

## A Reseller's Guide to Using Helm

WebHost Automation Ltd  
<http://www.webhostautomation.com/>  
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## About Helm and This Guide

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

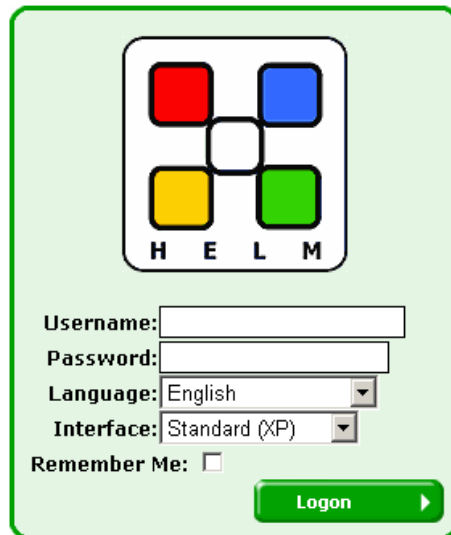
<http://www.webhostautomation.com>

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

# 1.) Logging into Helm

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

Click this link if you forget your login details.



The login form is enclosed in a green border. At the top center is the Helm logo, which consists of four colored squares (red, blue, yellow, green) arranged in a 2x2 grid, with the letters 'H E L M' below them. Below the logo are four input fields: 'Username:' (text), 'Password:' (text), 'Language:' (dropdown menu with 'English' selected), and 'Interface:' (dropdown menu with 'Standard (XP)' selected). Below these fields is a 'Remember Me:' checkbox. At the bottom right of the form is a green 'Logon' button with a right-pointing arrow.

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

Welcome To Helm. The Web Hosting Control System  
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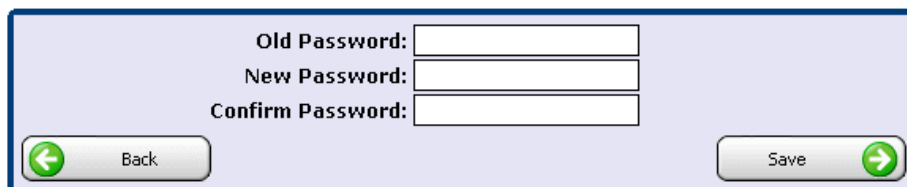
# 2.) Changing Your Password

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

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

## Control Panel Password

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



The form is enclosed in a blue border. It contains three input fields: 'Old Password:', 'New Password:', and 'Confirm Password:'. Below the input fields are two buttons: a 'Back' button with a left-pointing arrow and a 'Save' button with a right-pointing arrow.

## 3.) Changing Your Personal Details

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

### Personal Details

Below are your contact details. These details will be used whenever either your administrator or the control panel needs to get in touch with you. For this reason it is important that these details are always kept up to date.

<b>Title:</b>	<input type="text" value="Mr"/>
<b>First Name(s):</b>	<input type="text" value="Reseller"/>
<b>Last Name:</b>	<input type="text" value="Reseller"/>
<b>Company Name:</b>	<input type="text" value="Webhost"/>
<b>Address:</b>	<input type="text" value="10 Web Lane"/> <input type="text"/> <input type="text"/>
<b>Town:</b>	<input type="text" value="Webville"/>
<b>State/County:</b>	<input type="text" value="Host County"/>
<b>Country:</b>	<input type="text" value="United Kingdom"/>
<b>Zip/PostCode:</b>	<input type="text" value="HO5 7ME"/>
<b>Daytime Tel.:</b>	<input type="text" value="01234 567890"/>
<b>Evening Tel.:</b>	<input type="text"/>
<b>Mobile Tel.:</b>	<input type="text"/>
<b>Fax Tel.:</b>	<input type="text"/>
<b>Primary Email Address:</b>	<input type="text" value="reseller@reseller.com"/>
<b>Secondary Email Address:</b>	<input type="text"/>

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

## 4.) 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 "Account Settings" link. From there, you will find several icons and sub pages that we will explain in depth.

### Reseller Main Menu

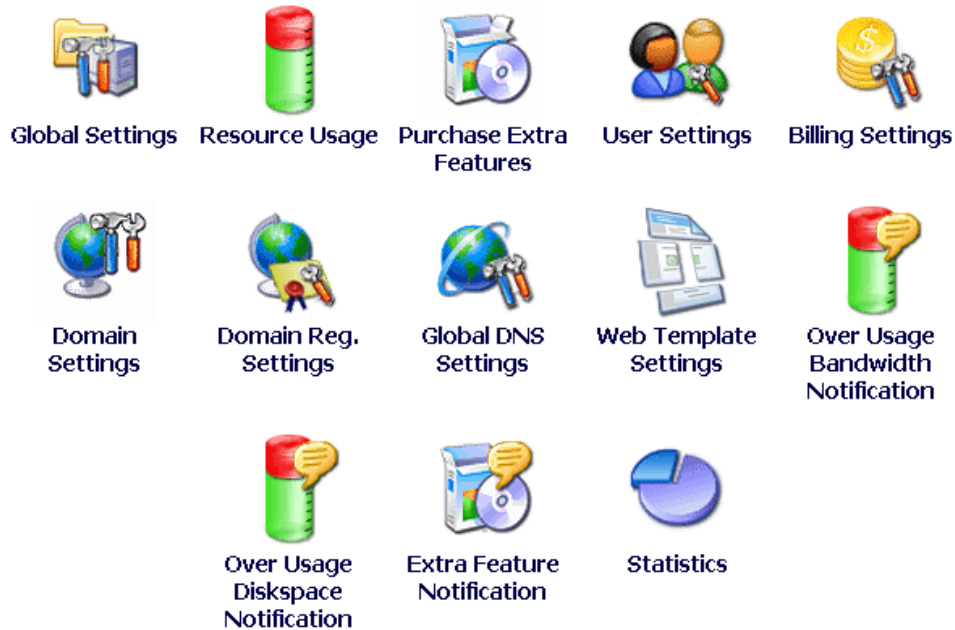
Welcome. This is the main menu to access any area of your control panel. To access areas of your account click on the relevant buttons below. Quick help can be found at the bottom of this page.



You will be taken to the Account Settings screen:

### Account Settings

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



## Step 1: Global Settings

Click on the "Global Settings" icon to begin.

### Global Settings

The following settings are relevant to your account.

