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# ModernBill v5.1 Configurations Manual

*All Articles in All Categories*

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## Automation Punch List

Below is a "punch list" of items you need to check to make sure your system is fully automated.

- Setup Your Server Group(s) With Control Panel Modules
- Setup Your Payment Group(s)
- Setup Your Encryption Settings
- Make Sure Your Products Are Tied To Your Server Group(s)
- Set Your Queue Rules \* Default Settings Do Not Automate Your System
- Setup Your Cron

## Creating Custom Questions and Attributes

TIP: You may also find the following document helpful: [Creating Custom Questions](#)

You can create custom questions tied specifically to the following:

Products

Order Forms

Control Panels

First you need to define which attributes you are going to use as your starting point. For example, you could ask the following question when a customer selects a specific product during the order process:

Which of the following programming languages would you like installed on your server?

PHP: Yes/No  
Perl: Yes/No  
ASP: Yes/No

In the example above, you see PHP, Perl, and ASP. These three are known as the attributes. The Yes/No variables are the values and represent name-value pairs.

Once you have defined your attributes and question, follow the instructions below to get your system configured properly:

1. Go to System and click on the Custom Attributes link in the Order Settings section.
2. When the page loads, click on the "new" button in the ID column.
3. A "Quick Add" form will appear. Enter the name of the attribute you want to use. In our example we used Language so we will enter Language in the Name textbox. After entering the name of your attribute, click on the "Add" button.
4. Static vs. Dynamic (Will be changed in a future version. Skip this option until further notice.)
5. Next, click on the "manage" button in the Question column.
6. When the page loads, click on the "add custom question" button.
7. Set the following:
  - Name: Enter the name of your question.
  - Display Order: Enter any numerical value for the order you want this question to be displayed.

---

Question: Enter your question. What you enter will be what is shown during the order process.

Description: Enter a description of the question. The description will be displayed during the order process.

Type: Select the type of question you want this to be from the drop down menu. (See Question Types to learn more.) For our example, we selected checkbox.

Input Restrictions: You can leave this as default or ctr+click the values in the Selectable list, then click on the < to move them to the Selected list. (See Input Restrictions to learn more.)

8. Click on the "next" button.

9. When the page loads, you will be presented with a list of options based on what you chose in the previous screen for the Question Type. Each Question Type has its specific settings that need to be configured. If you are creating questions that require multiple options, view the Option Value Pairs section.

10. Continue through the steps according to your specific question type.

11. Once you have created and configured your question, go back to the Show Attributes section in your system as described in Step 1. When the page loads, click on the pencil icon next to "None" in the Question column specific to your attribute. In our example we will click on the pencil icon for Attribute "PHP." A textbox will appear. Select the question you want to use for this Attribute in the drop down menu. Then click on the "Edit" button. In our example, we selected "Language" from the drop down menu.

12. Next, click on the pencil icon next to "Null" in the Subtype column specific to your attribute. In our example we will click on the pencil icon for Attribute "PHP." A textbox will appear. Select one of the following from the drop down menu:

Order Form  
Product  
Panel

13. For our example, we select Product from the drop down menu. This means it will be associated with any of the products we have previously setup in our system. Or if a particular product is setup at any point in the future, you can change the Product associated with the question at anytime.

14. After you select the Subtype in Step 13 above, click on the pencil icon next to "None" in the Subtype column specific to your attribute. Select the product you want to associate your question to in the drop down menu. Then click on the "Edit" button.

Attributes

The purpose of panel questions or custom questions is to yield attributes. Panel questions yield package attributes whose name-value pairs signify generic information about the package for which the modules are responsible for mapping to panel-specific calls. For example, disk space is represented using the same attribute name no matter which panel is processing disk space attributes. New kinds of package information require new attribute names. While the way in which name-value pairs are stored is not panel-specific, they are still stored per panel type (technically, per server group, since each server group deals with a single panel type). This allows common settings to be migrated seamlessly from one panel to another.

There are two main types of attributes:

pre-order - The custom attributes you configure will be used as pre-order attributes.  
post-order - During the order process they yield post-order attributes.

There are three subtypes of pre-order attributes:

product attributes  
order form attributes  
panel attributes

There are two subtypes of post-order attributes:

package attributes - Product and panel attributes become package attributes.

---

client attributes - Order form attributes become client attributes.

The pre-order attributes used by panels are also called product attributes (they are stored in the product\_attributes table), but they are actually per product and server group, so they are really product-panel attributes.

A question must be asked in order to get values for yielding post-order attribute-value pairs. Questions tell the system how to collect information from the clients. Pre-order attributes tell the system what to do with that information. Post-order attributes are the result.

An attribute should be assigned a question unless it is only referred to in a Value Map. Value Maps are optional, for dealing with multiple answers to multi-option questions. Attributes assigned a question should be assigned one and only one of a product, order form, or panel.

#### Pre-order Attributes

Pre-order attributes contain the following:

- Question
- Subtype (Order Form, Product, or Panel)
- Optional Value Map (explained later)

#### Post-order Attributes

Pre-order attributes yield post-order attributes depending on the subtype:

#### Pre-order Subtypes Yielding Post-order Subtypes

Pre-order Subtype	Post-order Subtype
-------------------	--------------------

Order Form	Client
------------	--------

Product	Package (non-panel-specific)
---------	------------------------------

Panel	Package (panel-specific)
-------	--------------------------

#### Custom Question Example

To understand these complex relationships, one must know how the questions are related to the attributes. Each attribute usually has a question associated with it. For example, you are an ISP who wants to collect the primary email address of each client during the order:

1. Go to System and click on the Custom Attributes link in the Order Settings section.
2. Add a new attribute (the "new" button under the ID column header).
3. Name it, for example, "PrimaryEmail". This will be the attribute name of the resulting client attribute as well.
4. Create a question that asks for the primary email address named, for example, "PrimaryEmailQuestion". See the section below on creating a question.
5. Assign the question "PrimaryEmailQuestion" you just created to the "PrimaryEmail" attribute you just created.
6. Assign an order form to the "PrimaryEmail" attribute. The question will be asked during the order process for the specified order form. The answer will yield the value for the client attribute "PrimaryEmail" associated with each client that goes through that order form.

---

That was an example of an order form attribute yielding a client attribute. To make custom package attributes, you can associate the attribute with either a product or a panel. When an attribute is associated with a product, it is asked any time that product is ordered, and yields a package attribute unassociated with a specific panel. These package attributes are for generic, package-specific information. When an attribute is associated with a panel, it is asked any time a product associated with that panel is ordered, and yields a complete package attribute associated with the panel associated with the custom attribute. This can be used to give panels extra information asked in whatever form you like. Some panels may recommend some custom questions, or leave them up to you to formulate the proper questions.

The package attributes generated for panel modules only differ from the package attributes yielded by custom panel attributes in that instead of asking the client the questions during order, they ask the admin during product creation.

Note: you should only associate an attribute with one of either a product, order form, or panel. Associating with more than one currently has undefined results. This will likely change in the future.  
Question Types

The custom question system allows you to make a custom form field for the order form which can be associated with any number of custom attributes. Custom questions use an elaborate system for building fields originally used by panel modules. The question describes not only the type of field, but also what question is asked, including options, depending on the type, and what kind of values are acceptable. There are many field types, corresponding to the standard HTML form fields:

- hidden
- text
- password
- textarea
- select
- multi-option select
- checkbox
- radio

To manage custom questions, see the "manage" button under the Question column header of the Custom Attributes page. When you add a custom question, you go through a multi-step wizard which steps you through creating a custom question. This process is fairly straight-forward if you are familiar with HTML form fields except for specifying option-value pairs and associating input restrictions.

#### Option-value Pairs

When you build any question which involves multiple options, the wizard firsts asks you which answers you want. Fill in a line-separated list of answers which will display as options to the user. Empty lines are stripped. For example, you can ask which languages the client would like installed:

```
PHP
Python
Perl
Lua
TCL
```

On the next step, you will be prompted to select which answers you would like to be selected by default, and to fill in the values associated with the answers. That field will start like:

```
PHP=
Python=
Perl=
Lua=
TCL=
```

...which you could fill in like:

```
PHP=php
Python=python
Perl=perl
Lua=lua
TCL=tcl
```

---

Then if the user selects "PHP", the value "php" will be added to the list of values returned by that question.

#### Input Restrictions

The system has many built-in input restrictions handled by the generic validator used all throughout the system. The ones that are suitable for questions are:

- String: could be anything
- Required: at least one character
- Empty: no characters allowed
- Bool: Empty, or "0" or "1"
- Int: numeric with an optional sign
- Unsigned Int: numeric with no sign
- Positive Int: numeric with no sign, and cannot be 0
- Double: any decimal number
- Price: 2 digit decimal
- Percent: integer between 0 and 100
- Percent2: 2 digit decimal between 0 and 100
- Month: numeric month with an optional padded 0
- Year: 4 digit unsigned integer
- TLD: a-z, optional a-z plus dots followed by a-z

There are two types of input restrictions defined in the file `/lib-tk/include/validator/validator.php`: "PCRE" and "method" input restrictions. If you are familiar with PHP, you can add more to this file.

#### Multi-option Questions and The Value Map

Usually, the answer to the question becomes the value of the attribute. However, multi-option questions can have multiple values. In that case, the value, by default, becomes the value of the last option selected. To deal with multiple values properly, create a new "value map" and associate it with the attribute with which the question is associated. A value map maps values to attribute maps. Attribute maps map any number of attribute-value combinations depending upon whether the value in the value map was selected. The attributes in the mappings need not be associated with a question, but they may be. An attribute may be used for mapping purposes only&mdash;if it does not have a question associated with it.

#### The Value Map

Name

Mappings &mdash; any number of:

Option Value  
AttributeMap

Name

Mappings &mdash; any number of:

Attribute  
Match Value  
No Match Value

The Value Map is a named list of Value Mappings. Value Mappings link Option Values (possible answers to a question) with Attribute Maps. In English, The Value Map says "For each of these Option Values, use these Attribute Maps."

The Attribute map is a named list of Attribute Mappings. Attribute Mappings tell the system to set an attribute to either of two values, depending on whether the Option Value in its Value Mapping was selected. In English, The Attribute Map says "For each of these attributes, set them to one of these values depending upon whether that option was selected."

As you can see, this is optimized for the case of dealing with boolean attributes. For example, we have the question we created earlier which asked which languages the client would like installed. To

---

make the proper value map for this question, you would:

Add a new attribute (the "new" button under the ID column header).

Name it "Languages".

Assign the languages question that we made earlier to that attribute.

Assign a panel to that attribute.

Add a new Value Map named "Languages" (the "new" button under the "Value Map" column header).

Assign that Value Map to the "Languages" attribute.

Expand the details of that attribute.

For each language:

Add a new mapping (the "add new" button beneath the Value Mappings table), specifying the value of the option. In our example, "php" is the value, while "PHP" is the option display name, do we specify "php" as the value of this Value Mapping.

Add a new Attribute Map named "PHP" (the "add new" button above the Attribute Mappings table).

Assign that new Attribute Map to the Value Mapping.

In this example, we will set a package attribute, associated with the panel, named "php" to the value "yes" if selected, and "no" if not selected.

For each attribute you want set (in this case, and in most cases, you will only need to do this once):

Add a new attribute named "php".

Add a new mapping (the "add new" button beneath the Attribute Mappings table), selecting the "php" attribute.

Set the "Match Value" to "yes".

---

Set the "No Match Value" to "no".

## Update a v5 License Key

This is the process to follow for users who have an existing license and have bought a client limit upgrade and need to get their license updated to the next tier. These steps can also be used to "flash" a license key, to generate a new key for a temporary license key that has expired.

Note: If you are a demo user who has bought a real ModernBill license, please follow the Upgrading from the demo version document.

1. Login to the members area: [www.modernsupport.com/modernbill](http://www.modernsupport.com/modernbill)
2. Click on "V5 License Center"
3. Click on "Generate a v5 license key"
4. Type in the URL of your domain. Example: [www.modernbill.com](http://www.modernbill.com)
5. Click "Generate License"
6. A new license shows up in the box. Copy and paste all of this key into a new file called "newkey.php"
7. Upload this file to your ModernBill directory in "lib-modernbill/include/config/" The full path (under Linux) should look something like this: `/home/www/vhosts/modernbill/lib-modernbill/include/config/`
8. Go to your ModernBill admin login page (app-modernbill-admin). You should see an orange screen with instructions telling you to rename the file you uploaded from "newkey.php" to "key.php"
- 9.) Rename the file you uploaded (newkey.php) to "key.php"
10. Refresh the page and login to your ModernBill.
11. At the bottom of the page in ModernBill your license client account and type should show correctly.

# README FIRST

## README FIRST

The manual you are reviewing now is the "Configurations Manual." Its sole purpose is to help you do the following:

- Install ModernBill
- Upgrade ModernBill Between Versions
- Migrating From Version 4 to Version 5
- Configuring Your System Including:

- Automation
- Customizations
- Order Forms
- Products

---

Taxes  
Invoice Settings  
HelpDesk  
Module Settings Including:

Control Panels  
Fraud Protection  
Gateways  
Registrars  
SSL Certificates

### Common Questions

You might want to view our list of common questions located in the following document:

<http://manual.modernbill.com/v5co/index.php?article=81>  
Operations Manual

If you need to learn how to use ModernBill after you have configured all your settings, view the "Operations Manual" located at:

<http://manual.modernbill.com/v5op/index.php>  
Getting Started

A "Quick Config" document has been prepared for you to get to the main configuration settings first. View the "Quick Config" document at:

<http://manual.modernbill.com/v5co/index.php?article=22>  
PDF Output

You have several options for PDF Output of the manual. Read your options below:

1. To PDF the entire manual, click on the "Main" category link. Then click on the "Export PDF" button in the "Other Options" section in the lower left-hand corner of the page.
2. To PDF a specific category, click on the category link. Then click on the "Export PDF" button in the "Other Options" section in the lower left-hand corner of the page.

Note: If you want to print all sub-categories in the "Control Panels" category, click on the "Control Panels" category link. This applies to any main category that contains sub-categories.

With your PDF Output you can save, print, email, and search the document based on your specific needs.

#### Can't Find The Information You Need?

This manual is consistently updated to reflect changes to the product. If you cannot find the information you need specific to configuring your ModernBill system, please create a helpdesk ticket at <http://www.modernsupport.com>.

## Installation

*There are no articles in this category.*

## New Installation

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## Installing ModernBill v5

### System Requirements

ModernBill v5 has a few basic requirements in order to run. Below is the list of supported environments in which ModernBill will run properly. You can also download our requirements script to test your server for compatibility with ModernBill. Rename the file to requirements.php, upload it to your server, and view the script in your browser to see the output and correct any incompatibilities.

### Operating Systems Supported

Unix/Windows

### Web Servers Supported

Apache (Recommended)

IIS (Must be run in CGI mode. ISAPI mode is not supported.)

### Secure Certificate

SSL (HTTPS) Recommended

Using an SSL or Secure Certificate will show your customers that ordering from your website is safe and secure.

### Databases Supported

MySQL  
PostGres

### PHP Version

PHP version 4.4.0 + or 5.0 +

Most servers are already set up with the latest PHP version. To learn more, visit <http://www.php.net>.

### php.ini Settings

```
open_basedir = none (or blank)
memory_limit = at least 64M
safe_mode = off
allow_url_fopen = on
register_globals = off or on
register_long_arrays = on
```

### Zend vs. IonCube

ModernBill is available in two encoded versions, Zend and IonCube. Either decoder can be used, depending on your preference. Please note that if you are using PHP version 5.0 +, you can use your choice of Zend Optimizer version 3.2 + or IonCube Loaders.

To learn more about Zend Optimizer, visit the Zend website at <http://www.zend.com>.

To learn more about IonCube Runtime Decoder (Included), visit the IonCube website at <http://www.ioncube.com>.

---

## New v5 Install

1. Create a new database for your billing system. You can create your database by using a MySQL GUI such as PHPMyAdmin or you can use the command line as follows:

The MySQL command:

```
mysqladmin -u USERNAME -h localhost -p create DBNAME
```

Replace the BOLD variables with your own variables. Make sure that the user you create for the database has full admin privileges.

More MySQL Command Line Help - Adding New Users to MySQL

2. Download either the Zend or IonCube version of ModernBill from your member's download area.

NOTICE! If you are using the IonCube encoded version of ModernBill, you will need to manually install the latest IonCube Loaders. Also note that if you are running the Ioncube encoded version 4.x of ModernBill, the Ioncube loaders currently installed on your server will not work properly. Make sure you install the new Ioncube loaders as described in the following steps.

1. Go to <http://www.ioncube.com/loaders.php>.
2. Download the IonCube Loaders specific to your Operating System.
3. Untar/Unzip the IonCube Loaders.
4. Upload the IonCube Loaders to your ModernBill root directory.  
Example: /modernbill/

3. You have two options for uploading your v5 files to your server. Choose from one of the options listed below:

Unzip Using The Command Line

In order for this to work you need shell access or a shell account and a FTP program.

a. Upload your V5 tar.gz file to your server using your favorite FTP client in forced BINARY mode to your server.

b. On the shell command line, type the following command and press Enter:

```
gunzip -c NAMEOFYOURFILE.tar.gz | tar xvf -  
ATTENTION FREEBSD USERS! You need to use the following command:  
tar xvfz NAMEOFYOURFILE.tar.gz
```

Note: By default it will extract the files into a directory called /modernbill/. You can leave the default name /modernbill/ or change it according to your own personal preference.

c. Continue to Step 4.

Using WinRAR To Install

a. Make sure you have WinRAR installed on your local machine. You can download WinRAR by visiting the following url:

<http://www.rarlab.com/download.htm>

b. Once you have WinRAR installed, unzip/untar your V5 Beta release.

Note: By default it will extract the files into a directory called /modernbill/. You can leave the default name /modernbill/ or change it according to your own personal preference.

c. Upload the /modernbill/ directory to your server using your favorite FTP client in forced BINARY mode.

d. Continue to Step 4.

4. Once the files have been successfully uploaded and/or extracted on your server, point your browser to <http://www.yourdomain.com/INSTALLDIR/app-modernbill-admin/install/>.

Note: [www.yourdomain.com](http://www.yourdomain.com) needs to be replaced with the domain your license is tied to. INSTALLDIR = By default V5 creates a root directory called /modernbill/. You can leave the default name /modernbill/ or change it according to your own personal preference.

---

5. Follow the instructions in the installation wizard through to completion. Remember to delete the /install/ directory prior to logging in to your V5 system.

6. Log into your v5 system. You are now ready to configure your settings.

#### Important Files

There are three files that are modified when you install ModernBill v5. They are listed below:

/modernbill/lib-modernbill/include/config/config.php

/modernbill/app-modernbill-order/config.php

## Affiliate Programs

*There are no articles in this category.*

### iDev Affiliate

#### **Integrating iDev Affiliate**

The iDev Affiliate module is currently not supported. Please contact <http://www.idevdirect.com/> for more information.

## HelpDesks

*There are no articles in this category.*

### Cerberus

#### **Integrating Cerberus**

The iDev Affiliate module is currently not supported. Please contact <http://www.cerberusweb.com/> for more information.

## Internal

#### **Internal HelpDesk**

---

The ModernBill v5 internal helpdesk is a basic system allowing you to receive support tickets from your clients. Follow the instructions below to get started.

Note: By default the Internal HelpDesk is already enabled. To disable the Internal HelpDesk, go to System/System Settings/Main System Settings and select No for Enable Internal Help Desk. Then click on the "Save Settings" button.

1. To start using the Internal HelpDesk, click on the HelpDesk navigation button at the top of the ModernBill application.

Note: By default the Internal HelpDesk is preconfigured with two departments:

Sales Department  
Tech Support Department

If you need to add additional departments to the Internal HelpDesk, click on the "HelpDesk Setup" link on the left side menu and continue on to Step 2.

2. A new menu will appear below the HelpDesk menu with three (3) options:

Edit Departments  
Edit Buckets  
Edit Response Templates

3. Click on the "Edit Departments" link.

4. When the page loads you will see the two preconfigured departments listed. On the right side of the page is the Add New Department section.

Set the following:

Name: Enter the name of your new department.  
Description: Enter a description of your new department.  
Associated Admins: Select the administrators you want to have access to your new department. You can use hold ctrl+click to select multiple administrators.

5. Click on the "add department" button.

6. Your new department will appear on the left side once added.

7. if you need to edit any of the departments, click on the "edit" icon in the Actions column in the Departments list.

8. Now you need to configure your buckets.

Note: By default the Internal HelpDesk is preconfigured with two buckets:

main sales bucket  
main tech support bucket

If you need to add additional buckets to the Internal HelpDesk, click on the "HelpDesk Setup" link on the left side menu and continue on to Step 9.

9. A new menu will appear below the HelpDesk menu with three (3) options:

Edit Departments  
Edit Buckets  
Edit Response Templates

10. Click on the "Edit Buckets" link.

---

11. When the page loads you will see the two preconfigured buckets listed. On the right side of the page is the Add New Bucket section.

Set the following:

Name: Enter the name of your new bucket.  
Associated Departments: Select the departments you want associated with your new bucket. You can use hold ctrl+click to select multiple departments.  
Associated Admins: Select the administrators you want to have access to your new bucket. You can use hold ctrl+click to select multiple administrators.

12. Click on the "add bucket" button.

13. Your new bucket will appear on the left side once added.

14. if you need to edit any of the buckets, click on the "edit" icon in the Actions column in the Buckets list.

15. Once you have your departments and buckets configured according your specific business needs, you can setup ticket email responders. To get started, click on the "HelpDesk Setup" link on the left side menu and continue on to Step 16.

16. A new menu will appear below the HelpDesk menu with three (3) options:

- Edit Departments
- Edit Buckets
- Edit Response Templates

17. Click on the "Edit Response Templates" link.

18. When the page loads, set the following:

Response Template Name: Enter the name of your email response.  
Response Template Body: Enter the content for the email body. You can use the fields as noted in the Fields section above the Response Template section. For example, if you want to have the system automatically enter the Ticket ID in the email when it's sent to the customer, use the {hdTicketID} field. Use the fields according to your specific business needs.  
Departments: Select the departments you want to associate this email response template. You can use hold ctrl+click to select multiple departments.

19. Click on the "add" button.

## Kayako

### **Integrating Kayako**

The iDev Affiliate module is currently not supported. Please contact <http://www.kayako.com> for more information.

## SupportTrio

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## Integrating SupportTrio

The iDev Affiliate module is currently not supported. Please contact <http://www.activecampaign.com/supporttrio/> for more information.

# Common Questions

## Common Questions

Below is a list of common questions specific to configuring ModernBill. Each set of questions is categorized for you to find what you need quickly. Each question is linked to an article for further information.

New questions are being added daily so check back frequently.

Last updated: 10/16/2006

Installation

How do I install ModernBill?

Upgrades

How do I upgrade from v4 to v5?

How do I upgrade from 5.0 RC2, RC3, RC4, and RC5.1 to 5.0 Stable?

How do I upgrade from 5.0.1, 5.0.2 to 5.0.5?

How do I upgrade from 5.0.3, 5.0.4 to 5.0.5?

Migrations

How do I migrate v4 ModernBill PayPal subscriptions to v5 ModernBill?

Internal HelpDesk

How do I enable the internal HelpDesk?

Credit Cards

How do I setup credit card encryption?

Administrators

How do I add new administrators to the system?

How do I add new administrator groups to the system?

Company Settings

How do I modify company settings?

Accepting Payments

What are payment groups and how do I create one?

Server Groups

What are server groups and how to set them up?

Taxes

How do I setup taxes?

How do I setup VAT Tax?

What are tax zones and how do I set them up?

What are tax groups and how do I setup them up?

Email

How do I set my system email method to use PHP Internal, Sendmail, SMTP or None?

How do I setup emails based on different locales?

Automation

Is there a list of items I can check off to make sure my system is fully automated?

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How do I configure the system to process invoice batches on specific days?  
How do I setup Auto-Suspension of client packages?  
How does the system Un-Suspend packages that are suspended?  
How do I setup complete automation?  
What is a cronjob?  
How can I learn more about cronjobs?

## Control Panel Modules

How do I configure the DirectAdmin module?  
How do I configure the Ensim module?  
How do I configure the Ensim Unify module?  
How do I configure the FreeRadius module?  
How do I configure the Helm module?  
How do I configure the Hostopia module?  
How do I configure the Hsphere module?  
How do I configure the Plesk module?  
How do I configure the TCAdmin module?  
How do I configure the cPanel module?

