Parallels® Plesk Billing

Installation and Update Guide

Parallels Plesk Billing 6.0 for Linux

‖ Parallels™

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Contents

Preface

In this chapter:

About This Product

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).

The software package comes bundled with an intuitive order process, complete with "shopping cart," allowing your customers to build an order of any size or complexity with a single checkout (as opposed to the customer having to run through your order form multiple times if they want multiple items).

Upon checkout, Parallels Plesk Billing supports your customers paying in a variety of ways including:

- *credit card* (through strong integrations between Parallels Plesk Billing and many merchant gateways)
- *third-party gateway* (such as PayPal, WorldPay, etc.)
- other manual options such as *check*, *bank draft*, and simply issuing an *invoice*.

Each of these payment options can be enabled/disabled and configured according to your company's specific business practices.

Parallels Plesk Billing can provision the following:

- Any domain name package can be automatically registered through any of the resellers with which Parallels Plesk Billing integrates (such as eNom, OpenSRS, etc.).
- Any hosting package can be automatically provisioned through any of the panels with which Parallels Plesk Billing integrates (such as Plesk, cPanel etc.).
- Any SSL Certificate can be automatically provisioned through the SSLFactory.com API (provided you have a a Parallels SSLFactory reseller account).
- Any virtual private server package can be automatically provisioned through Parallels Virtuozzo Containers.
- Customers will receive notification upon completed provisioning, as well as any passwords, etc. that are related to the customer accessing/using their purchased service.

Each of these provisioning options can be configured in Parallels Plesk Billing administrator panel according to your company's specific business practices.

The total time it takes for the customer to be fraud checked, charged, and their services turned on can be as little as a few minutes. The entire idea here is to save as much time as possible so that your company's team can focus on more important things than manually setting up client accounts.

The automation does not stop once a customer has paid and had their order setup. Parallels Plesk Billing is fully customizable and can be configured to automatically generate invoices and collect payment from customers when needed, send out late notices when customers do not pay on time, and even suspend a customer's hosting package after they have neglected to pay long enough.

Parallels Plesk Billing can even renew domains at your registrar as soon as your clients pay the invoice. Clients can "upgrade" or "downgrade" their services from the client interface and not only have the changes automatically provisioned out to the panel, but also receive a pro-rated credit/debit for the difference in monthly price and begin receiving invoices for the package they upgraded or downgraded to.

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.

Formatting convention	Type of Information	Example
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.
Italics	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 *wildcard character* search.
`Monospace`	The names of commands, files, directories, and domain names.	The license file is located in the `http://docs/common/licenses` directory.

`Preformatted`	On-screen computer output in your command-line sessions; source code in XML, C++, or other programming languages.	`# ls –al /files` `total 14470`
`Preformatted Bold`	What you type, contrasted with on-screen computer output.	**`# cd /root/rpms/php`**
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.

Introduction

Parallels Plesk Billing 6.0 comes in two different distributions: Standalone and Bundle (with Parallels Plesk Panel 9.0 and higher). This guide covers installation and update process in Unix/Linux environment for both distributions of Parallels Plesk Billing.

Starting with Parallels Plesk Billing 6.0.2, it is also possible to install Parallels Plesk Billing into Parallels Plesk Panel as an Application Package Standard (APS) application.

System Requirements

Before installing Parallels Plesk Billing, make sure your server meets our minimum system requirements. In this document, hosting environment will be referred to as *server*.

Parallels Plesk Billing Bundled Distribution

Configure your server to meet software and hardware requirements that are sufficient for running Parallels Plesk Panel. For details, please check system requirements of Parallels Plesk Panel for Linux installation (http://download1.parallels.com/Plesk/Plesk9.0/Doc/en-US/plesk-9.0-unix-installation-guide/62790.htm).

Parallels Plesk Billing Standalone Distribution

Note: We highly recommend running Parallels Plesk Billing on a dedicated server as opposed to a shared hosting account so that you have full control over the settings in your environment and your sensitive customer data is kept separate from other sites.

- Operating System: Linux (RedHat, CentOS, Gentoo, etc).
- Hardware Requirements: at least 1GHz CPU, 512MB RAM, 2GB HD.
- Web Servers for Unix: Apache or Lighttpd.
- PHP 5.1.6* or higher.
- PHP configuration:
  - `memory_limit` (set to 64M or higher)
  - `safe_mode`: (set to Off)
  - `register_long_arrays`: (set to On)
  - `error_reporting`: (set to 2039)
  - `open_basedir`: (left unset)
    > **Note:** We do not support Suhosin. Parallels Plesk Billing will not install or operate in a PHP/Suhosin environment.
- Required PHP Modules:

- curl
- gd
- mysql or mysqli
- openssl
- pcre
- xml
- zlib
- Database Servers: MySQL 4.0.11 or higher.
- Fileset Decoders:
  - Zend Optimizer 3.3.3+ or IonCube Loaders 3.1.32 +

* As "The PHP Group" has officially made the End-of-Life announcement for all versions of PHP 4, we highly advise that you install Parallels Plesk Billing on a server with PHP 5 so as to maintain the most up-to-date and secure environment for your data.

Installing Parallels Plesk Billing

In this chapter:

Installing Parallels Plesk Billing Bundle

Parallels Plesk Billing can be installed as Parallels Plesk Panel 9.0 component which provides for tight integration with Parallels Plesk Panel right out of the box.