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

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

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

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

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

URL[Display Text]

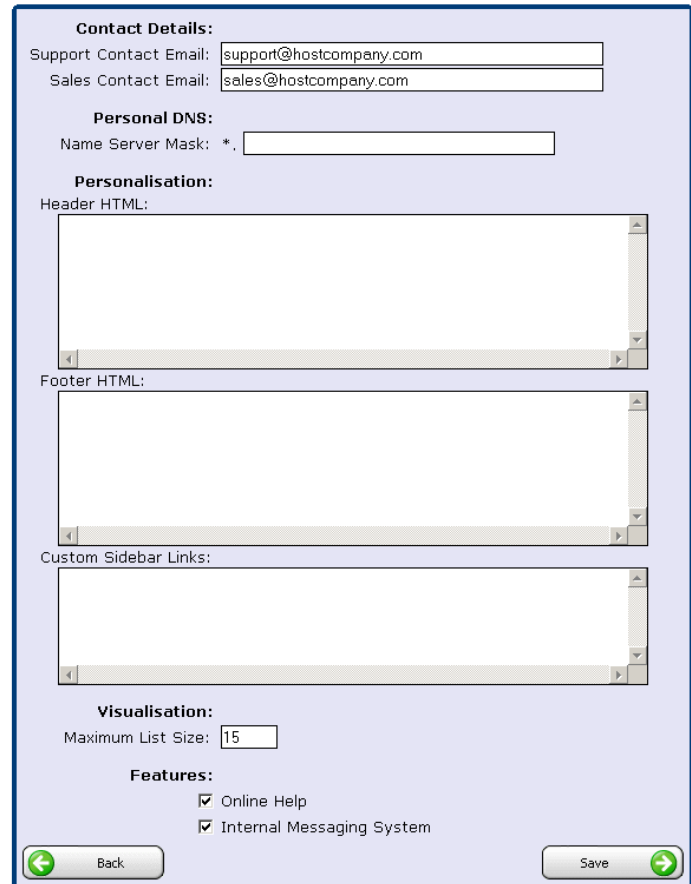
e.g. `http://www.microsoft.com[Microsoft's Site]`

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

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

**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.

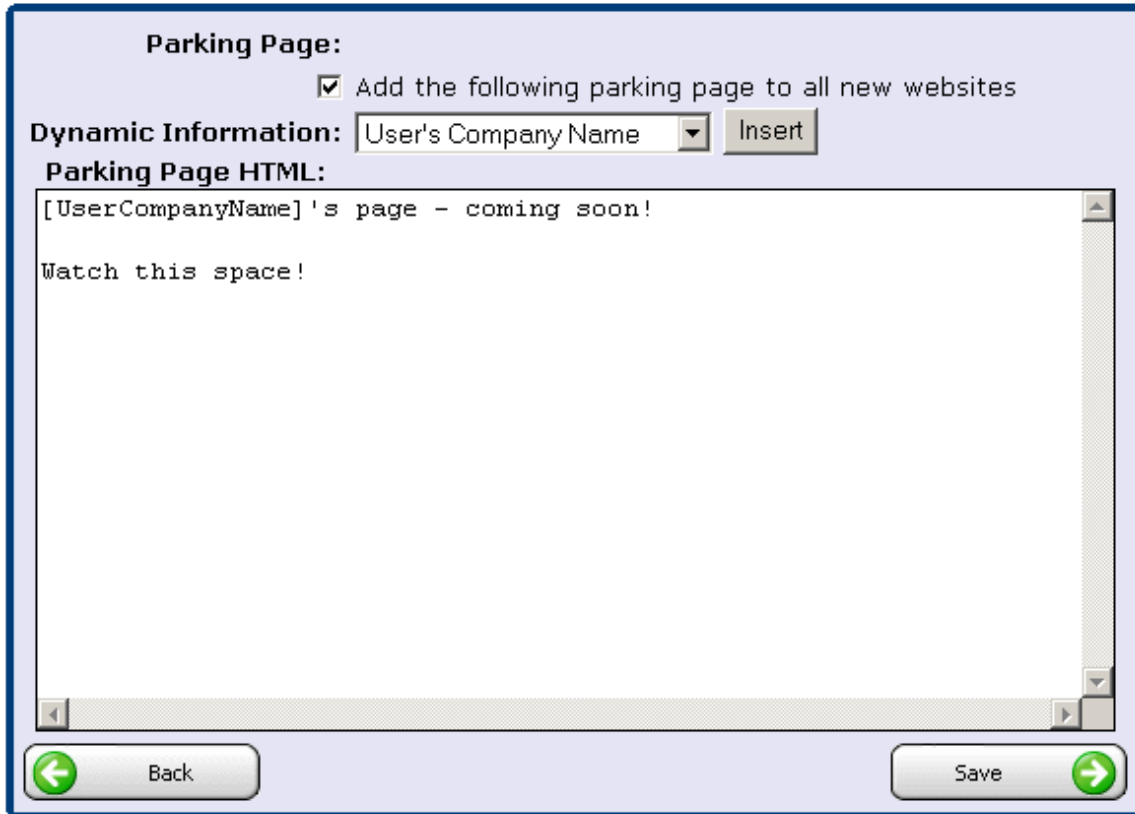


## Step 2: Domain Settings – Customized Parking Page

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

### Domain Settings

The following allows you to specify settings what are applied when a new domain is created.



The screenshot shows a web interface for configuring a parking page. It features a title "Parking Page:" followed by a checked checkbox "Add the following parking page to all new websites". Below this is a "Dynamic Information:" section with a dropdown menu containing "User's Company Name" and an "Insert" button. The main area is a text box labeled "Parking Page HTML:" containing the text "[UserCompanyName]'s page - coming soon!" and "Watch this space!". At the bottom, there are "Back" and "Save" buttons.