## Fraud Protection Modules

How do I setup FraudGuardian?

## Gateway Modules

How do I configure the Authorize.Net module?  
How do I configure the BluePay module?  
How do I configure the Merchant Commerce module?  
How do I configure the Merchant Partners module?  
How do I configure the PSIGate module?  
How do I configure the PayPal module?  
How do I configure the PlanetPayment module?  
How do I configure the QuickCommerce module?  
How do I configure the RTware module?  
How do I configure the Velocity Pay module?  
How do I configure the eProcessingNetwork module?  
How do I configure the eWay module?  
How do I configure the EchoInc module?  
How do I configure the InternetSecure module?

## Registrar Modules

How do I configure the Register.com module?  
How do I configure the eNom module?  
How do I configure the Nominet module? (Available Friday, Oct 27 EOB)

## SSL Certificate Modules

How do I configure the SSLFactory module?

## Order Forms

How do I configure order form(s)?  
How do I customize the order form?  
What are website widgets?

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How do I configure website widgets?

How do website widgets, the products.php page, and order forms all tie together?

## Upgrading

### Upgrading from v4.4 to v5.1 (Migration)

An advanced, yet easy-to-use Migration Manager is now available. You can upgrade your ModernBill 4.4 to the latest ModernBill 5.1 release. To get started, follow the directions below.

**NOTICE:** You **MUST** be using ModernBill 4.4.X in order to upgrade to ModernBill 5.1. If you are running a version prior to 4.4.X, follow the upgrade instructions at the following url:

<http://manual.modernbill.com/adminhelp/english/Installation/Upgrades.htm#pre4.4to4.4>

#### Things To Know Before You Begin

Past invoices are not carried over from 4.4 to 5.1. Instead, a prior balance product in 5.1 is created showing the account balance from 4.4.

If a module you currently use in 4.4 is not available in 5.1, 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 v4's latin-1 encoding to v5'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 5.1 while migrating your 4.4 data to your new 5.1 system.

Make a backup copy of your ModernBill 4.4 fileset (directory) and your ModernBill 4.4 database.

If you have created products in 5.1 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 setup in your 5.1 system before running the migration script.

#### Automatic Migration

##### Manual Migration

##### Automatic Migration

1. The first step is to install ModernBill 5.1. Make sure you install a new database for v5. Note that the Migration Manager will migrate data from 4.4 to your new 5.1 database. To learn how to install ModernBill 5.1, read the Installing ModernBill v5 document.

Note: When you are going through the installer and your system is a new installation, you will have the ability to tell the system to pre-populate example products. In order to have the system automatically create and map products from 4.4 to 5.1, do not tell the 5.1 installation to pre-populate the example products. Should you already have the example products pre-populated, simply delete them from the system by going to the Products tab and clicking on the "remove" link. Confirm the removal by clicking on the "yes" button.

2. Configure your encryption settings by following the Encryption Settings document. Make sure you have one payment group and one order form setup and configured in your 5.1 system. By default, ModernBill installs both a payment group and an order form. Modify the payment group and order form according to the primary/secondary gateway in your 4.4. For example, in 4.4 if you were using Authorize.Net and PayPal, configure your 5.1 payment group to use Authorize.Net and PayPal. To learn more about payment groups, read the Payment Groups document. Next, you need to configure your 5.1 order form to use the same locale (language) and currency as your 4.4 ModernBill system. To learn how to configure 5.1 order forms, read the Setting Up Your Order Form(s) document.

3. Configure any other modules you have including control panels, registrars, etc.

---

a. Registrar Modules: If you are using the eNom or Register.com modules, the migrator will automatically map these modules from your v4 to v5 system and you will not be required to configure them in v5. If you are using any other registrar module, you will need to configure the module in v5 and then manually map the module from v4 to v5 during step 18 of the migration process.

b. Panel Modules: If you are using cPanel or Plesk, you do not have to add servers to a server group as these will be migrated automatically (Support for additional panel modules will be provided in a future release). If you are using another panel, add servers to the server group and configure the panel modules. Note: Currently Plesk attributes do not get migrated along with hosting products.

4. Edit your email templates to your liking. As a v4 user, you have several options for your v5 email templates. If you would like to use the default v5 templates, read the Setting Up Email document for information on editing the templates so they are ready to use for communicating with your customers. Alternatively, if you would like to convert your v4 email templates to v5, read the Converting v4 Email Templates to v5 document.

5. Configure your invoice settings. To learn how to configure invoice settings, read the Invoice Settings document.

6. Setup automation settings. To learn how to setup automation settings, read the System Queue Settings document.

7. Open your `/modernbill/lib-modernbill/include/config/config.php` file in your ModernBill 5.1 fileset. Make sure the "ALLOW\_MIGRATION" setting has a value of "1" as shown below.

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

8. Save the config.php file.

9. Click on the System tab.

10. Click on the "Migration Settings" link in the "System Settings" section.

11. When the page loads, click on the "add migration" button.

12. Set the following:

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

Type: Currently only ModernBill 4 is available. Leave as default.

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: Since ModernBill 4 is the only database you can currently migrate from to v5.1, 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 the database username of your ModernBill v4.4 database.

Database Password: Enter the database password of your ModernBill v4.4 database.

Payment Group: Select the payment group specific to your v4.4 locale as described in Step 3 above.

Order Form: Select the payment group specific to your v4.4 locale as described in Step 3 above.

13. Click on the "configure associations" button.

14. Remember, if you have cPanel or Plesk modules setup in v4 and enabled, the migration tool will automatically migrate them over to v5. That said, leave the "Panels" drop down menus "as is" so the system can create them automatically. Otherwise, make sure you have configured your control panel modules and select them from the list.

15. Next, make sure you have configured and enabled your registrar modules and select them from the drop down menus in the "Registrars" list.

---

16. Enter your v4 Lek Pin in the "LEK Pin or encryption passphrase" textbox. Reminder: make sure you setup your v5 encryption settings first by following the Encryption Settings document or credit cards will not be encrypted properly in v5.

17. Click on the "associate ids" button.

18. The first step is to "Run Module Migration." Set the following:

Migration Action: This is automatically set to "Migrate."

Number of Modules Per Step: You can leave this as the default "5" value or select the number of modules you want the system to configure per step. You want the number of modules per step to be low so the system will not time-out.

Number of Steps: Leave as default "All" and the system will automatically configure the amount of steps need 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" above, the system would calculate a total of 10 steps ( $50/5 = 10$  Steps). Or you can check on the "more steps" radio button. Then enter the number of steps you want the system to use.

Control: Click on the "Start" button to start the module migration process.

TIP: To smooth the transition, it is recommended to run the migrator in steps and dump the database after each step.

19. When the module migration is completed, the system will automatically jump to the "Product Migration" step. Set the following:

Migration Action: This is automatically set to "Migrate."

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

Number of Steps: Leave as default "All" and the system will automatically configure the amount of steps need 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" above, the system would calculate a total of 2 steps ( $50/25 = 2$  Steps). Or you can check on the "more steps" radio button. Then enter the number of steps you want the system to use.

Control: Click on the "Start" button to start the product migration process.

TIP: Dumping the database between steps 2 and 3 of the migrator (steps 19 and 20 of this document) is especially useful as it allows you to keep your v4 system live until the last possible moment while testing your v5 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 v5, you can reinstall your step 2 dump and reimport the latest client data which will migrate the most current information. This should ease the transition for your customers.

20. When the product migration is completed, the system will automatically jump to the "Run Clients Migration" step. 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. Set the following:

Migration Action: This is automatically set to "Migrate."

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

Number of Steps: Leave as default "All" and the system will automatically configure the amount of steps need to complete the clients migration. For example, if you have 50 clients configured in v4, and you left the "Clients Per Step" at "5" above, the system would calculate a total of 10 steps ( $50/5 = 10$  Steps). Or you can check on the "more steps" radio button. Then enter the number of steps you want the system to use.

Double-check Add-on Choices: If you are accepting new clients in your v5 system, check on the "Yes" radio button. Keep in mind this process will significantly slow the system down, but can be used when accepting new clients.

Control: Click on the "Start" button to start the client migration process. This step will take the longest.

---

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

22. Next, verify that you can decrypt credit cards to see if it works properly.

23. Invoice for prior balances by following the steps below:

a. Click "Events" and locate ProcessInvoices in the list of events.

b. Expand the allowable actions by clicking the arrow next to the ProcessInvoices ID (ID 1) and click the Edit link.

c. Add the following line after in the box labeled "Queue Input", replacing XXXX with the ID of your Prior Balance product:

XXXX

d. Click the "submit" button.

e. Click the arrow next to the ProcessInvoices ID (ID 1) again and click "Run". This will create a new invoice in v5 for each customer with a prior balance.

**IMPORTANT!** Be sure to remove the line above when you are ready to take your system live, or your system will continue to bill only for prior invoices. For more information, [click here](#).

24. Change your order links on your website to reflect the new v5 order links. To learn how to use website widgets, which is how products are displayed on your website in v5, view the [Setting Up Website Widgets](#) document. For detailed examples, view the document on [How do website widgets, the products.php page, and order forms all tie together?](#)

25. Enable your cron jobs for v5.

Continue to check your system thoroughly for any possible issues. If you come across an issue, please create a helpdesk ticket for technical support.

Note: If this is a test migration, it is recommended that you change the contact email address by running the following SQL statement:

```
update client_contacts set contact_email = concat(contact_email, 'TEST');
```

The above SQL statement will prevent invoice emails from being sent out. Make sure you complete at least one test run.

When you are ready to go live, remember to remove the line you added in Step 23 so the system will begin invoicing normally.

a. Click "Events" and locate ProcessInvoices in the list of events.

b. Expand the allowable actions by clicking the arrow next to the ProcessInvoices ID (ID 1) and click the Edit link.

c. Remove the following line from the box labeled "Queue Input":

XXXX

d. Click the "submit" button.

Manual Migration

---

The manual migration requires a few extra steps when migrating from 4.4 to 5.1. For example, if you are going to do a manual migration, it requires you to create and configure all your products in v5 to match your products in v4. This will have to be done manually and can be very time-consuming. We will refer to this method as "Manual Mapping." In addition to creating and configuring all your products, you will also have to 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. We will refer to this method as "Manual Migration."

(Manual Mapping) If you are mapping the 4.4 to 5.1 products manually and you have completed a new install of ModernBill 5.1, create new products in 5.1 using the same specifications as your 4.4 installation. To be related to the packages you are using in your 4.4 ModernBill system. To learn how to create new products, read the Creating Products document. All aspects of the product will need to be created in ModernBill v5 including add-ons, email associations, pricing, etc.

(Manual Migration) Finish configuring ModernBill v5 with the settings that are appropriate to your business. This includes, but is not limited to, gateways, registrars, and hosting control panel configurations. You will be asked in the Migration Manager to associate the equivalent items to their new v5 configurations. The Migration Manager does not move over any System Configuration items as these have radically changed in v5. In essence, you will need to set-up ModernBill v5 as if you were starting from scratch. The Migration Manager only deals with customer related information such as packages and accounting information.

Before you begin the migration, there are several settings in the /modernbill/lib-modernbill/include/config/config.php file that you need to modify. Go ahead and open the /modernbill/lib-modernbill/include/config/config.php file and view the settings below.

1. The following line of code is to tell the system to keep the same package IDs when migrating client packages from v4 to v5. 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 default setting for "raisePriorBalancePackageKeysBy" is set to "50,000." If you have package ids higher than 50,000 in your v4 system, change the default setting to a higher number.

```
// a number above any v4 package ID, to avoid namespace collision
$CONF["raisePriorBalancePackageKeysBy"] = 50000;
```

3. 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;
```

When you are finished modifying the above to your specifications, continue with the instructions below.

1. Install your new ModernBill Version 5.1 system by following the New Installation document.

sNote: When you are going through the installer and your system is a new installation, you will have the ability to tell the system to pre-populate example products. Check the box to automatically pre-populate the example products.

2. Create all the products in your new 5.1 system with the same specifications as your v4.4 system. If you are going to have the system automatically create and map products from 4.4 to 5.1, do not tell the 5.1 installation to pre-populate the example products. To learn how to create new products, read the Creating Products document. All aspects of the product will need to be created in ModernBill 5.1 including add-ons, email associations, pricing, etc.

3. Make sure you have one payment group and one order form setup and configured in your 5.1 system. By default, ModernBill installs both a payment group and an order form. Modify the payment group and order form according to the primary/secondary gateway in your 4.4. For example, in 4.4 if you were using Authorize.Net and PayPal, configure your 5.1 payment group to use Authorize.Net and PayPal. To learn more about payment groups, read the Payment Groups document. Next, you need to configure your 5.1 order form to use the same locale (language) and currency as your 4.4 ModernBill system. To learn how to configure 5.1 order forms, read the Setting

---

Up Your Order Form(s) document.

4. Configure any other modules you have including control panels, registrars, etc.

Note: Only cPanel can be migrated automatically. Support for future modules will be provided in a future release.

5. Open your /modernbill/lib-modernbill/include/config/config.php file in your ModernBill 5.1 filset. Make sure the "ALLOW\_MIGRATION" setting has a value of "1" as shown below.

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

6. Save the config.php file.

7. Click on the System tab.

8. Click on the "Migration Settings" link in the "System Settings" section.

9. When the page loads, click on the "add migration" button.

10. Set the following:

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

Type: Currently only ModernBill 4 is available. Leave as default.

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: Since ModernBill 4 is the only database you can currently migrate from to 5.1, leave the "MySQL" set as default.

Database Host: Enter the host name of your ModernBill 4.4 database.

Database Name: Enter the database name of your ModernBill 4.4 database.

Database Username: Enter the database username of your ModernBill 4.4 database.

Database Password: Enter the database password of your ModernBill 4.4 database.

Payment Group: Select the payment group specific to your 4.4 locale as described in Step

3 above.

Order Form: Select the payment group specific to your 4.4 locale as described in Step 3

above.

11. Click on the "configure associations" button.

12. Before you can continue, you must have all your products created in your 5.1 system. Assuming you have completed creating all your products in 5.1 based on the products in your 4.4 system, 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 5.1 system.

13. 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.

14. 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.

15. Enter your v4 Lek Pin in the "LEK Pin or encryption passphrase" textbox. You must setup your v5 encryption settings first by following the Encryption Settings document.

16. Click on the "associate ids" button.

16. The first step is to "Run Module Migration." Set the following:

Migration Action: This is automatically set to "Migrate."

Number of Modules Per Step: You can leave this as the default "5" value or select the number of modules you want the system to configure per step. You want the number of modules per step to be low so the system will not time-out.

---

Number of Steps: Leave as default "All" and the system will automatically configure the amount of steps need 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" above, the system would calculate a total of 10 steps ( $50/5 = 10$  Steps). Or you can check on the "more steps" radio button. Then enter the number of steps you want the system to use.

Control: Click on the "Start" button to start the module migration process.

17. When the module migration is completed, the system will automatically jump to the "Product Migration" step. Set the following:

Migration Action: This is automatically set to "Migrate."

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

Number of Steps: Leave as default "All" and the system will automatically configure the amount of steps need 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" above, the system would calculate a total of 2 steps ( $50/25 = 2$  Steps). Or you can check on the "more steps" radio button. Then enter the number of steps you want the system to use.

Control: Click on the "Start" button to start the product migration process.

18. When the product migration is completed, the system will automatically jump to the "Run Clients Migration" step. Set the following:

Migration Action: This is automatically set to "Migrate."

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

Number of Steps: Leave as default "All" and the system will automatically configure the amount of steps need to complete the clients migration. For example, if you have 50 clients configured in v4, and you left the "Clients Per Step" at "5" above, the system would calculate a total of 10 steps ( $50/5 = 10$  Steps). Or you can check on the "more steps" radio button. Then enter the number of steps you want the system to use.

Double-check Add-on Choices: If you are accepting new clients in your v5 system, check on the "Yes" radio button. Keep in mind this process will significantly slow the system down, but can be used when accepting new clients.

Control: Click on the "Start" button to start the client migration process. This step will take the longest.

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

20. Next, verify that you can decrypt credit cards to see if it works properly.

Continue to check your system thoroughly for any possible issues. If you come across an issue, please create a helpdesk ticket for technical support.

Note: If this is a test migration, it is recommended that you change the contact email address by running the following SQL statement:

```
update client_contacts set contact_email = concat(contact_email, 'TEST');
```

The above SQL statement will prevent invoice emails from being sent out. Make sure you complete at least one test run.

## Upgrade from 5.0.1, 5.0.2 to 5.0.5

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Upgrading from 5.0.1, 5.0.2 to 5.0.5 is easy. Follow the instructions below.

Note: If you are upgrading from 5.0.3, 5.0.4 to 5.0.5, please follow the Upgrade from 5.0.3, 5.0.4 to 5.0.5 document.

1. Clear any theme templates (\*.tpl.php) from your temp directory. Tip: on Linux servers, this is typically /tmp. On Windows servers, this is typically C:\Temp.

2. Create a backup copy of your current ModernBill fileset and ModernBill database.

3. Go to your member's 5.0 download area:

<http://www.modernsupport.com/modernbill/index.php?type=downloads>

4. Upload your files and replace your current fileset. If you need instructions on how to upload your fileset, please view the [Installing ModernBill v5](#) document.

5. Next, generate a new license key:

<http://www.modernsupport.com/modernbill/index.php?type=V5>

6. Copy your new ModernBill license. Create a file called newkey.php and save it. You will need this file for another step.

7. Run through the upgrade wizard at [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/).

8. Select the appropriate upgrade option during the installation wizard that corresponds to your current version of ModernBill.

9. Delete the [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/) directory.

10. Upload the newkey.php file you created in Step 5 above to the [modernbill/lib-modernbill/include/config/](#) directory.

11. Refresh your ModernBill login screen.

If you have any questions regarding this document, please create a helpdesk ticket and reference this article.

## Upgrade from 5.0.3, 5.0.4 to 5.0.5

Upgrading from 5.0.3, 5.0.4 to 5.0.5 is easy. Follow the instructions below.

1. Clear any theme templates (\*.tpl.php) from your temp directory. Tip: on Linux servers, this is typically /tmp. On Windows servers, this is typically C:\Temp.

2. Create a backup copy of your current ModernBill fileset and ModernBill database.

3. Go to your member's 5.0 download area:

<http://www.modernsupport.com/modernbill/index.php?type=downloads>

4. Upload your files to a new directory. If you need instructions on how to upload your fileset, please view the [Installing ModernBill v5](#) document.

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

5. Next, 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

6. Run through the upgrade wizard at [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/).

---

7. Select the appropriate upgrade option during the installation wizard that corresponds to your current version of ModernBill.

8. Delete the `yourdomain.com/modernbill/app-modernbill-admin/install/` directory.

9. Login to your ModernBill and verify your system has been upgraded. The version number is located at the bottom of your ModernBill application.

If you have any questions regarding this document, please create a helpdesk ticket and reference this article.

## Migrating PayPal Subscriptions From V4 to V5

If you want to migrate PayPal subscriptions from your v4 ModernBill to your new v5 ModernBill, follow the instructions below.

1. Open the `/your-modernbill-dir/lib-mbapi/includes/modules/gateway/return/migration/paypal_return.inc.php` file.

2. There are two settings that need to be verified and/or modified in the `paypal_return.inc.php` file. The first setting is `cURL "$path_to_curl"` set to "PHP" by default as shown below:

```
$path_to_curl = "PHP"; // change to path to curl if you don't have php curl enabled
```

Make sure "PHP" is set to the same path as cURL in your v4 ModernBill.

3. Next, change the "WWW.EXAMPLE.COM" to your ModernBill root domain and directory.

```
$v5IPNUrl = http://WWW.EXAMPLE.COM/lib-mbapi/include/modules/gateway/return/paypal.php;
```

4. Save the file.

5. Replace your v4 ModernBill `paypal_return.inc.php` file with the one you modified above. Your v4 ModernBill `paypal_return.inc.php` file is located in the `/your-modernbill-dir/include/misc/mod_paypal/` directory.

## Upgrading from the demo version

Upgrading from the demo version to the latest 5.1.x release is easy. Follow the instructions below.

1. Clear any theme templates (\*.tpl.php) from your temp directory. Tip: on Linux servers, this is typically `/tmp`. On Windows servers, this is typically `C:\Temp`.

2. Create a backup copy of your current ModernBill fileset and ModernBill database. To create a backup of your ModernBill system, rename your `modernbill` directory to `modernbill_bk` or whatever makes sense to your organization.

To create a backup of the database, use phpMyAdmin or follow the SSH command line option below:

```
mysqldump -uUsername -pPassword --opt dbname > file
```

- Replace `Username` and `Password` with your database username and password, respectively.
- Replace `dbname` with the name of your ModernBill database.
- Replace `file` with the name you want to call your file.

3. Go to your member's 5.x download area:

```
http://www.modernsupport.com/modernbill/index.php?type=downloads
```

4. Download the latest version of ModernBill.

5. Upload your files to a new directory. If you need instructions on how to upload your fileset, please

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view the [Installing ModernBill v5](#) document.

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

6. Next, 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

7. Next, generate a new license key:

<http://www.modernsupport.com/modernbill/index.php?type=V5>

8. Run through the upgrade wizard at [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/). It will auto-detect your v5.x install (from your config files) and perform the upgrade to the latest database schema for you. (You should always make a backup of your database before any upgrade.)

**NOTICE!** If the installer asks you for your Admin & Company information again, **DO NOT PROCEED**. This means the installer thinks you are performing a new install. Please contact support for assistance.

9. Delete the [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/) directory.

10. If you have any live credit card data in a previous v5 install, please generate a NEW v5.1 LEK PIN & HASH. Then login to your ModernBill 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.

11. Login to your ModernBill and verify your system has been upgraded. The version number is located at the bottom of your ModernBill application.

If you have any questions regarding this document, please create a helpdesk ticket and reference this article.

## Upgrade from 5.0.5 to 5.1.X

**NOTICE!** You must be on version 5.0.5 before you can upgrade to 5.1.X

1. Clear any theme templates (\*.tpl.php) from your temp directory. Tip: on Linux servers, this is typically /tmp. On Windows servers, this is typically C:\Temp.

2. Create a backup copy of your current ModernBill fileset and ModernBill database. To create a backup of your ModernBill system, rename your modernbill directory to modernbill\_bk or whatever makes sense to your organization.

To create a backup of the database, use phpMyAdmin or follow the SSH command line option below:

