

Parallels[®] Plesk Billing

Parallels Plesk Billing 6.0 Client Guide

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Preface

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Typographical Conventions

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

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

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

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

Feedback

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

Overview

Parallels Plesk Billing is an ordering, billing, and provisioning automation solution aimed at small-to-mid-level hosting providers. Parallels Plesk Billing comes in two different distributions: Standalone and Bundle (with Parallels Plesk Panel).

Parallels Plesk Billing creates a client account upon initial purchase of a product. Once you order a product through Parallels Plesk Billing order page, you will receive an invoice. As soon as invoice is paid and your account is set up, you will receive an e-mail with the URL, username and password to your Parallels Plesk Billing Client interface.

The client interface to Parallels Plesk Billing is a complete portal for clients to perform such actions as:

- Pay invoices
- View past invoices
- Upgrade and downgrade packages
- Manage DNS on the purchased domain name
- Log into the hosting panel associated with your package

Client interface is by default available at:

- <http://host.name/path/to/plesk-billing/app-modernbill-client/> - for *standalone* Parallels Plesk Billing, where **host.name** is the host name of your Parallels Plesk Billing server.
- <https://host.name:8443/plesk-billing/app-modernbill-client/> - for *bundled* Parallels Plesk Billing (with Parallels Plesk Panel), where **host.name** is the host name of your Parallels Plesk Panel server.

Each client account can have several contacts tied to it.

Integration With Parallels Plesk Panel

Parallels Plesk Panel 9.0 features interface integration with Parallels Plesk Billing 6.0 and provides access from client's Parallels Plesk Panel to your client side billing automation system.

You can navigate between both applications transparently if Global Account is configured both in Parallels Plesk Panel and Parallels Plesk Billing. Global Account is a **single sign-on** (SSO) technology feature that allows logging into different Parallels products using a single global login and password. Read more about Global Account in *Parallels Plesk Panel 9.0 Client Guide > Setting Up Global Account* chapter.

- To connect to Global Account in your Parallels Plesk Billing client interface, go to **Global Account** menu and click **Connect to Global Account**.
- If you have a client account in Parallels Plesk Panel, you can view an account balance report in the billing system. To access your integrated billing system, go to Client's home page and click **Billing Details**. If there is no **Billing Details** button, it means that billing system is not accessible from your control panel.

Parallels Plesk Billing Client interface for bundled distribution is by default available at: <https://host.name:8443/plesk-billing/app-modernbill-client/> where **host.name** is the host name of your Parallels Plesk Panel server.

Managing Invoices

In your Client interface you can see the list of all invoices by going to the **Invoices** menu. You will see all invoices that were generated since you signed up via the order process.

You can sort the invoices by amount, date or status. Parallels Plesk Billing interface allows paying the invoices directly from Client's panel.

To pay for ordered products, go to Parallels Plesk Billing home page and click **Invoices** in the menu. You will see the table with the following information:

- **Invoice ID.** Clicking it will open an invoice and, if necessary, client can pay it right away.
- **Amount.** Invoice shows the amount to be paid.
- **Entered.** Date when invoice was generated depends directly on Billing Cycle settings made by administrator. Usually, the first invoice is generated immediately upon Client signup.
- **Due Date.** The invoice should be paid until this date.
- **Status.** Shows what happened to the invoice in terms of payment.

Click the invoice **Details** icon or invoice **ID** to open invoice. The invoice page shows you all details: payment amount, generation and due date, package the invoice is applied to, add-on description, discounts, taxes, transaction details (if invoice is paid) and so on.

If invoice is paid successfully, the **Transactions** section shows Transaction ID, Payment Method (Credit Card, Manual payment), Status Code, Date of transaction and the Amount paid.

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Paying Invoices

Parallels Plesk Billing interface allows paying the invoices directly from Client's panel.

From Client's interface, you can pay via credit card and third-party payments, for example PayPal, 2Checkout or WorldPay. If you choose manual or bank payment, it means the payment will take place outside Parallels Plesk Billing.

➤ **To pay the invoice:**

- 1 Go to Parallels Plesk Billing Client's home page and click the **Invoices** menu.
- 2 Click the **Pay Now** button. You will be taken to the confirmation page.
- 3 Choose payment method.
 - If configured, you can pay with third-party payment gateway by clicking **Pay Now** in the corresponding section. you will be redirected to the third-party interface.
 - Alternatively, choose existing billing account to apply payment:
Choose Billing Account. Drop-down box offers you a choice of billing accounts you have previously created.
New Billing Account Information. Optionally, you can create a new Billing Account (on page 15) by entering credit card details.
- 4 Click **Confirm Payment**.

Managing Packages

Detailed information about ordered packages is available in the **Packages** menu.

You can see all packages listed by package ID, price, billing cycle, date of next renewal and status.