Plesk Billing component is added during Parallels Plesk Panel installation via the auto-installation tool that can be downloaded from http://www.parallels.com/en/download/.

1 Download and run Parallels Plesk Panel Auto-installer. See *Parallels Plesk Control Panel 9.0 for Linux/Unix Installation Guide* for details.

2 Select Plesk Billing component when suggested during installation. For more details on installing components, see Step 10 of *Installing parallels Plesk Panel on Linux and FreeBSD* section in the *Parallels Plesk Control Panel 9.0 for Linux/Unix Installation Guide* for details.

> **Note:** Plesk Billing Bundle is also shipped as Virtuozzo template for optimized installation in Virtuozzo VE (Virtual Environment) with Plesk.

3 Complete the installation of Parallels Plesk Panel and Plesk Billing component.

> **Note:** After Parallels Plesk Panel is installed, the default login is "*admin*" and password is "*setup*".

4 Perform initial setup of Parallels Plesk Panel administrator prior to first login to Parallels Plesk Billing. For more details, see *Getting Started* in *Parallels Plesk Panel 9.0 Administrator's Guide.*

5 Install Parallels Plesk Panel license containing `modernbill-accounts` parameter which determines the maximum number of Parallels Plesk Billing clients. This parameter does not show in Parallels Plesk Panel GUI. To check if your Parallels Plesk Panel license key has this parameter, search the following strings in Parallels Plesk Panel key file:

```
<!-- Modernbill accounts count  -->
<plesk-unix-90:modernbill-accounts
core:type="integer">1000</plesk-unix-90:modernbill-accounts>
```

Note: Default Parallels Plesk Panel license without `modernbill-accounts` parameter allows creating only 1 Parallels Plesk Billing client account.

For more details, see *Installing License Keys* in *Parallels Plesk Panel 9.0 Administrator's Guide.*

6 Configure Global Account in Parallels Plesk Panel. It provides for transparent navigation between Parallels Plesk Panel and Plesk Billing without having to enter credentials every time. For more details, see *Setting Up Global Account* and *Connecting Local Accounts To Your Global Account sections in Plesk Control Panel 9.0 Administrator's Guide.*

7 Now that your Parallels Plesk Panel is configured, you can access Plesk Billing (on page 11) and configure Global Account on its side.

Note: Before Global Account is set up in Parallels Plesk Billing, you can use Parallels Plesk Panel administrator credentials to log in.

8 Go through Parallels Plesk Billing setup wizard to perform the initial configuration of your billing system. For more details, see *Setting Up Global Accounts* section *in Parallels Plesk Billing 6.0 Administrator Guide.*

Parallels Plesk Billing integrated into Parallels Plesk Panel is installed to the `/opt/plesk-billing` (for Linux) and `/usr/local/plesk-billing` (for FreeBSD) directories.

In this section:

Accessing Parallels Plesk Billing Bundle

Parallels Plesk Panel 9.0 features interface integration with Parallels Plesk Billing and provides several ways to access your 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.

To access Parallels Plesk Billing from Parallels Plesk Panel interface:

- Click the **Billing** button on Parallels Plesk Panel Administrator home page. It will open Parallels Plesk Billing administrator interface in a new window.

- Go to the **Client Accounts** page in Parallels Plesk Panel and in the client's **Balance** column click the balance indicator link. It will bring the administrator to Client Invoices page in Parallels Plesk Billing administrator interface.

- Click the **Client Accounts** button on Parallels Plesk Administrator Panel home page and click the chosen client name. On the client's home page click the **Balance** link to get to Client's Details page or click the **Billing Details** button to get to Package Details page.

To access Parallels Plesk Billing bundle directly, go to:

- https://host.name:8443/plesk-billing/admin/ - administrator panel.
- https://host.name:8443/plesk-billing/client/ - client panel.
- https://host.name:8443/plesk-billing/order/ - order page.

  Where *host.name* is the host name of your Parallels Plesk Panel server.

Installing Standalone Parallels Plesk Billing

Parallels Plesk Billing Standalone installation and update are completely different from those for bundled distribution.

For standalone installation, it is recommended that you have Shell access to your server in order to install and operate Parallels Plesk Billing.

1 Once your system is ready, you will need to create a database for Parallels Plesk Billing to store information in. You can create this database using a graphical interface such as phpmyadmin, or via command line by running:

`mysqladmin -u` ***username*** `-h localhost -p create` ***databasename***

Replace ***username*** and ***databasename*** with your own variables. Make sure that the user you created for the database has full admin privileges.

2 Go to the web-accessible folder on your server:

`cd /var/www/mycompany.com/httpdocs`

3 Download Parallels Plesk Billing 6.0 fileset according to your encoder (Zend or IonCube) from http://www.parallels.com/download/billing/

4 Untar the fileset.

Use special parameters to preserve the file permissions set on the files/folders inside. It is important as the permissions are set properly on the "`tmp`" folder inside for it to be *world readable and writable.* The `plesk-billing` folder will be created in your web-accessible folder.

`# tar -xvzpf` ***pleskbilling-fileset***`.tar.gz`

5 Install Parallels Plesk Billing via Installation Wizard by going to:

http://mycompany.com/plesk-billing/admin/install/
where ***mycompany.com*** is your corporate domain, and `plesk-billing` is the Plesk Billing directory.