```
mysqldump -uUsername -pPassword --opt dbname > file
```

- a. Replace Username and Password with your database username and password, respectively.
- b. Replace dbname with the name of your ModernBill database.
- c. Replace file with the name you want to call your file.

3. Go to your member's 5.x download area:

<http://www.modernsupport.com/modernbill/index.php?type=downloads>

4. Download the latest version of ModernBill.

5. Upload your files to a new directory. If you need instructions on how to upload your fileset, please view the [Installing ModernBill v5](#) document.

**IMPORTANT:** You must upload a new fileset to a new directory. Do not just replace your current

---

fileset, otherwise there could be issues during and after the upgrade.

6a. Next, 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

6b. The \* lib-modernbill/include/config/config.php file from 5.0.5 is NOT compatible with 5.1.2. You will need to 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 will need to move those to config.example.php.

6c. Rename your 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.

7. Next, generate a new license key:

<http://www.modernsupport.com/modernbill/index.php?type=V5>

8. Run through the upgrade wizard at [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/). It will auto-detect your v5.x install (from your config files) and perform the upgrade to the latest database schema for you. (You should always make a backup of your database before any upgrade.)

**NOTICE!** If the installer asks you for your Admin & Company information again, **DO NOT PROCEED**. This means the installer thinks you are performing a new install. Please contact support for assistance.

9. Delete the [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/) directory.

10. If you have any live credit card data in a previous v5 install, please generate a NEW v5.1 LEK PIN & HASH. Then login to your ModernBill 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.

11. Login to your ModernBill and verify your system has been upgraded. The version number is located at the bottom of your ModernBill application.

12. Check to see if you have the "New Order Email" template by going to System/Email Settings/Email Template Groups. If you do not have an associated "New Order Email" template added to the "New Order Email" group, read the Email Template Groups document to learn how to add your template. You can use the following examples for both the HTML and Text version:

HTML Body

Dear {\$contactFirstName} {\$contactLastName},

---

Thank you very much for choosing {\$companyName} as your Web and E-CommerceHosting Provider. This is your order confirmation email for your Web hostingaccount with {\$companyName}. Please note that this is not your accountinformation. An email with your username, password, and IP address will be mailed to you later once your account is setup at {\$companyName}.Contact Information:Email:{\$contactEmail}{if \$contactCompany} Company:{\$contactCompany}{/if} Address:{\$contactAddress1} {strip} {if \$contactAddress2} {\$contactAddress2} {/if} {/strip} {\$contactCity}, {\$contactState} {\$contactZip} Phone:{\$contactPhone1}{if \$contactFax} Fax:{\$contactFax}{/if} Username:{\$contactUsername}Order Information:{foreach from=\$lineltems item=lineltem} {strip} {if \$lineltem.domainName} {if \$smarty.const.`\$lineltem.domainName` } {\$smarty.const.`\$lineltem.domainName` } {else} {\$lineltem.domainName} {/if} {else} {if \$smarty.const.`\$lineltem.packageName` } {\$smarty.const.`\$lineltems.packageName` } {else} {\$lineltem.packageName} {/if} {/if} {/strip} {if \$smarty.const.`\$lineltem.cycleName` } {\$smarty.const.`\$lineltem.cycleName` } {else} {\$lineltem.cycleName} {/if} ?@? {\$lineltem.lineltemPriceAmount|getAmount:\$currencyID} {foreachelse} - Empty - {/foreach} Sub Total {\$invoiceSubTotal|getAmount:\$currencyID} Total Due {\$invoiceAmount|getAmount:\$currencyID} Thank You for Signing Up! {\$companyName} Text Body

Dear {\$contactFirstName} {\$contactLastName}, Thank you very much for choosing {\$companyName} as your Web and E-CommerceHosting Provider. This is your order confirmation email for your Web hostingaccount with {\$companyName}. Please note that this is not your accountinformation. An email with your username, password, and IP address will be mailed to you later once your account is setup at {\$companyName}.Contact Information: Email: {\$contactEmail}{if \$contactCompany} Company: {\$contactCompany}{/if} Address: {\$contactAddress1} {strip} {if \$contactAddress2} {\$contactAddress2} {/if} {/strip} {\$contactCity}, {\$contactState} {\$contactZip} Phone: {\$contactPhone1}{if \$contactFax} Fax: {\$contactFax}{/if} Username: {\$contactUsername}Order Information:{foreach from=\$lineltems item=lineltem} {strip} {if \$lineltem.domainName} {if \$smarty.const.`\$lineltem.domainName` } {\$smarty.const.`\$lineltem.domainName` } {else} {\$lineltem.domainName} {/if} {else} {if \$smarty.const.`\$lineltem.packageName` } {\$smarty.const.`\$lineltems.packageName` } {else} {\$lineltem.packageName} {/if} {/if} {/strip} {if \$smarty.const.`\$lineltem.cycleName` } {\$smarty.const.`\$lineltem.cycleName` } {else} {\$lineltem.cycleName} {/if} ?@? {\$lineltem.lineltemPriceAmount|getAmount:\$currencyID} {foreachelse} - Empty - {/foreach} Sub Total {\$invoiceSubTotal|getAmount:\$currencyID} Total Due {\$invoiceAmount|getAmount:\$currencyID} Thank You for Signing Up! {\$companyName}

If you have any questions regarding this document, please create a helpdesk ticket and reference this article.

## Update a v5 License Key

This is the process to follow for users who have an existing license and have bought a client limit upgrade and need to get their license updated to the next tier. These steps can also be used to "flash" a license key, to generate a new key for a temporary license key that has expired.

Note: If you are a demo user who has bought a real ModernBill license, please follow the Upgrading from the demo version document.

1. Login to the members area: [www.modernsupport.com/modernbill](http://www.modernsupport.com/modernbill)
2. Click on "V5 License Center"
3. Click on "Generate a v5 license key"
4. Type in the URL of your domain. Example: [www.modernbill.com](http://www.modernbill.com)
5. Click "Generate License"

---

6. A new license shows up in the box. Copy and paste all of this key into a new file called "newkey.php"

7. Upload this file to your ModernBill directory in "lib-modernbill/include/config/" The full path (under Linux) should look something like this: /home/www/vhosts/modernbill/lib-modernbill/include/config/

8. Go to your ModernBill admin login page (app-modernbill-admin). You should see an orange screen with instructions telling you to rename the file you uploaded from "newkey.php" to "key.php"

9.) Rename the file you uploaded (newkey.php) to "key.php"

10. Refresh the page and login to your ModernBill.

11. At the bottom of the page in ModernBill your license client account and type should show correctly.

## Upgrade from 5.1.X to 5.2.x

NOTICE: If you are upgrading from 5.0.X, please read the document Upgrade from 5.0.5 to 5.1.X as there are additional steps specific to that version.

1. Clear any theme templates (\*.tpl.php) from your temp directory. Tip: on Linux servers, this is typically /tmp. On Windows servers, this is typically C:\Temp.

2. Create a backup copy of your current ModernBill fileset and ModernBill database. To create a backup of your ModernBill system, rename your modernbill directory to modernbill\_bk or whatever makes sense to your organization.

To create a backup of the database, use phpMyAdmin or follow the SSH command line option below:

```
mysqldump -uUsername -pPassword --opt dbname > file
```

- a. Replace Username and Password with your database username and password, respectively.
- b. Replace dbname with the name of your ModernBill database.
- c. Replace file with the name you want to call your file.

3. Go to your member's 5.x download area:

<http://www.modernsupport.com/modernbill/index.php?type=downloads>

4. Download the latest version of ModernBill.

5. Upload your files to a new directory. If you need instructions on how to upload your fileset, please view the Installing ModernBill v5 document.

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

6. Next, 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

7. Run through the upgrade wizard at [yourdomain.com/modernbill/app-modernbill-admin/install/](http://yourdomain.com/modernbill/app-modernbill-admin/install/). It will auto-detect your v5.1.x install (from your config files) and perform the upgrade to the latest database schema for you. (You should always make a backup of your database before any upgrade.)

7b. The installer validates your members login information and checks that the license key on file matches your domain. If the installer doesn't recognize your license key, generate a new license key

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in the member's center:

<http://www.modernsupport.com/modernbill/index.php?type=V5>

NOTICE! If the installer asks you for your Admin & Company information again, DO NOT PROCEED. This means the installer thinks you are performing a new install. Please contact support for assistance.

8. Delete the `yourdomain.com/modernbill/app-modernbill-admin/install/` directory.

9. Login to your ModernBill and verify your system has been upgraded. The version number is located at the bottom of your ModernBill application.

Note: ModernBill 5.1.5 and up include additional requirement testing for optimal server performance. This has been improved in the latest CVS version to provide even more detailed explanations of potential system incompatibilities. If you receive a warning about your XML parser, you can either download the latest CVS version from the member's area or get the most up-to-date requirement script from <http://www.modernbill.com/support/requirements.txt> and save to `/modernbill/app-modernbill-admin/install/include/requirements.php` -- this script will allow you to see what is causing the warnings, and you can take the necessary steps to resolve any incompatibilities, which may include upgrading your version of PHP or recompiling with a newer version of expat.

## Safely dump and restore a ModernBill 5 MySQL database

In order to safely backup and restore your ModernBill v5 database, please follow the steps below.

### Database dump

The process is completely typical except that it needs to be ensured that the character set is utf8. To do that, the argument `--default-character-set=utf8` may be passed to both `mysql` and `mysqldump` as demonstrated below.

1. Login to your preferred command line client (SSH/Telnet, etc.).

2. Enter the following:

```
mysqldump --default-character-set=utf8 -u v5_username v5_database -p | gzip > dump.sql.gz
```

You will be prompted for your database password. Enter it and a backup will be created in the current directory.

### Restoring your database

At the command line, type the following to restore your database from backup:

```
gunzip -c dump.sql.gz | mysql --default-character-set=utf8
```

Tip: make sure you are either in the directory where your backup is located or you include the path to the file in the command (ie: `gunzip -c /path/to/dump.sql.gz | mysql --default-character-set=utf8`)

If the character set encoding is not preserved properly, multibyte characters may be malformed on restoration. Symptoms of this problem include:

- Some language drop-downs have no options

- Currency symbols not being displayed correctly

- "Garbage" or unintelligible characters in client data

The language drop-downs and currency symbols can be fixed by loading `locale.sql.gz` (properly passing `--default-character-set=utf8` to MySQL) available in the Misc. Downloads page of the Download Center (member login required).

# Quick Config

## **IMPORTANT: Quick Config**

You must follow the steps listed below before you can successfully use your new ModernBill system.  
NOTICE! These steps must be followed in the order listed.

### Setup gateway (Payment Group)

1. Go to System/Payment Settings/Payment Groups.
2. Click on the "edit" icon in the Actions column for the default Payment Group ID "1" column.
3. When the page loads you can rename "PG1" to any Payment Group Name specific to your needs.
4. Modify the Payment Group Currency to your specific needs. The default currency is listed as "USD."
5. Select the gateway you want to use from the Add Primary Gateway drop down menu.
6. If you want to add a second gateway to your payment group, select the gateway from the Add Secondary Gateway drop down menu.
7. Click on the "Edit Payment Group" button.
8. When the page loads, click on the Payment Group ID link and you should see the gateway listed.

Note: Make sure you setup your gateway(s) according to the instructions specific to your gateway(s) in Modules/Gateways.

### Setup Encryption Settings

Follow the Setting Up Credit Cards document.

### Setup Registrar Module

1. Go to System/Domain Settings/Registrar Modules.
2. Click on the registrar module you want to configure.
3. Enter your settings according to your specific account information.

Note: Make sure you setup your registrar(s) according to the instructions specific to your registrar(s) in Modules/Registrars.

### Setup TLDs

1. Go to System/Domain Settings/Domain TLD Settings.
2. When the page loads you will see a list of default TLDs.
3. Click on the pencil icon in the Actions column for the TLD you want to modify. Before you continue on to Step 4, please read the following note.

Note: If you are using multiple registrars for the same TLD such as .com, you will need to have multiple instances of the .com TLD Name. To do this simply create another .com TLD entry and name it according to your specific needs. An example is shown below:

.com - eNom

---

.com - Register.com  
.com - OpenSRS

Or you can have multiple entries for a single TLD for only one registrar as shown below:

.com - eNom-Shared  
.com - eNom-Reseller  
.com - eNom-Dedicated

Each TLD name can be different.

4. Set the following (You can use the default settings, modify, or add according to your specific needs):

Name: Enter the name of your TLD based on the note section in Step 3 above.

Extension: Enter the TLD extension such as com/net/co.uk/ etc.

Registrar: Select the registrar you want to use for this TLD in the drop down menu.

Active: If this TLD is active, check the box. If the TLD is not active, make sure the box is unchecked.

Whois Server: Enter the whois server you want to use for this TLD.

Whois Response: Enter the response that is returned when you do a whois lookup to the whois server you are using.

Auto Search: Check the Enabled box if you want the system to search for this TLD when the user is searching for another TLD. For example, a user is searching for a .biz domain. If you have the .com Auto Search checked, the user will see the results of the .com domain and if its available or not in addition to the .biz domain they are searching.

Is Transferable: Check the Yes box if the domain can be transferred.

Transfer Type: Select from the following:

Code  
Fax  
Email  
Mail

Transfer Minimum Term: Select the minimum number of years this TLD can be transferred in the drop down menu.

Minimum Term: Select the minimum number of years this TLD can be registered.

Maximum Term: Select the maximum number of years this TLD can be registered.

Local Renew Type: Select from the following:

Disabled  
Auto Renew  
ModernBill Renew

IDN Support: Check the Yes box if this TLD requires IDN support.

IDN Type: Select from the following:

Punycode

Remote Lock: Check the Enabled box if you want to have the domain locked at the registrar level. (More information will be provided post v5 stable release).

5. Click on the "edit tld" button.

#### Associating TLDs To Order Forms

During the installation of ModernBill you have the option to install a default Domain Registration product. This type of product must be created if you plan on selling and registering domains for your customers. If you selected to create the Domain Registration product during the installation process, follow the instructions below to learn how to associate your TLDs with your Order Forms.

1. Go to Products.

2. Click on the Products "plus sign" in the Products section.

3. Click on the arrow next to "Filter By: Active" and leave the drop down selected as "Show All."
4. When the page loads you will see Product Name "Domains" and Product Type "Domain Registration Product."
5. Click on the "magnifying glass" icon in the Actions item.
6. Click on the "Set Order Forms" link.
7. Move the order forms(s) from the Selectable box to the Selected box. You can either double-click each order form or you can highlight each order form using ctrl+left mouse click.
8. Next, click on the "edit product order forms" button.
9. Once you have saved your settings, click on the "Set TLDs" link.
10. Move the TLD(s) from the Selectable box to the Selected box. You can either double-click each order form or you can highlight each order form using ctrl+left mouse click.
11. Next, click on the "edit product tlds" button.

#### Setup your Server Groups

1. Go to System/Server Settings/Server Group Settings.
2. By default you will see 1 "List Servers" in the Server Group ID column. Click on the "List Servers" link. The "Add A Panel" drop down menu will appear below the "List Servers" record (Also called SG1). Select the control panel you want to use for this Server Group and then click on the "Add" button.

Note: You can only add the same type of control panel to one Server Group. For example, if you add DirectAdmin to your Server Group, you cannot add Plesk or Ensim, or any of the other available control panels. If you need to setup different types of control panels, add a new Server Group by clicking on the "add server group" button.

3. When the page loads, you can configure your module settings.
4. Once Step 3 is completed, go back to System/Server Settings/Server Group Settings and click on the Server Group ID you added your control panel to in Step 2 above. You will then see your control panel has been added to the server group. To add additional control panels, click on the next control panel link (contains a plus sign).

#### Setup Order Form

View the Setting Up Your Order Form(s) document.

#### Product Setup

View the Creating Products document.

#### Tax Setup

View the Setting Up Taxes document.

#### Email Setup

View the Setting Up Email document.

**Admins**

---

## Adding ModernBill Administrators

You can add as many ModernBill administrators to your system as needed for your specific business needs. To get started, read the directions below.

1. Go to System/System Settings/Admin Settings/Add New Admin.
2. Enter the following information:

First Name: Enter the administrator's first name.  
Last Name: Enter the administrator's last name.  
Email: Enter the administrator's email address.  
Username: Enter the administrator's username.  
New Password: Enter the administrator's password.  
Enter Password Again: Confirm the administrator's new password by entering it again.  
Language: Select the language you want the administrator to use.  
Country: Select the administrator's country.

3. Click on the "Add Admin Profile" button.
4. When the page loads, two new options are available: Active and Assigned Admin Groups.
5. To active the administrator, click on the "Active" radio button next to the Active label.
6. To assign the administrator to specific administrator groups, check all that apply in the Assigned Admin Groups list.
7. Click on the "Update Profile" button.

## Setting Up Administrator Groups

1. Go to System/System Settings/Admin Settings/Manage Admin Groups.

## Viewing Administrators

You can view a list of your administrators by going to System/System Settings/Admin Settings. Once the page loads, you will see a list of all the administrators you have created.

## Editing Administrator Profiles

You can edit one or all of your administrator profiles. To get started, follow the directions below.

1. Go to System/System Settings/Admin Settings.
2. When the page loads, click on the magnifying glass icon in the Actions column.
3. Next, click on the "Edit" link under Actions.
4. Edit the administrator's profile accordingly.
5. Click on the "Update Profile" button.

# Automation

## Setting Up Automation

Utilize the new System Queue to process all automated items in your ModernBill v5 system. You will also need to configure the Payment Queue.

System Queue  
Payment Queue  
Setting Up The Cron Job

### System Queue

The System Queue allows you to process:

- Run any amount of items at a time.
- Create accounts on any supported control panel.
- Auto-Suspend/Enable accounts on any supported control panel.
- Process payments.
- Process domains.

The first thing you want to do is configure your System Queue settings. Follow the directions below to get started.

1. Go to System/Automation Settings/System Queue Settings.
2. Enter the number of items you want the System Queue to process at a time in the Number of System Queue items to run a time textbox. The default value is set to "3."
3. You can choose to process Active Clients based on the following:

- Do not run these items.
- Client does not have a balance due.
- Customer paid this item's invoice.
- Even if the invoice has not been paid.

Make your selection in the Active Clients Run If drop down menu.

4. You can choose to process New Clients based on the following:

- Do not run these items.
- Client does not have a balance due.
- Customer paid this item's invoice.
- Even if the invoice has not been paid.

Make your selection in the New Clients Run If drop down menu.

5. You can choose to process New Client Domain Orders based on the following:

- Do not run these items.
- Client does not have a balance due.
- Customer paid this item's invoice.
- Even if the invoice has not been paid.

Make your selection in the New Client Domain Orders drop down menu.

---

6. You can choose to process Active Domains based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the Domain Active Type drop down menu.

7. You can choose to process Domain Renewals based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the Domain Renewals Run If drop down menu.

8. You can choose to process Domain/Hosting calls based on the following:

Run the panel call first.  
Run after the panel call, even.....  
Ignore the panel call order.....

Make your selection in the Domain/Hosting calls drop down menu.

9. Click on the "Save Settings" button.

#### Payment Queue

1. Go to System/Payment Settings/Payment Queue.

2. Set the following:

Payment Queue Action: Your choices are:

Charge - This determines whether the items in the payment queue get sent to the gateway as Charge, also called AUTH\_CAPTURE.  
Authenticate Only - Authorization Only and requires a payment capture at a later point in time.

Process New Invoices: Do you want to process new invoices? Select Yes/No.

Process Declined Transactions: Do you want to process declined transactions? Select Yes/No.

Process Errored Transactions: Do you want to process errored transactions? Select Yes/No.  
Only Charge on the Due Date? Do you want to charge and process invoices on their due date only? Select Yes/No.

Clear the Payment Queue first: Do you want to clear the payment queue first? If you set this to No, invoices could get charged twice. Select Yes.

Try Lesser Amounts: If a transactions fails, do you want to try to process for lesser amounts on the credit card? This will process a partial payment if the lesser amount is successfully charged.

Batch Days Before Due: How many days do you want to batch invoices before their due date? Enter the number of days according to your specific needs.

3. Click on the "Save Settings" button.

#### Setting Up The Cron Job

The system automatically adds an administrator user called "Cron User." This user has a Remote Access Hash needed to run the System Queue for complete automation. Follow the steps below to get your Cron Job setup.

1. Go to System/System Settings/Admin Settings.
2. Find the "Cron User" record.
3. Click on the magnifying glass icon.
4. Copy the Remote Access Hash.
5. Open your /path/to/mb/lib-modernbill/include/config/config.php/ file and paste the "Remote Access Hash" as shown below.

```
$CONF["remoteAccessHash"] = "f2ad7647377beb58808b8ffceff5527d4f9d4c1d";
```

6. Save the file.

7. Next, setup your cron job on your server to run the /path/to/mb/app-modernbill-admin/sbin/runevents.php file. View the example below.

```
*/* * * * * /path/to/php /path/to/mb/app-modernbill-admin/sbin/runevents.php
```

\*/\* \* \* \* \* (This sets it to run every five (5) minutes. You can set this to run whenever you need based on your specific needs. The recommended time is every five (5) minutes.)

#### Check Your Cron User Permissions

In order for cron and automation to run properly, your cron admin user must be assigned the permissions needed to run cron.

1. Go to System/System Settings/Admin Settings.
2. Find the "Cron User" record.
3. Click on the pencil icon.
4. In the row "Assigned Admin Groups", make sure the cronadmin box is checked. Click the "update profile" button to save the changes.

## Your First Cronjob

Creating a cronjob is simple once you understand the basic format. Below is a step by step guide to help you learn how to create a cronjob.

Please note: these are NOT instructions for setting up automation for ModernBill, but rather to help you understand the process of creating a cronjob. To set up your cron job for ModernBill, follow the instructions in the Setting Up Automation document, or skip directly to the Setting Up The Cron Job section.

1. Login to your server using SSH or Telnet.
2. Once logged in, type the following on the command line and click enter. The command is highlighted in blue.

```
[root@ns1 cronjobs]# crontab -l
```

If you do not have any cronjobs in your crontab, your screen will look similar to the following:

```
bash-2.05a$ crontab -l
```

```
# DO NOT EDIT THIS FILE - edit the master and reinstall.
# (/home/username/.crontab installed on Wed Jul 16 13:19:06 2003)
# (Cron version -- $Id: crontab.c,v 2.13 1994/01/17 03:20:37 vixie Exp $)
bash-2.05a$
```

3. To add cronjobs to your crontab list, type the following on the command line and click enter. The command is highlighted in blue.

```
bash-2.05a$ crontab -e
```

4. When the new screen appears, add the MAILTO line as the first entry in the file. See the example below.

```
MAILTO=admin@mydomain.com
```

5. Next, add your cronjobs to the file. Our example cronjobs are highlighted in red. You can add as many cronjobs as you need.

```
MAILTO=admin@mydomain.com
```

```
05 4 * * * /root/cronjobs/build-devo-full-src.sh
```

---

```
10 4 * * * /root/cronjobs/create-daily-changelog.sh
15 4 * * * /root/cronjobs/build-cvs-full-ion.sh
20 4 * * * /root/cronjobs/build-cvs-full-zend.sh
30 6 * * * /root/cronjobs/sync-manual.sh
```

6. Now save the file.

7. If you need to make changes or additions to the crontab file, follow Step 3 above.

8. To view your newly created crontab, follow Step 3 above.

## What is a cronjob?

A cronjob (cron daemon) is a long running process that executes commands at specific dates and times.

For commands that need to be executed repeatedly (e.g. hourly, daily or weekly), use crontab, which has the following options:

`crontab filename` Install the filename as your crontab file.

`crontab -e` Edit your crontab file.

`crontab -l` Show your crontab file.

`crontab -r` Remove your crontab file.

The crontab command creates a crontab file containing commands and how often cron should execute them. Each entry in a crontab file consists of six fields, specified in the following order:

Field Value Description

minute 0-59 The exact minute that the command sequence executes.

hour 0-23 The hour of the day that the command sequence executes.

day 1-31 The day of the month that the command sequence executes.

month 1-12 The month of the year that the command sequence executes.

weekday 0-6 The day of the week that the command sequence executes. Sunday=0, Monday = 1, Tuesday = 2, and so forth.

command Special The complete command sequence variable that is to be executed.

Each of the patterns from the first five fields may either be an asterisk (\*) (meaning all legal values) or a list of elements separated by commas. An element is either a number or two numbers separated by a minus sign (meaning an inclusive range).

Note that the specification of days may be made by two fields (day of the month and day of the week). If both are specified as a list of elements, both are followed. For example:

```
MAILTO=user@domain.com
0 0 1,15 * 1 /big/dom/xdomain/cgi-bin/scriptname.cgi
```

The cron daemon would run the program scriptname.cgi in the cgi-bin directory on the first and fifteenth of each month, as well as on every Monday and email the results to user@domain.com. To specify days by only one field, the other field should be set to \*. For example:

```
MAILTO=user@domain.com  
0 0 * * 1 /big/dom/xdomain/cgi-bin/scriptname.cgi
```

The program would then only run on Mondays and email the results to user@domain.com.  
Note: If a cron job specified in your crontab entry produces any error messages when it runs, they will be reported to you via email.

## Credit Cards

### Setting Up Credit Cards

Credit cards are setup per gateway. However, before you can accept and use credit cards in your system, you must setup your encryption settings. Follow the instructions below.

1. Go to System/System Settings/Encryption Settings.
2. If you want to store credit cards in your ModernBill system, enter "Agree" in the Encryption Agree textbox.
3. Next, go to your member's license area located at <http://www.modernsupport.com/modernbill/index.php?type=v5lek>.
4. Enter your encryption key in the textbox provided. The encryption key is any alphanumeric value that you make up. It can be anything you want it to be.
5. Select your four digit PIN from the four drop down menus.
6. Click on the "Generate LEK Hash" button.
7. When the page loads, the Encryption Hash is generated. Copy the Encryption Hash.
8. Enter the Encryption Hash you copied in Step 7 above and enter it in the Encryption Hash textbox.
9. Enter the pin you selected when you created your Encryption Hash in the Encryption LEK Pin textbox.
10. Click on the "Save Settings" button.

## Customizations

*There are no articles in this category.*

## Directories

### Renaming your ModernBill directories.

You can now rename the directories to whatever you want in ModernBill 5.

NOTICE! The interface directory names CAN be changed, however you must go through the installer before changing them.

1. Open the aliases.php file in the lib-pkg directory.
2. The following directory structure will be listed by default:

```
$ _MB_ALIASES["app-modernbill-admin"] = "app-modernbill-admin";  
$ _MB_ALIASES["app-modernbill-client"] = "app-modernbill-client";  
$ _MB_ALIASES["app-modernbill-order"] = "app-modernbill-order";
```

3. You MUST leave the original directory name "as is" in the left column as highlighted in red below:

```
$ _MB_ALIASES["app-modernbill-admin"] = "app-modernbill-admin";  
$ _MB_ALIASES["app-modernbill-client"] = "app-modernbill-client";  
$ _MB_ALIASES["app-modernbill-order"] = "app-modernbill-order";
```

4. In our example we are going to rename each of the default directories to another name as highlighted in red below:

```
$ _MB_ALIASES["app-modernbill-admin"] = "admin";  
$ _MB_ALIASES["app-modernbill-client"] = "client";  
$ _MB_ALIASES["app-modernbill-order"] = "order";
```

Note: You can name the directories to anything you want according to your specific needs. Our example above is to demonstrate simplicity.

5. If there are other "app" or "lib" directories in your ModernBill installation, add an additional line for each directory as highlighted in red below:

```
$ _MB_ALIASES["app-modernbill-admin"] = "app-modernbill-admin";  
$ _MB_ALIASES["app-modernbill-client"] = "app-modernbill-client";  
$ _MB_ALIASES["app-modernbill-order"] = "app-modernbill-order";  
$ _MB_ALIASES["app-helpdesk"] = "app-helpdesk";  
$ _MB_ALIASES["lib-action"] = "lib-action";  
$ _MB_ALIASES["lib-data"] = "lib-data";
```

6. Save the file and start using your new directory names.

**\*\* IMPORTANT \*\***

If you change the default directory names, upgrading ModernBill will require you to make these changes each time. This will ensure that your renamed directories contain the most current updates after an upgrade.

## Order Form

### Customizing The Order Form

You can easily customize the ModernBill v5 order form by editing the smarty template files and CSS in your theme directory. Follow the instructions below.

1. Go to your /lib-themes/default/app-modernbill-order/templates/shopping directory.
2. There are two files you need to modify:

```
header.tpl  
footer.tpl
```

3. Open the header.tpl file. You can modify any of the code below the `<tag>` tag. Save the file after you

have completed your modifications.

4. Open the footer.tpl file. You can modify any of the code above the tag. Save the file after you have completed your modifications.

5. You can modify the style sheet by going to the /lib-themes/default/lib-modernbill/css/ directory and view the shoppingstyle.css file.

Note: You can change the background color by modifying the following section of code:

```
body {  
    font-family: "Tahoma", sans-serif;  
    font-size: 10px;  
    background-color: #cfc7c7;  
}
```

## Website Widgets

### Customizing Website Widgets

Customizing your ModernBill website widgets can be done easily with a little html and php knowledge. We show you how and what to modify, now it's up to you to be as creative as you can with your own unique design skills. To get started, follow the instructions below.

1. Go to the /your-modernbill-directory/lib-themes/default/app-modernbill-order/templates/website\_widgets directory.

2. You will see a list of .tpl files. These are the Smarty templates used to define the "look and feel" of your website widgets.