Parallels Plesk Billing shows a number of different kinds of package status. These statuses can be divided into groups based on their behavior:

- **Active.** By far the most common status for a package. Active packages is the one being actively used by a client. This might be a current hosting package, software license, or service subscription. Packages marked **Active** will be invoiced.
- **Pending.** When you first purchase a package, that package has a status of **Pending**. Packages marked **Pending** will not be invoiced beyond the first one.
- **Suspended.** Packages marked **Suspended** will only be invoiced if set to do so by admin in the invoicing rules.
- **Transferred.** Packages are marked **Transferred** if package is transferred from another client. Packages with this status are not invoiced.
- **Pending Renewal.** Domain packages behave a little differently than other packages do. When a domain is approaching its renewal date, and you receive an invoice, the package status is set to **Pending Renewal**. Once the invoice has been paid and the domain actually renewed with the registrar, the package status will again change to *Active*. Packages marked **Pending Renewal** will not be invoiced.
- **Canceled, Fraudulent, Collections, Work In Progress, Failed, Expired, Stopped, Started, Submitted, Completed** packages are not invoiced.

Clicking **Manage** will take you to the package details page. Different types of packages offer different details and actions associated with them. Should it be configured by administrator, you can upgrade and downgrade any package.

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Managing Hosting Packages

Click **Manage** to go to the Hosting Package details page. It will show Package ID, name, type and package status.

- **Upgrade.** There are two sections in the upgrade process - **Add-ons** and **Packages**. If there are add-ons associated with the existing product, they will be listed and available to upgrade.
 - Click **Adjust Add-ons** button if you are *only* adjusting add-ons to the existing package. You will be billed for add-ons only.
 - Click **Perform Upgrade** next to the package that is available for upgrade if you choose a better deal of hosting package.
- **Downgrade.** There are two sections in the downgrade process - **Add-ons** and **Packages**. If there are add-ons associated with the existing product, they will be listed and available to downgrade.
 - Click **Adjust Add-ons** button if you are *only* adjusting add-ons to the existing package. You will be billed for add-ons only.
 - Click **Perform Upgrade** next to the package that is available for downgrade if you choose another deal of hosting package.
- **Panel Options.** Click it to see details about the hosting panel this package is associated with, in particular server group and control panel name.
- **Panel Login.** Click it to log into the hosting panel associated with their package.

Managing Domain Registration Packages

Click **Manage** to go to the Domain Registration Package details page. It will show Package ID, name, type and package status.

- **Upgrade.** There are two sections in the upgrade process - **Add-ons** and **Packages**. If there are add-ons associated with the existing product, they will be listed and available to upgrade.
 - Click **Adjust Add-ons** button if you are *only* adjusting add-ons to the existing package. You will be billed for add-ons only.
 - Click **Perform Upgrade** next to the package that is available for upgrade if you choose a better deal of hosting package.
- **Downgrade.** There are two sections in the downgrade process - **Add-ons** and **Packages**. If there are add-ons associated with the existing product, they will be listed and available to downgrade.
 - Click **Adjust Add-ons** button if you are *only* adjusting add-ons to the existing package. You will be billed for add-ons only.
 - Click **Perform Upgrade** next to the package that is available for downgrade if you choose another deal of hosting package.

For more information, read about Managing Domains (on page 14).

Managing SSL Certificate Packages

Click **Manage** to go to the Hosting Package details page. It will show Package ID, name, type and package status.

- **Upgrade.** There are two sections in the upgrade process - **Add-ons** and **Packages**. If there are add-ons associated with the existing product, they will be listed and available to upgrade.
 - Click **Adjust Add-ons** button if you are *only* adjusting add-ons to the existing package. You will be billed for add-ons only.
 - Click **Perform Upgrade** next to the package that is available for upgrade if you choose a better deal of hosting package.
- **Downgrade.** There are two sections in the downgrade process - **Add-ons** and **Packages**. If there are add-ons associated with the existing product, they will be listed and available to downgrade.
 - Click **Adjust Add-ons** button if you are *only* adjusting add-ons to the existing package. You will be billed for add-ons only.
 - Click **Perform Upgrade** next to the package that is available for downgrade if you choose another deal of hosting package.
- **Manage Certificate.** Click it to see details about the certificate this package is associated with
 - **CSR Information.** This tab shows Certificate signing request details.
 - **Contact Information.** This tab shows Supplied, Technical and Billing Contact details.
 - **Package Summary.** This tab shows package name, date it was created and cycle.

Managing Domains

Client's interface of Parallels Plesk Billing allows viewing and managing registered domains.

Go to the **Domains** menu to see the list of all domains that come with different packages.

Parallels Plesk Billing also offers a set of additional options available mainly for domains registered with Enom registrar:

- **Edit Contact Info.** This option allows editing contact information you have entered during domain registration. *Registrant, Administrative, Technical* and *Auxiliary Billing* contact information you give on this page will show in the Whois output for this name. Make sure to provide complete and accurate information.
- **Edit DNS Settings.** Optionally, edit DNS settings you have entered during domain registration.
- **Change Registrar Lock Setting.** Optionally, lock your domain with a special status code in order to prevent unauthorized, unwanted or accidental changes to the domain name.
- **Change Autorenew Setting.** This option allows changing date and rules of domain auto-renewal.
- **Change Domain Password.** Domain password stops random transferring of domain names and allows only the holder of the password to transfer it.

