

Helm 4 - Adding Customers

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<http://www.webhostautomation.com/>
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Table of Contents

ABOUT HELM.....	3
IMPORTANT INFORMATION ABOUT THIS GUIDE	3
ADDING CUSTOMERS TO HELM	4
CREATING A CUSTOMER ACCOUNT ROLE	5
CREATING A CUSTOMER.....	7
ADDING A PACKAGE TO A CUSTOMER.....	9
PACKAGE LIMITS.....	12



About Helm

The Helm 4 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>

Important Information About This Guide

Because of the unique “unlimited user model” that Helm 4 employs, there is no longer a strict tier system. Therefore, the Administrator/Reseller/User layout that existed in the previous version of Helm no longer exists.

As well as this, the addition of Account roles and Login roles means that there are no longer strict permissions attributable to a specific user. Effectively, if a user has the correct permissions, they can see and/or do anything in Helm, even if they are not an administrator.

Because of these changes, this guide will encompass all aspects of Helm, split into different sections. Depending on the permissions your Account role or Login role has, you may not be able to see or use certain parts of Helm. However, you can still use this guide to find out more about the areas of Helm that are available to you.

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

Adding Customers to Helm

If you are a web hosting company, then it is likely that you'll want to add your customers into Helm in order to create and manage their domains, allow them to purchase services from you, and to keep track of the limits available to them.

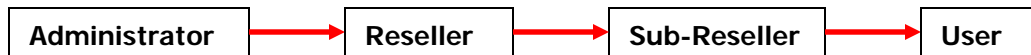
Helm 4 has an unlimited user model, which means you can have as many levels of customers as you wish. This differs to Helm 3, which had a strict model of:



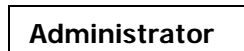
Helm 4's model is entirely up to you. If you don't want to have resellers (for instance, if your business has only just started up), then the following model will work fine:



Alternatively, if you are a larger company you may want to allow your resellers to have their own resellers, then Helm will allow you to do this too:



If you want to use it to just manage your own sites, it can be as simple as:



The choice is yours!

Once you have decided what kind of user model you are going to have, you will now want to set up Helm for your users.

Creating a Customer Account Role

In order to set up customers, you will first need to decide what kind of permissions they will have on their account. Helm lets you choose what a user can and cannot do – and any permissions they do not have will remove the appropriate icons from Helm. This is useful if you want your customers to see certain items in Helm but not have the power to use other features. In order to do this, you will need to create Account Roles for your customers. You can get to these here:

Home > Account Settings > Customer Account Roles

As there are no Customer Account Roles currently set up, click Add to get taken to the Add Account Role page:

Add Account Role
Logged in as ADMIN

Use this form to create a new Account Role for this Account.

Back

Role Name:*

Role Description:

Is Public

Available Permissions:

Pre-defined Roles

Reseller ▾

Specify Permission

Available Permissions		Selected Permissions
Create Login. Update Login. Delete Login. Create Login Role. Update Login Role. Delete Login Role. Create Account	>> <<	

Save

Role Name:- Choose a friendly name for the Role Name, e.g. “User” or “Reseller”.

Role Description:- Here you can expand on the role name and add a description about it.

Is Public:- If this is checked then this role will be available for your customers to “sign up” to it, via the Online Shop. If you check the box, then after saving the role you will see a new link for the role appear here:

Home > My Shop > Shop Configuration

Pre-defined Roles:- Helm has helpfully taken the most common features of a reseller and a user (based on the abilities they had in Helm 3) and given you the ability to choose these as “Pre-defined” roles to save you time. For instance, a Reseller will not be able to add servers to Helm, or use other administrator functionality, but they can add users underneath them, set up billing

functionality, etc. Similarly, users cannot add customers but they can manage their domains and Packages. You can choose either the “Reseller” or “User” pre-defined role if you want to quickly set up an Account Role, or if you would like to micro-manage the permissions yourself, then you can instead choose Specify Permission.

Specify Permission: - If you would prefer to choose the precise abilities that a customer can have, then choose this button to specify permissions for this role. When you choose this option, the Available Permissions list will become active. Simply highlight the permission you want the role to have (Ctrl-click to select multiple permissions) and click the >> button to move them into the Selected Permissions box. If you want to remove any permissions from the role, highlight them in the Selected Permissions box and click the << button to move them back to the Available Permissions box.

