

Microsoft FTP Configuration Guide for Helm 4

How to configure Microsoft FTP for use with Helm

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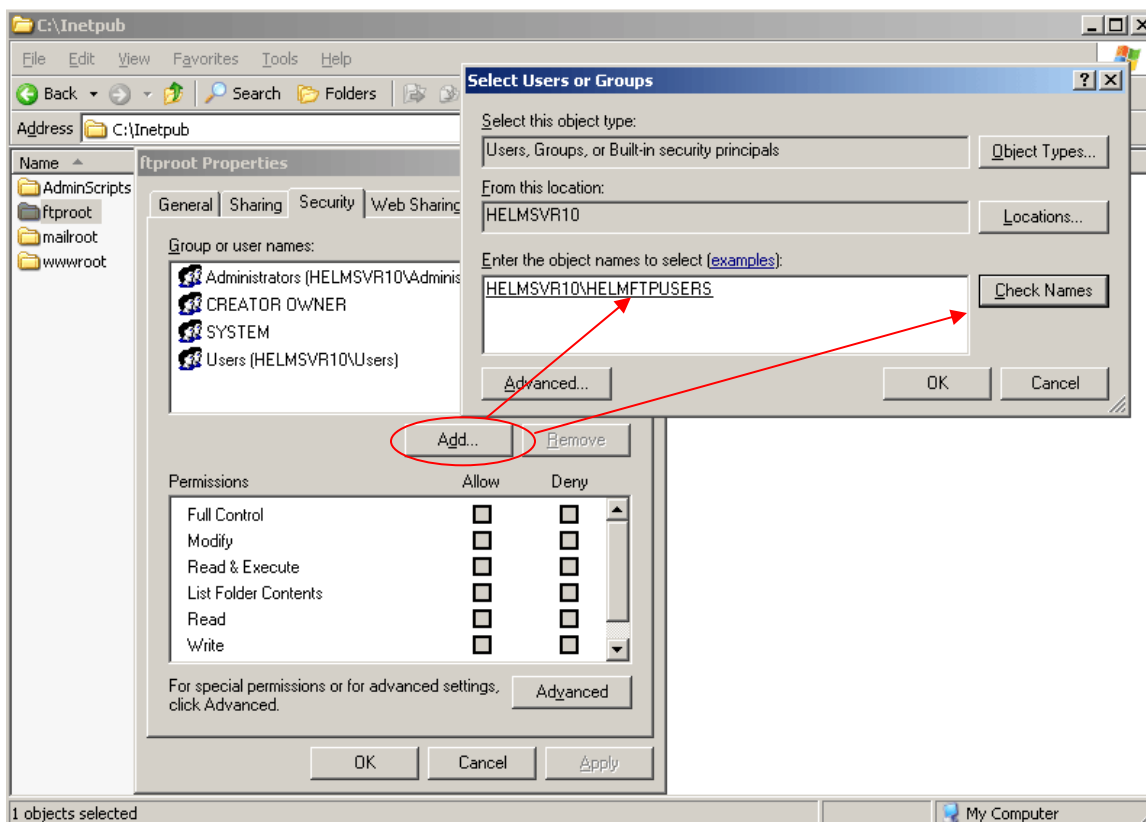
Using Helm with Microsoft FTP Server

There is one configuration required for Helm to use Microsoft FTP server. This service won't be able to read the log files from remote web servers, so if you are going to use this service, you will need to install it on all of the web servers. Helm will select the FTP service on the same machine as the web service by default and if available.

The configuration is simple – right-click the default FTP root folder (usually this is C:\inetpub\ftproot) and choose Properties. Choose Security, and add the following user group:

HELMFTPUSERS

Click “Check Names”, and it should come up with the relevant user group.



Give this user group Read, List Folder Contents and Read & Execute permissions on the folder. Click OK to save the changes.

Important Note: - Do **NOT** delete the Default FTP site from IIS. This is needed by Helm, and will cause major issues with FTP if it is removed.