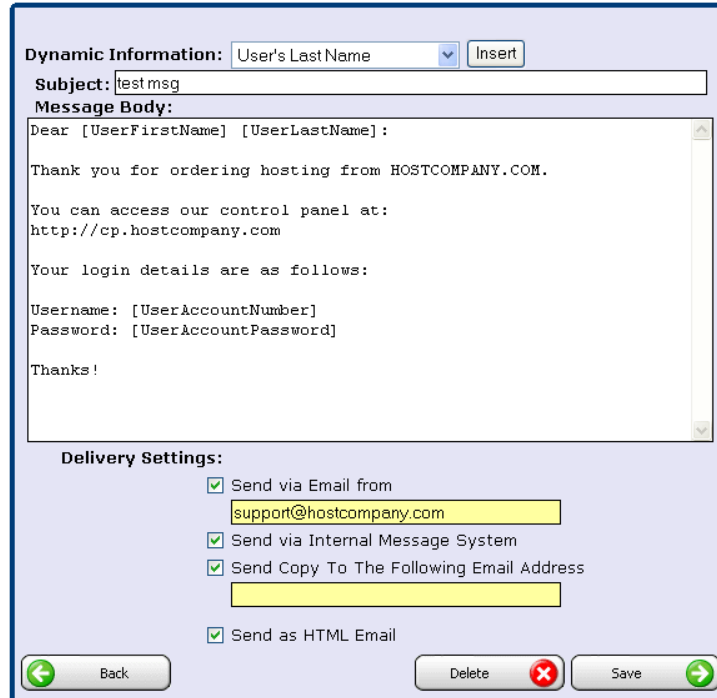
To set up a customized parking page, simply check the “Add the following parking page to all new web sites” box and enter the HTML code of your page into the “Parking Page HTML” box. Once you have completed this, click the “Save” button.

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

## Step 3: User Settings – Customized Welcome Letter

### Welcome Message

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



**Dynamic Information:** User's Last Name

**Subject:** testmsg

**Message Body:**

```
Dear [UserFirstName] [UserLastName]:

Thank you for ordering hosting from HOSTCOMPANY.COM.

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

Your login details are as follows:

Username: [UserAccountNumber]
Password: [UserAccountPassword]

Thanks!
```

**Delivery Settings:**

- Send via Email from
- Send via Internal Message System
- Send Copy To The Following Email Address
- Send as HTML Email

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

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

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

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

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

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

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

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

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

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

The screenshot shows a form with a dropdown menu for "Dynamic Information". The dropdown is open, showing several options: "User's Last Name", "User's Account Username", "User's Account Password", "User's Title", "User's First Name", "User's Last Name", and "User's Company Name". The "User's Account Username" option is currently selected. To the right of the dropdown is an "Insert" button. Below the dropdown, there are text input fields for "Your New Host", "User's First Name", and "User's Last Name". The form also contains some placeholder text like "you for orderi" and "n access our control panel at /cp.somehostingcompany.com".

## Step 4: Global DNS Settings

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

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

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

### Add DNS Record

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

The screenshot shows the "Add DNS Record" form. It has the following fields: "Record Type" (A (Host Record)), "Record Name" (cp), "Record Data" (192.168.1.100), and "Record Preference" (0). There are "Back" and "Save" buttons at the bottom.

## Step 5: Over Usage Bandwidth Notification

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



### Over Usage Bandwidth Notification

The following form allows you to specify the template notification that gets sent when a user exceeds or approaches their bandwidth limit.

**Dynamic Information:**

**Subject:**

**Message Body:**

**Delivery Settings:**

Send via Email from

Send via Internal Message System

Send Copy To The Following Email Address

Send as HTML Email

**Delivery Interval:**

**NOTE:-** The over usage notification email will be sent out if, during the scheduled running of the bandwidth collector, it is found that the user'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 user, 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 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 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.

**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 6: Over Usage Diskspace Notification

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



### Over Usage Bandwidth Notification

The following form allows you to specify the template notification that gets sent when a user exceeds or approaches their bandwidth limit.

**Dynamic Information:**

**Subject:**

**Message Body:**

**Delivery Settings:**

Send via Email from

Send via Internal Message System

Send Copy To The Following Email Address

Send as HTML Email

**Delivery Interval:**

**NOTE:-** The over usage notification email will be sent out if, during the scheduled running of the bandwidth collector, it is found that the user's diskspage usage exceeds (even by the smallest amount) the diskspage 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 user, similar to the welcome message.

**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 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.

**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.

## 5.) 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](http://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 a reseller, 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 the following way:

If you enable Web Templates in Helm so that your customers can purchase them, then all sales will be linked directly to your account – and you will make 20% commission on all templates bought by your customers. For example, if one of your customers purchases a web template through Helm worth \$50, then you will receive \$10 commission.

Read on to find out how to sign up 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:

### Web Template Settings

The following settings allow you to control the ability for your users to purchase website templates from TemplateMonster.com. By signing up for your own Affiliate Account and entering the details below you can make 20% on each sale. Visit <http://www.helm3.com/products/templates/> for more information.

**Template Settings:**

Enabled

Affiliate Name:

**Reseller Signup:**

First Name:

Last Name:

Website URL:

Email Address:

Phone Number:

Security Question:  ▼

Security Answer:

Date of Birth:  ▼

Username:

Password:

Confirm Password:

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 users and they can then purchase Web Templates. 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 end users.

## 6.) Adding Your Hosting Plans

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

### Reseller Main Menu

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

Account Settings    Hosting Plans    Users    Domains    Billing

Reports    Password    Personal Details    Messaging    Online Help

Click here!

## 6.a) Helm Hosting Plan Worksheet

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

## Adding Your Hosting Plans (Continued)

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

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

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

### Add Hosting Plan

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

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

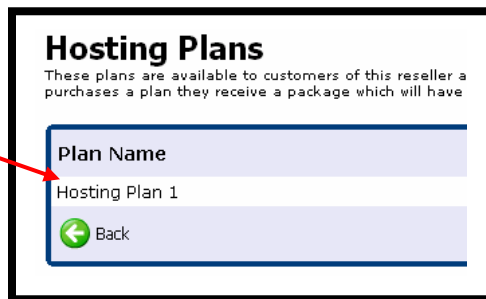
Plan Name:

Setup Fee:

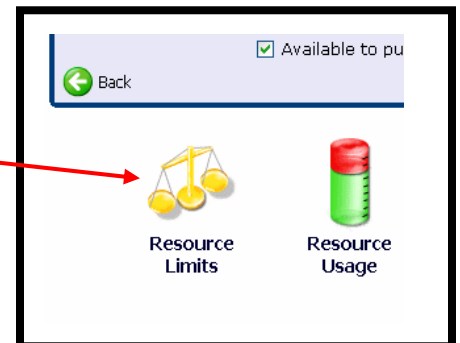
Recurring Fee:  Every  Year(s)

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

Click here!