Note: Installation wizard will alert if your system does not meet the minimum requirements (on page 8). Please read the warnings and meet the necessary requirements or have your system administrator do it.

6 Accept the terms of *End User License Agreement* and click **Continue***.*

7 Generate configuration file and enter system information. Choose the way to install configuration file:

- **I will manually edit my config files.** Check it for installation via SSH.

- **Attempt to auto-upload them.** Check it for installation via FTP: enter valid FTP username and password to the server where Plesk Billing is installed.

- **Attempt to write them directly.** Before checking this option, make this directory writable: `lib-billing/include/config`.

8 Enter database connection information for Parallels Plesk Billing:

- **Database Type.** Choose one from the drop-down box.
- **Database host**, **name**, **username**, **password.** Enter data you configured during database creation on Step 1.

9 Enter system path information:

- **Temporary directory.** Word writable directory to store temporary files, for instance */tmp.*

10 Enter the URL to the directory containing Parallels Plesk Billing applications and libraries:

- **HTTP URL.** For example http://mycompany.com/plesk-billing*.*
- **HTTPS URL.** For example https://mycompany.com/plesk-billing*.*
- **SecureURL Protocol.** If you do not have an SSL certificate, select 'http'.

Click the **Save and Continue** button.

11 Copy and save the file that was generated as `config.php` and place it into `lib-billing/include/config` directory.

- **Skip the cURL test.** On some servers cURL test may cause next pages to hang if cURL cannot be found in its usual location. Checking this option is optional.

12 Test your PHP cURL settings. It will show you all incorrect configuration if there is any.

Note: If PHP cURL test fails, you can't proceed with installation until you fix cURL configuration.
As a workaround, go back to Step 11, choose S*kip the cURL test* and click **Continue**.

13 Validate the license for your domain. Enter your domain URL, for example: *mycompany.com.* Please note that www.mycompany.com and *mycompany.com* is not the same domain.

- **Activation Code.** To get the Key Activation Code, go to Parallels Plesk Billing online store at http://www.parallels.com/store/ppb/ and purchase a license. Copy and paste the Key Activation Code received from your sales representative on the wizard screen and click **Continue** to proceed.
- **Install the Free Version**. The free version is a fully functional Parallels Plesk Billing with the limit of 10 clients. You can upgrade your license from free version at any time after installation. Please refer to Parallels Plesk Billing licensing section of the Administrator Guide for more details.

14 Enter Parallels Plesk Billing administrator information: admin username and password to enter Parallels Plesk Billing as administrator, your first and last name and administrator e-mail (for example admin@mycompany.com).

15 Enter company Information that will be used in billing, clients' invoices and accounting. Click **Continue** to start building database.

16 When the installation wizard is complete, remove the "`install`" directory before you start using the product.

You may do this from command line with the following command:
`# rm -rf plesk-billing/admin/install`

Once Parallels Plesk Billing is successfully installed, access the login screen at: https://mycompany.com/plesk-billing/admin/ with admin username and password you specified during installation.

In this section:

Using an FTP Client to Install Parallels Plesk Billing

Installation process via FTP is very much the same as via SSH, however you should prepare before installation via wizard:

1 Download the latest Parallels Plesk Billing 6.0 fileset according to your chosen encoder from http://www.parallels.com/download/billing/.

2 Untar the fileset anywhere on your computer. The `plesk-billing` directory will be created.

3 Upload the plesk-billing folder to your server in BINARY mode. You can use, say, the open-source FileZilla FTP client which allows BINARY transfer of the uploading files by going to **Transfer > Transfer type > Binary**.

4 Set proper permissions on the files you uploaded to your server. The way of doing this will differ between FTP clients, but you will need to recursively set mode "755" on all files and folders you uploaded. Then set mode "777" on the 'tmp' folder. For more information about setting permissions, check your FTP client's documentation.

5 Install Parallels Plesk Billing via Installation Wizard going to:
http://mycompany.com/plesk-billing/admin/install/

where `mycompany.com` is your corporate domain, and `plesk-billing` is the Parallels Plesk Billing directory.

Further, follow the instructions in the *Installing Standalone Parallels Plesk Billing* chapter.

Installing Parallels Plesk Billing as APS Application for Parallels Plesk Panel

The Application Packaging Standard (APS) is a new application packaging format designed to help implement a Software-as-a-Service (SaaS) business model. This new SaaS model, facilitated by APS, enables additional revenue generation per user and is now made available to all industry hosting providers and independent software vendors who wish to have this new capability.

Starting with version 6.0.2, Parallels Plesk Billing can be installed as an APS application from the Parallels Plesk Panel server application vault. For details, please refer to the *Parallels Plesk Panel Administrator Guide*.

Updating Parallels Plesk Billing Bundle

Here is the outline of the Parallels Plesk Billing bundle upgrade run by the Auto-installer tool.

You can find the autoinstaller binary file in your Parallels Plesk Panel distribution or download it from the Parallels download site. After you run it, you are taken through the upgrade procedure step by step.

1 Launch Parallels Plesk Panel auto-installer. See *Parallels Plesk Panel 9.0 for Linux/Unix Installation Guide* for details.