Once you have chosen the permissions that you require, click Save to save the Customer Account Role.

Now that you have set up a Customer Account Role, you are ready to create your first customer.

Creating a Customer

To get to the customer creation section of Helm, go to:

Home > My Customers

As there are no customer accounts currently set up, click Add to get taken to the Create Customer page:

Create Customer Logged in as: ADMIN

Use this form to create a customer account. Back

Account Details

Account Name:*

Role: Reseller Role [Create a new role...](#)

Login Details

Admin Login Name:*

First Name:

Last Name:

Login Email Address:*

Password:*

Confirm Password:

Contact Details

Company Name:

Company Email Address:

Address 1:*

Address 2:

Address 3:

Town:*

Postcode:*

Country: United Kingdom

County/State: Aberdeenshire

Save

Account Name:- Enter a name for this Account. This will be used to login to Helm, alongside the Admin Login Name and password.

Role:- Choose an Account Role to assign to this Customer from the dropdown box. You can select the Customer Account Role that you created earlier here, or if required, click the "Create a new role" link to create a new Account Role.

Admin Login Name:- Enter the Login Name you want to use in order to login as an administrator to this Customer Account (e.g. "admin").

Login Email Address:- Enter the Primary Email Address here. This is the default address that all messages to this Customer will go to.

Password:- Enter a password that will be used in conjunction with the Admin Login Name.

Confirm Password:- Confirm the password you just entered.

Company Name:- Enter the Company Name here.

Company Email Address:- Enter the Company Email Address here. This is the default address that this Customer's system messages come from.

Address 1/2/3:- Enter the Company Address here.

Town:- Enter the Town here.

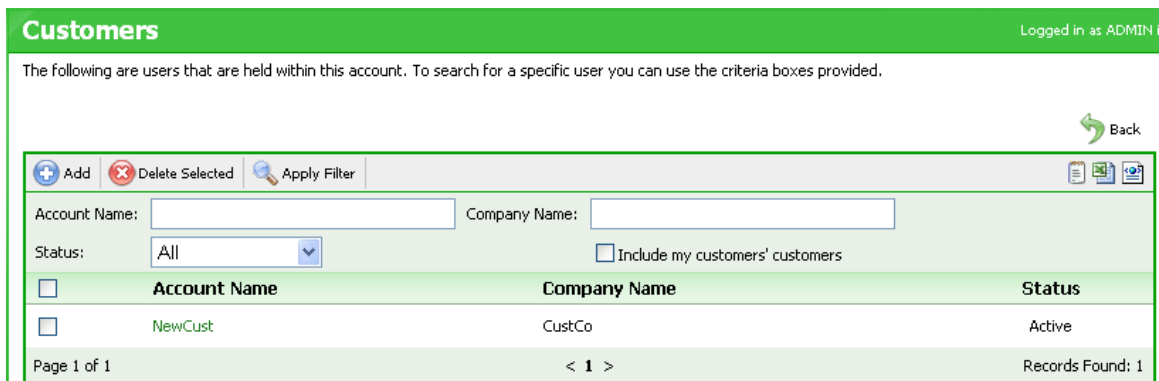
Postcode:- Enter the Postcode/ZIP here.

Country:- Choose the Country that the company resides in from the dropdown box.

County/State:- Enter the County/State here.

Once you've entered your customer's account details, click Save to save them.

You will see your new customer in the Customers list:



The screenshot shows a web interface for managing customers. At the top, there is a green header with the title "Customers" and the text "Logged in as ADMIN". Below the header, a message states: "The following are users that are held within this account. To search for a specific user you can use the criteria boxes provided." To the right of this message is a "Back" button with a circular arrow icon. Below the message is a search and filter area containing buttons for "Add", "Delete Selected", and "Apply Filter", along with some utility icons. Below this are search criteria boxes: "Account Name:" and "Company Name:" (both text input fields), "Status:" (a dropdown menu currently set to "All"), and a checkbox labeled "Include my customers' customers". Below the search area is a table with the following data:

<input type="checkbox"/>	Account Name	Company Name	Status
<input type="checkbox"/>	NewCust	CustCo	Active

At the bottom of the table area, it shows "Page 1 of 1", a pagination control "< 1 >", and "Records Found: 1".

Adding a Package to a Customer

Now that your customer has been created, they will need to have a Package added to their account in order to start adding domains, setting up their own plans (if they are a reseller) and so on.