Microsoft FTP and Microsoft FrontPage Extensions Issue

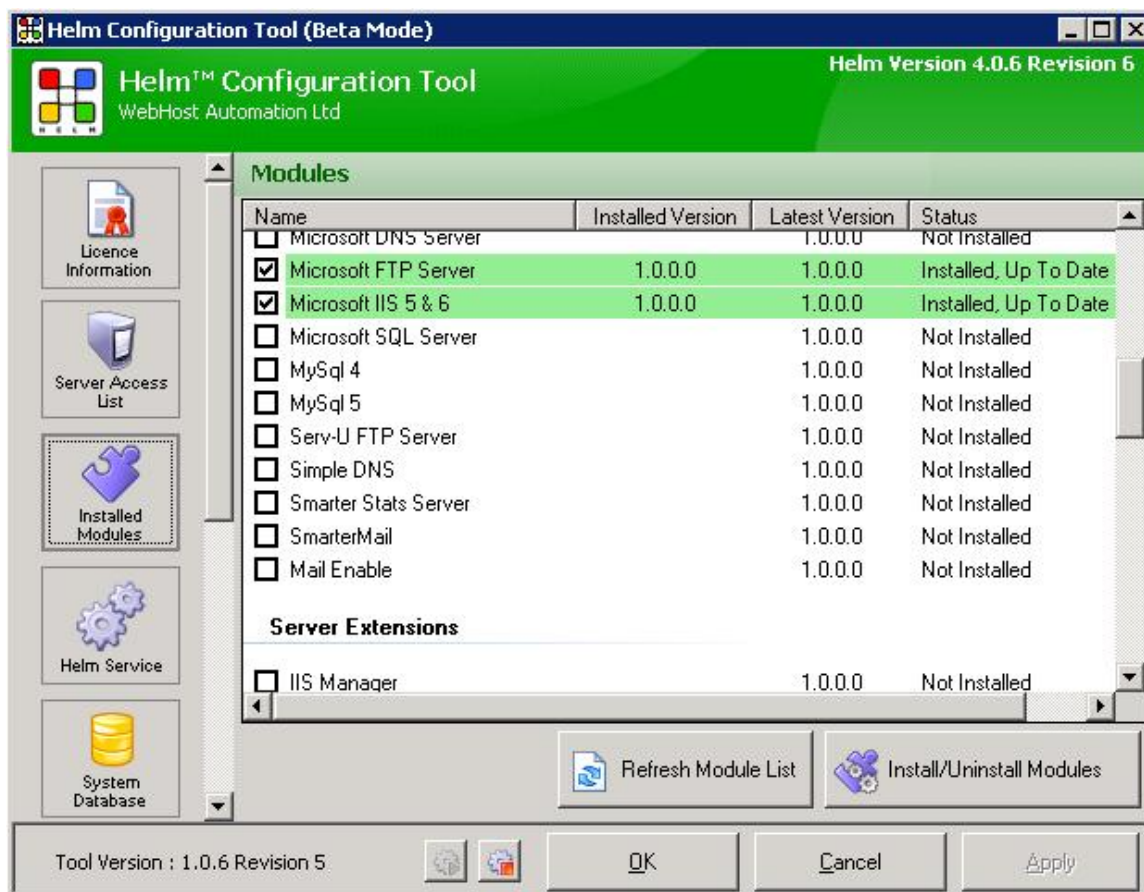
When FrontPage Extensions are installed on a domain, Windows removes FTP access to the “**wwwroot**” folder. This is to prevent FTP from causing errors in the FrontPage Extensions, which does happen when both applications have access to the same folder. Because of this, it is highly recommended that you do NOT install FrontPage Extensions on domains that have FTP accounts (either manually or through Helm). Microsoft currently provides no workaround for this issue.

Setting up the MS FTP Module

Open up the Helm Configuration Tool, a link for which can be found either on the desktop or in the tools sub-folder usually located here:

C:\Program Files\WebHost Automation\Helm4\Tools

and click on the ‘Installed Modules’ button on the left.



Scroll down the list of modules available and ensure that the 'Microsoft FTP Server' module is checked and that it is 'Installed, Up to date'. If not, you can check the module, and then click the 'Install/Uninstall Modules' button to install the module. Once installed, you can configure the MS FTP service within the Control Panel itself.

Setting up an MS FTP Service in Helm

In Helm, go to:

Home > Helm System > Servers > [Your Server] > Services

Create a new service, select **Microsoft FTP** from the 'provider' dropdown box and give it a friendly name (such as "Microsoft FTP Service"). You will then be presented with the following screen:

The screenshot shows the configuration window for a Microsoft FTP service. The 'Provider' is set to 'Microsoft FTP'. The 'Friendly Name' is 'Default FTP Service'. The 'IP Address' is '1.2.3.4 (1.2.3.4)' with a dropdown arrow and a link 'Create new IP Address...'. The 'Physical Path' is 'C:\FtpData' with a folder icon. The 'NT User Account Description' is 'MsFTP User Created By Helm'. There is a checked checkbox for 'Remove FTP Data on Domain Deletion'. The 'FTP Site ID' is '1'. Below this is a section titled 'Resource Assignment' with two radio buttons: 'Do not assign to Resource' (selected) and 'Create a new Resource for this Service'. Under the second option, there is a 'Resource Name' field, a 'Distribution Type' dropdown set to 'Maximum Domain Count', and a 'Distribute to Primary Resource' checkbox. A 'Save' button is at the bottom right.