2 Select Parallels Plesk Billing component when suggested during installation.

3 In your Parallels Plesk Panel, go to **System** >**Server Settings** >**Server Groups** and make sure to include SSO for Parallels Plesk Panel in *Local Parallels Plesk Panel Parameters*.

For more details on updating/installing components, see Step 8 of *Updating Plesk on Linux and FreeBSD* section in the *Parallels Plesk Panel 9.0 for Linux/Unix Installation Guide*.

Upgrading Parallels Plesk Billing

This chapter focus is upgrading old ModernBill versions to Parallels Plesk Billing of the latest version.

In this chapter:

Migrating from ModernBill 5.0.5 and Later to Parallels Plesk Billing 6+

This section provides instructions on how to upgrade ModernBill 5.0.x (5.0.5 and later) and 5.2.x to Parallels Plesk Billing 6+.

Note: If you have ModernBill 5.0.5 and older, contact our support team regarding the update.

This instruction assumes that you have already contacted the accounts department at Parallels and have a valid Parallels Plesk Billing 6 license. You should either know your License Activation Code, or have your key file (either a zip or an xml file). It is best to have your activation code. If you do not have either of these items, please stop now and contact the accounts department at Parallels to purchase a license or change your existing license.

Note: Parallels Plesk Billing 6 requires that you run it on a server with PHP 5.1+ installed. Previous versions were able to run on PHP 4 systems, so make sure that your server is running a suitable version of PHP before continuing with this upgrade.

> ➢ *To perform the upgrade:*

1 Create a backup copy of your current ModernBill fileset:

1. Rename your `modernbill` directory to `modernbill_bk` or any other preferred name.

2 Create a backup copy of your current ModernBill database by using phpMyAdmin, or by issuing the following command:

```
        # mysqldump -u <username> -p <password> --opt <db-name> > <file>
```

where

- *<username>* and *<password>* are the database user name and password, respectively

- *<db-name>* is the name of your ModernBill database

- *<file>* is the name you want to call your backup file

To find out the database name, user name and password, run the following command:

```
# cat plesk-billing.bak/lib-billing/include/config/config.php
| grep db
```

It outputs the required information.

3 Download the latest version of Parallels Plesk Billing:

1. Go to http://www.parallels.com/download/plesk/billing/.

2. Choose the file that you need based on encoder (Zend or IonCube) and archive type (Zip or Tar.Gz).

4 Extract the archive, and upload your files to a new directory. If you need instructions on how to upload your fileset, refer to the **Installing Parallels Plesk Billing** chapter (on page 10).

Important: You must upload the new fileset to a new directory. Do not just replace your current fileset, otherwise there could be issues during and after the upgrade.

5 Copy your old configuration files to the new fileset.

Important: Performing this step is different basing on whether you are upgrading from 5.0.x or 5.2.x.

a If upgrading from 5.2.x, copy the files as follows:

- `lib-modernbill/include/config/config.php` **->** `lib-billing/include/config/config.php`

- `lib-modernbill/include/config/smarty.php` **->** `lib-billing/include/config/smarty.php`

    (if you do not have this file it is ok)

> **b**   If upgrading from 5.0.x:
>
> 1. Copy your old config files into the new fileset as shown below:
>   - `lib-modernbill/include/config/config.php`
>   - `lib-modernbill/include/config/smarty.php`
>   - `app-modernbill-order/config.php`
>
> 2. The `lib-modernbill/include/config/config.php` file from 5.0.5 is NOT compatible with 5.1.x and later versions. You must copy the following settings from your `config.php` file to the `config.example.php` file:
>   - `$CONF["dbType"]`
>   - `$CONF["dbType"]`
>   - `$CONF["dbHost"]`
>   - `$CONF["dbName"]`
>   - `$CONF["dbPassword"]`
>   - `$CONF["standardURL"]`
>   - `$CONF["secureURL"]`
>   - `$CONF["secureURLProtocol"]`
>   - `$CONF["remoteAccessHash"]`
>
>   Additionally, if you have changed any settings such as `$CONF["localURL"]`, you must also move those to `config.example.php`.
>
> 3. Rename you `config.php` file to `configOLD.php,` and `config.example.php` to `config.php`.
>
>   This will allow you to save your settings, yet use the new file format.

6 Run through the upgrade wizard at https://<yourdomain.com>/<NewPleskBillingFileset>/admin/install/.

It auto-detects and performs the upgrade to the latest database schema for you. Be sure to always make a backup of your database before any upgrade.

7 The installer validates your Key Activation Code and verifies that your license key domain matches your installation domain. If you do not have an activation code but do have your xml key, just click **Install Free Version** and continue through the upgrade.

8 Delete the https://<yourdomain.com>/<NewPleskBillingFileset>/admin/install/ directory.

9 Log in to your Parallels Plesk Billing 6 installation at https://<yourdomain.com>/<NewPleskBillingFileset>/admin/ and verify your system has been upgraded. To see the product version,go to **System -> System Configuration**, then select **System Settings** and click **Versions**.

10 (Optional) If you did not have an activation code to enter on step 7, do the following:

1. Go to **System** -> **Server Settings** -> **System Info** -> **License Management**.

2. Click **Upload Key**.

3. Either copy and paste in your xml key, or click **Browse** and locate your xml key file.

4. Click **Upload Key**.

Note: If you receive any error messages when doing this, please contact Parallels support.