Click here!



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

### Plan Resources

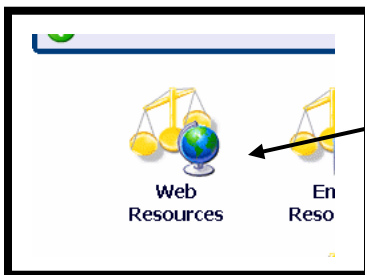
Below are the resources that have been assigned to this plan. All packages that created from this plan will inherit the values below.

**5a) Enter quotas**

**5b) Click Save**

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

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



**6a) Click on the "Web Resources" icon**

### Plan Resources

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

**6b) Enter quota information.**

**6c) Save settings.**

**6d) Click "Back".**

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

## 7.) Setting up Extra Features

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

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

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

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

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

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

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



### Add Extra Feature

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

**Plan Name:** Hosting Plan 1

**Description:**

**Resource Type:**

**Quantity:**  \*Only valid for 'Extra' resources

**Setup Fee:**

**Recurring Fee:**  Every  Year(s)

Send notification when purchased

Available to purchase

Shared across all plans

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

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

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

## Extra Features

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

**Plan Name:** Hosting Plan 1

[← Back](#) [Add New +](#)

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

## 7a.) Extra Feature Notification

Helm gives you the ability to send out notifications to your users when they purchase an Extra Feature. Click the "Extra Feature Notification" icon to go to the following screen:

### Extra Feature Notification

The following form allows you to specify the template notification form that gets sent when an extra feature has been purchased.

**Dynamic Information:**

**Subject:**

**Message Body:**

**Delivery Settings:**

Send via Email from

Send via Internal Message System

Send Copy To The Following Email Address

Send as HTML Email

**NOTE:-** The extra feature notification email will be sent out as soon as a user 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 user, similar to the welcome message.

**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 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.

## 7b.) Purchasing Extra Features

Extra features may or may not be offered by your administrator for purchase. These can be a wide range of items that you can add to your reseller package, that you can sell on to your customers. Examples include extra domains, extra bandwidth, and extra disk space. The screen below shows a couple of options:

### Extra Features

The follow form allows you to purchase extra features for this account. Adding extra features such as extra domains will increase your package limits allowing you to setup up more than the original default limits.

**Reseller, Reseller (SAMPLE\_RESELLER)**

User Account: SAMPLE\_RESELLER

Add Extra Feature:

Quantity:

Purchased Extra Features	
Description	Quantity
No extra features have been added to this package	

From the dropdown box, select the feature you wish to purchase, and click "Add New". You can do this for as many features as you want (as long as those features are available).

Important Note: - You will not be able to use these features until they are paid for in the Billing section. Once purchased, you will be able to see them in the [Resource Usage](#) section of your reseller package.

## 8.) Billing Your Customers

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

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

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

### Billing Settings Menu

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

The screenshot shows a web interface for billing settings. At the top, it identifies the user as 'Reseller, Reseller (SAMPLE\_RESELLER)' and the account as 'User Account: SAMPLE\_RESELLER'. A checkbox labeled 'Enable Billing System' is checked. There are 'Back' and 'Save' buttons. Below this are seven icons representing different settings: Billing Configuration, Tax Settings, Invoicing, Payment Receipts, Payment Gateways, Payment Reminders, and Credit Card Failure Notification.

- 2Checkout
- 2Checkout V2
- WorldPay
- ProPay
- PayPal
- Authorize.NET
- LinkPoint
- NoChex
- SecurePay
- ProTx VPS Form
- Moneris eSelect Plus

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

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

## 9.) Automated Billing

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

### Current Supported Online Payment Gateways

Helm supports the following online payment gateways for automated billing:

- **Authorize.Net AIM**
- **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, go to:

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

#### Billing Settings Menu

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

**Reseller, Reseller (SAMPLE\_RESELLER)**

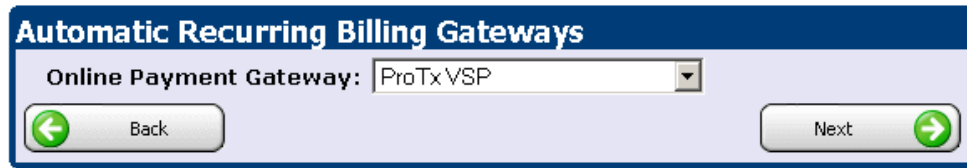
User Account: SAMPLE\_RESELLER

Enable Billing System

[Back](#) [Save](#)



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.



**Automatic Recurring Billing Gateways**

Online Payment Gateway: ProTx VSP

Back Next

Over the next few pages, you can find the setup instructions for the supported online gateways.

## ProTx VSP

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

### Payment Gateway Settings

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

#### Automatic Recurring Billing Gateways

**Online Payment Gateway:** ProTx VSP

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**ProTx VSP Protocol:**

**ProTx DLL Path:**

**Vendor Login Name:**

**Sub-Merchant ID:**

**Purchase URL:**

**Preauth URL:**

**Refund URL:**

**Currency Code:**

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

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

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

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

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

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

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

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

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

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

## Adding Cards to ProTx VSP

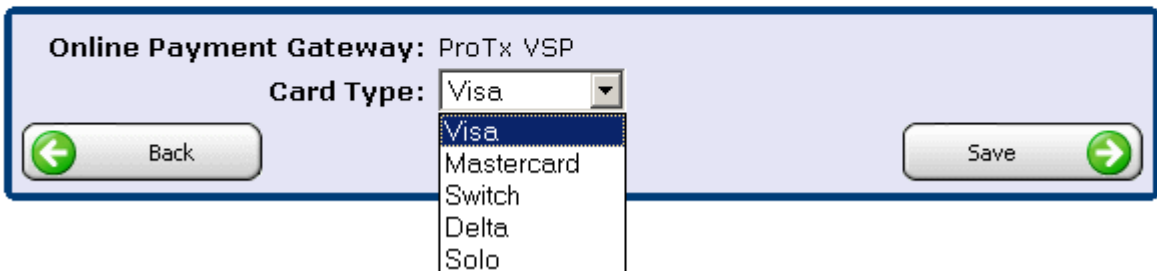
Credit/Debit Cards Supported by ProTx:

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

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

### **Add Card Type**

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



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

## Automatic Recurring Billing Gateways

Online Payment Gateway: ProTx VSP

Enabled:

CC Failure Retry Limit:

Payment Description:

ProTx VSP Protocol:

ProTx DLL Path:

Vendor Login Name:

Sub-Merchant ID:

Purchase URL:

Preauth URL:

Refund URL:

Currency Code:



Back

Save



## Assigned Card Types

Card Type



Visa



Mastercard



Switch

Add New



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

## Authorize.Net

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

**Automatic Recurring Billing Gateways**

**Online Payment Gateway:** Authorize.Net AIM

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**Authorize.Net Login Id:**

**Authorize.Net Mode:**

**Trans. Key/Password:**

**Authorize.Net Version:**

**Gateway URL:**

**Authorised Server IP:**

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

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

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

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

**Authorize.Net Mode:-** You will have set up Authorize.Net to use either Password Mode or Transaction Key Mode, so choose the relevant mode from the dropdown box.