Friendly name:- Enter a friendly name of the Service you are adding (e.g. "Default FTP Service").

IP Address:- Choose the IP Address from the dropdown on which you want the FTP service to communicate on. If you want to create a new IP Address, click the link by the side of the dropdown.

Physical Path:- Enter the root path that you want to store your FTP folders in (by default this location is "C:\FtpData").

NT User Account Description:- Enter a description that will be added to the FTP user account that is created in Windows (by default this is "MSFTP User Created By Helm").

FTP Site ID:- This is the site 'Identifier' in IIS. This is usually set to '1' and belongs to the 'Default FTP site' within IIS.

Unlike Helm 3, Helm 4 also allows the user to add the FTP resource at the same time as adding the FTP Service. Adding resources separately to the service will be explained later in this document.

Do not assign to Resource:- If you don't wish to create a Resource at the same time, choose this option.

Creating a new Resource for this service:- If you want to create a Resource along with this service, choose this option. You will also need to choose the following.

Resource Name:- Enter a name for the Resource you are adding (e.g. "FTP Resource").

Distribution Type:- Choose the type of Distribution that you want any added domains to use. The options are.

- **Random Distribution:** If this option is picked, then one of the services in the Resource is picked at random, and the domain/account created on that service. If that service is offline then Helm will attempt to add the domain/account to another random service in the Resource.

- **Maximum Domain Count:** If this option is picked, then the servers associated with the services in the Resource are analysed, and the domain/account is created on the service whose server has the least amount of domains/accounts already on it. If that service is offline then Helm will attempt to add the domain/account to the service with the next lowest amount on it.

- **Provider Load Index:** If this option is picked, then the providers associated with the services in the Resource are analysed, to see which server is the "least heavily laden". The domain/account is then added to that service. If that particular service is offline then Helm will attempt to add the domain/account to the service on the next "least heavily laden" server.

Distribute to Primary Resource:- If you check this box, when a domain is added into Helm, Helm will attempt to create each account (Web, Mail, FTP, DNS, etc) on the same server as whichever Resource is marked as "Primary Resource" in the Plan Template. If it is not possible to do so because no corresponding service exists on that server, then a random server which does have the service on will be used.

Example:

- You have Server 1 with Web, DNS and FTP services on it.
- You have Server 2 with Web, DNS and Mail services on it.

In the Plan Template, let us assume that you have selected the FTP Resource as the Primary Resource. Therefore, when a domain is created, the FTP account will be created on Server 1, the Web and DNS accounts will be created on Server 1 (because this is the server with the Primary

Resource on it), and the Mail account will be created on Server 2 (because there is no Mail service on Server 1 for the Resource to utilise).

Assign this Service to the following Resource:- If you already have a Resource created which utilizes an FTP Service of the same type (for instance, if you have Microsoft FTP on another server and already have a Resource set up for it), then you can add this new Service to that existing Resource. Simply choose the Resource you want to add the Service to from the dropdown box.

Once you have selected your options, click Save to save the service.

Setting up an MS FTP Resource in Helm

Once you have set up the Service, you will need to add this Service into your FTP Resource so that Helm will use it when creating FTP accounts. A Resource is simply a single service, or group of services, that you can use in your hosting plans to offer to customers. For instance, you may have added a number of MS FTP Services into Helm, and want to utilize them all. To do this, you can simply create an FTP Resource and then add all of your MS FTP services to it. The new Resource can then be utilized in plans and packages by your customers, which will distribute domains between each FTP service, dependent on the settings you have provided.

To set up the Resource, go to:

Home > Helm System > Resources

If you haven't got an FTP resource, create a new Resource, selecting **Microsoft FTP** from the 'Provider' dropdown box. This will present you with the following screen.

You can add a Resource into Helm here. These Resources will then be available for any plan templates you wish to setup. The settings are:

Provider:- Choose the Provider that you want this Resource to use.

Resource Name:- Enter a name for the Resource you are adding (e.g. "Web Resource" or "FTP Resource").

Distribution Type:- As explained above (Page 6)

Available Services:- In this box you can select the Services that you want to assign to the Resource. You can either select them individually or use control-click (hold down Control and left-click on items) to select multiple items from the Available Services box. Select the ones you want

and choose the >> arrow to move them into the Selected Services box. The Resource will then be assigned the Services in the Selected Services box. If you want to take Services out of the Selected Services box, simply select them and use the << arrow to move them out again. Click Save to save your Resource settings.