11 If you have any live credit card data in a previous v5 install, please generate a new v6 LEK PIN & HASH. Then log in to Parallels Plesk Billing to update your encryption settings with your new LEK credentials.

The system will re-encrypt your sensitive data automatically after you confirm your changes. Should you run into any problems, please contact support for assistance.

Once you are done with the upgrade, you can start porting any past customizations you had done to the theme or other file-based modifications to the new installation. Be sure NOT to just copy old templates over to the new templates directory because many templates have changed and you might break system functionality with a modified older template. The best route is to actually redo the modifications.

The file system layout of Parallels Plesk Billing is slightly different than that of older versions. The key differences are:

- `app-modernbill-admin` **->** `admin`
- `app-modernbill-order` **->** `order`
- `app-modernbill-client` **->** `client`
- `lib-themes/default/app-modernbill-admin` **->** `lib-themes/default/admin`
- `lib-themes/default/app-modernbill-order` **->** `lib-themes/default/order`
- `lib-themes/default/app-modernbill-client` **->** `lib-themes/default/client`
- `lib-themes/xpreloaded/app-modernbill-admin` **->** `lib-themes/xpreloaded/admin`
- `lib-themes/xpreloaded/app-modernbill-order` **->** `lib-themes/xpreloaded/order`
- `lib-themes/xpreloaded/app-modernbill-client` **->** `lib-themes/xpreloaded/client`
- `lib-modernbill` **->** `lib-billing`
- `app-modernbill-api` **->** `action-api`

There are symlinks at `app-modernbill-*` pointing to the new directories, so there should be minimal consequences to the change on your customizations, but you still should update to the new structure.

Migrating from ModernBill 4.4 to Parallels Plesk Billing 6+

An advanced, yet easy-to-use Migration Manager is available. You can migrate your ModernBill 4.4 to the Parallels Plesk Billing 6.

Note: You MUST be using ModernBill 4.4.X in order to upgrade to Plesk Billing 6+. If you are running a version prior to 4.4.X, you must upgrade to at least 4.4.0.

It is possible to perform either automated or manual migration. In both cases, you back up ModernBill v4 database and fileset, install and configure Parallels Plesk Billing 6, and then address the Migration Manager. The difference is that automated migration creates the v6 system for you (products and modules), while manual migration requires you to create and configure all your products in v6 to match your products in v4. With manual migration, the Migration Manager does not move over any System Configuration items. In essence, you will need to set up Plesk Billing 6 as if you were starting from scratch. The Migration Manager only deals with customer related information such as packages and accounting information.

In this section:

Things to Know Before You Start

- If a module you currently use in 4.4 is not available in Plesk Billing 6, do not upgrade until the module is available.
- PHP extension "iconv" must be enabled and compiled with your PHP. This is to allow conversion from v.4's latin-1 encoding to Plesk Billing 6's utf-8 encoding.
- If you are currently taking "live orders" in your 4.4 installation, you need to take down the order form in 4.4. However, you can take new orders in your Plesk Billing 6 installation while migrating your 4.4 data to the system.
- Make a backup copy of your ModernBill 4.4 fileset (directory) and your ModernBill 4.4 database.
- (For automated migrations) If you have created products in Plesk Billing 6 with the same IDs as your 4.4 products, this will cause conflicts during the migration. Therefore, we recommend deleting any products that have been set up in your Plesk Billing 6 system before running the migration script.

Performing Automated Migration

➢ *To perform an automated migration:*

1 Install Parallels Plesk Billing 6.

Make sure you install a new database for v6. Note that the Migration Manager will migrate data from 4.4 to your new v6 database. To learn how to install Parallels Plesk Billing, refer to the **Installing Parallels Plesk Billing** (on page 10) chapter.

Note: When you are going through the installer and your system is a new installation, the installer will pre-populate example products in your v6 system. In order to have the system automatically create and map products from 4.4 to v6, delete them from the system by going to the **Products** tab and clicking **remove**. Confirm the removal by clicking **Yes**.

2 Log in to your v6 installation and make sure that you have your license installed if this is a standalone installation and not bundled with a Parallels Plesk Panel license.

3 Go through the system configuration wizard by clicking the **Configuration Wizard** link under the **System** menu.

If you have already gone through this, you do not need to do it again.

Note: If your ModernBill 4 installation uses encryption and stores credit card numbers, it is essential that you enable encryption in your Parallels Plesk Billing installation.

4 Set up encryption settings if you did not do this when you were going through the configuration wizard:

1. Go to **System** -> **System Configuration**.

2. Click **System Settings** -> **Encryption Settings**.

3. Type "agree" in the first text box.

4. Select **Local Encryption Key (LEK)**.

5. Open a new browser window or a tab and go to http://www.pleskbilling.com/support/lek.php?lekVersion=5.

6. Fill in the required information and submit.

7. Copy the entire hash given in the page that opens after submit.

8. Go back to the Encryption Settings page in your Plesk Billing 6 installation and paste the hash next to the **New Hash**.

9. Enter the **LEK Pin** that you chose on that page as well.

10.   Submit the page and then confirm the changes.

Unless the encryption is configured, credit cards will not be encrypted properly in v6.