**Trans. Key/Password:-** The password or transaction key related to the login and mode chosen.

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

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

**Authorised Server IP:-** The IP that may be sent with the Authorize.Net transaction, in some cases (e.g. Wells Fargo accounts) an IP is required. By default this is set to 255.255.255.255, which can be left, or alternatively you can enter the IP of the control server.

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

### **Adding Cards to Authorize.Net**

Credit/Debit Cards Supported by Authorize.Net:

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

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

## Moneris eSelect Plus

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

### Payment Gateway Settings

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

#### Automatic Recurring Billing Gateways

**Online Payment Gateway:** Moneris eSelect Plus

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**Store API Token:**

**Store Email Address:**

**Moneris URL:**

**Moneris Request DLL:**

**Moneris Purchase DLL:**

**Moneris Preauth DLL:**

**Moneris Refund DLL:**

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

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

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

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

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

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

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

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

### **Adding Cards to Moneris eSelect Plus**

Credit/Debit Cards Supported by Moneris:

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

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

## LinkPoint Secure

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

**Automatic Recurring Billing Gateways**

**Online Payment Gateway:** LinkPoint Secure

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**LinkPoint DLL Path:**

**LinkPoint Store Number:**

**LinkPoint Certificate Path:**

**LinkPoint Store URL:**

**LinkPoint Store Port:**

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

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

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

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

**LinkPoint Store Number:-** This will be provided to you by LinkPoint.

**LinkPoint Certificate Path:-** This certificate will be provided to you by LinkPoint. In here, you need to type the physical path to the certificate on your server.

**LinkPoint Store URL:-** The address to the LinkPoint secure store. Leave this as default.

**LinkPoint Store Port:-** The port to the LinkPoint secure store. Leave this as default.

## Adding Cards to LinkPoint Secure

Credit/Debit Cards Supported by LinkPoint Secure:

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

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

## psiGate

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

### Automatic Recurring Billing Gateways

**Online Payment Gateway:** psiGate Gateway

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**psiGate DLL Path:**

**psiGate Store Number:**

**psiGate Certificate Path:**

**psiGate Store URL:**

**psiGate Store Port:**

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

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

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

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

**psiGate Store Number:-** This will be provided to you by psiGate.

**psiGate Certificate Path:-** This certificate will be provided to you by psiGate. In here, you need to type the physical path to the certificate on your server.

## Adding Cards to psiGate

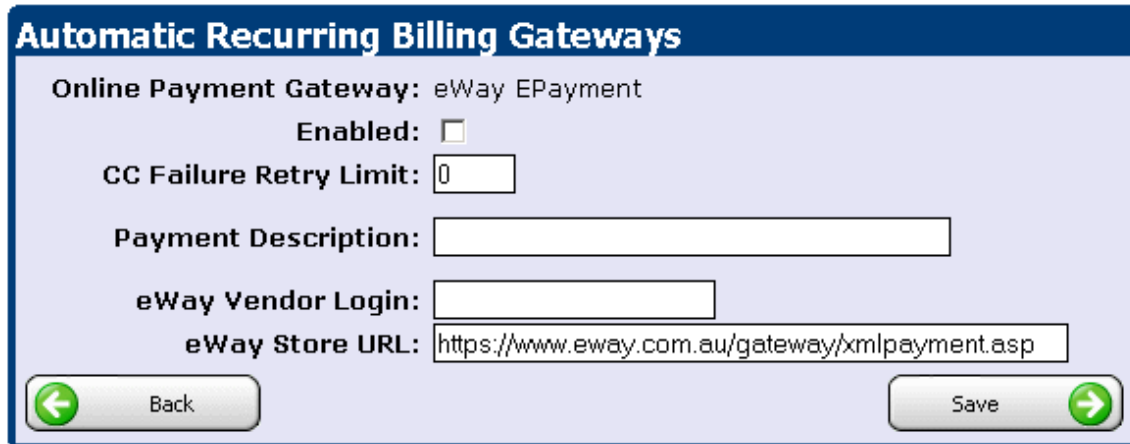
Credit/Debit Cards Supported by psiGate:

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

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

## eWay EPayment

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



The screenshot shows a web interface titled "Automatic Recurring Billing Gateways". It features a form for configuring the "eWay EPayment" gateway. The form includes the following fields and controls:

- Online Payment Gateway:** eWay EPayment
- Enabled:** A checkbox that is currently unchecked.
- CC Failure Retry Limit:** A text input field containing the value "0".
- Payment Description:** An empty text input field.
- eWay Vendor Login:** An empty text input field.
- eWay Store URL:** A text input field containing the URL "https://www.eway.com.au/gateway/xmlpayment.asp".
- Navigation:** A "Back" button with a left arrow and a "Save" button with a right arrow.

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

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

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

**eWay Vendor Login Name:-** The login name provided to you by eWay EPayment.

**eWay Store URL:-** The address to the eWay EPayment secure store. Leave this as default.

## Adding Cards to eWay EPayment

Credit/Debit Cards Supported by eWay EPayment:

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

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

## SecurePay (USA)

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

**Automatic Recurring Billing Gateways**

**Online Payment Gateway:** SecurePay (USA)

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**SecurePay Login Id:**

**SecurePay URL:**

**SecurePay DLL Path:**

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

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

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

**SecurePay Login Id:-** The login Id provided to you by SecurePay.

**SecurePay URL:-** The address to the SecurePay secure store. Leave this as default.

**SecurePay DLL Path:-** The path to the SecurePay DLL installed on your server. You will get sent this DLL when you sign up for a SecurePay account. The path to this file can be altered as necessary to wherever you have installed it.