Delete:- If you want to delete the Resource, simply click the Delete button and confirm the deletion on the screen that follows. This delete option is only available if the Resource exists.

Once you have chosen your Resource options, click Save to save the Resource.

Adding the MS FTP Resource into your Plan Template

Plan Templates are a way for you to configure Resources, domain provisioning and DNS templates, and then group them together so that they can be assigned to your plans. By creating Plan Templates, it will remove the need to go through each plan you create, and assign different Resources to them, depending on what you offer. For example, in Helm 3 if you had several "Web and FTP-only" plans and several "Web, FTP and DNS" plans, you would need to create each plan, go into its Resource limits and alter them to use the appropriate Resources. With Helm 4, this isn't necessary. You simply set up a Plan Template for Web and FTP, and one for Web, FTP and DNS, then choose the Plan Template you are basing the Plan on when you create it.

You can add the MS FTP resource into your Plan Template by doing the following:

1.) Navigate to

Home > My Plan Templates

At this screen you can either add a new template or edit an existing template (by clicking on the existing template name in the list).

- **If you already have a Plan Template set up**, then simply click the required Plan Template in the list. You will see a list of Available Resources on the left, and in there will be the FTP Resource you created earlier. Select it and use the >> button to move the Resource to the Selected Resource box, then click Save.

- **If this is a fresh install and a new Plan Template**, click Add and give your Plan Template name (e.g. "All Services"). A list of 'Available Resources' should be visible on the left. Highlight the Resource you wish to select and using the >> button move the resources to the Selected Resources box.

2.) Upon saving the template, you will be presented with the following screen:

Edit Plan Template

Logg

Use this form to edit the properties of a Plan Template.

The Plan Template has been successfully saved.

 Back

Template Name: * <input type="text" value="FTP example"/>						
<table border="1"> <tr> <td>Available Resources</td> <td></td> <td>Selected Resources</td> </tr> <tr> <td>Resources: <input type="text" value="Web Resource [Web]"/></td> <td> <input data-bbox="592 493 617 525" type="button" value=" >> "/> <input data-bbox="592 535 617 567" type="button" value=" << "/> </td> <td><input type="text" value="FTP Resource [FTP]"/></td> </tr> </table>	Available Resources		Selected Resources	Resources: <input type="text" value="Web Resource [Web]"/>	<input data-bbox="592 493 617 525" type="button" value=" >> "/> <input data-bbox="592 535 617 567" type="button" value=" << "/>	<input type="text" value="FTP Resource [FTP]"/>
Available Resources		Selected Resources				
Resources: <input type="text" value="Web Resource [Web]"/>	<input data-bbox="592 493 617 525" type="button" value=" >> "/> <input data-bbox="592 535 617 567" type="button" value=" << "/>	<input type="text" value="FTP Resource [FTP]"/>				
Primary Resource: <input type="text" value="None Selected"/>						
Static IPs Allow the following to use Static IPs: <input type="checkbox"/> FTP Resource [FTP]						
Created: Friday, January 05, 2007 10:49 AM Last Updated: Friday, January 05, 2007 10:56 AM						
<input type="button" value="Copy"/> <input type="button" value="Delete"/> <input type="button" value="Save"/>						
Provisioning Methods <input type="button" value="Add"/> <input type="button" value="Delete Selected"/>						
No Items Found						
Extra Features <input type="button" value="Add"/> <input type="button" value="Delete Selected"/>						
No Items Found						

Template Name:- Choose a friendly name for the Plan Template.

Resources:- In this box you can select the Resources that you want to assign to the Plan Template. Select them individually from the Available Resources box and choose the >> arrow to move them into the Selected Resources box. The Plan Template will then be assigned the Resources in the Selected Resources box. If you want to take Resources out of the Selected Resources box, select them and use the << arrow to move them out again.

- Important Note: You can only have one Resource of each type in a Plan Template, and you will not be able to see other available Resources for an assigned type until you unassign that Resource. For instance, you may have added two FTP Resources into Helm, such as "Serv-U Resource" and "MS FTP Resource". If "MS FTP Resource" is currently assigned to the Plan Template then you will not be able to see "Serv-U Resource" in the Available Resources box until you unassign "MS FTP Resource".

Primary Resource:- Choose a Primary Resource from the dropdown box. This will be used in conjunction with Resources in Helm to determine which server domains and accounts are to be distributed to. Any accounts added into Helm, will attempt to get added to the same server that the Primary Resource is located on. So when you add a domain to Helm and the Primary Resource is Web, then Helm will attempt to create all other services (FTP, Mail, DNS, etc) on the same server as the Web account. If it can't, it will pick another available server.