5   Edit the `config.php` file:

1. Open the `lib-billing/include/config/config.php` file in your Plesk Billing 6 fileset.

2. Make sure the "ALLOW_MIGRATION" setting has a value of "1" as shown below.

```
define("ALLOW_MIGRATION", 1);
```

3. Save the file.

6   Create the migration task:

1. Go to **System** -> **System Configuration**.

2. Click **System Settings** -> **Migration Settings** > **Add Migration**.

3. Specify the following:

    ▪   **Name**. Enter the name of this migration. You need to enter a name that can be referenced later.

    ▪   **Type**. Leave as default ModernBill 4.

    ▪   **Comments**. Can be anything such as "This is the company we acquired on xx/xx/xxxx" or "Do not run this migration until xx/xx/xxxx." It is completely up to you.

    ▪   **Driver**. Leave the "MySQL" set as default.

    ▪   **Database Host**. Enter the host name of your ModernBill v4.4 database.

    ▪   **Database Name**. Enter the database name of your ModernBill v4.4 database.

    ▪   **Database Username**. Enter database user name of your ModernBill v4.4 database.

    ▪   **Database Password**. Enter database user password of your ModernBill v4.4 database.

    ▪   **Payment Group**. Select the payment group that matches your v4.4 locale and currency (likely the default).

    ▪   **Order Form**. Select the order form specific to your v4.4 locale (likely the default).

4. Click **Add**.

7   Perform the mapping.

This step is designed to let you tell Plesk Billing 6 which of your panels in your ModernBill v4 installation map to which of your server groups in your Plesk Billing 6 installation. If you are doing a single migration you will likely be able to just continue in this step without any changes to the drop-down menus.

1. Click **Configure Associations**.

2. Select your registrar modules from the **Registrars** list.

3. Enter your v4 Lek Pin in the **LEK Pin or encryption passphrase** textbox.

4. Click **Associate IDs**.

8   Run modules migration:

1. Set the following:

   ▪ **Number of Modules Per Step**. You can leave here the default "5" value or select the number of modules you want the system to configure per step.

   ▪ You may want the number of modules per step to be low so the system will not time-out.

   ▪ **Number of Steps**. Leave the default "All" and the system will automatically configure the amount of steps needed to complete the modules migration. For example, if you have 50 modules configured in v4, and you left the **Number of Modules Per Step** at "5", the system would calculate a total of 10 steps (50/5 = 10 Steps). Or you can select the **More Steps** option and then enter the number of steps you want the system to use.

2. Click **Start** to start the module migration process.

Tip: To smooth the transition, it is recommended to save a dump of the database after each transition (modules, products, clients).

When the module migration is completed, the system automatically goes to the Product Migration step.

9   Perform the product migration:

1. Set the following:

   ▪ **Number of Products Per Step**. You can leave here the default "25" value or select the number of products you want the system to configure per step. You may want the number of products per step to be low so the system will not time-out.

   ▪ **Number of Steps**. Leave the default "All" and the system will automatically configure the amount of steps needed to complete the products migration. For example, if you have 50 products configured in v4, and you left the **Number of Products Per Step** at "25", the system would calculate a total of 2 steps (50/25 = 2 Steps). Or you can select the **More Steps** option and then enter the number of steps you want the system to use.

2. Click **Start** to start the product migration process.

Tip: Dumping the database between steps 2 and 3 of the migrator (steps 15 and 16 of this document) is especially useful as it allows you to keep your v4 system live until the last possible moment while testing your v6 system. Save the dump after the products have been migrated but before customer information has been migrated so you can do a fresh import of the customer information at the last possible moment. After you are satisfied and trained on v6, you can re-install your step 2 dump and re-import the latest client data which will migrate the most current information. This should ease the transition for your customers.

When the product migration is completed, the system automatically goes to the Run Clients Migration step.

10 Perform clients migration:

> **Important**: At this point, it is important to disable your v4 order form, v4 client area access, and v4 cron jobs so that all client data is migrated properly.

1. Set the following:

    -   **Clients Per Step**. You can leave here the default "5" value or select the number of clients you want the system to configure per step. You may want the number of clients per step to be low so the system will not time-out. If you have a really powerful server, you can raise the value and it will make the migration go more quickly.

    -   **Number of Steps**. Leave the default "All" and the system will automatically configure the amount of steps needed to complete the clients migration. For example, if you have 50 clients configured in v4, and you left the **Clients Per Step** at "5", the system would calculate a total of 10 steps (50/5 = 10 Steps). Or you can select the **More Steps** option and then enter the number of steps you want the system to use.

2. Double-check **Add-on Choices**: If you are accepting new clients in your v6 system, select the **Yes** option.

    Keep in mind that this process will significantly slow the system down, but can be used when accepting new clients.

3. Click **Start** to start the client migration process.

    This step will take the longest time among the rest migration steps.

When the **Migration Progress** bar displays "100%," the migration phase of modules, products, and clients is 100% complete.

11 Verify that you can decrypt credit cards and see them properly:

1. Search for a client who you know has a credit card account.

2. Go to the client details page.

3. Click the **show all billing accounts** link in the **Billing Accounts** section.

4. Find the credit card billing account on the next page, and click the **more** link to expand the row.

5. Beside the '**last four**' of the credit card click the **view** link.

6. Enter your LEK pin or passphrase and continue.

7. Verify that you can now see the credit card number in full.

If you cannot do this, please contact our support team, or restore from a previous version and make sure you followed ALL of the migration steps to the letter.