## Adding Cards to SecurePay

Credit/Debit Cards Supported by SecurePay:

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

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

## E-xact Transactions

Below is the Gateway Settings page for E-xact Transactions, which you will need to customise as appropriate:

**Automatic Recurring Billing Gateways**

**Online Payment Gateway:** E-xact Transactions

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**E-xact Login Id:**

**E-xact Login Password:**

**E-xact DLL Path:**

**Auto EPN:**

**User Static IP:**

**Primary IP for E-xact Transaction Server:**

**Primary Port:**

**Secondary IP for E-xact Transaction Server:**

**Secondary Port:**

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

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

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

**E-xact Login Id:-** The login Id provided to you by E-xact.

**E-xact Password:-** The password for logging in to your E-xact account.

**E-xact DLL Path:-** The path to the E-xact DLL installed on your server. You will get sent this DLL when you sign up for a E-xact account. The path to this file can be altered as necessary to wherever you have installed it.

**Auto EPN:-** This is E-xact's automated IP lookup to get to their payment servers. This is set to "False" by default and means that this system won't be used, and instead the IPs specified in the Primary and Secondary IP boxes will be used. Unless the E-xact server IPs change, then this can be left as False. If set as False, make sure that the Static IP dropdown is set to "True".

**Use Static IP:-** This is set to "True" by default in conjunction with the Auto EPN field above. If set to True, it will use the IPs and ports specified in the Primary and Secondary fields.

**Primary IP for E-xact Transaction Server:-** The Primary IP that the E-xact Transaction server is set on. This doesn't need to be changed by default.

**Primary Port:-** The Primary Port that the E-xact Transaction server listens on. This doesn't need to be changed by default.

**Secondary IP for E-xact Transaction Server:-** The Secondary IP that the E-xact Transaction server is set on. This doesn't need to be changed by default.

**Secondary Port:-** The Secondary Port that the E-xact Transaction server listens on. This doesn't need to be changed by default.

## **Adding Cards to E-xact Transactions**

Credit/Debit Cards Supported by E-xact Transactions:

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

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

## Velocity

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

**Automatic Recurring Billing Gateways**

**Online Payment Gateway:** Velocity

**Enabled:**

**CC Failure Retry Limit:**

**Payment Description:**

**Velocity Pay Id:**

**Velocity Pay Password:**

**Velocity Pay URL:**

**Velocity Pay Currency:**

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

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

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

**Velocity Pay Id:-** The login Id provided to you by Velocity.

**Velocity Pay Password:-** The password for logging in to your E-xact account.

**Velocity Pay URL:-** The address to the Velocity secure store. Leave this as default.

**Velocity Pay Currency:-** The currency you have set in the Velocity store.

## Adding Cards to Velocity Pay

Credit/Debit Cards Supported by Velocity Pay:

- **Visa**
- **Mastercard**
- **American Express**
- **Diners Club**
- **Switch**
- **Delta**
- **Solo**
- **Visa Electron**
- **Maestro**
- **Visa Plus**

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

## 10.) Adding Cards for Payment


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

To do this, choose Billing from the Home menu:

### Billing Menu

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

Total Account Balance: **\$1,000.00 due**

 Back



Make Payment



Manage Credit  
Cards



Account  
Statements



Recurring  
Payments



Outstanding  
Customer  
Invoices



Customer  
Credit Card  
Transactions



Billing Settings

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

## Add Credit Card

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



Friendly Name:

Card Type:

-  Visa
-  Mastercard
-  American Express
-  Switch


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

## Add Credit Card

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

### Smith, John (DOMAIN\_CUSTOMER)

**Friendly Name:**

**Card Type:**  Visa

**Card Details:**

Card Number:

Valid From Date:  /

Expiry Date:  /

**Card Holder Details:**

Name on Card:

Address:

Town:

County/State:

Country:

PostCode/Zip:

Default Credit Card

You will be presented with the above screen. One point of note:

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


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

## Credit Card Details

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

### Smith, John (DOMAIN\_CUSTOMER)

**Friendly Name:**

**Card Type:**  Visa

**Card Details:**  
Card Number: 4929xxxxxxxx0006  
Valid From Date:  /   
Expiry Date:  /

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

Default Credit Card

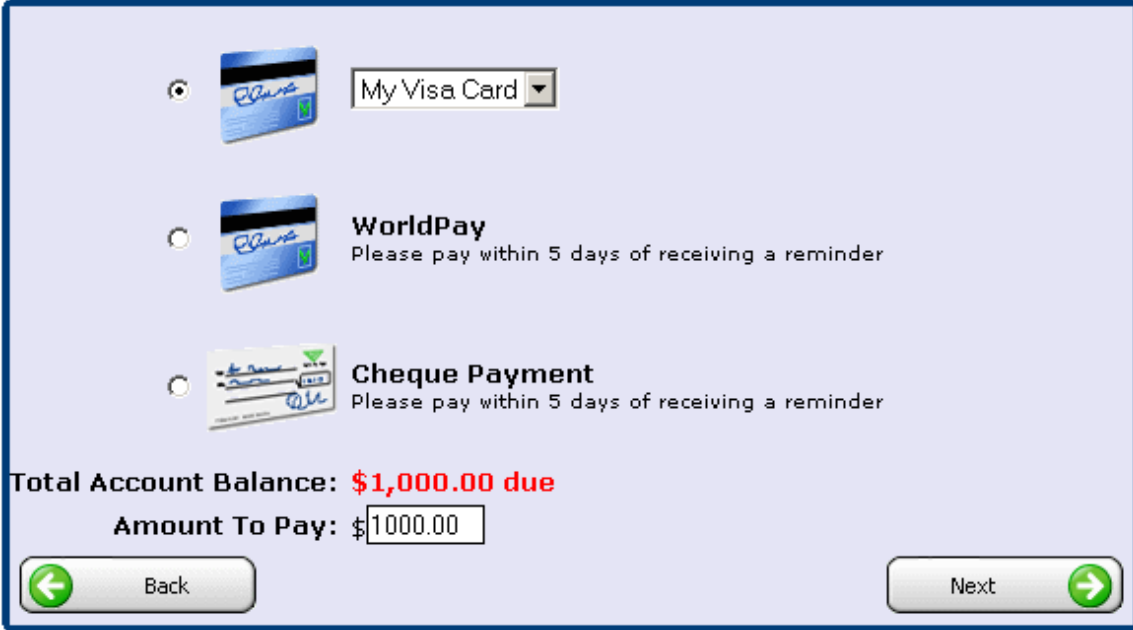
Once saved, the credit card number will be blanked out except for the prefix and suffix.

