raising your support ticket can save hours of unnecessary responses to gain further information.

Examples of poor support requests

"I am unable to login to Helm, please help"

"I added a domain and received an error, what could be wrong?"

"Helm will not create any email accounts. Please tell me what to do?"

"Why do I keep getting errors while using Helm?"

As you can imagine, the above support tickets examples are unhelpful and uninformative, and will most likely lead to a longer resolution of your problem, since we will have to ask for further information. Be sure to tell us everything you want us to know about your issue in order to get a speedy resolution!