```
README  
ppcSpecialOfferWidget-List.tpl  
simpleWidget-Grid.tpl  
ppcSpecialOfferWidget-Grid.tpl  
simpleSingleProductPlusAddons.tpl  
simpleWidget-List.tpl
```

There is a README file in the directory as well. Read through it to see an example. The README file was written by the ModernBill development team.

3. Modify the .tpl file according to the type of website widget you are using. For example, if you are using the simpleWidget-Grid, you will need to modify the simpleWidget-Grid file. If you are not familiar with the types of widgets available or how to use the widgets, please read the Website Widgets document.

## Email

### Setting Up Email

ModernBill v5 provides an extensive email system that allows you to send emails based on locale.

Before you get started, review the following terms:

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Email Actions: Email actions are specific to each type of email group you will use in your system specific to the following:

- Packages
- Invoices
- Credit Card Payment
- eCheck Payment
- Bank Draft Payment
- Manual Payment
- Secondary Gateway Payment
- Declined Payment
- Payment Error
- Domain Renewal
- Domain Transfer - Success Email
- Domain Transfer - Failure Email
- Credit Card Expiration Notification
- Package Suspension
- Package Enable

Note: Email Actions are predefined by default and cannot be modified.

To get started, follow the instructions below.

1. Go to Events/Emails.
2. Find the Email Template Group you want to add an email template to and click on the "add" button.
3. Set the following options:

- Email Template Group Name: Enter the name of template group you want to create.
- Email Action: By default, the email action you selected on the previous page will already be selected. If not, select the type of email action from the Email Action drop down menu.
- Email From: Name: Enter the "From" name.
- Email Reply-To: Name: Enter the "Reply-To" name.
- Email CC: Address: Enter the "CC" email address.
- Email From: Address: Enter the "From" email address.
- Email Reply-To: Address: Enter the "Reply-To" email address.
- Email BCC: Address: Enter the "BCC" email address.

4. Click on the "save email template group data" button.
5. When the page loads, you will see a checkmark next to Email Templates at the bottom of the page. Click on the "add locale" button.
6. Set the following options:

- Locale Language: Select the locale language you want to use from the drop down menu.
- Locale Region/Country: Choose how you want to apply this email template.
  - Apply to All countries
  - Apply to ONE country
  - Apply to REGION of countries

- Locale Language Default: This is used to indicate that the system should use this email template if it cannot match any another template to the contact's locale
- Email Template Subject: Enter the subject of your email.
- Email Template HTML Body: Enter the body of your email template in html format.
- Email Template Text Body: Enter the body of your email template in text format.

Note: All contacts are set to receive HTML by default when they come through the order form. If you do not want a specific client to receive HTML emails, go to the client's account details page and click on the "edit primary" button. When the page loads, uncheck "HTML" for the Email Format. Click on the "edit contact" button.

---

7. Reload Options (New in 5.1.3): If you need to reload the original email templates, perform the following steps:

- a. Select the template you want to reload.
- b. Reload HTML: Select Yes.
- c. Reload Text: Select Yes.

Caution: this will replace this existing template. Please make a backup of your existing template if you do not wish to lose it.

8. Click on the "save" button.

9. When the page loads, you will see your new template added with the local you want to use for the email template group you selected. You can add as many email templates to this group or any other group as you need based on your specific needs.

10. Repeat Steps 1-8 above until you have created all the templates you need specific to your needs.

## Invoices

### Setting Up Invoicing

You can setup invoicing to support the following:

- Invoice Active Clients
- Invoice Suspended Clients
- Invoice Active Packages
- Invoice Suspended Packages
- Invoice Active Domains
- Send Invoice e-mail notification

The system also allows you to select how you want to number your invoices such as:

- YEAR-ID, example 2006-1234
- YEAR-SEQ, example: 2006-1
- VATYEAR-SEQ, example 2006-1

Set the sequence of your invoices. For example, you can start with "1" or "1000" or any number specific to your business needs.

Invoicing is one of the many features used by ModernBill to create accounting entries. The basic accounting entries that get created for an invoice are as follows:

**Income:** The amount of money you have coming in from the invoice in reference, not including taxes.

**Taxes Payable:** The amount of money that you are going to pay in taxes for the invoice in reference.

**Accounts Receivable:** The amount of money (income + tax) you will receive from the customer for the invoice in reference.

There are other accounting entries that can be made during invoice creation, but those are controlled by you. For example, coupon cost. When someone uses a coupon, ModernBill will keep

---

track of how much the product they purchased WOULD have cost them had they not used a coupon. The system creates the appropriate expense entries each time an invoice is created.

In addition to coupon cost, there is product cost. You have the ability to associate generic accounting entries with each product created. These entries are created each time a package of that product type is included on an invoice.

## Localization

*There are no articles in this category.*

## Modules

### **Mod\_ModernBill**

Module: Mod\_ModernBill

The Mod\_ModernBill Module supports REAL-TIME connections from the billing system to the ModernBill Reseller Program. This will allow your customers to automate the purchasing process of their resold ModernBill licenses. Before you can setup your ModModernBill module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the [Setting Up A Server Group](#) document. Once you have successfully created a Server Group, follow the instructions below.

You will be able to only execute the following command:

Create Account

Step 1: Create a ModernBill Reseller Account (Not Available to Demo Customers)

Browse to the ModernBill Members Area at:

<https://www.modernsupport.com/modernbill>

Select the Reseller Center and follow the prompts for creating a reseller account.

Step 2: As stated in the [Setting Up A Server Group](#) document, you have a default Server Group created. You can use the default Server Group to add your ModModernBill module or you can use any of the Server Groups you have created.

Step 3: Select ModModernBill from the list of panels.

Step 4: When the page loads, fill out the form as described below.

Server Name: Enter the name you want to call this Module for display purposes.

Enabled: Select Yes.

Username: Enter the username to the ModernBill support area.

Password: Enter the password to the ModernBill support area.

ModernBill Reseller ID: Enter your reseller ID. This field was mistakenly labeled as URL in its first release.

---

Account Name Rule: Select the type of name rule you want to apply to the username.

Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.

Username Sequence: Enter the numeric value you want to use for the username sequence.

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Step 5: Click on the "Submit" button.

Once you have successfully setup the ModModernBill module and created a hosting product, follow the instructions below.

1. Click the Products tab and locate the hosting product to which you wish to add ModModernBill license attributes.
2. Click the ID of the hosting product.
3. Click the "server groups" link and move your ModModernBill server to the "Selected" box by highlighting it and clicking the "

## Control Panels

### Setting Up A Server Group

A Server Group contains one or more control panel modules. Each Server Group can only use one type of control panel. For example, if you use cPanel and Plesk, you need to setup a separate Server Group for each control panel. Each Server Group supports unlimited servers per control panel type. Follow the instructions below to setup a Server Group.

1. Go to System/Server Settings/Server Group Settings.
2. By default you will see "1 List Servers" in the Server Group ID column. You can start with the default Server Group and add your control panel modules accordingly. To do so, follow the document specific to your control panel in Modules/Control Panels.
3. If you want to add a new Server Group, click on the "Add" link.
4. When the page loads, enter the name of the server group you are adding in the Server Group Name textbox.
5. Select how you want accounts to be created on the servers associated with this Server Group in the Server Group Fill Type drop down menu.

You can select either "Least Full" where accounts are created on servers with the fewest amount of accounts or you can select "Fill One At A Time" where accounts are created on one server at a time.

---

6. Click on the "Submit" button.

## Control Panel Comparison Chart

Hold your mouse over the "Control Panels" headers such as Plan, Custom, Win, Reseller, and Auto Plan.

Control Panels	Plan	Custom	Win	Reseller	Auto Plan	Usage
Direct Admin	X					
	X					
	X					
	X					
Plesk						
	X					
	X					
cPanel						
	X					
	X					
Ensim						
	X					
	X					
	X					
TCAdmin						
	X					
	X					
	X					
Helm						
	X					
	X					
	X					
	X					

FreeRadius

x

x

## cPanel

### Setting Up cPanel

Before you can setup your cPanel module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your cPanel module or you can use any of the Server Groups you have created.
2. Once Step 2 is completed, click on the Server Group ID you want to use for your cPanel module(s). Click on the "+ cPanel" link.
3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this cPanel server.

Enabled: Select Yes.

Username: Enter the username to the cPanel/WHM interface.

Host: Enter the hostname of the cPanel/WHM interface. ie., localhost or IP Address of remote server

Access Hash: Enter the access has you created in your cPanel/WHM administration interface.

Notes: You can configure the module to connect to a local or remote cPanel server. The key is to make sure that the Host, User, and AccessHash are setup properly. If you receive this error message: "Access Denied", then one of the above settings is not correct.

Make sure you remove the -----BEGIN WHM ACCESS KEY----- and -----END WHM ACCESS KEY----- lines in your cPanel AccessHash.

Use SSL: Set to Yes if your cPanel server uses SSL (Port 2087)

Account Name Rule: Select the type of name rule you want to apply to the username.

Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.

Username Sequence: Enter the numeric value you want to use for the username sequence.

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Maximum Server Weight: How many accounts do you want to create on this cPanel server? Enter the number.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

4. Click on the "Submit" button.

## cPanel Reseller

*There are no articles in this category.*

## DirectAdmin

### Setting Up DirectAdmin

Before you can setup your DirectAdmin module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your DirectAdmin module or you can use any of the Server Groups you have created.
2. Once Step 2 is completed, click on the Server Group ID you want to use for your DirectAdmin module(s). Click on the "[+ DirectAdmin](#)" link.
3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this DirectAdmin server.

Enabled: Select Yes.

Username: Enter the username to the DirectAdmin interface.

Password: Enter the password to the DirectAdmin interface.

URL: Enter the url to the DirectAdmin server.

IP: Enter the IP to the DirectAdmin server.

Account Name Rule: Select the type of name rule you want to apply to the username.

Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.

Username Sequence: Enter the numeric value you want to use for the username sequence.

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Maximum Accounts: How many accounts do you want to create on this DirectAdmin server? Enter the number.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

4. Click on the "Submit" button.

## Ensim

### Setting Up Ensim

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Before you can setup your Ensim module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your Ensim module or you can use any of the Server Groups you have created.
2. Once Step 2 is completed, click on the Server Group ID you want to use for your Ensim module(s). Click on the "+ Ensim" link.
3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this Ensim server.  
Enabled: Select Yes.  
Symbolic Link Append String: Enter the symbolic link append string. It is already set to -XYZ by default.  
Shared IP: Enter the IP to the Ensim server.  
Account Name Rule: Select the type of name rule you want to apply to the username.  
Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.  
Sequence: Enter a numeric sequence. Example: 1 or 10 or any number you choose. The number will increment with each account. If you choose to use this option, select "Add Sequence" from the "Account Name Rule" drop down menu.

#### Username Rules

Minimum Username Length: Enter the minimum length for the username.  
Maximum Username Length: Enter the maximum length for the username.

#### Password Rules

Minimum Password Length: Enter the minimum length for the password.  
Maximum Password Length: Enter the maximum length for the password.

#### Account Limits

Maximum Server Weight: You can determine the significance of each account on this server. For example, if the accounts are for resellers and will be using a lot of disk space and bandwidth, enter a high weight value.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

#### Nameservers

Nameserver 1: Enter a value.

Nameserver 1 IP: Click the "get ip" button to retrieve the IP value for Nameserver 1.

Nameserver 2: Enter a value.

Nameserver 2 IP: Click the "get ip" button to retrieve the IP value for Nameserver 2.

Nameserver 3: Enter a value.

Nameserver 3 IP: Click the "get ip" button to retrieve the IP value for Nameserver 3.

Nameserver 4: Enter a value.

Nameserver 4 IP: Click the "get ip" button to retrieve the IP value for Nameserver

4.

4. Click on the "Submit" button.

5. Create symbolic links to the VirtDomain scripts on the local server, using the same append string you used when you configured the module in the previous steps. For our example, we would use the following commands to create the needed links:

```
cd /usr/local/bin
ln -s AddVirtDomain AddVirtDomain-XYZ
ln -s DeleteVirtDomain DeleteVirtDomain-XYZ
ln -s EnableVirtDomain EnableVirtDomain-XYZ
```

```
In -s DisableVirtDomain DisableVirtDomain-XYZ
In -s EditVirtDomain EditVirtDomain-XYZ
In -s ListAllVirtDomains ListAllVirtDomains-XYZ,
In -s DomainExists DomainExists-XYZ,
In -s AddReseller AddReseller-XYZ
```

6. Edit the file `/etc/sudoers`. Add the following lines to the end of the file, substituting your link names as needed.