Static IPs:- Here you can choose which of your Resources you want to allow to use Static IPs. Check the box next to the required Resource, and click Save to save your settings.

Provisioning Methods:- Here you can see the Provisioning Methods you have set up for this Plan Template. Click Add to get taken to the Add Provisioning Method page, or click a Provisioning Method in the list to get taken to the Edit Provisioning Method page for that particular Provisioning Method. You can see a check box to the left of each Provisioning Method created. If you check the boxes next to the Provisioning Methods you want to delete and click "Delete Selected", Helm will attempt to remove all of the selected Provisioning Methods. To delete all of the Provisioning Methods in the list, check the very top box and then click "Delete Selected".

Extra Features:- Click Add to get taken to the Add Extra Feature page where you can create an Extra Feature for this Plan Template. If there are Extra Features already set up, then click one in the list to get taken to the Edit Extra Feature page. If you want to delete an Extra Feature, then check the box to the left of each Extra Feature you want to delete and click "Delete Selected". This will remove all of the selected Extra Features from Helm. Alternatively to delete all of the Extra Features, check the very top box and then click "Delete Selected".

3.) Now that the Plan Template is saved, read on to learn how you can set up Provisioning Methods for the Plan Template.

Adding an MS FTP Provisioning Method

Provisioning Methods are a means of executing a number of tasks during the creation of a domain. For instance, in a particular Plan Template you may want to create a POP3 account or an FTP account when you create a domain. Alternatively, you may want to set web forwarding, or default documents. All of these actions can be provisioned, in the order you choose, by adding the appropriate Provisioning Methods.

Provisioning methods are dependent on the Provider Modules you have installed. For instance, if you don't have the IIS 5/6 Provider installed, you will not be able to use Provisioning Methods such as web forwarding, or virtual directory creation.

In order to add an FTP provisioning method, navigate to:

Home > My Plan Template > [Your Template]


Scroll down to the Provisioning Methods section on this page and click 'Add'. Give your template a friendly name such as 'Add FTP Account' and select '(FTP) Create FTP Account' from the Available Methods dropdown box.

Clicking Save will present the following screen:

Logged in as ADMIN

Add Provisioning Method

Use the form below to add a new domain provisioning method to your account. Provisioning methods are called when ever a domain is first created or is promoted from a parked domain to a full hosted domain.

FTP example  Back

Friendly Name: *

Available Methods: ▼

Parameters


Username: *

Password: *

Path to Root Folder (e.g. /wwwroot):

Can Read From Folder

Can Write To Folder

 Save

Friendly Name:- Enter a friendly name for the Provisioning Method, e.g. "Add FTP Account".

Available Methods:- Choose the type of Provisioning Method that you want to use. The options for that Provisioning Method will then appear underneath. For a full list of available Provisioning Methods and their options, you will need to refer to the documentation for each individual Provider Module.

Username:- Enter a relevant name for the FTP account to be created as. Using tag text in this field will allow you to add usernames of your setting choice.

For example:- **[\$domain.Name]** would create a username for the automatically created FTP account identical to the name of the FTP account itself.

Password:- Enter a relevant password in this field. Again tag text can be used for custom user settings.

For example: **[\$domain.owner.password]** would create a password identical to the account the user logs in as.

Path to Root folder:- This field allows you to specify the root a user can FTP to. An example would be */wwwroot* but this depends on the user's choice.

Can Read from Folder:- Allows you to read up to and including the root folder.

Can Write to Folder:- Allows you to write up to and including the root folder.