## 11.) Making a Payment

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

### Make Payment

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



The screenshot displays a payment selection interface. At the top, there are three radio button options, each with a card or cheque icon. The first option, 'My Visa Card', is selected and has a dropdown menu. The second option is 'WorldPay' with a note 'Please pay within 5 days of receiving a reminder'. The third option is 'Cheque Payment' with a note 'Please pay within 5 days of receiving a reminder'. Below these options, the 'Total Account Balance' is shown as '\$1,000.00 due' in red. Underneath, 'Amount To Pay' is shown as '\$1000.00' with a text input box. At the bottom, there are two buttons: 'Back' with a left arrow and 'Next' with a right arrow.

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

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

The payment has been successfully taken

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

## Credit Card Transactions

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

### Billing Menu



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



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

### Credit Card Transactions

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

**Report Period:**  
From:    
To:  

Card Prefix:   
Card Suffix:

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

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

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

## Credit Card Failure Notification

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



### Credit Card Failure Notification

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

**Dynamic Information:** User's Account Username [v] [Insert]

**Subject:** [Text Field]

**Message Body:** [Large Text Area]

**Delivery Settings:**

- Send via Email from [Text Field]
- Send via Internal Message System
- Send Copy To The Following Email Address [Text Field]
- Send as HTML Email

[Back] [Save]

As with most other custom notifications, you can choose:

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

## 12.) Auto-Signup Script

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

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

### Billing Configuration

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

**Currency Symbol:**

**Add Recurring Transactions:**  days before due date.

**Pay on Signup:**

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

Terms And Conditions URL:

Pay On Signup Header HTML:

Pay On Signup Footer HTML:

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

**[HELM INSTALL FOLDER]\Helm\Control Panel**

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

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

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

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

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

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

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

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

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

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

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

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

Where **RESELLERACCOUNT** is your account number in Helm.

## 13.) Other Billing Settings

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

### Billing Settings Menu

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

A) Enable/Disable Billing System

B) Save Settings

Reseller, Reseller (SAMPLE\_RESELLER)  
 User Account: SAMPLE\_RESELLER  
 Enable Billing System  
 Back Save



## Tax Settings

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

### Tax Settings

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

Tax Rate: 0 %  
 Tax Name: Tax  
 Back

## Invoice Settings

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

## Payment Gateway Configuration

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

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



### Payment Gateway Settings

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

**Standard Payment Gateways**

Payment Gateway:

**Automatic Recurring Billing Gateways**

Online Payment Gateway:

## Payment Reminders

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

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



### Payment Reminder

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

**Send Reminder:**  Days  Due Date

**Dynamic Information:**

**Subject:**

**Message Body:**

```
Dear [UserFirstName]:

We're sending you this email to remind you that you need to login
to your Helm Control Panel at http://cp.hostcompany.com and pay
your hosting bill, which is due in 10 days.

For your convenience, here is your username and password:

Username: [User&accountNumber]
Password: [User&accountPassword]

Thanks,

Your Hosting Company!
```

**Delivery Settings:**

Send via Email from

Send via Internal Message System

Send Copy To The Following Email Address

Send as HTML Email

**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.

## 14.) Adding New Customers

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

### Step 1: Entering Customer Information

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

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

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

**Reseller, Reseller (SAMPLE\_RESELLER)**

Reseller Account: SAMPLE\_RESELLER

Account Number:  \* Optional

Title:

First Name(s):

Last Name:

Company Name:

Address:

Town:

State/County:

Country: United States of America

Zip/PostCode:

Daytime Tel.:

Evening Tel.:

Mobile Tel.:

Fax Tel.:

Primary Email Address:

Secondary Email Address:

Send Welcome Message

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

## Step 2: Choosing a Plan and Adding the Domain

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

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

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

### Add Package

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

**A) Enter Package Name**

**B) Click Save**

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

### Packages

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

**A) Click Package**

Package Name	Type
Test Company Web Site	Hosting P
Back	<b>Package Search</b>
	<b>Package Status</b>

**B) Change the account status to "Active"**

**C) Click Save**

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

**Test Company Web Site**


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

Active  
 Payment Due  
 Pending Payment

Back Delete Save

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




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

 **Add Domain**

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


User Account: SAMPLE\_CUSTOMER  
 Package: Sample Hosting Package

Domain Registration:

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


Back Next

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

 **Add Domain**

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

User Account: SAMPLE\_CUSTOMER  
 Package: Sample Hosting Package

Domain Registration:  No registration or transfer required

Domain Name: www.  .

Back Save

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

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

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

## Resending a Welcome Message

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



**Click Here!**

## 15.) Normal Signup Script

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

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

### User Settings

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

#### User Settings

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

**Reseller, Reseller (SAMPLE\_RESELLER)**

**Reseller Account:** SAMPLE\_RESELLER

**General User Settings:**

Account Number Prefix:

Min Password Length:

**Account Signup:**

Enable Remote Auto-Signup Script

**Account Vetting:**

Enable Account Vetting

Sending an alert email to the following account:



Welcome  
Message



Signup Script  
Generator

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

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

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

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

## Signup Script Generator

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

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

**Step 3:** Click Next.

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

### Signup Script Generator

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

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

**Signup Settings:**

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

**Script Output:**

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

# 16.) 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 Reseller Main Menu.

## Reseller Main Menu

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



Account Settings



Hosting Plans



Users



Domains



Billing



Reports



Password



Personal Details



Messaging



Online Help

Click here!




You will be taken to the following screen:

## Messages

Use the forms below to contact all your customers through the internal messaging system. When a user next logs into their account, they will see the message on their main menu.

Messages Sent		
Subject	Date Sent	Expiry Date
System Message	2004-09-28 15:43	2004-09-29
System Message	2004-09-28 15:42	2004-09-29
TEST	2004-09-28 15:39	2004-09-29

### Compose Message

**Message From:**   
**Message To:**    
**Subject:**   
**Expiry Date:**    
**Message:**

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 your customers.