```
    Cmnd_Alias ENSIM = /usr/local/bin/AddVirtDomain-XYZ, \
/usr/local/bin/DeleteVirtDomain-XYZ, \
/usr/local/bin/EnableVirtDomain-XYZ, \
/usr/local/bin/DisableVirtDomain-XYZ, \
/usr/local/bin/EditVirtDomain-XYZ, \
/usr/local/bin/ListAllVirtDomains-XYZ, \
/usr/local/bin/DomainExists-XYZ, \
/usr/local/bin/AddReseller-XYZ
apache ALL=(ALL) NOPASSWD: ENSIM
```

7. Save and close the file.

Note: You will need to edit the `sudoers` file and make sure that the following, if present, is commented out: `Defaults requiretty`

## Ensim Unify

### Setting Up Ensim Unify

Before you can setup your Ensim Unify module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the [Setting Up A Server Group](#) document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the [Setting Up A Server Group](#) document, you have a default Server Group created. You can use the default Server Group to add your Ensim Unify module or you can use any of the Server Groups you have created.
2. Once Step 2 is completed, click on the Server Group ID you want to use for your EnsimUnify module(s). Click on the "[+ Ensim Unify](#)" link.
3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this Ensim Unify server.  
Enabled: Select Yes.  
Ensim Unify Username: Enter the username to your Ensim Unify server.  
Ensim Unify Password: Enter the password to your Ensim Unify server.  
Ensim Unify Url: Enter the Url to your Ensim Unify server.  
Ensim Unify IP: Enter the IP address to your Ensim Unify server.

#### Username Rules

Minimum Username Length: Enter the minimum length for the username.  
Maximum Username Length: Enter the maximum length for the username.

#### Password Rules

Minimum Password Length: Enter the minimum length for the password.  
Maximum Password Length: Enter the maximum length for the password.

#### Account Limits

Maximum Server Weight: You can determine the significance of each account on this

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server. For example, if the accounts are for resellers and will be using a lot of disk space and bandwidth, enter a high weight value.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

### Nameservers

Nameserver 1: Enter a value.

Nameserver 1 IP: Click the "get ip" button to retrieve the IP value for Nameserver 1.

Nameserver 2: Enter a value.

Nameserver 2 IP: Click the "get ip" button to retrieve the IP value for Nameserver 2.

Nameserver 3: Enter a value.

Nameserver 3 IP: Click the "get ip" button to retrieve the IP value for Nameserver 3.

Nameserver 4: Enter a value.

Nameserver 4 IP: Click the "get ip" button to retrieve the IP value for Nameserver 4.

4. Click on the "Submit" button.

## **Charging for e-mail account usage (SPLA) Ensim Unify**

### Setup

Make sure the following are setup and configured properly:

Setup your Server Group and Ensim Unify module.

Setup your base packages in that server group tied to a Unify template. Ex: Silver Hosted Exchange, Gold Hosted Exchange. To learn how to setup and configure a product, view the Hosting Product document.

Setup a "usage" type product for each e-mail type to be sold tied to that server group and e-mail type (the e-mail type linkage is setup on the attributes screen). The price for each of these products should be the per e-mail account price. Ex: Basic Exchange Account, Medium Exchange Account, Large Exchange Account, Super Duper Exchange Account. To learn how to create a "usage" type product, view the Usage Product document.

### Day-to-Day Operations

New orders for these base packages will automatically get one of each e-mail "usage" packages tied to this server group at the time of provisioning to Unify.

The daily "Process Usage" event will run if the ModernBill cron is setup and pull the number of each e-mail accounts in use and update the quantity of each e-mail usage package.

When invoicing runs, the e-mail usage packages will calculate the total amount due for each e-mail usage package based on the per e-mail account price.

## FreeRadius

### **Setting Up FreeRadius**

Before you can setup your FreeRadius module, you MUST have a Server Group setup. To learn

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how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your FreeRadius module or you can use any of the Server Groups you have created.

2. Once Step 2 is completed, click on the Server Group ID you want to use for your FreeRadius module(s). Click on the "[+ FreeRadius](#)" link.

3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this FreeRadius server.

Enabled: Select Yes.

Username: Enter the username to the FreeRadius interface.

Password: Enter the password to the FreeRadius interface.

Server: Enter the server name to the FreeRadius server.

Database Type: Select the database type of the FreeRadius server.

Database Name: Enter the name of the FreeRadius database.

Account Name Rule: Select the type of name rule you want to apply to the username.

Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.

Username Sequence: Enter the numeric value you want to use for the username sequence.

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Maximum Accounts: How many accounts do you want to create on this FreeRadius server? Enter the number.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

4. Click on the "Submit" button.

## Helm

### Setting Up Helm

Before you can setup your Helm module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your Helm module or you can use any of the Server Groups you have created.

2. Once Step 2 is completed, click on the Server Group ID you want to use for your Helm module(s). Click on the "[+ Helm](#)" link.

3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this Helm server.

Enabled: Select Yes.

Username: Enter the username to the Helm interface.

Password: Enter the password to the Helm interface.

URL: Enter the url to the Helm server.

IP: Enter the IP to the Helm server.

Account Name Rule: Select the type of name rule you want to apply to the

username.

Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.

Username Sequence: Enter the numeric value you want to use for the username

sequence.

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Maximum Accounts: How many accounts do you want to create on this Helm server? Enter the number.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

4. Click on the "Submit" button.

## Hostopia

### Setting Up Hostopia

Before you can setup your Hostopia module, you **MUST** have a Server Group setup. To learn how to setup a Server Group, view the [Setting Up A Server Group](#) document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the [Setting Up A Server Group](#) document, you have a default Server Group created. You can use the default Server Group to add your Hostopia module or you can use any of the Server Groups you have created.

2. Once Step 2 is completed, click on the Server Group ID you want to use for your EnsimUnify module(s). Click on the "[+ Hostopia](#)" link.

3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this Hostopia server.

Enabled: Select Yes.

Hostopia Username: Enter the username to your Hostopia server.

Hostopia Password: Enter the password to your Hostopia server.

Hostopia: Enter the Url to your Hostopia server.

Hostopia IP: Enter the IP address to your Hostopia server.

Account Name Rule: Select how you want account names to be setup on your Hostopia server. Your choices are:

Use the order form input username

First 8 of Domain

First 4 of Domain, Last 1, plus TLD

Use the domain name

Username Prefix

Add Suffix

Add Sequence

Generate a random username

Prefix or Suffix: Enter the string you want to add to the beginning or end of the username.

Sequence: If you selected the "Add Sequence" option in the Account Name Rule above, enter the

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

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Maximum Server Weight: Enter the maximum number of accounts you want to be created on your Hostopia server.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

#### Nameservers

Nameserver 1: Enter the nameserver you want associated with packaged created on this Hostopia server.

Nameserver 1: Enter the nameserver IP you want associated with packaged created on this Hostopia server.

Nameserver 2: Enter the nameserver you want associated with packaged created on this Hostopia server.

Nameserver 2: Enter the nameserver IP you want associated with packaged created on this Hostopia server.

Nameserver 3: Enter the nameserver you want associated with packaged created on this Hostopia server.

Nameserver 3: Enter the nameserver IP you want associated with packaged created on this Hostopia server.

Nameserver 4: Enter the nameserver you want associated with packaged created on this Hostopia server.

Nameserver 4: Enter the nameserver IP you want associated with packaged created on this Hostopia server.

Note: You can click on the "get ip" button to retrieve the IP address AFTER you have entered the nameserver. The system will retrieve this information for you.

4. Click on the "Submit" button.

## Hsphere

### Setting Up Hsphere

Before you can setup your Hsphere module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your Hostopia module or you can use any of the Server Groups you have created.

2. Once Step 2 is completed, click on the Server Group ID you want to use for your EnsiumUnify module(s). Click on the "[+ Hsphere](#)" link.

3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this Hsphere server.

Enabled: Select Yes.

Hsphere Username: Enter the username to your Hsphere server.

Hsphere Password: Enter the password to your Hsphere server.

Hsphere Url: Enter the Url to your Hsphere server.

Hsphere IP: Enter the IP address to your Hsphere server.

Account Name Rule: Select how you want account names to be setup on your Hsphere server. Your choices are:

Use the order form input username

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First 8 of Domain  
First 4 of Domain, Last 1, plus TLD  
Use the domain name  
Username Prefix  
Add Suffix  
Add Sequence  
Generate a random username

Prefix or Suffix: Enter the string you want to add to the beginning or end of the username.

Sequence: If you selected the "Add Sequence" option in the Account Name Rule above, enter the

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Maximum Server Weight: Enter the maximum number of accounts you want to be created on your Hsphere server.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

## Nameservers

Nameserver 1: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 1: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Nameserver 2: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 2: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Nameserver 3: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 3: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Nameserver 4: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 4: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Note: You can click on the "get ip" button to retrieve the IP address AFTER you have entered the nameserver. The system will retrieve this information for you.

4. Click on the "Submit" button.

# InterWorx

## Setting Up InterWorx

Before you can setup your InterWorx module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your InterWorx module or you can use

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any of the Server Groups you have created.

2. Once Step 2 is completed, click on the Server Group ID you want to use for your InterWorx module(s). Click on the "+ InterWorx" link.

3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this InterWorx server.

Enabled: Select Yes.

Password: Enter the password to the InterWorx interface.

URL: Enter the url to the InterWorx server.

Use Secure Connection: Do you want to use a secure connection? Select Yes.

Verify Peer Certificate: Do you want to verify the peer certificate? Select Yes.

Account Name Rule: Select the type of name rule you want to apply to the username.

Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.

Sequence: Enter the numeric value you want to use for the username sequence.

Minimum Username Length: Enter the minimum length for the username.

Maximum Username Length: Enter the maximum length for the username.

Minimum Password Length: Enter the minimum length for the password.

Maximum Password Length: Enter the maximum length for the password.

Maximum Server Weight: Enter the maximum number of accounts you want to be created on your Hsphere server.

Current Number of Accounts: How many accounts are currently on the server? Enter the number.

#### Nameservers

Nameserver 1: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 1: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Nameserver 2: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 2: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Nameserver 3: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 3: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Nameserver 4: Enter the nameserver you want associated with packaged created on this Hsphere server.

Nameserver 4: Enter the nameserver IP you want associated with packaged created on this Hsphere server.

Note: You can click on the "get ip" button to retrieve the IP address AFTER you have entered the nameserver. The system will retrieve this information for you.

4. Click on the "Submit" button.

Plesk

## Setting Up Plesk

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Before you can setup your Plesk module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your Plesk module or you can use any of the Server Groups you have created.
2. Once Step 2 is completed, click on the Server Group ID you want to use for your Plesk module(s). Click on the "+ Plesk" link.
3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this Plesk server.  
Enabled: Select Yes.  
Username: Enter the username to the Plesk interface.  
Password: Enter the password to the Plesk interface.  
URL: Enter the url to the Plesk server.  
IP: Enter the IP to the Plesk server.  
Show Server Level: Do you want to show the server load level for this Plesk module?  
Select Yes. (Not all control panel modules support this feature)  
Account Name Rule: Select the type of name rule you want to apply to the username.  
Prefix or Suffix: Enter the prefix/suffix you want to apply to the username.  
Username Sequence: Enter the numeric value you want to use for the username sequence.  
Minimum Username Length: Enter the minimum length for the username.  
Maximum Username Length: Enter the maximum length for the username.  
Minimum Password Length: Enter the minimum length for the password.  
Maximum Password Length: Enter the maximum length for the password.  
Maximum Accounts: How many accounts do you want to create on this Plesk server? Enter the number.  
Current Number of Accounts: How many accounts are currently on the server? Enter the number.

4. Click on the "Submit" button.

5. After setting up your Plesk module, you will want to configure the Plesk attributes for each of your products. For more information, view the Configuring Plesk Attributes document.

## Configuring Plesk Attributes

Before you can setup Plesk attributes, you must first setup your Plesk module and create a hosting product. To learn how to setup your Plesk module, view the Setting Up Plesk document. To learn how to create a hosting product, view the Hosting Product document. Once you have successfully setup the Plesk module and created a hosting product, follow the instructions below.

1. Click the Products tab and locate the hosting product to which you wish to add Plesk attributes.
2. Click the ID of the hosting product.
3. Click the "server groups" link and move your Plesk server to the "Selected" box by highlighting it and clicking the "

TCAdmin

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## Setting Up TCAdmin

Before you can your TCAdmin module, you MUST have a Server Group setup. To learn how to setup a Server Group, view the Setting Up A Server Group document. Once you have successfully created a Server Group, follow the instructions below.

1. As stated in the Setting Up A Server Group document, you have a default Server Group created. You can use the default Server Group to add your TCAdmin module or you can use any of the Server Groups you have created.
2. Once Step 2 is completed, click on the Server Group ID you want to use for your TCAdmin module(s). Click on the "+ TCAdmin" link.
3. When the page loads, follow the instructions below.

Server Name: Enter the name you want to call this TCAdmin server.  
Enabled: Select Yes.  
TCAdmin Username: Enter the username to the TCAdmin interface.  
TCAdmin Password: Enter the password to the TCAdmin interface.  
TCAdmin URL: Enter the url to the TCAdmin server.  
TCAdmin IP: Enter the IP to the DirectAdmin server.  
Account Name Rule: Select the type of name rule you want to apply to the username.  
Prefix or Suffix: Enter the prefix/suffix you want to apply to the username sequence.  
Username Sequence: Enter the numeric value you want to use for the username sequence.  
Minimum Username Length: Enter the minimum length for the username.  
Maximum Username Length: Enter the maximum length for the username.  
Minimum Password Length: Enter the minimum length for the password.  
Maximum Password Length: Enter the maximum length for the password.  
Maximum Accounts: How many accounts do you want to create on this TCAdmin server? Enter the number.  
Current Number of Accounts: How many accounts are currently on the server? Enter the number.

4. Click on the "Submit" button.

## Fraud Protection

*There are no articles in this category.*

## FraudGuardian

### Setting Up FraudGuardian

You can setup FraudGuardian to help identify fraudulent orders that come through your ModernBill system. Follow the directions below to get started.

Note: Before you can continue, make sure you have your FraudGuardian account details available. If you do not have a FraudGuardian account, signup at [www.fraudguardian.com](http://www.fraudguardian.com).

1. Go to System/Other Settings/Fraud Modules.
2. When the page loads, click on the FraudGuardian link.

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3. Set the following:

Enabled: Select Yes.

Username: Enter your FraudGuardian username.

Password: Enter your FraudGuardian password.

4. Click on the "Submit" button. The page will reload. Once this is complete, continue on to Step 5 below.

5. Click on the "Manage" link.

6. Set the following:

Fraud Set Name: Enter the name of the Fraud Set.

Fraud Set Email: Enter the email you want to use to email your FraudGuardian reports.

7. Click on the "Define New Fraud Set" link.

8. Now you need to define your country specific thresholds for your Fraud Set. Set the following:

Threshold Name: Enter the name of your threshold.

Threshold Type: Select one of the following:

Apply to ALL countries - This will apply to all countries.

Apply to ONE country - This will apply to only one country. Select from the drop down menu.

Apply to REGION of countries - You select a parent country such as North American or child countries such as the Caribbean, Central America, or Northern America.

9. Click on the "Define New Country Threshold" link.

10. Click on the "Configure" link in the Actions column.

11. Set the following:

Configure Fraud Score Threshold Action

Score 1: There are two steps for the Score 1 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

---

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Select the score you want to use for Score 1 in the Score drop down menu.

Note: Score 1 is considered to be the best score.

Score 2: There are two steps for the Score 2 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Select the score you want to use for Score 2 in the Score drop down menu.

Note: Score 2 is considered to be the 2nd best score and should be higher than what you set for Score 1.

Score 3: There are two steps for the Score 3 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

---

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Select the score you want to use for Score 3 in the Score drop down menu.

Note: Score 3 is considered to be the 3rd best score and should be higher than what you set for Score 1 and Score 2.

Score 4: There is only one step for the Score 4 setting. Notice the Score column shows "> Score 3" which means the action you choose in A below will occur when the score is greater than what you have set for Score 3.

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

#### Configure Amount Override Threshold Action

Amount 1: There are two steps for the Amount 1 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

---

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Enter the amount you want to set for this action in the Amount column. Each amount you enter will be less than or equal to the order amount the user purchases.

Note: Amount 1 is the lowest amount.

Amount 2: There are two steps for the Amount 2 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Enter the amount you want to set for this action in the Amount column. Each amount you enter will be less than or equal to the order amount the user purchases.

Note: Amount 2 should be greater than what you entered for Amount 1 above.

Amount 3: There are two steps for the Amount 3 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

---

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Enter the amount you want to set for this action in the Amount column. Each amount you enter will be less than or equal to the order amount the user purchases.

Note: Amount 3 is the greatest amount and should be more than what you entered for Amount 1 and Amount 2.

12. Next, choose either "Use Default Fraud Score" or "Use Adjusted Fraud Score" for the ADJUST FRAUD SCORE TRIGGERS section. There are ten (10) "Triggers" that are used to generate the total Fraud Score. Each "Trigger" is weighted by what you set. If the "Trigger" is greater than 0, it will multiply a value of 1 times the score you set for that "Trigger." The sliders and/or textboxes in the Adjust Value column allows you to give each "Trigger" a "weight" according to your specific needs.

Each "Trigger" value that you assign will be added if it is met by the order. Keep in mind if you set the value at 0, the "Trigger" will not be used during the order process. View the example below:

Trigger
Adjusted Value
Default Value

Email is Free:

2.5

Email is High Risk:

---

5.0

Country Matches IP:

2.5

Country is High Risk :

5.0

IP Distance From Country:

---

10.0\*

BIN Country Match:

2.0

BIN Bank Match:

1.0

Shipping is High Risk:

5.0

IP is Anon Proxy:

---

5.0

IP is Open Proxy:

2.5

Using the table above you'll see the following will be triggered IF the order parameters indicate possible fraud:

Email is Free:  $2.5 \times 1 = 2.5$   
Country Matches IP:  $1 \times 1 = 1$   
Country is High Risk:  $5 \times 1 = 5$

Total: 7.5

If all of the above are triggered, the score would be 7.5. If you "weighted" each trigger according to your specific needs, the score would be lower or higher depending on the values you set.

13. Once you have configured all of your settings, click on the "Click here to save all settings" button.

---

# Gateways

## Adding A Gateway

Gateways are always setup in Payment Groups. A Payment Group is used to define your Primary and Secondary Gateway(s). To get started, follow the directions below.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the "edit" icon in the Actions column for the default Payment Group ID "1" column.
3. When the page loads you can rename "PG1" to any Payment Group Name specific to your needs.
4. Modify the Payment Group Currency to your specific needs. The default currency is listed as "USD."
5. Select the gateway you want to use from the Add Primary Gateway drop down menu.
6. If you want to add a second gateway to your payment group, select the gateway from the Add Secondary Gateway drop down menu.
7. Click on the "Edit Payment Group" button.
8. When the page loads, click on the Payment Group ID link and you should see the gateway listed.

Note: Make sure you setup your gateway(s) according to the instructions specific to your gateway(s) in Modules/Gateways.

## Setting Up Multiple Gateways

You can setup as many gateways as you need in ModernBill v5. First note that gateways are setup as "Payment Groups." Whether you have one gateway or many gateways, they will be setup in the system as a Payment Group(s). First review the differences between Primary and Secondary Gateway below.

**Primary Gateway:** A primary gateway is your main gateway known as a "real gateway" such as BluePay, Authorize.net, etc.

**Secondary Gateway:** A secondary gateway is a 3rd party gateway such as PayPal, WorldPay, and 2Checkout. You can have as many secondary gateways as you want per payment group. For example, you have Payment Group 1. Your Primary Gateway is BluePay. Then you have two Secondary Gateways, PayPal and WorldPay setup.

Note: There can be only one Primary Gateway per Payment Group, but you can have as many secondary gateways as you need (as long as they are supported) per Payment Group.

Once you have read and understand the information provided above, continue with the directions below on how to create a Payment Group.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the "edit" icon in the Actions column for the default Payment Group ID "1" column.
3. When the page loads you can rename "PG1" to any Payment Group Name specific to your needs.

4. Modify the Payment Group Currency to your specific needs. The default currency is listed as "USD."
5. Select the gateway you want to use from the Add Primary Gateway drop down menu.
6. If you want to add a second gateway to your payment group, select the gateway from the Add Secondary Gateway drop down menu.

Note: There can be only one Primary Gateway per Payment Group, but you can have as many secondary gateways as you need (as long as they are supported) per Payment Group.

7. Click on the "Edit Payment Group" button.

8. When the page loads, click on the Payment Group ID link and you should see the gateway listed.

Note: Make sure you setup your gateway(s) according to the instructions specific to your gateway(s) in Modules/Gateways.

## Gateway Comparison Chart

Hold your mouse over the "Gateways" headers such as T1, T2, AC, AO, Refund, and VOID.

Gateways T1 T2 AC AO Refund VOID

BluePay

X

X

X

X

?

Authorize.net

X

X

X

X

?

eWay

X

X

?

PSIGate

X

X

X

X

?

PayPal Subscription

x

?

## Authorize.net

### Setting Up Authorize.net

Before you can setup your Authorize.net gateway, make sure you have added the Authorize.net gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the Authorize.net gateway to a Payment Group, continue with the instructions below on how to configure your Authorize.net gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your Authorize.net gateway to in the Payment Group ID column.
3. Your Authorize.net gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the Authorize.net gateway label you want to configure.
5. Follow the steps below to configure your Authorize.net gateway.

Authorize.net Login ID: XXXXX (Login to your Authorize.net account to retrieve this information)

Note: This is not the username used to log into authorize.net. It is the API Login ID that is available from within your authorize.net account.

Authorize.net Password: XXXXX (This is your Authorize.net Transaction Key)

Note: This is not your Authnet login password. The API Transaction Key will need to be used in place of the Authnet login password.

Authorize.net Version: Enter the version of the Authorize.net you are using.  
Invoice Description: Enter the description of your Authorize.net gateway invoice.  
General Email: Do you want to generate an emails for transactions? Select Yes.  
Batch Recurring: Is the batch recurring? Select Yes.  
Gateway Testing: Are you testing the Authorize.net gateway? Select Yes.  
Gateway URL: Select "Live URL" when you want to use your Authorize.net module in a production environment. Make sure the "Gateway Testing" mode is set to "No" above. If you want to test your Authorize.net module, make sure the "Gateway Testing" mode is set to "Yes" above. Then go to <http://developer.authorize.net/testaccount/> and create a test account. Make sure you select "Test URL" for "Gateway URL." Use your test account login information.  
Accept Visa cards: Do you accept Visa cards? Select Yes.  
Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
Accept American Express cards: Do you accept American Express cards? Select Yes.  
Accept Discover cards: Do you accept Discover cards? Select Yes.  
Accept JCB cards: Do you accept JCB cards? Select Yes.

6. Click the "Save Settings" button.

# BluePay

## Setting Up BluePay

Before you can setup your BluePay gateway, make sure you have added the BluePay gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the BluePay gateway to a Payment Group, continue with the instructions below on how to configure your BluePay gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your BluePay gateway to in the Payment Group ID column.
3. Your BluePay gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the BluePay gateway label you want to configure.
5. Follow the steps below to configure your BluePay gateway.

Account ID: XXXXX (Login to your BluePay account to retrieve this information)  
Secret Key: XXXXX (Login to your BluePay account to retrieve this information)  
Batch Recurring: Is the batch recurring? Select Yes.  
Testing: Are you testing the BluePay gateway? Select Yes.  
Invoice Description: Enter the description of your BluePay gateway invoice.  
Accept Visa cards: Do you accept Visa cards? Select Yes.  
Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
Accept American Express cards: Do you accept American Express cards? Select Yes.  
Accept Discover cards: Do you accept Discover cards? Select Yes.  
Accept JCB cards: Do you accept JCB cards? Select Yes.  
Accept enRoute cards: Do you accept enRoute cards? Select Yes.  
Accept Diner's Club cards: Do you accept Diner's Club cards? Select Yes.  
Accept Solo cards: Do you accept Solo cards? Select Yes.  
Accept Maestro cards: Do you accept Maestro cards? Select Yes.  
Accept Visa Delta cards: Do you accept Visa Delta cards? Select Yes.  
Accept other Bankcards: Do you accept Bankcards? Select Yes.  
Accept Visa Electron cards: Do you accept Visa Electron cards? Select Yes.  
Enable eCheck: Do you allow payment by eCheck? Select Yes.

6. Click the "Save Settings" button.

# EchoInc

## Setting Up EchoInc

Before you can setup your EchoInc gateway, make sure you have added the EchoInc gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the EchoInc gateway to a Payment Group, continue with the instructions below on how to configure your EchoInc gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your EchoInc gateway to in the Payment Group ID column.
3. Your EchoInc gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the EchoInc gateway label you want to configure.
5. Follow the steps below to configure your EchoInc gateway.

Echo Merchant ID: XXXXX  
 Echo Merchant Pin: XXXXX  
 Gateway Testing: N/A  
 Invoice Description: Enter the description of your EchoInc gateway invoice.  
 Accept Visa cards: Do you accept Visa cards? Select Yes.  
 Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
 Accept American Express cards: Do you accept American Express cards? Select Yes.  
 Accept Discover cards: Do you accept Discover cards? Select Yes.

6. Click the "save settings" button.

## eProcessingNetwork

### Setting Up eProcessingNetwork

Before you can setup your eProcessingNetwork gateway, make sure you have added the eProcessingNetwork gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the eProcessingNetwork gateway to a Payment Group, continue with the instructions below on how to configure your eProcessingNetwork gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your eProcessingNetwork gateway to in the Payment Group ID column.
3. Your eProcessingNetwork gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the eProcessingNetwork gateway label you want to configure.
5. Follow the steps below to configure your eProcessingNetwork gateway.

Login ID: XXXXX  
 Password: XXXXX  
 Version: Enter the version of the eProcessingNetwork you are using.  
 General Email: N/A  
 Batch Recurring: N/A  
 Gateway Testing: N/A  
 Invoice Description: Enter the description of your eProcessingNetwork gateway invoice.  
 Accept Visa cards: Do you accept Visa cards? Select Yes.  
 Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
 Accept American Express cards: Do you accept American Express cards? Select Yes.  
 Accept Discover cards: Do you accept Discover cards? Select Yes.

6. Click the "save settings" button.

## eWAY

### Setting Up eWAY

Before you can setup your eWAY gateway, make sure you have added the eWAY gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the eWAY gateway to a Payment Group, continue with the instructions below on how to configure your eWAY gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your eWAY gateway to in the Payment Group ID column.
3. Your eWAY gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the eWAY gateway label you want to configure.
5. Follow the steps below to configure your eWAY gateway.

eWay Customer ID: XXXXX (Login to your eWay account to retrieve this information)

Invoice Description: Enter the description of your eWAY gateway invoice.

Testing: Are you testing the eWAY gateway? Select Yes.

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

Accept Discover cards: Do you accept Discover cards? Select Yes.

Accept JCB cards: Do you accept JCB cards? Select Yes.

Accept Diner's Club cards: Do you accept Diner's Club cards? Select Yes.

Accept other Bankcards: Do you accept Bankcards? Select Yes.

6. Click the "Save Settings" button.

## InternetSecure

### Setting Up InternetSecure

Before you can setup your InternetSecure gateway, make sure you have added the InternetSecure gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the InternetSecure gateway to a Payment Group, continue with the instructions below on how to configure your InternetSecure gateway.

1. Go to System/Payment Settings/Payment Groups.

2. Click on the id of the Payment Group you added your InternetSecure gateway to in the Payment Group ID column.
3. Your InternetSecure gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the InternetSecure gateway label you want to configure.
5. Follow the steps below to configure your InternetSecure gateway.

InternetSecure Merchant ID: XXXXX  
Gateway Testing: Choose from the following:

Always Approve  
Always Decline  
Live Mode

Accept Visa cards: Do you accept Visa cards? Select Yes.  
Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
Accept American Express cards: Do you accept American Express cards? Select Yes.  
Accept Discover cards: Do you accept Discover cards? Select Yes.

6. Click the "save settings" button.

LinkPoint

*There are no articles in this category.*

Merchant Commerce

## Setting Up MerchantCommerce

Before you can setup your MerchantCommerce gateway, make sure you have added the MerchantCommerce gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the MerchantCommerce gateway to a Payment Group, continue with the instructions below on how to configure your MerchantCommerce gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your MerchantCommerce gateway to in the Payment Group ID column.
3. Your MerchantCommerce gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the MerchantCommerce gateway label you want to configure.
5. Follow the steps below to configure your MerchantCommerce gateway.

Login ID: XXXXX  
Password: XXXXX  
Version: Enter the version of the MerchantCommerce you are using.

General Email: N/A  
Batch Recurring: N/A  
Gateway Testing: N/A  
Invoice Description: Enter the description of your MerchantCommerce gateway invoice.  
Accept Visa cards: Do you accept Visa cards? Select Yes.  
Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
Accept American Express cards: Do you accept American Express cards? Select Yes.  
Accept Discover cards: Do you accept Discover cards? Select Yes.

6. Click the "save settings" button.

## Merchant Partners

### Setting Up MerchantPartners

Before you can setup your MerchantPartners gateway, make sure you have added the MerchantPartners gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the MerchantPartners gateway to a Payment Group, continue with the instructions below on how to configure your MerchantPartners gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your MerchantPartners gateway to in the Payment Group ID column.
3. Your MerchantPartners gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the MerchantPartners gateway label you want to configure.
5. Follow the steps below to configure your MerchantPartners gateway.

Login ID: XXXXX  
Password: XXXXX  
Version: Enter the version of the MerchantPartners you are using.  
General Email: N/A  
Batch Recurring: N/A  
Gateway Testing: N/A  
Invoice Description: Enter the description of your MerchantPartners gateway invoice.  
Accept Visa cards: Do you accept Visa cards? Select Yes.  
Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.  
Accept American Express cards: Do you accept American Express cards? Select Yes.  
Accept Discover cards: Do you accept Discover cards? Select Yes.  
Accept JCB cards: Do you accept JCB cards? Select Yes.  
Accept Diner's Club cards: Do you accept Diner's Club cards? Select Yes.

6. Click the "save settings" button.

---

## Moneris

### Setting Up Moneris

Before you can setup your Moneris gateway, make sure you have added the Moneris gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the Moneris gateway to a Payment Group, continue with the instructions below on how to configure your Moneris gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your Moneris gateway to in the Payment Group ID column.
3. Your Moneris gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the Moneris gateway label you want to configure.
5. Follow the steps below to configure your Moneris gateway.

Moneris Store ID: XXXXX Enter your Moneris store ID

Moneris API Token: (Login to your Moneris account to retrieve this information)

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

Accept Discover cards: Do you accept Discover cards? Select Yes.

Accept JCB cards: Do you accept JCB cards? Select Yes.

Accept Diner's Club cards: Do you accept Diner's Club cards? Select Yes.

6. Click the "Save Settings" button.

## PagoPorInternet

*There are no articles in this category.*

## PayPal

### Setting Up PayPal

Before you can setup your PayPal gateway, make sure you have added the PayPal gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the PayPal gateway to a Payment Group, continue with the instructions below on how to configure your PayPal gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your PayPal gateway to in the Payment Group ID column.
3. Your PayPal gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the PayPal gateway label you want to configure.
5. Follow the steps below to configure your PayPal gateway.

ID: yourname@yourdomain.com (Enter your primary PayPal email address)

Item Name: Enter a comment or description about your product or service. This will appear on the customer's PayPal receipt.

Return URL: Enter your install url - https://your\_install\_dir/

Cancel URL: Enter your install url - https://your\_install\_dir/

Display Logo: Enter the url to your display logo. This is the logo that will show up on the PayPal payment page once they go through the ModernBill shopping cart. This is a logo you create.

Submit Image: Enter the url to your submit image.

IPN URL: Enter the url to your IPN. ModernBill automatically enters the url to your IPN in the system.

Subscription Enable: Do you allow PayPal subscriptions (Recurring payments)?  
Select Yes.

Subscription Image: Enter the url to your subscription image. This is the logo that will show up on the PayPal payment page once they go through the ModernBill shopping cart. This is a logo you create.

Gateway Testing: Are you testing the PayPal gateway? Select Yes.

Paypal Accept Addresses: Enter any PayPal addresses at which you would like to receive payments, separated either by comma or a new line for each address. Example: billing@yourdomain.com, service@yourdomain.com, domains@yourdomain.com. Note: any address listed here must be an active PayPal account.

6. Click on the "Save Settings" button.
7. Go to System/Admin Settings.
8. When the page loads, find the "OrderForm" row in the "First Name" column. Next, click on the details icon in the Actions.
9. Copy the remote access hash string value in the "Remote Access Hash" entry.
10. Open the gateway.php file located in the lib-modernbill\include\config\ directory. Line 5 shows the following:

```
//$CONF["IPNAccessHash"] = "451c6dbb1d801828e7470fcdbe25201dbc2633d9"; // same as the order form users hash.
```

Uncomment the line by removing the two slashes at the start of the line as shown below:

```
$CONF["IPNAccessHash"] = "451c6dbb1d801828e7470fcdbe25201dbc2633d9"; // same as the order form users hash.
```

11. Enter the remote access hash you copied in Step 9 above. Placing a valid remote access hash allows for the IPN's to register with the system.
12. Save the file.

Note: After you have tested the connection with PayPal, be sure to change "Gateway Testing" to "No" to accept live payments.

# PlanetPayment

## Setting Up PlanetPayment

Before you can setup your PlanetPayment gateway, make sure you have added the PlanetPayment gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the PlanetPayment gateway to a Payment Group, continue with the instructions below on how to configure your PlanetPayment gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your PlanetPayment gateway to in the Payment Group ID column.
3. Your PlanetPayment gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the PlanetPayment gateway label you want to configure.
5. Follow the steps below to configure your PlanetPayment gateway.

Login ID: XXXXX  
Password: XXXXX  
Version: Enter the version of the PlanetPayment you are using.  
General Email: N/A  
Batch Recurring: N/A  
Gateway Testing: N/A  
Invoice Description: Enter the description of your PlanetPayment gateway invoice.  
Accept Visa cards: Do you accept Visa cards? Select Yes.  
Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

6. Click the "save settings" button.

# Protx

## Setting up Protx

Before you can setup your Protx gateway, make sure you have added the Protx gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the Protx gateway to a Payment Group, continue with the instructions below on how to configure your Protx gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your Protx gateway to in the Payment Group ID column.
3. Your Protx gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.

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4. Click on the "edit" icon in the Actions column next to the Protx gateway label you want to configure.

5. Follow the steps below to configure your Protx gateway.

Login ID: XXXXX Enter your Protx login ID

Version: If you are using a version of Protx other than 2.22, enter it here. Otherwise, leave the default.

Mode: Are you running in live mode, testing the Protx gateway, or simulating failed transactions? Choose from the dropdown.

Refund Description: Enter the description of your Protx gateway refund message.

Invoice Description: Enter the description of your Protx gateway invoice.

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

Accept Discover cards: Do you accept Discover cards? Select Yes.

Accept JCB cards: Do you accept JCB cards? Select Yes.

Accept Solo cards: Do you accept Solo cards? Select Yes.

Accept Maestro cards: Do you accept Maestro cards? Select Yes.

Accept Visa Delta cards: Do you accept Visa Delta cards? Select Yes.

Accept Visa Electron cards: Do you accept Visa Electron cards? Select Yes.

6. Click the "Save Settings" button.

## PSIGate

### Setting Up PSIGate

Before you can setup your PSIGate gateway, make sure you have added the PSIGate gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the PSIGate gateway to a Payment Group, continue with the instructions below on how to configure your PSIGate gateway.

1. Go to System/Payment Settings/Payment Groups.

2. Click on the id of the Payment Group you added your PSIGate gateway to in the Payment Group ID column.

3. Your PSIGate gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.

4. Click on the "edit" icon in the Actions column next to the PSIGate gateway label you want to configure.

5. Follow the steps below to configure your PSIGate gateway.

PSIGate Merchant ID: XXXXX (Login to your PSIGate account to retrieve this information)

PSIGate Pass Phrase: XXXXX (Login to your PSIGate account to retrieve this information)

Testing: Are you testing the PSIGate gateway? Select Yes.

Invoice Description: Enter the description of your PSIGate gateway invoice.

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

6. Click the "Save Settings" button.

## QuickCommerce

### Setting Up QuickCommerce

Before you can setup your QuickCommerce gateway, make sure you have added the QuickCommerce gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the QuickCommerce gateway to a Payment Group, continue with the instructions below on how to configure your QuickCommerce gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your QuickCommerce gateway to in the Payment Group ID column.
3. Your QuickCommerce gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.
4. Click on the "edit" icon in the Actions column next to the QuickCommerce gateway label you want to configure.
5. Follow the steps below to configure your QuickCommerce gateway.

Login ID: XXXXX

Password: XXXXX

Version: Enter the version of the QuickCommerce you are using.

General Email: N/A

Batch Recurring: N/A

Gateway Testing: N/A

Invoice Description: Enter the description of your QuickCommerce gateway invoice.

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

Accept Discover cards: Do you accept Discover cards? Select Yes.

Accept Diner's Club cards: Do you accept Diner's Club cards? Select Yes.

6. Click the "save settings" button.

## RTWare

### Setting Up RTWare

Before you can setup your RTWare gateway, make sure you have added the RTWare gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the RTWare gateway to a Payment Group, continue with the instructions below on how to configure your RTWare gateway.

1. Go to System/Payment Settings/Payment Groups.
2. Click on the id of the Payment Group you added your RTWare gateway to in the Payment

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Group ID column.

3. Your RTWare gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.

4. Click on the "edit" icon in the Actions column next to the RTWare gateway label you want to configure.

5. Follow the steps below to configure your RTWare gateway.

Login ID: XXXXX

Password: XXXXX

Version: Enter the version of the RTWare you are using.

General Email: N/A

Batch Recurring: N/A

Gateway Testing: N/A

Invoice Description: Enter the description of your RTWare gateway invoice.

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

Accept Discover cards: Do you accept Discover cards? Select Yes.

6. Click the "save settings" button.

## Velocity Pay

### Setting Up Velocity Pay

Before you can setup your Velocity Pay gateway, make sure you have added the Velocity Pay gateway to a Payment Group. To learn how to add a gateway to a Payment Group, read the Adding A Gateway document. Once you have added the Velocity Pay gateway to a Payment Group, continue with the instructions below on how to configure your Velocity Pay gateway.

1. Go to System/Payment Settings/Payment Groups.

2. Click on the id of the Payment Group you added your Velocity Pay gateway to in the Payment Group ID column.

3. Your Authorize.net gateway will appear in a list after clicking on the Payment Group ID you chose in Step 2 above.

4. Click on the "edit" icon in the Actions column next to the Velocity Pay gateway label you want to configure.

5. Follow the steps below to configure your Velocity Pay gateway.

Velocity Pay Login ID: XXXXX (Login to your Velocity Pay account to retrieve this information)

Velocity Pay Password: XXXXX (Enter your Velocity Pay password)

Invoice Description: Enter the description of your Velocity Pay gateway invoice.

Velocity Pay Callback Url: Enter your Velocity Pay Callback Url.

Note: Entering "disable" as the value will disable the Callback URL option.

Velocity Pay Duplicate Delay: Enter the number of seconds for your Velocity Pay Duplicate Delay. If a duplicate transaction is attempted within the number of seconds you entered, the transaction will be rejected. This reduces duplication when processing transactions.

Note: Entering "0" as the value will disable the Duplicate Delay option.

Velocity Pay Minor Currency Decimal: The decimal places between the major currency and minor currency. In most cases, the decimal is "2" for two places.

Velocity Continuous Authority: Do you want continuous Authority? Select Yes. The first transaction gets authorized using the billing information. If verified by the system, it's stored in the database so the system does not have to send the billing information again.

General Email: Do you want to generate an emails for transactions? Select Yes.

Batch Recurring: Is the batch recurring? Select Yes.

Accept Visa cards: Do you accept Visa cards? Select Yes.

Accept MasterCard cards: Do you accept MasterCard cards? Select Yes.

Accept American Express cards: Do you accept American Express cards? Select Yes.

Accept Discover cards: Do you accept Discover cards? Select Yes.

Accept JCB cards: Do you accept JCB cards? Select Yes.

Accept Diner's Club cards: Do you accept Diner's Club cards? Select Yes.

Accept Solo cards: Do you accept Solo cards? Select Yes.

Accept Maestro cards: Do you accept Maestro cards? Select Yes.

Accept Visa Electron cards: Do you accept Visa Electron cards? Select Yes.

6. Click the "Save Settings" button.

## Registrars

### Registrar Comparison Chart

Hold your mouse over the "Registrars" headers such as Register, Transfer, Renew, Balance, and Pricing.

Registrars Register Transfer Renew Balance Pricing

eNom

X  
X  
X  
X  
X

register.com

X  
X  
X  
X  
X

## Nominet

### Setting Up Nominet

---

## Before You Begin

The Nominet module requires that you are a tag holder with Nominet, for more information on becoming a tag holder please see the Nominet website (<http://www.nominet.org.uk/tag/becometagholder/>).  
Configure The Module

Note: To fully setup the Nominet module you will require access to some system files to make modifications, if you do not have full root access to your server please consult your service provider.

1. Go to System/Domain Settings/Registrar Modules.
2. When the page loads, click on the "server with plus sign" icon in the "nominet" row.
3. Set the following:

### Nominet Admin Account

Nominet: Select Yes to enable the module.  
PGP binary location: Enter the path to where your pgp binary is located on your server. If you are not sure about the path to pgp on your server, ask your administrator or SSH to your server and run the following command:

which pgp

The above command should give you the path to your pgp binary. A possible example is /usr/bin/pgp.

PGP binary location and args: The example provided is -u \${MY\_TAG} -a --always-trust --no-secmem-warning --clear-sign.

Tag Name: The example provided is MY\_TAG.

Return Email: Enter the returne mail address you will be using.

Email Username: Enter your Nominet username.

Email Password: Enter your Nominet password.

Emal Pop Server: Enter the pop server host or IP address.

Nominet Test Mode: Are you testing the Nominet module? Select Yes.

Renew Type: Select the renew type from the drop down menu. Your choices include:

Obey TLD - The TLD selection for this setting will apply.

Auto Renew - Let the registrar auto-renew the domain.

ModernBill Renew - Let ModernBill create an events queue item to have the registrar renew the domain.

Allow Transfer: Will you allow the domain administrator to transfer the domain?  
Select Yes.

### Admin Contact

First Name: Enter the administrator contact's first name.

Last Name: Enter the administrator contact's last name.

Company: Enter the administrator contact's company name.

Email: Enter the administrator contact's email address.

Address 1: Enter the administrator contact's address 1.

Address 2: Enter the administrator contact's address 2.

City: Enter the administrator contact's city.

State: Enter the administrator contact's state.

Zip: Enter the administrator contact's zip.

Country: Enter the administrator contact's country.

Phone: Enter the administrator contact's phone.

Fax: Enter the administrator contact's fax.

### Tech Contact

First Name: Enter the technical contact's first name.  
Last Name: Enter the technical contact's last name.  
Company: Enter the technical contact's company name.  
Email: Enter the technical contact's email address.  
Address 1: Enter the technical contact's address 1.  
Address 2: Enter the technical contact's address 2.  
City: Enter the technical contact's city.  
State: Enter the technical contact's state.  
Zip: Enter the technical contact's zip.  
Country: Enter the technical contact's country.  
Phone: Enter the technical contact's phone.  
Fax: Enter the technical contact's fax.

### Aux Billing Contact

First Name: Enter the auxillary billing contact's first name.  
Last Name: Enter the auxillary billing contact's last name.  
Company: Enter the auxillary billing contact's company name.  
Email: Enter the auxillary billing contact's email address.  
Address 1: Enter the auxillary billing contact's address 1.  
Address 2: Enter the auxillary billing contact's address 2.  
City: Enter the auxillary billing contact's city.  
State: Enter the auxillary billing contact's state.  
Zip: Enter the auxillary billing contact's zip.  
Country: Enter the auxillary billing contact's country.  
Phone: Enter the auxillary billing contact's phone.  
Fax: Enter the auxillary billing contact's fax.

4. Click on the "Submit" button.

## Distribute IT

### **Setting Up Distribute IT**

1. Go to System/Domain Settings/Registrar Modules.
2. When the page loads, click on the "server with plus sign" icon in the "distribute it" row.
3. Set the following:

#### Distribute IT Admin Account

Enable Distribute IT: Select Yes to enable the module.  
Display Name: Enter the display name of your Distribute IT account.  
Account No: Enter your Distribute IT account number.  
Username: Enter your Distribute IT username.  
Password: Enter your Distribute IT password.

Allow Domain Password: Will you allow the domain to use a password? Select Yes.  
Allow Registrar Lock: Will you allow Distribute IT to lock the domain? Select Yes.  
Renew Type: Select the renew type from the drop down menu. Your choices include:

Obey TLD - The TLD selection for this setting will apply.

Auto Renew - Let the registrar auto-renew the domain.

---

ModernBill Renew - Let ModernBill create an events queue item to have the registrar renew the domain.

Allow Nameserver Override: Will you allow the domain owner to override the default nameservers? Select Yes.

Use Custom Nameserver: Do you want to use custom nameservers? Select Yes.

Allow Renew: Will you allow the domain administrator to renew the domain?

Select Yes.

Allow Transfer: Will you allow the domain administrator to transfer the domain?

Select Yes.

Allow Change DNS: Will you allow the domain administrator to change the DNS of the domain? Select Yes.

Allow Change Contact Info: Will you allow the domain administrator to change the contact information for the domain? Select Yes.

Allow Change Registrar Lock: Will you allow the domain administrator to change the registrar lock option for the domain? Select Yes.

Allow Change Auto Renew: Will you allow the domain administrator to change the auto renew option for the domain? Select Yes.

Allow Change Update Domain Password: Will you allow the domain administrator to change the update password for the domain? Select Yes.

Allow Register Name Server: Will you allow the domain administrator to modify the nameserver for the domain? Select Yes.

#### Credit Card Information For Prepaid Account

Supplier ID: Select the type of the credit card you wish to fund the account with.  
Credit Card Number: Enter the credit card number you wish to fund the account with.

Credit Card Expiry Date: Enter your credit card expiration date in mmyy format (example: 05/09)

#### Admin Contact

First Name: Enter the administrator contact's first name.

Last Name: Enter the administrator contact's last name.

Company: Enter the administrator contact's company name.

Email: Enter the administrator contact's email address.

Address 1: Enter the administrator contact's address 1.

Address 2: Enter the administrator contact's address 2.

City: Enter the administrator contact's city.

State: Enter the administrator contact's state.

Zip: Enter the administrator contact's zip.

Country: Enter the administrator contact's country.

Phone: Enter the administrator contact's phone.

Fax: Enter the administrator contact's fax.

#### Tech Contact

First Name: Enter the technical contact's first name.

Last Name: Enter the technical contact's last name.

Company: Enter the technical contact's company name.

Email: Enter the technical contact's email address.

Address 1: Enter the technical contact's address 1.

Address 2: Enter the technical contact's address 2.

City: Enter the technical contact's city.

State: Enter the technical contact's state.

Zip: Enter the technical contact's zip.

Country: Enter the technical contact's country.

Phone: Enter the technical contact's phone.

Fax: Enter the technical contact's fax.

---

### Aux Billing Contact

First Name: Enter the auxillary billing contact's first name.  
Last Name: Enter the auxillary billing contact's last name.  
Company: Enter the auxillary billing contact's company name.  
Email: Enter the auxillary billing contact's email address.  
Address 1: Enter the auxillary billing contact's address 1.  
Address 2: Enter the auxillary billing contact's address 2.  
City: Enter the auxillary billing contact's city.  
State: Enter the auxillary billing contact's state.  
Zip: Enter the auxillary billing contact's zip.  
Country: Enter the auxillary billing contact's country.  
Phone: Enter the auxillary billing contact's phone.  
Fax: Enter the auxillary billing contact's fax.

4. Click on the "Submit" button.

eNom

### **Setting Up eNom**

**IMPORTANT:** Access to both the test and live servers at eNom is restricted by IP. When you are ready to go live with your site, you must contact eNom and have them add your IP address to their live server in order for the connection between ModernBill and eNom to be successful.

1. Go to System/Domain Settings/Registrar Modules.
2. When the page loads, click on the Enom link.
3. Make sure you have signed up for a FREE ModernDNS account so you can receive TLD purchases as low as \$7.95.
4. Once you have completed your FREE ModernDNS account setup, follow the instructions below.

#### Admin Account

Enable Enom: Select Yes.  
Display Name: Enter the name you want to use for this Registrar.  
Username: Enter your ModernDNS username.  
Password: Enter your ModernDNS password.  
Enable Test Mode: Are you testing the Enom registrar? Select Yes.  
Allow Domain Password: Will you allow the domain to use a password? Select Yes.  
Allow Registrar Lock: Will you allow Enom to lock the domain? Select Yes.  
Renew Type: Select the renew type from the drop down menu. Your choices include:

Obey TLD - The TLD selection for this setting will apply.

Auto Renew - Let the registrar auto-renew the domain.

ModernBill Renew - Let ModernBill create an events queue item to have the registrar renew the domain.

Allow Nameserver Override: Will you allow the domain owner to override the default nameservers? Select Yes.

---

Use Custom Nameserver: Do you want to use custom nameservers? Select Yes.  
Allow Renew: Will you allow the domain administrator to renew the domain? Select Yes.  
Allow Transfer: Will you allow the domain administrator to transfer the domain? Select Yes.  
Allow Change DNS: Will you allow the domain administrator to change the DNS of the domain? Select Yes.  
Allow Change Contact Info: Will you allow the domain administrator to change the contact information for the domain? Select Yes.  
Allow Change Registrar Lock: Will you allow the domain administrator to change the registrar lock option for the domain? Select Yes.  
Allow Change Auto Renew: Will you allow the domain administrator to change the auto renew option for the domain? Select Yes.  
Allow Change Update Domain Password: Will you allow the domain administrator to change the update password for the domain? Select Yes.  
Allow Register Name Server: Will you allow the domain administrator to modify the nameserver for the domain? Select Yes.

#### Admin Contact

First Name: Enter the administrator contact's first name.  
Last Name: Enter the administrator contact's last name.  
Company: Enter the administrator contact's company name.  
Email: Enter the administrator contact's email address.  
Address 1: Enter the administrator contact's address 1.  
Address 2: Enter the administrator contact's address 2.  
City: Enter the administrator contact's city.  
State: Enter the administrator contact's state.  
Zip: Enter the administrator contact's zip.  
Country: Enter the administrator contact's country.  
Phone: Enter the administrator contact's phone.  
Fax: Enter the administrator contact's fax.

#### Tech Contact

First Name: Enter the technical contact's first name.  
Last Name: Enter the technical contact's last name.  
Company: Enter the technical contact's company name.  
Email: Enter the technical contact's email address.  
Address 1: Enter the technical contact's address 1.  
Address 2: Enter the technical contact's address 2.  
City: Enter the technical contact's city.  
State: Enter the technical contact's state.  
Zip: Enter the technical contact's zip.  
Country: Enter the technical contact's country.  
Phone: Enter the technical contact's phone.  
Fax: Enter the technical contact's fax.

#### Aux Billing Contact

First Name: Enter the auxillary billing contact's first name.  
Last Name: Enter the auxillary billing contact's last name.  
Company: Enter the auxillary billing contact's company name.  
Email: Enter the auxillary billing contact's email address.  
Address 1: Enter the auxillary billing contact's address 1.  
Address 2: Enter the auxillary billing contact's address 2.  
City: Enter the auxillary billing contact's city.  
State: Enter the auxillary billing contact's state.  
Zip: Enter the auxillary billing contact's zip.  
Country: Enter the auxillary billing contact's country.  
Phone: Enter the auxillary billing contact's phone.  
Fax: Enter the auxillary billing contact's fax.

5. Click on the "Submit" button.

## Ready to go live? How to add or delete your IP address for use with your API.

You can add or delete IP addresses at any time.

1. Log into your account, click on left menu option Help, then eNom Support Center link
2. Click the request help feature from Support Center tool.
3. Send your login name and the IP address you want added to the live environment
4. You will receive a confirmation email with the case assigned.
5. eNom will reply back via the assigned case when it's completed.

# OpenSRS

## Setting Up OpenSRS

1. Go to System/Domain Settings/Registrar Modules.
2. When the page loads, click on the "server with plus sign" icon in the "opensrs" row.
3. Set the following:

### OpenSRS Admin Account

Enable OpenSRS: Select Yes to enable the module.

Display Name: Enter the display name of your OpenSRS account.

Username: Enter your OpenSRS username.

Key: Enter your OpenSRS private key (You have to login to the reseller web interface at OpenSRS and generate a new private key).

Enable Test Mode: Are you testing the OpenSRS module? Select Yes.

Allow Domain Password: Will you allow the domain to use a password? Select Yes.

Allow Registrar Lock: Will you allow OpenSRS to lock the domain? Select Yes.

Renew Type: Select the renew type from the drop down menu. Your choices include:

Obey TLD - The TLD selection for this setting will apply.

Auto Renew - Let the registrar auto-renew the domain.

ModernBill Renew - Let ModernBill create an events queue item to have the registrar renew the domain.

Allow Nameserver Override: Will you allow the domain owner to override the default nameservers? Select Yes.

Use Custom Nameserver: Do you want to use custom nameservers? Select Yes.

Allow Renew: Will you allow the domain administrator to renew the domain?

Select Yes.

Allow Transfer: Will you allow the domain administrator to transfer the domain?

Select Yes.

Allow Change DNS: Will you allow the domain administrator to change the DNS of the domain? Select Yes.

Allow Change Contact Info: Will you allow the domain administrator to change the contact information for the domain? Select Yes.

Allow Change Registrar Lock: Will you allow the domain administrator to change the registrar lock option for the domain? Select Yes.

Allow Change Auto Renew: Will you allow the domain administrator to change the auto renew option for the domain? Select Yes.

Allow Change Update Domain Password: Will you allow the domain administrator to change the update password for the domain? Select Yes.

Allow Register Name Server: Will you allow the domain administrator to modify the nameserver for the domain? Select Yes.

---

### Admin Contact

First Name: Enter the administrator contact's first name.  
Last Name: Enter the administrator contact's last name.  
Company: Enter the administrator contact's company name.  
Email: Enter the administrator contact's email address.  
Address 1: Enter the administrator contact's address 1.  
Address 2: Enter the administrator contact's address 2.  
City: Enter the administrator contact's city.  
State: Enter the administrator contact's state.  
Zip: Enter the administrator contact's zip.  
Country: Enter the administrator contact's country.  
Phone: Enter the administrator contact's phone.  
Fax: Enter the administrator contact's fax.

### Tech Contact

First Name: Enter the technical contact's first name.  
Last Name: Enter the technical contact's last name.  
Company: Enter the technical contact's company name.  
Email: Enter the technical contact's email address.  
Address 1: Enter the technical contact's address 1.  
Address 2: Enter the technical contact's address 2.  
City: Enter the technical contact's city.  
State: Enter the technical contact's state.  
Zip: Enter the technical contact's zip.  
Country: Enter the technical contact's country.  
Phone: Enter the technical contact's phone.  
Fax: Enter the technical contact's fax.

### Aux Billing Contact

First Name: Enter the auxillary billing contact's first name.  
Last Name: Enter the auxillary billing contact's last name.  
Company: Enter the auxillary billing contact's company name.  
Email: Enter the auxillary billing contact's email address.  
Address 1: Enter the auxillary billing contact's address 1.  
Address 2: Enter the auxillary billing contact's address 2.  
City: Enter the auxillary billing contact's city.  
State: Enter the auxillary billing contact's state.  
Zip: Enter the auxillary billing contact's zip.  
Country: Enter the auxillary billing contact's country.  
Phone: Enter the auxillary billing contact's phone.  
Fax: Enter the auxillary billing contact's fax.

4. Click on the "Submit" button.

**Register.com**

## **Setting Up Register.com**

1. Go to System/Domain Settings/Registrar Modules.
2. When the page loads, click on the Register.com link.

- 
3. Make sure you have signed up for a FREE ModernDNS account so you can receive TLD purchases as low as \$7.95.
  4. Once you have completed your FREE ModernDNS account setup, follow the instructions below.

#### Admin Account

Enable Register.com: Select Yes.  
Display Name: Enter the name you want to use for this Registrar.  
Username: Enter your ModernDNS username.  
Password: Enter your ModernDNS password.  
Enable Test Mode: Are you testing the Register.com registrar? Select Yes.  
Allow Domain Password: Will you allow the domain to use a password? Select Yes.  
Allow Registrar Lock: Will you allow Register.com to lock the domain? Select Yes.  
Renew Type: Select the renew type from the drop down menu. Your choices include:

Obey TLD - The TLD selection for this setting will apply.

Auto Renew - Let the registrar auto-renew the domain.

ModernBill Renew - Let ModernBill create an events queue item to have the registrar renew the domain.

Allow Nameserver Override: Will you allow the domain owner to override the default nameservers? Select Yes.

Use Customer Nameserver: Do you want to use custom nameservers? Select Yes.

Allow Renew: Will you allow the domain administrator to renew the domain? Select Yes.

Allow Transfer: Will you allow the domain administrator to transfer the domain? Select Yes.

Allow Change DNS: Will you allow the domain administrator to change the DNS of the domain? Select Yes.

Allow Change Contact Info: Will you allow the domain administrator to change the contact information for the domain? Select Yes.

Allow Change Registrar Lock: Will you allow the domain administrator to change the registrar lock option for the domain? Select Yes.

Allow Change Auto Renew: Will you allow the domain administrator to change the auto renew option for the domain? Select Yes.

Allow Change Update Domain Password: Will you allow the domain administrator to change the update password for the domain? Select Yes.

Allow Register Name Server: Will you allow the domain administrator to modify the nameserver for the domain? Select Yes.

#### Admin Contact

First Name: Enter the administrator contact's first name.  
Last Name: Enter the administrator contact's last name.  
Company: Enter the administrator contact's company name.  
Email: Enter the administrator contact's email address.  
Address 1: Enter the administrator contact's address 1.  
Address 2: Enter the administrator contact's address 2.  
City: Enter the administrator contact's city.  
State: Enter the administrator contact's state.  
Zip: Enter the administrator contact's zip.  
Country: Enter the administrator contact's country.  
Phone: Enter the administrator contact's phone.  
Fax: Enter the administrator contact's fax.

#### Tech Contact

First Name: Enter the technical contact's first name.  
Last Name: Enter the technical contact's last name.

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Company: Enter the technical contact's company name.  
Email: Enter the technical contact's email address.  
Address 1: Enter the technical contact's address 1.  
Address 2: Enter the technical contact's address 2.  
City: Enter the technical contact's city.  
State: Enter the technical contact's state.  
Zip: Enter the technical contact's zip.  
Country: Enter the technical contact's country.  
Phone: Enter the technical contact's phone.  
Fax: Enter the technical contact's fax.

#### Aux Billing Contact

First Name: Enter the auxillary billing contact's first name.  
Last Name: Enter the auxillary billing contact's last name.  
Company: Enter the auxillary billing contact's company name.  
Email: Enter the auxillary billing contact's email address.  
Address 1: Enter the auxillary billing contact's address 1.  
Address 2: Enter the auxillary billing contact's address 2.  
City: Enter the auxillary billing contact's city.  
State: Enter the auxillary billing contact's state.  
Zip: Enter the auxillary billing contact's zip.  
Country: Enter the auxillary billing contact's country.  
Phone: Enter the auxillary billing contact's phone.  
Fax: Enter the auxillary billing contact's fax.

5. Click on the "Submit" button.

## SSL Certificates

*There are no articles in this category.*

## SSLFactory

### **Setup Up SSLFactory**

ModernBill in conjunction with SSLFactory allows you to provision SSL Certificates easily, quickly, and efficiently.

#### SSL Certificates available

RapidSSL - A low-priced 128-bit SSL certificate delivered to you in 10 minutes! Single-signed certificate at the lowest price available.

QuickSSL - A low-priced 128-bit SSL certificate delivered to you in 10 minutes! Real-time two-factor telephone authentication and Unique Business Identifier included make it a great value.

QuickSSL Premium - This 128-bit SSL certificate includes a dynamic security seal for your site and real-time, two-factor telephone authentication plus the Unique Business Identifier (DUNS number equivalent), and is still delivered in only 10 minutes.

True BusinessID - Provides end-to-end internet security protection for doing business online. Secure transactions through High Assurance SSL and business validation from True Site - so you are completely covered!

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## Getting Started

1. Go to System/Other Settings/SSLFactory.

2. Set the following:

Enabled: Yes

Username: Enter your SSLFactory username.

Access Code SSL Factory: Enter the code under the SSLFactory found in SSLCenter.

Use your SSLFactory login to retrieve this information.

3. Click on the Submit button.

4. Create products for each SSL Certificate type you want to sell to your customers. To learn how to create Products in ModernBill, view the Creating Products document. For each SSL Certificate product you create, you will need to do modify a few settings in order for the system to provision the certificates.

Each SSL Certificate product should have the following set correctly:

Associate Domain: Suppressed

Associate Addon: Suppressed

Note: Billing Cycles can only be set to 1, 2, and 3 year cycles.

5. Next, click on Set Attributes.

6. Click on the green pencil icon under the Value column.

7. Enter certProductType as the Name and click the "Add" button.

8. Once the page loads, click on the pencil icon in the Actions column. Enter the Product ID associated with the SSL Certificate type you are setting up and click on the Add button.

The Product IDs are listed below:

Product  
Product ID

RapidSSL  
RapidSSL

QuickSSL  
QuickSSL

QuickSSL Premium  
QuickSSLPremium

True BusinessID  
TrueBizID

9. Repeat Steps 4-8 for each of your SSL Certificate products. Once you have completed the tasks above, you are ready to start accepting orders and provisioning SSL Certificates to your customers.

# Order Forms

## Setting Up Your Order Form(s)

Setting up your order form is essential if you want to sell products, utilize payment gateways, process orders, and use the new localization feature in ModernBill v5. To get started, follow the directions below.

1. Go to System/Order Form settings.

2. By default your system is preconfigured with one (1) order form. You can edit the default order form according to your specific needs by clicking on the "edit" icon in the Actions column. If you want to add a new order form, click on the "add new order form" button.

3. Set the following:

Order Form Name: Enter the name of your order form.

Payment Group: Select the payment group you want to use for this order form. To learn more about Payment Groups, view the Adding A Gateway document.

Company: The default company is what you setup during installation. You cannot modify this setting.

Language: Select the language you want to use for this order form.

Country: Select the country you want to use for this order form as default.

Domain Options: Check each box that applies to your specific needs.

Perform WHOIS lookups for prospective domains.

Allow purchase of new domains.

Transfer Domain

Allow customer to use existing domain.

Allow the customer to skip this step.

'Free' Email Banning: Do you want to allow free emails to be used for ordering? Select Yes.

Order Email Banning Message: Enter the message you want users to see on the order form if they are trying to use a free email address.

IP Banned Message: Enter the message you want users to see on the order form if their IP address is banned from your system.

Enable Check Option: Do you want users to have the option to pay by check? Select Yes.

Enable Invoice Option: Do you want users to have the option to pay by invoice? Select Yes.

Enable Bank Draft Option: Do you want users to have the option to pay by bank draft?

Select Yes.

Minimum Username Length: Enter the minimum number of characters you want the user to enter as their username.

Maximum Username Length: Enter the maximum number of characters you want the user to enter as their username.

Minimum Password Length: Enter the minimum number of characters you want the user to enter as their password.

Maximum Password Length: Enter the maximum number of characters you want the user to enter as their password.

Continue Shopping URL: Enter the URL that you want your customers to be sent to when they click the continue shopping button in the cart.

Terms and Conditions Page: Enter the url to your Terms and Conditions page.

Product Settings: Move the products from the "Unassigned Products" list to the "Assigned Products" list by double-clicking each product or highlighting each product and click on the left arrow button.

Note: If you want to sell domains, you must associate a Domain Registration product.

Product Addon Settings: N/A

---

Coupon Settings: If you have created coupons in your system, they will appear in the "Unassigned Coupons" list. To associate coupons you want to have available on this order form, move the coupons from the "Unassigned Coupons" list to the "Assigned Coupons" list by double-clicking each coupon or highlighting each coupon and click on the left arrow button. If you need to learn how to create coupons, view the Creating Coupons document.

4. Click on the "Submit" button.

5. With ModernBill 5.0, you do not need to create multiple order forms. The new logic uses "website widgets" as the starting point for ordering a product off your website. Each website widget is linked directly to the ModernBill 5.0 shopping cart. The shopping cart allows the customer to add as many products and continue through the order process when ready to make the final transaction. Website widgets can be placed anywhere on your website and can be customized to the "look and feel" of your website.

Once you have setup your order form and you want to view your products, go to <http://yourdomain/modernbill-dir/app-modernbill-order/products.php>. You will see your products and services on the page as "website widgets." If a product is not showing up on the products.php as a widget, you need to add your products to the website widget list by following the instructions in the Setting Up Website Widgets document.

Note: For information on branding each order form, view the Branding Multiple Order Forms document.

## Branding Multiple Order Forms

ModernBill v5 allows you to brand multiple order forms to distinguish between different product lines, areas of your site, or even multiple companies, all connected to a single ModernBill installation.

### Creating Multiple Order Forms

1. Create two order forms in ModernBill as described in the Setting Up Your Order Form(s) document.
2. Create a website widget for each order form as described in the Setting Up Website Widgets document.
3. Copy the `/lib-themes/default/app-modernbill-order/` directory to:

```
/lib-themes/default/app-modernbill-order1  
/lib-themes/default/app-modernbill-order2
```

Note: Leave the original order form files in place as they will be used for any other order form.

4. Modify the following files in both new directories to brand each order form:

```
/templates/shopping/header.tpl  
/templates/shopping/footer.tpl
```

For more information on customizing the header and footer, see the Customizing The Order Form document.

5. The website widget for order form 1 will now go to the `app-modernbill-order1` order form, and the website widget for order form 2 will go to the `app-modernbill-order2` order form.

## Renaming your ModernBill directories.

You can now rename the directories to whatever you want in ModernBill 5.

---

NOTICE! The interface directory names CAN be changed, however you must go through the installer before changing them.

1. Open the aliases.php file in the lib-pkg directory.

2. The following directory structure will be listed by default:

```
$ MB_ALIASES["app-modernbill-admin"] = "app-modernbill-admin";
$_MB_ALIASES["app-modernbill-client"] = "app-modernbill-client";
$_MB_ALIASES["app-modernbill-order"] = "app-modernbill-order";
```

3. You MUST leave the original directory name "as is" in the left column as highlighted in red below:

```
$ MB_ALIASES["app-modernbill-admin"] = "app-modernbill-admin";
$_MB_ALIASES["app-modernbill-client"] = "app-modernbill-client";
$_MB_ALIASES["app-modernbill-order"] = "app-modernbill-order";
```

4. In our example we are going to rename each of the default directories to another name as highlighted in red below:

```
$ MB_ALIASES["app-modernbill-admin"] = "admin";
$_MB_ALIASES["app-modernbill-client"] = "client";
$_MB_ALIASES["app-modernbill-order"] = "order";
```

Note: You can name the directories to anything you want according to your specific needs. Our example above is to demonstrate simplicity.

5. If there are other "app" or "lib" directories in your ModernBill installation, add an additional line for each directory as highlighted in red below:

```
$ MB_ALIASES["app-modernbill-admin"] = "app-modernbill-admin";
$_MB_ALIASES["app-modernbill-client"] = "app-modernbill-client";
$_MB_ALIASES["app-modernbill-order"] = "app-modernbill-order";
$_MB_ALIASES["app-helpdesk"] = "app-helpdesk";
$_MB_ALIASES["lib-action"] = "lib-action";
$_MB_ALIASES["lib-data"] = "lib-data";
```

6. Save the file and start using your new directory names.

**\*\* IMPORTANT \*\***

If you change the default directory names, upgrading ModernBill will require you to make these changes each time. This will ensure that your renamed directories contain the most current updates after an upgrade.

## Customizing The Order Form

You can easily customize the ModernBill v5 order form by editing the smarty template files and CSS in your theme directory. Follow the instructions below.

1. Go to your `/lib-themes/default/app-modernbill-order/templates/shopping` directory.

2. There are two files you need to modify:

```
header.tpl
footer.tpl
```

3. Open the header.tpl file. You can modify any of the code below the `<tag>` tag. Save the file after you have completed your modifications.

4. Open the footer.tpl file. You can modify any of the code above the `<tag>` tag. Save the file after you have completed your modifications.

5. You can modify the style sheet by going to the `/lib-themes/default/lib-modernbill/css/` directory

---

and view the shoppingstyle.css file.

Note: You can change the background color by modifying the following section of code:

```
body {  
    font-family: "Tahoma", sans-serif;  
    font-size: 10px;  
    background-color: #cfcdc7;  
}
```

## Using The EZOrder Form

ModernBill v5 has an ezorder form that you can use to replace the standard order form. The steps below explain how to properly configure your system to use the ezorder form.

### EZOrder Form Configuration

1. Setup and configure an order form in ModernBill as described in the Setting Up Your Order Form(s) document.
2. Navigate to System > System Settings > Admin Settings.
3. Locate the user "API User". Click the pencil icon to edit.
4. Locate the "Assigned Admin Groups" setting. Check the box next to "root". Click "update profile" to save.
5. When the page loads, copy the remote access hash.
6. Open /app-modernbill-api/config.php and paste the remote access hash as follows:  

```
define("ACCESS_HASH", "PASTE ACCESS HASH HERE");
```
7. Visit /app-modernbill-order/ezorder.php in your browser to view your ezorder page.

## Website Widgets

### Setting Up Website Widgets

ModernBill v5 supports website widgets. A website widget is a piece of code you can place anywhere on your website, locally or remotely to your ModernBill system, and link any product to your order form.

#### Overview

There are two types of website widgets:

- Product Widgets
- Whois Widgets

Website widgets are designed to accomplish two different things. A product widget is designed to display a product for a specific order form (and currency). The product widget displays buttons to allow people to add those products during the order process. A whois widget is meant to display a form to allow people to determine if a domain is available for purchase (or transfer) and to purchase it on a given cycle/currency.

---

## Product Widget Use

In order to use a product widget you need to have it set up in the system through the admin panel. Things you need to set are: order form, associated products, and display template. The PHP code you need in order to display a product widget on your website can be found in the "additional data" of the website widgets in the admin panel. The "additional data" can be toggled and displayed by clicking on the website widget of your choice anywhere except on one of the buttons (edit or delete).

Note: Website widgets are always provided with the utf-8 character set. Therefore, any page that includes them needs to set the character set to utf-8. In PHP, this can be done with the following PHP code before headers are sent (before any output is sent):

```
header("Content-Type: text/html; charset=utf-8");
```

If you still have multibyte issues on your website widgets, it is possible that the ModernBill database was not dumped and restored properly. See [How to safely dump and restore a ModernBill 5 MySQL database](#) for further instruction.

## Whois Widget Use

In order to display a whois widget on a website you must have a normal website widget defined and associated with an order form. You need to use the php code provided in the same manner you would for a product widget except you change the "whoisWidget => 0," flag to either 1 or 2 depending on what you want. The two levels of whois widgets are:

- 1 => Full whois widget exactly like the one found in the cart
- 2 => Small whois widget that only supports purchases and does not disrupt page layout

## Getting Started

1. Go to Products/Website Widgets.
2. By default your system is preconfigured with a website widget. If you click on the "Website Widgets" link in the "Widgets" secondary navigation bucket. The default widget is called "WW 1" for "Website Widget 1" in the list. You can edit the widget by clicking on the green "pencil" icon in the Actions column.
3. Set the following:
  - Website Widget Name: Modify or enter the name you want to use for this widget.
  - Widget Template: Select the widget template you want to use from the drop down menu.
  - Products: Select the products you want to associate with this website widget from the Selectable list. Move your selected products by double-clicking on the items or highlight them and click the left-arrow button.
4. Click on the "save" button.
5. Repeat Steps 1-4 above until you have created all the website widgets you need for your website.
6. Now you need to get the code for your website. To do so, click on the "Website Widgets" link in the "Widgets" secondary navigation bucket. When the page loads, click on any row specific to the website widget you want to place on your website. The page will expand displaying the code you need to insert in your website code. The code is preconfigured for you and is available for the following:
  - Local Include Code
  - Remote Include Code
7. Copy the code from the section you need and place it anywhere on your website as long as you are using PHP pages.
8. Repeat Steps 6 and 7 until you have completed inserting website widgets on your website.

---

## JavaScript Widgets

If you would like to include a website widget on a non-PHP page, you can display the widget using Javascript.

In order to implement and use JavaScript Widgets, follow the instructions below:

1. Go to Products/Website Widgets.
2. By default your system is preconfigured with a website widget. If you click on the "Website Widgets" link in the "Widgets" secondary navigation bucket. The default widget is called "WW 1" for "Website Widget 1" in the list. You can edit the widget by clicking on the green "pencil" icon in the Actions column.
3. Set the following:
  - Website Widget Name: Modify or enter the name you want to use for this widget.
  - Widget Template: Select the widget template you want to use from the drop down menu.
  - Products: Select the products you want to associate with this website widget from the Selectable list. Move your selected products by double-clicking on the items or highlight them and click the left-arrow button.
4. Click on the "save" button.
5. Repeat Steps 1-4 above until you have created all the website widgets you need for your website.
6. Copy the following code into your website page, substituting the relevant directory structure:

## Products

### **How do website widgets, the products.php page, and order forms all tie together?**

The concept of using website widgets is very new to ModernBill and was introduced in Version 5.0. Many customers ask how website widgets are used and how they are tied to the products.php page and order forms. Before we get started, first you need to know the functionality and general information of each component.

If you are already familiar with website widgets, the products.php page, and order forms, review some of the common questions asked regarding these three areas:

Does the products.php page replace order forms?  
Can I have multiple products.php pages to display my website widgets and products?  
Can I have multiple website widgets per products.php page?  
How are products linked to the shopping cart on my website?

Note: Website widgets are always provided with the utf-8 character set. Therefore, any page that includes them needs to set the character set to utf-8. In PHP, this can be done with the following PHP code before headers are sent (before any output is sent):

```
header("Content-Type: text/html; charset=utf-8");
```

If you still have multibyte issues on your website widgets, it is possible that the ModernBill database was not dumped and restored properly. See [How to safely dump and restore a ModernBill 5 MySQL database](#) for further instruction.

Website Widget

---

A website widget is a piece of code that displays a specified set of products anywhere on a website, be it on the same server as ModernBill or in a remote location. Note the following information:

You can have any number of products attached to a website widget.

You can have multiple widgets per order form.

You can have multiple products per order form.

You can have multiple server groups per order form.

An order form is really the shopping cart system that uses locale, currency, domain settings, and username/password settings.

## The products.php Page

The products.php page is a default page that uses the default widget that's installed with your ModernBill. The default website widget displays default packages, Bronze, Silver, and Gold.

You can set the products.php to any website widget. To do this, follow the instructions below:

1. Open the products.php file located in /your-modernbill-directory/app-modernbill-order/.
2. Locate the following section of code.

```
$websiteWidgetArgs = array(  
    'widgetID' => 1,  
    'method' => 'local',  
    'whoisWidget' => 0,  
    'urlORpath' => dirname(__FILE__)  
);
```

Notice the line highlighted in red:

```
$websiteWidgetArgs = array(  
    'widgetID' => 1,  
    'method' => 'local',  
    'whoisWidget' => 0,  
    'urlORpath' => dirname(__FILE__)  
);
```

3. The widgetID is the website widget ID located in your ModernBill. To find the ID for the website widget you want to use, follow the subset of instructions below:

- a. Click on the Products tab in your ModernBill.
- b. Click on the "Website Widgets" link in the left main sub nav.
- c. When the page loads, find the website widget you want to use.
- d. Each record in the widget list has column "ID" and contains the identification number of its associated widget.

4. Again, the default widget code below is using widget column ID 1:

```
$websiteWidgetArgs = array(  
    'widgetID' => 1,  
    'method' => 'local',  
    'whoisWidget' => 0,  
    'urlORpath' => dirname(__FILE__)  
);
```

---

Replace ID 1 with the ID you want to use. In our example, we are using widget column ID 2. We replaced widget ID 1 with widget ID 2 as shown below:

```
$websiteWidgetArgs = array(
    'widgetID' => 2,
    'method' => 'local',
    'whoisWidget' => 0,
    'urlORpath' => dirname(__FILE__)
);
    Multiple products.php Pages
```

You can use multiple products.page pages to display your various website widgets. Before you consider this option, read the Linking Products To Your Shopping Cart section of this document first. Then decide which method is right for you. However, if you prefer to setup and use multiple products.php pages, the instructions below will get you started.

1. Open the /your-modernbill-directory/app-modernbill-order/ directory. You will see the default products.php file.

2. Decide how many products.php pages you want to use. If you decide three (3) pages will fit your organization's model, create two (2) copies of the products.php file. If your organization needs ten (10) pages, create nine (9) copies of the products.php file. You can name the copies anything you want. Ex. products2.php, products3.php, etc. They do not have to contain the word "products."

3. Open each of your products.php files and make sure the widgetID variable (highlighted in red below) is using the website widget you want to display on that particular products.php page. To learn how to retrieve the widgetID variable, read the The products.php Page section of this document.

```
$websiteWidgetArgs = array(
    'widgetID' => 1,
    'method' => 'local',
    'whoisWidget' => 0,
    'urlORpath' => dirname(__FILE__)
);
```

4. Now you can display your products.php pages as shown below (example only):