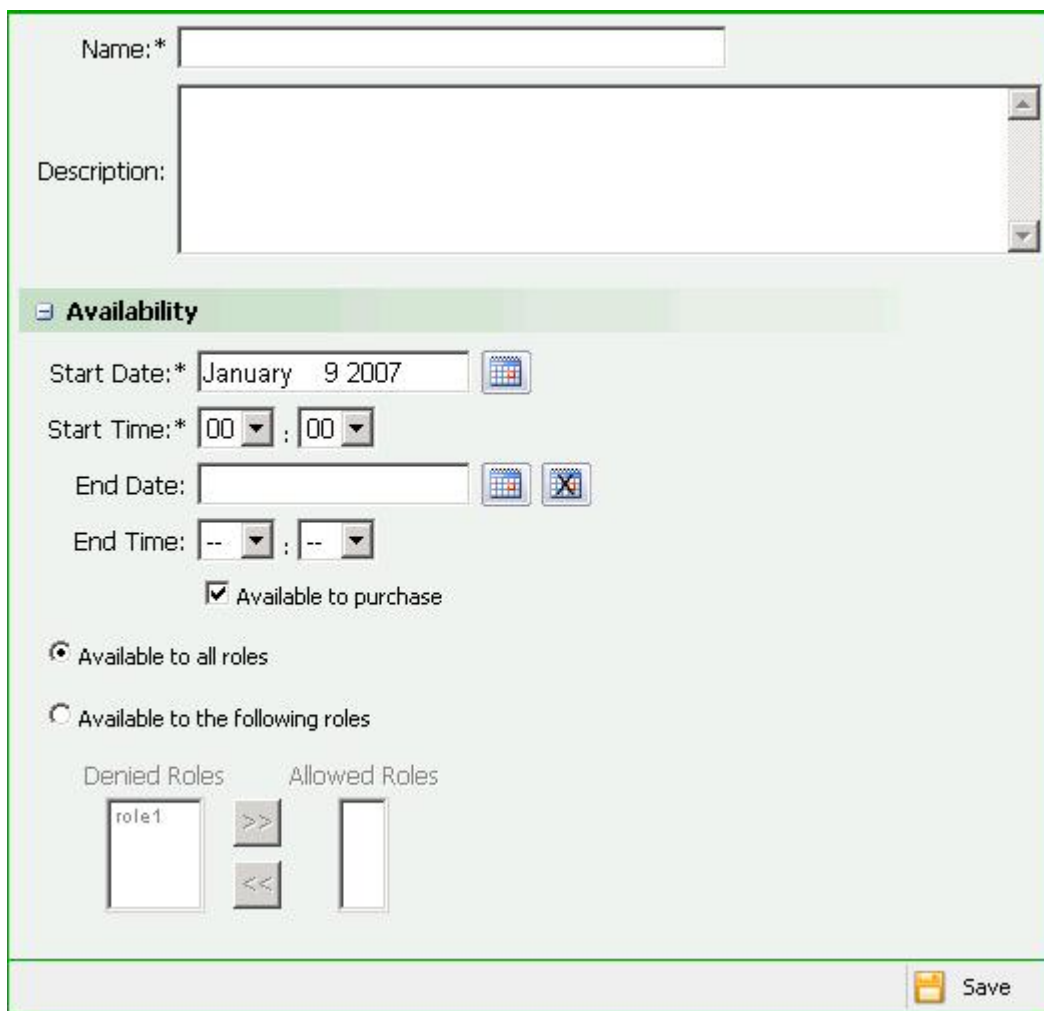
Adding MS FTP Extra Features

Extra Features allow you to define additional features (more FTP accounts or extra domains, for example) that can then be purchased and used by customers through their control panel - without your interaction!

An extra feature can be added by navigating to your plan template page at

Home > My Plan Template > [Your Template]

Scroll down to the extra features section and click 'Add' in order to add an Extra Feature into Helm. On adding an extra feature you will be presented with the following screen:



The screenshot shows a web form for adding an extra feature. It includes the following fields and options:

- Name:** A text input field with an asterisk indicating it is required.
- Description:** A large text area for entering a description.
- Availability:** A section with a minus sign icon and the title "Availability".
 - Start Date:** A date picker set to "January 9 2007".
 - Start Time:** Two dropdown menus set to "00" and "00".
 - End Date:** A date picker with a calendar icon and a delete icon.
 - End Time:** Two dropdown menus set to "--" and "--".
 - Available to purchase
 - Available to all roles
 - Available to the following roles
 - Denied Roles:** A list box containing "role1".
 - Allowed Roles:** An empty list box.
 - Navigation buttons: ">>" and "<<".

A "Save" button is located at the bottom right of the form.

Name: - Choose a name for the Extra Feature.

Description: - Enter a description for the Extra Feature.

Start Date: - Choose the date that you wish the Extra Feature to become active on by using the

calendar button. To remove the date, use the "clear date" button.

Start Time:- Choose the time that you wish the Extra Feature to become active on, during the Start Date.

End Date:- Choose the date that you wish the Extra Feature to become inactive on by using the calendar button. To remove the date, use the "clear date" button. If you don't want the Extra Feature to expire, simply leave this blank.

End Time:- Choose the time that you wish the Extra Feature to become inactive on, during the End Date. Leave this blank if you don't have an End Date.

Available to Purchase:- If you want this Extra Feature to be available to purchase by customers, check this box. Uncheck it if you don't want the Extra Feature to be purchasable until a later time. It will remain unavailable until you check the box again.

Available to All Roles:- If you want this Extra Feature to be made available to all Roles, then choose this button.

Available to the Following Roles:- If you only want this Extra Feature to be made available to a particular Role or Roles, then select a relevant Role in the "Denied Roles" box and click the >> button to move it into the "Allowed Roles" box. The Extra Feature will then be available to all Roles in the "Allowed Roles" box.