12 Change your order links on your Web site to reflect the new v6 order links.

To learn how to use Web site widgets, which is how products are displayed on your Web site in v6, refer to the **Administrator Guide: Configuring Order Settings > Using Website Widgets** section.

13 Enable your cron jobs for v6.

14 Continue to check your system thoroughly for any possible issues.

If you come across an issue, please contact technical support.

15 If it was a test migration, it is recommended that you change the contact e-mail addresses of your customers, and corrupt the credit card numbers, by running the following SQL statements:

```
   update client_contacts set contact_email =
concat(contact_email, '__TEST__');
   update client_billing_accounts set billing_card_num =
concat('__TEST__', billing_card_num);
```

These two actions can be undone by the following queries:

```
   update client_contacts set contact_email =
replace(contact_email, '__TEST__', '');
   update client_billing_accounts set billing_card_num =
replace(billing_card_num, '__TEST__', '');
```

Performing Manual Migration

➢ *To perform manual migration:*

1 Install Parallels Plesk Billing 6.

To learn how to install Parallels Plesk Billing, refer to the **Installing Parallels Plesk Billing** (on page 10) chapter.

2 Log in to your v6 installation and make sure that you have your license installed if this is a standalone installation and not bundled with a Parallels Plesk Panel license.

3 Go through the system configuration wizard by clicking the **Configuration Wizard** link under the **System** menu.

If you have already gone through this, you do not need to do it again.

Note: If your ModernBill 4 installation uses encryption and stores credit card numbers, it is essential that you enable encryption in your Parallels Plesk Billing installation.

4 Set up encryption settings if you did not do this when you were going through the configuration wizard:

1. Go to **System** -> **System Configuration**.

2. Click **System Settings** -> **Encryption Settings**.

3. Type "agree" in the first text box.

4. Select **Local Encryption Key (LEK)**.

5. Open a new browser window or a tab and go to http://www.pleskbilling.com/support/lek.php?lekVersion=5.

6. Fill in the required information and submit.

7. Copy the entire hash given in the page that opens after submit.

8. Go back to the Encr yption Settings page in your Plesk Billing 6 installation and paste the hash next to the **New Hash**.

9. Enter the **LEK Pin** that you chose on that page as well.

10.   Submit the page and then confirm the changes.

Unless the encryption is configured, credit cards will not be encrypted properly in v6.

5 Edit the system configuration file: `lib-billing/include/config/config.php` file in the v6 fileset:

1. The following line of code is to tell the system to keep the same package IDs when migrating client packages from v4 to v6. This is completely optional. The default setting is "true" and can be changed to "false".

```
       // whether to keep v4 client and package IDs
$CONF["syncMigrationIDs"] = true;
```

2. The following line of code is to tell the system to allow manual migration of products. To do this, set the `migrateProducts` variable to "false" as shown below.

```
       // whether to migrate products
$CONF["migrateProducts"] = false;
```

3. The following line is to tell system that migration functionality is enabled. Make sure the "ALLOW_MIGRATION" setting has a value of "1" as shown below.

```
define("ALLOW_MIGRATION", 1);
```

4. Save the file.

6 Make sure you have one payment group and one order form set up and configured in your v6 system.

By default, Plesk Billing 6 installs both a payment group and an order form.

1. Modify the payment group and order form according to the primary/secondary gateway in your 4.4.

   For example, if you were using Authorize.Net and PayPal in 4.4, configure your v6 payment group to use Authorize.Net and PayPal. To learn more about payment groups, refer to the **Administrator Guide: Configuration Wizard > Setting Up Payment Groups** section.

2. Configure your v6 order form to use the same locale (language and country) as your 4.4 ModernBill system.

7 Create products in v6 using the same specifications as your 4.4 installation.

These should be related to the packages you are using in your 4.4 ModernBill system. All aspects of the product need to be created in Plesk Billing v6 including add-ons, email associations, pricing, etc.

To learn how to create products, refer to the **Administrator Guide: Selling Products > Creating ... Products** sections.

8 Finish configuring Plesk Billing v6 with the settings that are appropriate to your business. Configure all the modules in your system including registrar (if applicable), control panel (if applicable), gateway (if applicable), and any other module that you use in v4.

9 Create the migration task:

1. Go to **System** -> **System Configuration.**

2. CLick **System Settings** -> **Migration Settings** > **Add Migration**.

3. Specify the following:

   - **Name**. Enter the name of this migration. You need to enter a name that can be referenced later.

   - **Type**. Leave as default ModernBill 4.

   - **Comments**. Can be anything such as "This is the company we acquired on xx/xx/xxxx" or "Do not run this migration until xx/xx/xxxx." It is completely up to you.

   - **Driver**. Leave the "MySQL" set as default.

   - **Database Host**. Enter the host name of your ModernBill v4.4 database.

   - **Database Name**. Enter the database name of your ModernBill v4.4 database.

   - **Database Username**. Enter database user name of your ModernBill v4.4 database.

   - **Database Password**. Enter database user password of your ModernBill v4.4 database.

   - **Payment Group**. Select the payment group that matches your v4.4 locale and currency (likely the default).

   - **Order Form**. Select the order form specific to your v4.4 locale (likely the default).

4. Click **Add**.

10 Perform products, hosting control panels and registrars mapping:

1. Click **Configure Associations**.

   Before you can continue, you must have all your products created in v6 based on the products in your 4.4 system.