**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:

**Edit Message**

**Message From:** System Admin

**Subject:** System Message

**Expiry Date:** 2004-09-29

**Message:**

Please note, we will be moving servers tonight at 11:00pm.  
Apologies for the inconvenience.  
Webhost Company.

Back Delete Add New Save

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.

## 17.) Reports and Who's On

Helm gives you the ability to generate reports for customer and domain bandwidth, and customer and domain disk space usage. It also lets you 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 Reseller Main Menu and you will be taken to the following screen:

### System Reports

Below you will find a list of reports you can run to keep track of resource usage, sales information and more.



**Who's On**  
Who's On is a tool that will show you who is currently logged into Helm, and where they are in the system.



**Customer Bandwidth Usage Report**  
This report shows the amount of bandwidth used by each customer over a specified period.



**Customer Diskspace Usage Report**  
This report shows the amount of disk space used by each customer over a specified period.



**Domain Bandwidth Usage Report**  
This report shows the amount of bandwidth used by each domain over a specified period.



**Domain Diskspace Usage Report**  
This report shows the amount of disk space used by each domain over a specified period.


 Back

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:

## Who's On

This is a list of users that are currently logged into Helm.

User Name	Logon Time	Current Location	IP Address
DEMORESELLER (Reseller)	2004-10-06 11:31 (9 minutes 6 seconds)	Who's On (Last Activity: 0 minutes 1 seconds ago)	212.50.185.165



 Back

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

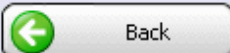

You can also click on one of the reports to see the various bandwidth usages. For instance, if you clicked on Customer Bandwidth Usage Report, you would be taken to the following screen:

## Customer Bandwidth Usage Report

This report allows you to easily see the amount of bandwidth being used by each customer.

**Report Period:**  
 From:    
 To:  

**Export Report:** Microsoft Excel

 Back  

Customer	Package	Package Type	Used (MBytes)	Limit (MBytes)	% Used
SU71	My New Package	Platinum Hosting Yearly	5,776.56	8,500.00	67.96%
SU27	My New Package	Gold Hosting Yearly	2,899.94	4,000.00	72.50%
SU15	My New Package	Gold Hosting Yearly	2,055.93	3,000.00	68.53%

In the above example, three packages are listed with the customer 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 user.

An example of a statistical display of a customer is below:


## Statistics

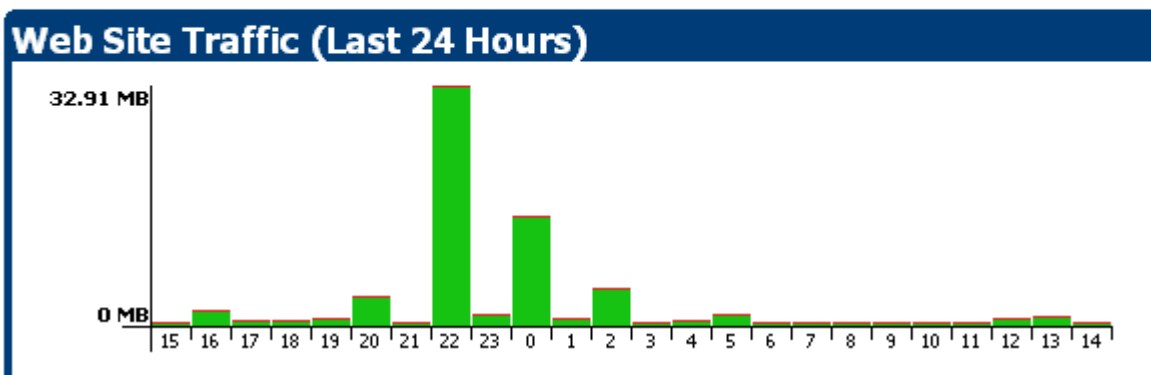
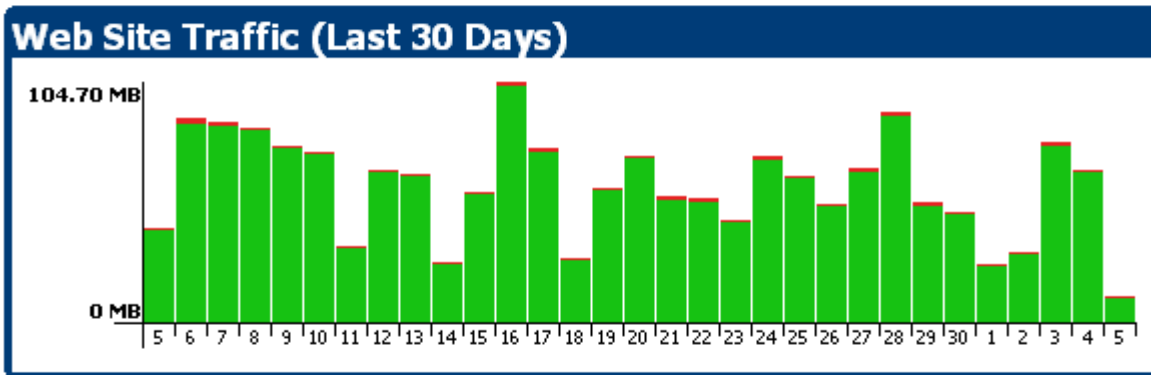
The following shows basic statistics about your account. These details are collected periodically and will show only the statistics up to the last collection time.

**Domains Setup:** ■ 27 of 350

**Bandwidth Usage:** ■ 1,850.01 MBytes of 10,000.00 MBytes Used

**Diskspace Usage:** ■ 465.20 MBytes of 1,000.00 MBytes Used

 Back



This is also accessible directly from the 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 reports work 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 user currently uses:



## Customer Diskspace Usage Report

This report allows you to easily see the amount of disk space being used by each customer.

**Report Date:** 2005-02-09

**Export Report:** Microsoft Excel

Customer	Package	Package Type	Used (MBytes)	Limit (MBytes)	% Used
UN1	Gold Package	Gold Plan	47.00	100.00	47.00%

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

The domain disk space usage report is similar too:



## Domain Diskspace Usage Report

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

**Report Date:** 2005-02-09

**Export Report:** Microsoft Excel

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.

## And finally....

Thank you for using Helm! We hope you have as much enjoyment using our product as we do creating it. If you have any issues using the Helm Control Panel, please pass these onto your administrator who will be happy to help.