Assuming that you have successfully followed the [Helm 4 Initial Setup Guide](#) then you will have already created a Plan Template and Plan at the Administrator level. If not, you should read through and complete that guide before continuing with the customer setup in this document.

Click on the customer in the list, and you'll see the Customer Main Menu:

Main Menu Logged in as ADMIN

Welcome. This is the main menu to access any area of your control panel. Back

Account Name:*

Role: Reseller Role

Email Address: custco@customer.com

Status: Include Customers

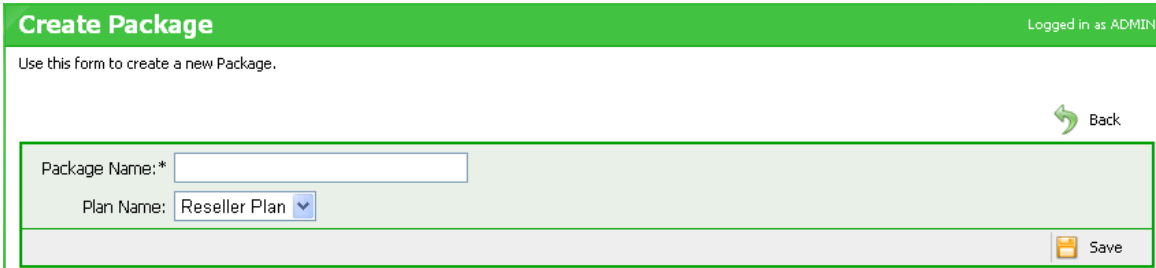
Last Logged In User: admin

Billing **Account Settings** **Plan Templates** **Plans** **Packages**

Domains **Customers** **Notes**

In this case, you want to add a Package to the customer account before doing anything else. Remember – a Package is an instance of the Plan that you set up at the administrator level in the Helm 4 Initial Setup Guide. By adding a Package to the customer, you are giving the customer all of the limits available in the Plan that you set up, such as the number of domains they can add, the amount of bandwidth available to them, etc.

Click on Packages and then click "Add" to get taken to the Create Package screen:

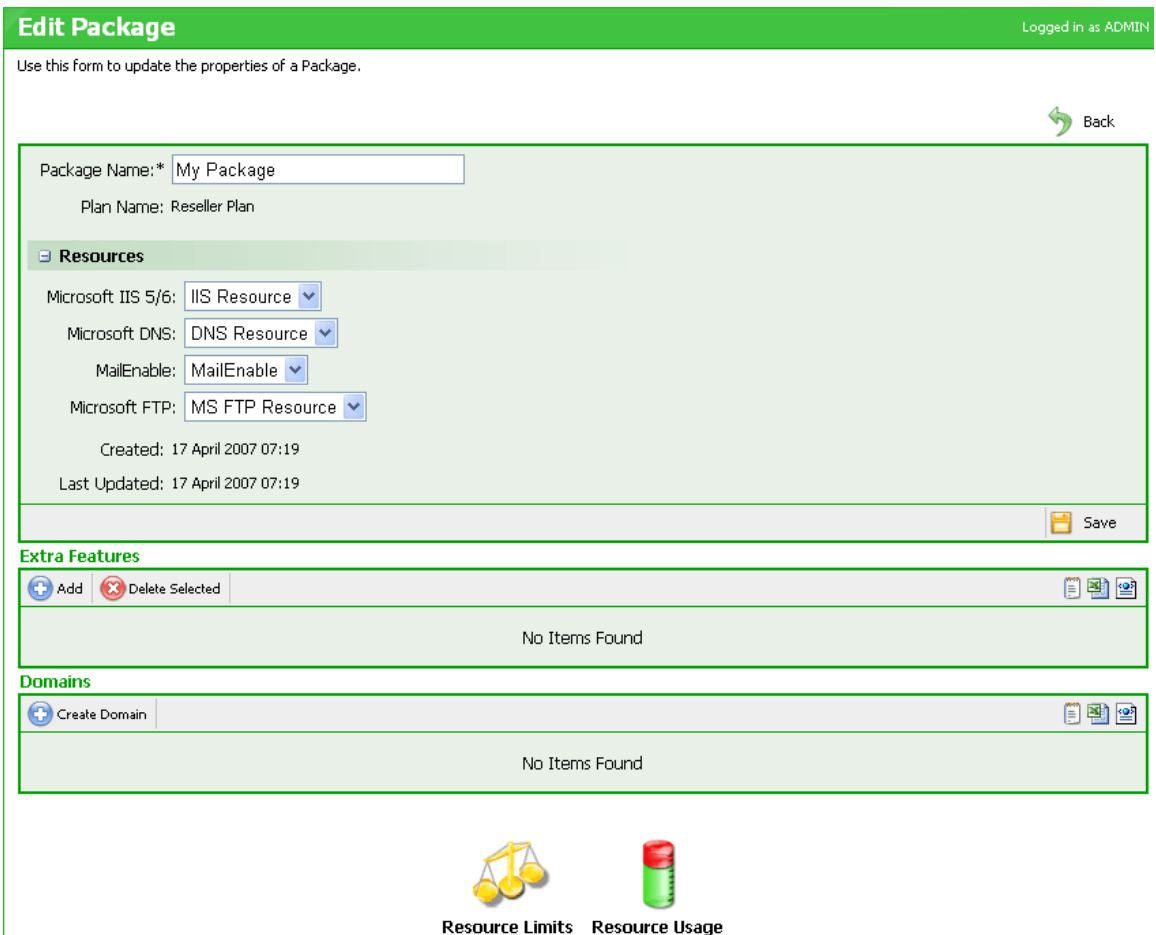


Package Name:- Choose a friendly name for the Package (e.g. My Package).

Plan Name:- Choose a Plan that you are basing the Package on. In this case, you can select the Plan that you have already set up.

Click Save to add the Package to the customer's account. You will now see the Package in the Packages list.

If you now click the Package, you will be taken to the Edit Package page:



Resources:- Here you can choose which Resources are utilized by the various services that are assigned to this particular Package. For instance you may have several web resources spread over multiple web servers, and want all domains to go to a particular web server. In that case you can select the resource assigned to that particular web server, and click Save to save it.

Extra Features:- Clicking the “Add” button will take you to the “Add Extra Feature” page where you can assign extra features to your Package which have been set up at the Plan level. If no extra features have been set up at the Plan level then you will see a “none available” message.

Create Domain:- Click this button to get taken to the “Create Domain” page where you can add a domain to your account.

Resource Limits:- If you choose this you will get taken to the Resource Limits page where you can configure the limits for this specific Package (see below).

Resource Usage:- Click this to see the current usage statistics for your Package.

Package Limits

If you click the Resource Limits icon as mentioned above, you will get taken to the Package Limits page. Here you can see the limits that the Package has inherited from the Plan it is based on.

Logged in as ADMIN

Package Limits

This form shows the the limits that have been assigned to this package.

My Package ↶ Back

System

Domain Aliases: Unlimited

Domains: Unlimited

IP Addresses: Unlimited

Parked Domains: Unlimited

Sub Domains: Unlimited

Total Bandwidth (MB): Unlimited

Total Diskspace (MB): Unlimited

Web

DNS

Enable DNS Editor

Bandwidth (MB): Unlimited

Diskspace (MB): Unlimited

Mail

Bandwidth (MB): Unlimited

Diskspace (MB): Unlimited

Email Accounts: Unlimited

Email Groups: Unlimited

Email Lists: Unlimited

FTP

Bandwidth (MB): Unlimited

Diskspace (MB): Unlimited

FTP Accounts: Unlimited

These limits will vary dependent on the Resources that the Package is utilizing. For instance, if a Package uses only Web and DNS, then other limits such as FTP and Mail won't show up here.

The difference between editing a Plan and editing a Package is as follows:

- If you edit a Plan, then it will affect any Packages that are based on that Plan. For instance, if you have a Plan with a limit of 10 domains, and you change the plan to increase the limit to 15 domains, then all Packages based on that Plan will have their domain limit increased to 15, across all customer accounts.
- If you edit a Package, then it will only affect that particular Package. So if you alter the Package to increase the domain limit from 10 to 15 then only this one Package (and therefore, one customer account) will be affected.

This way, you can decide whether you want to alter the limits for a certain group of customers or just a single customer. Make sure you “Save” your settings if you make any changes.

In this guide you have learned how to:

- Create a Customer Account Role
- Create a Customer which uses that Account Role
- Add a Package to a Customer
- Set the limits for that Package