2. Map each product in the **Products** list using the drop-down menus in the **To** column.

   The **From** column represents the products in your 4.4 system. You can map the 4.4 products in the **From** column to any product you have created in your v6 system.

3. Map your control panels by using the drop-down menus in the **To** column to the **From** column.

   The **From** column represents the control panels in your 4.4 system. Again, you must have your control panels configured in order to map them correctly. You can always modify your control panel configurations at a later time.

4. Map your registrars by using the drop-down menus in the **To** column to the **From** column.

   The **From** column represents the registrars in your 4.4 system. Again, you must have your registrars configured in order to map them correctly. You can always modify your registrar configurations at a later time.

5. Enter your v4 Lek Pin in the **LEK Pin or encryption passphrase** textbox.

6. Click **Associate IDs**.

Since you have manually associated your products, registrars, and modules, you need to go directly to the client part of the migration.

11 Go to the client part of migration:

1. Go to **System -> System Configuration.**

2. Click **System Settings -> Migration Settings > Show Migrations**.

3. Click the details icon for your migration.

    This is the screen that has the **Configure Associations** and other button across the top of the screen.

4. Click **Continue** on the right side.

    You are now at the client migrator.

12 Start the migration:

1. Set the following:

    - **Migration Action**. This is automatically set to "Migrate".

    - **Clients Per Step**. You can leave here the default "5" value or select the number of clients you want the system to configure per step. You may want the number of clients per step to be low so the system will not time-out.

    - **Number of Steps**. Leave the default "All" and the system will automatically configure the amount of steps needed to complete the clients migration. For example, if you have 50 clients configured in v4, and you left the **Clients Per Step** at "5", the system would calculate a total of 10 steps (50/5 = 10 Steps). Or you can select the More Steps option and then enter the number of steps you want the system to use.

2. Double-check **Add-on Choices**: Select the **Yes** option if you are accepting new clients in your v6 system.

    Keep in mind this process will significantly slow the system down, but can be used when accepting new clients.

3. Click **Start** button to start the client migration process.

    This step will take the longest.

When the **Migration Progress** bar says "100%," the migration is 100% complete.

13 Verify that you can decrypt credit cards and see them properly:

1. Search for a client who you know has a credit card account.

2. Go to the client details page.

3. Click the **show all billing accounts** link in the **Billing Accounts** section.

4. Find the credit card billing account on the next page, and click the **more** link to expand the row.

5. Beside the '**last four**' of the credit card click the **view** link.

6. Enter your LEK pin or passphrase and continue.

7. Verify that you can now see the credit card number in full.

If you cannot do this, please contact our support team, or restore from a previous version and make sure you followed ALL of the migration steps to the letter.

14 Continue to check your system thoroughly for any possible issues.

If you come across an issue, please contact technical support.

15 If it was a test migration, it is recommended that you change the contact e-mail addresses of your customers, and corrupt the credit card numbers, by running the following SQL statements:

```
   update client_contacts set contact_email =
concat(contact_email, '__TEST__');
   update client_billing_accounts set billing_card_num =
concat('__TEST__', billing_card_num);
```

These two actions can be undone by the following queries:

```
   update client_contacts set contact_email =
replace(contact_email, '__TEST__', '');
   update client_billing_accounts set billing_card_num =
replace(billing_card_num, '__TEST__', '');
```

Appendix A. Migrating Parallels Plesk Billing from Standalone to Bundled Version

If you have a standalone Parallels Plesk Billing version 5.3, 5.6, or 6.0, you can migrate your billing solution to a version bundled with Parallels Plesk Panel. For this, you have to run a migration script that converts old database of a standalone version to a bundled form and switches bundled Parallels Plesk Billing to use old database. In this document we provide an example procedure of migration in case of migrating from standalone Parallels Plesk Billing 5.6 to a bundled Parallels Plesk Billing 6.0.

➢ **To migrate from standalone to bundled version:**

1 Install Plesk 9 with bundled Parallels Plesk Billing 6.0 component.

2 Make sure that from this moment standalone Parallels Plesk Billing 5.6 has no access to its database to avoid simultaneous access of Parallels Plesk Billing 5.6 and Parallels Plesk Billing 6.0 to the same database. To do this, you can disable virtual host which serves Parallels Plesk Billing 5.6 or change database name in its configuration file.

From this moment your standalone Parallels Plesk Billing is turned off. You can access your billing solution at the URL for bundled version, for example `https://host.name:8443/plesk-billing/,` where `host.name` is the host name of your Parallels Plesk Panel server.

3 Run the migration script in your command line with the name of your old Parallels Plesk Billing 5.6 database specified. For example:

```
/usr/share/plesk-billing/ppb-migrator.sh -d <your_standalone_plesk_billing_database>
(for Linux)
/usr/local/share/plesk-billing/ppb-migrator.sh  -d
<your_standalone_plesk_billing_database> (for FreeBSD)
```

Note: `ppb-migrator.sh` migration script creates database dump in the current directory.

4 Access bundled Parallels Plesk Billing 6.0 via GUI or API. At this stage, bundled Parallels Plesk Billing 6.0 operates with the old database updated to version 6.0.

5 You may now remove your standalone Parallels Plesk Billing 5.6 installation.