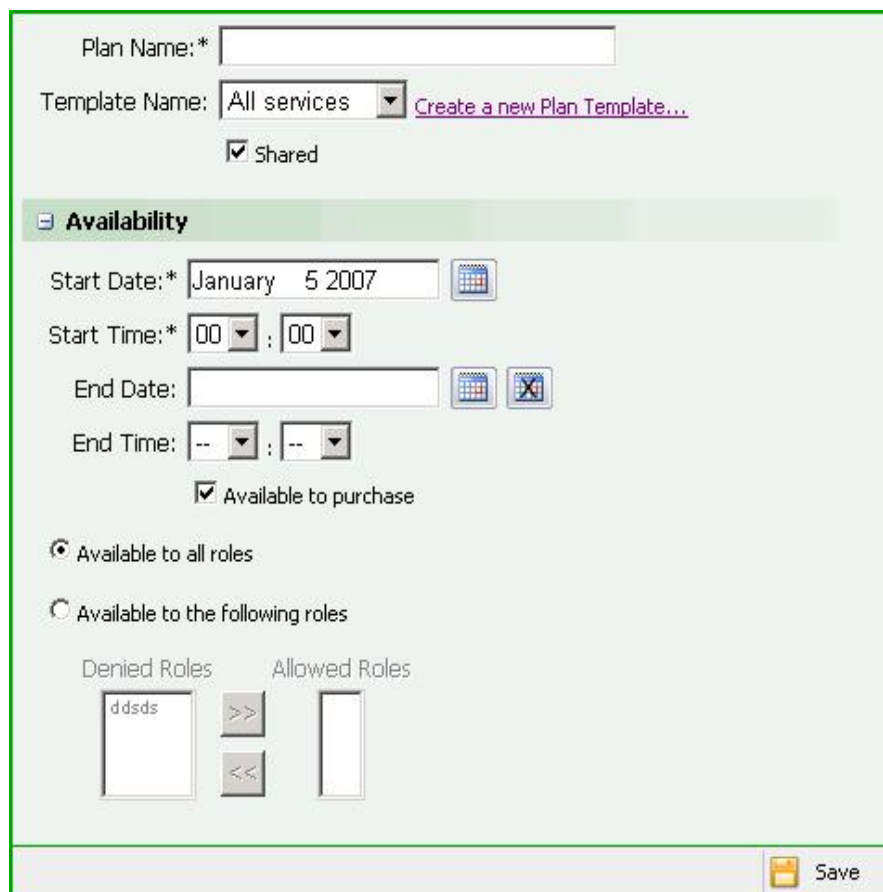
Fill in the fields as required and click Save to save the Extra Feature.

Adding the MS FTP Resource into a Plan

Plans are collections of resource limits that your customers can purchase through their account. They are based on the Plan Templates that you have set up. When a plan is purchased, it will appear as a package within the customer's account.

You can access your plans by clicking **My Plans** on the main menu screen.

Click the 'Add' button to add a new plan. You will be presented with the following screen.



The screenshot displays a web form for adding a new plan. The form includes the following fields and options:

- Plan Name:** A text input field with an asterisk indicating it is required.
- Template Name:** A dropdown menu currently set to "All services", with a link "Create a new Plan Template..." next to it.
- Shared:** A checked checkbox.
- Availability:** A section header with a minus sign icon.
- Start Date:** A date picker set to "January 5 2007".
- Start Time:** Two dropdown menus set to "00".
- End Date:** An empty date picker.
- End Time:** Two dropdown menus set to "--".
- Available to purchase:** A checked checkbox.
- Available to all roles:** A selected radio button.
- Available to the following roles:** An unselected radio button.
- Denied Roles:** A list box containing "ddsds".
- Allowed Roles:** An empty list box.
- Navigation:** Two arrow buttons (>> and <<) between the Denied and Allowed Roles list boxes.
- Save:** A button with a floppy disk icon and the text "Save".

The fields are explained on the following page.

Plan Name:- Choose a name for the Plan (e.g. FTP Plan).

Template:- A Plan needs to be based on a Plan Template. Select a Plan Template from the dropdown box or, if you haven't yet created a Plan Template, click the "Create a new Plan Template" link to do so. The Plan Template will specify which Resources are available to the Plan.