Adding Billing Accounts

The final step of the order process allows you to choose your payment method and enter your billing account information if required. This billing information becomes your default billing account that is used for paying invoices.

However, if you want to associate certain packages with certain types of payment, credit card type or bank, you can add more billing accounts through your Client interface.

➤ **To add a billing account:**

- 1 Go to **Billing Accounts** menu and click **New Billing Account** button.

Note: By default the primary contact has a billing account created. If you need to add new contacts and create billing accounts for the new contacts, read the *Adding Contacts* document.

- 2 Select the type of billing account you want to add for this client.
- 3 Fill out the form according to the type of billing account you chose.

- **Credit Card Account.** Enter your credit card information here if you want your invoices to be automatically charged when they become due. This has advantage as you don't have to worry about downtime with your site because you forgot to pay the bill and admin will receive payment promptly.

Name On Card. Enter your name as it appears on the credit card.

Type. Select the type of card from the drop-down menu.

Card Number. Enter the credit card number, with no spaces or dashes.

Expiry Month. Enter the two digit code for the month the card expires. For example, January must be entered as 01, not 1.

Expiry Year. Enter the four digit code for the year the credit card expires, ex: 2010.

Issue Number. Some cards also require that you enter the **Issue Number** and **Start Date**, which should be printed on the card itself. Enter the **Issue Number** here. This can be found on the front of the client's card.

Start Date. Enter the Start Date here.

- **eCheck Account, Bank Draft Account, or Wire Transfer Account**

Bank Name. Enter the name of your bank here.

Bank State/Province. Enter the state or province that your bank's home branch is in.

Type. Choose the type of account from the drop-down menu.

Routing Number. Enter the bank's routing number here. The routing number is a nine digit number that can be found on the bottom left-hand corner of a check.

Account Number. Enter your account number here. Account numbers vary in the number of digits they use.

License/ID Number. Enter your driver's license or state ID number here.

License/ID State. Enter the two letter code for the state that issued the driver's license or ID above.

Date of Birth. Enter your date of birth, using the format 01/01/2000 for month/day/year.

▪ **Manual Payment Account, Third Party Gateway Account**

These accounts do not require any information from you. You will need to give your payment information to a third party, such as PayPal, 2CheckOut or Western Union, and these companies will send payment directly to your admin. When admin receives this payment, he will manually mark your invoices as paid.

- 4 Select packages this billing account pays for. Move all the packages you want to associate with this billing account by double-clicking the package name from the **Not Billable For** list to the **Billable For** list. You can also use the arrow keys at the bottom (make sure you click on the package(s) before you using the arrow keys).
- 5 Enter your encryption pass-phrase if necessary.
- 6 Click **Save Billing Account**.

You can later edit or remove existing billing accounts.

Adding Contacts

Each Parallels Plesk Billing Client account can have several contacts tied to it. Go to the **Contacts** menu to edit existing and add new contacts to your client.

- **Edit Contact Info.** Click this option to edit the contact information you entered during the order process.
- **View/Manage Billing Account.** Click this option to edit the contact information you entered during the order process.
- **Add Contact.** Click this button if you want to add more contacts to your client account. On the **Contact Details** page fill in the following:
 - **Company.** Enter the company name.
 - **First Name.** Enter your contact's first name here.
 - **Last Name.** Enter your contact's last name here.
 - **E-mail.** Enter your contact's e-mail address here. This is the e-mail address that Parallels Plesk Billing will use to send automatically generated e-mails to.
 - **Street Address.** Enter your contact's street address here.
 - **Address 2.** If the address requires a second line, or contains an apartment or suite number, enter this information here.
 - **City.** Enter the city of your contact's address here.
 - **State.** Enter your contact's state or province here. If you enter the two letter code for a US state, a second field will appear asking for the county.
 - **County.** This field only appears if you enter the two letter state code for US states. Choose the county your contact resides in.
 - **Zip.** Enter your contact's zip or postal code here.
 - **Country.** Enter your contact's country here.
 - **Primary Phone.** Enter your contact's phone number here.
 - **Secondary Phone.** If your contact has a second phone number, enter it here.
 - **Fax.** Enter your contact's fax number here.
 - **Mobile Phone.** Enter your contact's cell phone here.
 - **User name.** Enter the user name you would like your contact to use when logging in to Parallels Plesk Billing here.
 - **New Password.** Enter the password you would like your contact to use when logging in to Parallels Plesk Billing here.
 - **Confirm Password.** Confirm the password by entering it a second time.
 - **Language.** Enter the language that you would like the Parallels Plesk Billing interface to appear in for this contact. Although there are many language choices, these will only be used if there is a translation file present.

- **Email Format.** Choose whether you would like your contact to receive HTML or plain text e-mails.
- **Email Actions.** Here you can specify which e-mails you would like your contact to receive. Generally, it's a good idea to have all e-mails sent, and you can quickly choose all the e-mails by clicking **Toggle All**.

Click **Save Contact** to apply.