Shared:- Checking this box means that you can effectively pool the resources of this Plan with any other shared Plan(s) based on the same Plan Template. For instance, let us assume you have three Plans based on the same Template, one with a limit of 5 domains and 100MB bandwidth, one with 10 domains and 500MB bandwidth, and one with 15 domains and 800MB bandwidth. If they are all "Shared", a customer would be able to add a total of 30 domains using a total 1400MB bandwidth over the three Plans. If they were not "Shared", you would only be able to add 5 domains to the first Plan, and the bandwidth for those 5 domains could not exceed 100MB. This is obviously a very powerful feature and gives you more selling power, and your customers a lot more flexibility in purchasing.

Start Date:- Choose the date that you wish the Plan to become active on by using the calendar button. To remove the date, use the "clear date" button.

Start Time:- Choose the time that you wish the Plan to become active on, during the Start Date.

End Date:- Choose the date that you wish the Plan to become inactive on by using the calendar button. To remove the date, use the "clear date" button. If you don't want the Plan to expire, simply leave this blank.

End Time:- Choose the time that you wish the Plan to become inactive on, during the End Date. Leave this blank if you don't have an End Date.

Available to Purchase:- Check this box if you want to allow your customers to be able to purchase this Plan. Uncheck it to remove it from the list of Plans that are available to them to purchase.

Available to All Roles:- If you want this Plan to be made available to all Roles, then choose this button.

Available to the Following Roles:- If you only want this Plan to be made available to a particular Role or Roles, then select a relevant Role in the "Denied Roles" box and click the >> button to move it into the "Allowed Roles" box. The Plan will then be available to all Roles in the "Allowed Roles" box.

Once the relevant information has been added to the Plan and saved, you will be presented with the screen on the following page where you can adjust the Resource Limits available to your Plan. Depending on which Resources your Plan is currently using (inherited from the Plan Template), you may see different Resource Limits on this page. For instance, if you are not utilizing a Mail Resource, then you won't see any Mail Resource Limits here.

Limits
Logged in as [username]

This form shows the resources that have been assigned to this plan and their corresponding limits.

FTP plan
↶ Back

Update To Packages

System

Domain Aliases:	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
Domains:	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
IP Addresses:	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
Parked Domains:	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
Sub Domains:	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
Total Bandwidth (MB):	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
Total Diskspace (MB):	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited

FTP

Bandwidth (MB):	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
Diskspace (MB):	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited
FTP Accounts:	<input type="text" value="0"/>	<input type="checkbox"/> Unlimited

Update To Packages:- Check this box if you want the changes you make on this screen to filter down to your existing Packages. If you leave this unchecked then the existing Packages will remain the same. For instance, you may be decreasing the number of domains you offer in the Plan from 10 to 5, but you want to leave the existing Packages with 10. In this instance, you would leave this box unchecked and only new Packages will have a limit of 5 domains. Alternatively, if you check the box then all existing Packages will have their domain limit reduced to 5.

System Resource Limits:- These are the only Resource Limits which are permanently available in your Plans, regardless of which Resources you have available to your Plan.

Domain Aliases:- Select the number of domain aliases that you want this Plan to have available.

Domains:- Enter the maximum number of Domains you want this Plan to allow. If you want to allow unlimited Domains, check the "Unlimited" box.

IP Addresses:- Enter the maximum number of IP Addresses you want this Plan to allow. If you want to allow unlimited IP Address, check the "Unlimited" box.

Parked Domains:- Enter the maximum number of Parked Domains you want this Plan to allow. If you want to allow unlimited Parked Domains, check the "Unlimited" box.

Sub Domains:- Enter the maximum number of Sub Domains you want this Plan to allow. If you want to allow unlimited Sub Domains, check the "Unlimited" box.

Total Bandwidth:- Enter the total amount of Bandwidth you want this Plan to allow (in MB). Total bandwidth covers the sum of all Bandwidth in all resources - Web, Mail, FTP, etc. If you want to allow unlimited Bandwidth, check the "Unlimited" box.

Total Diskspace:- Enter the total amount of Diskspace you want this Plan to allow (in MB). Total Diskspace covers the sum of all bandwidth in all resources - Web, Mail, FTP, etc. If you want to allow unlimited Diskspace, check the "Unlimited" box.

You will also see a number of other resource limits here – these will all be dependent on the Resources available to your Plan. In most cases, these limits are a simple figure i.e. you choose the number of POP3 Accounts, or SSL Sites, or FTP Accounts, etc that are available to the Plan. In some cases there may be a check box, such as "Default Documents" or "Enable DNS Editor". With check box limits, these simply mean that the option is available in the Plan, and new icons will be visible when this Plan is added to a customer account.

After making your choices for the Plan Limits, click Save. You have now setup your MS FTP Service and Resource, and created a Plan Template and Plan for it.

If you want to add more Services, then please refer to the documentation for the relevant Service you wish to add.