```
/your-modernbill-directory/app-modernbill-order/products.php (default file)
/your-modernbill-directory/app-modernbill-order/products2.php (copy)
/your-modernbill-directory/app-modernbill-order/products3.php (copy)
    Multiple Website Widgets Per products.php Page
```

You can add as many widgets to a products.php page as you need. Before you consider this option, read the Linking Products To Your Shopping Cart section of this document first. If you decide you want to add more than one website widget to your products.php page, follow the instructions below.

1. Open the /your-modernbill-directory/app-modernbill-order/ directory. You will see the default products.php file.

2. Notice the following section of code:

### **Available Products**

3. Copy the above code and paste it into the same products.php document. You can add as many of these code sections as you need.

4. Modify the widgetID variable as described in the The products.php Page section of this document.

### Replacing Order Forms

The products.php does not replace order forms, but before we get into the main uses of

---

products.php, you need to understand the purpose of order forms and the shopping cart system. Order forms are specific to locale, currency, domain settings, and username/password settings.

A customer visits your website. On your website you have a list of products. Your products are linked to the ModernBill shopping cart system. The shopping cart system holds all the products and services your customer is considering for purchasing while visiting your website. In the shopping cart section, your customer can order a domain name (if you choose), add add-ons, answer custom questions, and view their order in the currency and language you set in your order form settings. Again, order forms are specific to locale, currency, domain settings, and username/password settings and are specific to the shopping cart area only.

## Linking Products To Your Shopping Cart

There are several ways to link products to your shopping cart. View the examples below:

### Example 1: Image link or Text link

First, take a look at the Our Tasty Menu on the Joe's Host website. Notice the three (3) "Sign up!" images under each product listing - Appetizer, Entree, and Dessert. Each of these images are linked directly to the shopping cart. Below is an excerpt of html code that generates the "Our Tasty Menu" page. Pay close attention to the red highlighted value=key sets.

The variables available for website widgets are described as:

- orderFormID - The ID to the order form tied to the website widget being used.
- productID - The ID of the product being linked to the shopping cart.
- productVariantID - The variant ID of the product.
- cycleID - The billing cycle or now referred to as "cycle" associated with the product.

The system already populates the variables above for you depending on how you setup your website widgets, products, and order forms. To get the pre-populated url, go to your products.php page via your favorite browser. Right-click on the "order" button for the product you want to retrieve the url.

### Example 2: Using The products.php Page

You can only have one widget per products.php page, but you can have multiple products per widget. You can customize the products.php page match the "look and feel" of your website. Website widgets use Smarty template to manipulate the rendering of the products.php output. Before you attempt to modify any of the Smarty files, you need to visit the Smarty website at <http://smarty.php.net/>. Next you need to understand the widget templates that are available in the system. They are listed below:

- ppcSpecialOfferWidget-Grid.tpl
- ppcSpecialOfferWidget-List.tpl
- simpleSingleProductPlusAddons.tpl
- simpleWidget-Grid.tpl
- simpleWidget-List.tpl

The website widget Smarty templates listed above are located in the /your-modernbill-dir/lib-themes/default/app-modernbill-order/templates/website\_widgets directory. Modify each template accordingly.

Note: You associate the website template you want to use on the products.php by going to your website widget using the ModernBill interface and choose from the "Widget Template" drop down menu.

### Example 3: Using Standalone PHP Include Code (Local)

You can place a website widget anywhere on your website using standard PHP includes. The code is very similar to what you learned in the The products.php Page section of this document. Below is an example of using the PHP include code when placing a website widget on a local website.

---

Notice the widgetID is highlighted in red. This must match with the website widget you want to use as described in the [The products.php Page](#) document. Remember, if you only want one (1) product to show up in the website widget, associate only one product when setting up the website widget in the ModernBill interface. Also notice the method is highlighted in orange and indicates the type of placement this widget is utilizing on your website. The method for the local PHP include file is "local."

#### Example 4: Using Standalone PHP Include Code (Remote)

You can place a website widget anywhere on your website using standard PHP includes. The code is very similar to what you learned in the [The products.php Page](#) section of this document. Below is an example of using the PHP include code when placing a website widget on a local website.

Notice the widgetID is highlighted in red. This must match with the website widget you want to use as described in the [The products.php Page](#) document. Remember, if you only want one (1) product to show up in the website widget, associate only one product when setting up the website widget in the ModernBill interface. Also notice the method is highlighted in orange and indicates the type of placement this widget is utilizing on your website. The method for the remote PHP include file is "remote."

#### Example 5: Using JavaScript

You can place a website widget anywhere on your website using standard JavaScript. The code example is shown below:

Notice the wwid is highlighted in red. This is the same ID as the widgetID described in the [The products.php Page](#) document. Remember, if you only want one (1) product to show up in the website widget, associate only one product when setting up the website widget in the ModernBill interface.

## Creating Products

### Creating Products

ModernBill v5 uses several types of predefined products to make it easier to create products in your system. Once your product has been created, you can modify the product to your specific needs. To get started, follow the instructions below.

1. Go to System/Product Settings/Product Settings/Add Product.

**Note:** If you selected the option for ModernBill to preconfigure products for you during the installation process, you will see those products in the product list when the page loads. To edit each product according to your specific needs, click on the "edit" icon in the Actions column. To add new products, continue to Step 3 below.

2. When the page loads, you will see the following settings have already been configured. However, you can modify the settings by clicking on the "edit" icon next to each product label.

Product ID: This is preset by the system and cannot be modified.

Type: Select the type of product you want to use for this product.

Name: Enter the name of your product.

Comments: Enter any comments you to associate with this product.

Billing Plan: Select the type of billing cycle you want to use for this product. Your choices are:

- Forever
- One Time Only
- Fixed Duration

---

Is Active: Is the product active? Select Yes.  
Addon Product: Is this an addon product? Select Yes.  
Is Proratable: Do you want the product to be proratable? Check the box.  
Associate Domain: Select how you want domains to be associated with this product from the drop down menu. Your choices are:

Optional  
Required  
Suppressed

Associate Addon: If this is not an addon product and you would like to associate addons with this product, select from the drop down menu. Your choices are:

Optional  
Required  
Suppressed

Date Created: This is preset by the system and cannot be modified.

3. Once you have modified the product settings according to your specific needs in Step 2 above, you will see a list of options you can set as described below:

Set Order Forms: Select the order form you want to use for this product.

Note: You can double-click from the Selectable list or click on an item and then click in the "

## Branding Multiple Order Forms

ModernBill v5 allows you to brand multiple order forms to distinguish between different product lines, areas of your site, or even multiple companies, all connected to a single ModernBill installation.

### Creating Multiple Order Forms

1. Create two order forms in ModernBill as described in the Setting Up Your Order Form(s) document.
2. Create a website widget for each order form as described in the Setting Up Website Widgets document.
3. Copy the /lib-themes/default/app-modernbill-order/ directory to:

/lib-themes/default/app-modernbill-order1  
/lib-themes/default/app-modernbill-order2

Note: Leave the original order form files in place as they will be used for any other order form.

4. Modify the following files in both new directories to brand each order form:

/templates/shopping/header.tpl  
/templates/shopping/footer.tpl

For more information on customizing the header and footer, see the Customizing The Order Form document.

5. The website widget for order form 1 will now go to the app-modernbill-order1 order form, and the website widget for order form 2 will go to the app-modernbill-order2 order form.

---

## Creating one-time billing products.

You can easily create products that require a one-time charge. For example, if you sell DVDs or IP Addresses, you can setup your ModernBill system to charge the customer one time only. To get started, follow the directions below.

1. If you are familiar with creating a product according to the Creating Products document, some settings are going to be slightly different when creating one-time charge products. If you have already created your product, make sure the following is set correctly:

Type: Select Non-Hosting product from the drop down menu.  
Name: In our example, we are going to enter "DVD" as the product name. We entered "How to Win at Hosting DVD" as the name of our product.  
Comments: Just a general description will work perfectly such as "How to Win at Hosting DVD."  
Billing Plan: One Time Only  
Is Active: Yes  
Is Proratable: No  
Is Option: Leave as default if shown.  
Addon Group: None  
Question: Leave as default if shown.  
Associate Addon: Suppressed  
Associate Domain: Suppressed  
Cancellation Rules: Select according to your specific needs.

Once you have made sure all of the above are correct, click on the "save" button.

Note: If at any point you come back to the products details page, some of the options will be suppressed. You can continue to use the product without any issues.

2. When the page loads, click on the "order forms" link.

3. Move the order form you want to assign this product to from the Selectable list to the Selected list. Then click on the "edit product order forms" button.

4. Next, click on the "Time Cycles" link on the left sub-nav menu. A "Time Cycles" box will appear on the left side of the page. Then click on the "Add Cycle" link.

5. The name you enter for the Name value will be shown in the order form. For our example, we entered the name of the DVD as "How to Win at Hosting DVD." Be sure to select a time cycle for your one time billing product. Then click on the "add" button.

6. Go back to Products. Then find the product you want to edit and click on the edit link in the Actions column.

7. Click on the "cycles" link. Move the time cycle you created in Step 4 & 5 above from the Selectable list to the Selected list. Then click on the "edit product cycles" button.

8. Next, click on the "prices" link. Click on the edit icon in the Pricing column. Enter the price of your product in the General textbox. Click on "edit product variant prices" button.

9. Click on the "Website Widgets" link in the left sub-nav menu. When the box appear on the left side of the page, click on the "Website Widgets" link. When the page loads, click on the edit icon in the Actions column for the website widget you want to use. By default, website widget WW 1 is available. You can use the default website widget or create a new one depending on your specific needs.

10. Move the product you created from the Selectable list to the Selected list. In our example we moved the "How to Win at Hosting DVD" product.

11. Click on the "save" button.

12. Now go to <http://yourdomain.com/your-modernbill-directory/products.php>. You should see the

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website widget and your product.

Repeat the steps above to add all your one-time charge products.

## Add-ons

### **Creating add-ons, custom questions, and attributes.**

NOTICE - Please skip to the "Creating Add-ons" section of this document by click on the link below:

Creating Add-ons

ModernBill v5 supports three distinct types of custom attributes:

1. Product Attributes
2. Order Form Attributes (Client Attributes)
3. Generic Attributes

Depending upon your business rules, you may need to setup one or more of these attributes as needed. Here are a few quick tips to help you decide which attributes to use to meet your needs.

#### Product Attributes

Product Attributes are custom attributes associated to one or more products.

When a product with attributes is ordered using the shopping cart, the end-user will be asked the custom question(s) configured for each associated attribute.

Notes:

Product attributes DO NOT affect pricing.  
Since multiple products can be ordered at the same time using the shopping cart, the system can ask multiple questions accordingly.  
Answer(s) to custom question(s) will be stored as package attribute(s).  
(A product becomes a package after it is ordered.)  
Package attributes can be used by Panel Modules for provisioning purposes IF the panel module supports it.

Example Product Attributes:

Please select the datacenter where your server will be co-located.  
What domain would you like your license registered to?

#### Order Form Attributes

Order Form Attributes are custom attributes associated to one or more order form groups.

When an order is placed using an order form with attributes, the end-user will be asked the custom question(s) configured for each associated attribute.

Notes:

Order form attributes DO NOT affect pricing.  
Order forms can support unlimited custom questions.  
Answer(s) to custom question(s) will be stored as client attribute(s).

---

## Example Order Form Attributes:

How did you hear about us?  
What is your favorite color?

### Generic Attributes

Generic Attributes are custom attributes that will be used for creating add-ons only.\*

\* Add-ons were designed to replace panel attributes associated with a product. However, if you have a product that IS NOT associated with a panel, but want to create add-ons for it anyway, you need to setup the Generic Attribute(s) FIRST.

#### Notes:

Generic attributes by themselves DO NOT affect pricing.  
Generic attributes used for creating add-ons CAN affect pricing!

### Setting up Product Attributes & Order Form Attributes

Product attributes & order form attributes can be created using the same steps.

1. Go to System/Custom Attributes.
2. Click the &ldquo;manage questions&rdquo; button.
3. Click the &ldquo;add custom question&rdquo; button.
4. Set the following:

Name: Enter the name of your question.  
Display Order: Enter the order you want your questions to appear.  
Question: Enter your question.  
Description: Enter a description of your question. (This will appear on the order form)  
Type: Select what type of question you want this to be from the drop down menu.

Hidden  
Text  
Password  
Text Area  
Select Radio

Input Restrictions: For advanced users only.

5. Click on the "next" button.
6. Follow the wizard steps according to what you selected as the "Type" in Step 4 above. Repeat as needed to setup all your questions.
7. When you have completed adding your questions, click on the "Manage Attributes" link on the left sub-menu.
8. Next, click the &ldquo;new product or order form attribute&rdquo; button on the manage attributes screen.
9. Enter the &ldquo;attribute key&rdquo; in the pop-up window and click the &ldquo;add&rdquo; button. This will create an empty attributes record ready for more input.

An empty custom attribute record should look like this:

---

\* Click the pencil icon to choose the type of attribute this record will become.

\* After the type is chosen, the association edit icon will be active and ready for setting.

\* Lastly, click the custom question edit icon to assign this attribute to the question you created in step 1.

A completed custom attribute record will now look like this:

### Creating Add-ons

1. Go to System/Custom Attributes.
2. When the page loads, click on the "new generic attribute" button.
3. There are two sections: Setup Internal Values and Setup Display Values

Set the following accordingly:

Setup Internal Values:

Generic Attribute Key: Enter a key that represents the add-on question. (Not displayed)

Example: Choose OS

Generic Question Name: Enter a name that represents the question you are asking for the add-on. (Not displayed)

Example: Which OS

Setup Display Values:

Default Question: Enter the question you are asking for the add-on. (Displayed)

Example: Which operating system do you want installed on your server?

Default Answer Value: Enter a default value if applicable to your business model. (Displayed)

Question Description: Enter a description that best represents your question. (Displayed)

4. Click on the "save" button.
5. Click on the Products tab.
6. When the page loads, find the product you want to associate the add-on you created above.
7. Click on the Details link in the Action column for the product you chose.
8. Find the "Associate Addon" setting. Select either "optional" or "required" in the drop down menu.
9. Click on the "save" button.
10. Click on the "attributes" link.
11. Click on the green pencil icon in the Value column. When the pop-up window appears, leave the Name empty and click the "Add" button.
12. When the page loads, click on the "add-ons" link.

---

13. Next, click on "create new addons for this product" button.

14. Set the following:

Panel Attribute to Change: Select the attribute/custom question you want to use for this add-on from the drop down menu.

New or Update Existing Addon: Leave as default.

Addon HTML Display Type: Select from one of the following in the drop down menu.

Radio Buttons  
Select Menu  
Checkboxes

Addon Display Label: Enter the display you want to use for the add-on label.

How Many Options Do You Need?: Select how many options you want to give the customer for this particular add-on from the drop down menu. For our example we chose 2 as the number of options.

Note: You can only add five (5) options at a time when configuring an add-on. If you need more than five (5) options, follow the instructions below (This assumes you have already created an add-on, otherwise you will not be able to add more options):

- a. Go to Products.
- b. Find the product you want to use to modify the add-on and click on the "details" link.
- c. When the page loads, click on the "add-ons" link.
- d. Next, click on the "create new option" button at the bottom of the options list.
- e. You can then select the number of options you need to add in the "How Many Options Do You Need?" drop down menu. Notice the "Panel Attribute to Change" and the "New or Update Existing Addon" settings are prepopulated.
- f. Continue through the wizard until you have added your additional options. If you need to add another group of five (5), or less depending on the total needed, repeat steps 'a' through 'e' above.

15. Click on the "next" button.

16. When the page loads you will see two sections: Option Display Name and Option Internal Value(s)

Set the following accordingly.

Option Display Name:

Replace "Name 1" with the display name you want to use for option one.

Replace "Name 2" with the display name you want to use for option two.

Optional Internal Value(s):

Enter the values you want to be used internally based on the Option Display Name 1.

Enter the values you want to be used internally based on the Option Display Name 2.

Below is an example:

Set Configurations Options

Option Display Name  
Optional Internal Value(s)

CentOS  
CentOS

17. Click on the "next" button.
18. Enter prices for your options and click on the "next" button.
19. Click on the "finish" button.
20. When you browse to where your ModernBill order form is located you will see the add-ons you have created.

## Coupons

### Creating Coupons

You can create coupons for as many billing cycles as you want and/or period of time that you need specific to any product in your system. Follow the instructions below to get started.

1. Go to System/Products/Coupons/Add Coupon.

2. Enter the following information:

Coupon Code: Enter the name of your coupon.

Type: Select the type you want to use for your coupon (Percent or Unit)

Percent - You can set the coupon to be any percentage specific to your needs.

Unit - You can set a flat amount off of a particular product.

Discount: Enter either a percentage value or a flat amount value. (MUST be a numeric value.)

Comments: Enter any comments you want for this coupon.

Active: Is the coupon active? Select Yes.

Start Date: Enter the date you want the coupon to start by selecting the date options from each drop down menu or click on the "..." button to view the built-in calendar.

End Date: By default the "End Date" is disabled. If the "End Date" is left disabled, it will not expire. To enable the "End Date" setting, click on the checkbox. Then select the date options from each drop down menu or click on the "..." button to view the built-in calendar.

Number of cycles: Enter the number value for the amount of billing cycles you want the coupon to be applied.

Max Count: Enter the maximum number of times the coupon can be used.

New Signups: Is the coupon specific to new signups only? Check the box if Yes.

3. Click the "Add Coupon" button.

# TLDS

## Adding A TLD

You can add as many TLDS to your system as you need. Your TLD MUST be supported by the system.

Note: TLDS will not show up in the order form unless you have specified prices.

To get started, follow the directions below.

1. Go to System/Products/TLDS/Add TLD.

2. Enter the following information:

Name: Enter the name of your TLD. (.com)

Extension: Enter the TLD extension. (.com)

Registrar: Select the registrar you want to use for this TLD in the drop down menu.

Active: Is the TLD active? Select Yes.

Whois Server: Optional. If you want to override the built-in values, enter the whois server you want to use for this TLD.

Whois Response: Optional. If you want to override the built-in values, enter the whois response for this TLD. (No match)

Auto Search: Do you want the system to automatically search for this TLD even if the user choose to search on another TLD? Select Yes.

Is Transferable: Is the TLD transferable? Select Yes.

Transfer Type: Select from the following based on the type of transfer type specific to this TLD.

Code

Fax

Email

Mail

Transfer Minimum Term: Select the number of years to transfer. (Ex: .uk is 2 yr minimum term)

Minimum Term: The minimum number of years you want to register the domain.

Maximum Term: The maximum number of years you want to register the domain.

Local Renew Type: Select the type of renewal you want to associated with this domain. Your choices are:

Disabled-You do not want to renew the TLD at all.

Auto Renew: You want the registrar associated with the TLD to automatically renew the domain.

ModernBill Renew: You want ModernBill to renew the TLD.

IDN Support: Allow for international character translations for this TLD. (International Domain Name)

IDN Type: Select the type of IDN you want support for this TLD. Currently only Punycode is supported. (International Domain Name)

Remote Lock: Supports registrar locking of the TLD.

3. Click the "Add TLD" button.

---

## System

*There are no articles in this category.*

## System Settings

*There are no articles in this category.*

## Main System Settings

### **Main System Settings**

System >> System Settings >> Main System Settings

Currently the only option in "Main System Settings" is the enabling the internal HelpDesk. Set the following:

Enable Internal HelpDesk: Select "Yes" to enable the HelpDesk. Select "No" to disable the HelpDesk.

## Encryption Settings

### **Encryption Settings**

System >> System Settings >> Encryption Settings

NOTICE! ModernBill supports full-automated encryption using "LEK" and semi-automated encryption using a unique "Passphrase."

1. Click on the System tab.
2. Click on the "Encryption Settings" link in the System Settings section.
3. When the page loads, enter "agree" without quotes in the General Encryption Settings section.
4. There are two ways you can encrypt credit cards in the system. One is using the Local Encryption Key (LEK) and the other is using a Passphrase.

LEK Encryption Settings

Will I have to do less work if I use the LEK option? Yes! The LEK option supports full automation for your system! If you want to have more tasks to complete in your day-to-day operations, choose the Passphrase method below.

---

If you are choosing to use the fully-automated LEK method, click on the "Local Encryption Key (LEK) radio button. Then open a new browser window and follow the instructions below to retrieve your LEK Pin and Hash.

- a. Go to <http://www.modernsupport.com/modernbill/index.php?type=v5lek>.
- b. Enter your encryption key in the textbox provided. The encryption key is any alphanumeric value that you make up. It can be anything you want it to be.
- c. Select your four digit PIN from the four drop down menus.
- d. Click on the "Generate LEK Hash" button.
- e. When the page loads, the Encryption Hash is generated. Copy the Encryption Hash.

Next, in the "Secret To Remember" section, set the following:

LEK Pin: This is the four digit PIN you set in Step "b" above.

LEK Pin Again: Enter the four digit PIN again for verification.

Then enter the "Hash" you copied in Step "e" above in the New Hash textbox.

#### Passphrase Encryption Settings

Will I have do to more manual work if I choose the Passphrase option? Yes! You will be prompted to enter this passphrase to decrypt and encrypt encoded data for viewing and setting credit card information. In addition, when clients enter new encoded data, you will be assigned a to-do to re-encrypt the dat with your passphrase. This is a tedious option.

Set the following:

Passphrase: Enter any alphanumeric phrase that you can remember.  
Confirm: Enter the same passphrase you entered above.

## Admin Settings

*There are no articles in this category.*

## My Profile

### My Profile

System >> System Settings >> Admin Settings >> My Profile

You can modify the profile you are logged in as by following the instructions below.

1. Click on the System tab.
2. Click on the "Admin Settings" link in the System Settings section.
3. Click on the "My Profile" link in the left sub nav.
4. Modify the following according to your specific needs:

First Name  
Last Name  
Email  
Username  
New Password  
Enter Password Again  
Theme  
Language  
Country  
Active  
  
Inactive  
Active

5. Click on the "update profile" button.

## Add New Admin

### Add New Admin

System >> System Settings >> Admin Settings >> Add New Admin

You can add as many ModernBill administrators to your system as needed for your specific business needs. To get started, read the directions below.

1. Click on the System tab.
2. Click on the "Admin Settings" link in the System Settings section.
3. Click on the "Add New Admin" link in the left sub nav.
4. Set the following information:

First Name: Enter the administrator's first name.

Last Name: Enter the administrator's last name.

Email: Enter the administrator's email address.

Username: Enter the administrator's username.

New Password: Enter the administrator's password.

again.  
Enter Password Again: Confirm the administrator's new password by entering it

Language: Select the language you want the administrator to use.

Country: Select the administrator's country.

Active

Inactive

Active

Assigned Admin Groups: Check each admin group you want this administrator to be assigned. To learn more about admin groups, read the Manage Admin Groups document.

5. Click on the "Add Admin Profile" button.

# Manage Admin Groups

## Manage Admin Groups

System >> System Settings >> Admin Settings >> Manage Admin Groups

To get to the "Manage Admin Groups" section, follow the instructions below:

1. Click on the System tab.
2. Click on the "Admin Settings" link in the System Settings section.
3. Click on the "Manage Admin Groups" link in the left sub nav.
4. You have several options on the "Manage Admin Groups" page:

View/Edit Admin Groups Permissions  
Edit Admin Groups Names  
Remove Admin Groups  
Add New Admin Groups  
View/Edit Admin Groups Permissions

When the page loads you will see a section that lists all available admin groups in the system. Each admin group show the following:

Admin Group Name  
Actions

Details - See Details below to edit permissions.  
Edit - See Edit Admin Groups Name below to edit the name of the admin group.  
Remove - See Remove Admin Groups below to remove the admin groups.

### Details

1. Click on the "Details" icon in the Actions column next to the admin group you want to edit or modify.
2. When the page loads, move the administrators from the "Unassigned Admins" list to the "Assigned Admins" list by double-clicking each admin or use the arrow keys.
3. Click on the "update admin assignments" button.  
Edit Admin Groups Name

1. Click on the "Edit" icon in the Actions column next to the admin group name you want to edit or modify.
2. When the page loads, modify the "Admin Group Name" accordingly.
3. Click on the "update" button.  
Add New Admin Groups

You can add as many administrator groups to your system as needed for your specific business needs. To get started, read the directions below.

1. Click on the System tab.
2. Click on the "Admin Settings" link in the System Settings section.

3. Click on the "Manage Admin Groups" link in the left sub nav.
4. Enter a name for the admin group you want to create in the textbox next to the "add new group" button.
5. Click on the "add new group" button.
6. When the page loads, move the administrators from the "Unassigned Admins" list to the "Assigned Admins" list by double-clicking each admin or use the arrow keys.
7. Click on the "update admin assignments" button.
8. Next you need to define the actions for the group you created. Each action defines the flexibility or limitations of the administrators that you added to the group. To add the actions, click on the +/- symbol next to "Select the actions that all admins in this group can perform."
9. All of the "actions" categories will expand. Each category shows two lists, one for "Allow" and one for "Deny." Go through the list and move the actions you want each administrator in this group to have access to by double-clicking or using the arrow buttons.

Note: If you are not sure what each actions represents in the system, you can use the built-in recording feature. To use the recording feature, click on the "Click to record actions" link. Go through the system as if you were an administrator in this group. Each page or feature you use will be recorded. If you do not want an administrator to have access to a particular page or feature in the system, do not view the page or use the feature. While the recording feature is turned on, a red spiral icon and the text "stop recording" appear to the left of the "Dashboard" link. When you are finished recording the actions for this group, click on the "stop recording" link. The page will automaticall reload. Scroll down the list of actions and you will see all the actions that you viewed in the system moved from the "Deny" list to the "Allow" list. You can adjust the actions according to your specific needs by double-clicking the action or using the arrow button. When you are finished adjusting your actions, continue on to Step 10 below.

10. Click on the "update action assignments" button.  
Remove Admin Groups

1. Click on the "remove" icon in the Actions column for the admin group you want to remove.

2. The system will verify if you want to remove the admin group by stating:

Remove AdminGroup ID: "x"?

3. Click on the "yes" or "no" button accordingly.

**Filter By: Active**

### **Filter By: Active**

System >> System Settings >> Admin Settings >> Filter By: Status

The "Filter By: Status" feature is designed to generate a list of administrators based on the following:

- Show All (Default)
- Inactive
- Active

---

Choose from the drop down menu available and click on the arrow box.

## Search By: Keyword/ID

### **Search By: Keyword/ID**

System >> System Settings >> Admin Settings >> Search By: Keyword/ID

Enter a keyword or ID and press the arrow button. The system will retrieve all records related to the keyword or ID you are searching.

## Migration Settings

*There are no articles in this category.*

## Company Settings

### **Company Settings**

System >> System Settings >> Company Settings

1. Click on the System tab.
2. Click on the "Company Settings" link in the System Settings section.
3. When the page loads, modify the following accordingly:

- Name
- Short Description
- URL
- Client URL
- Order URL
- Email
- Address 1
- Suite/Apartment
- City
- State
- Zip
- Country
- Phone 1
- Phone 2
- Fax Tax ID Number

4. Click on the "save changes" button.

---

## Versions

### Versions

System >> System Settings >> Versions

1. Click on the System tab.
2. Click on the "Versions" link in the System Settings section.

The versions feature is specific to ModernBill developers only. This will be relocated and hidden in a future release.

## Payment Settings

*There are no articles in this category.*

## Payment Groups

### Payment Groups

System >> Payment Settings >> Payment Groups

Payment Groups are groups consisting of two gateways:

Primary (BluePay, Authorize.net, etc.)  
Secondary (PayPal, WorldPay, etc.)

View/Modify Payment Groups  
Add New Payment Group  
View/Modify Payment Groups

1. Click on the System tab.
2. Click on the "Payment Groups" link in the Payment Settings section.
3. Click on the "edit" icon in the Actions column for the default Payment Group ID "1" column.
4. Modify the Payment Group Currency to your specific needs. The default currency is listed as "USD."
5. Select the gateway you want to use from the Add Primary Gateway drop down menu.
6. If you want to add a second gateway to your payment group, select the gateway from the Add Secondary Gateway drop down menu.
7. Click on the "Edit Payment Group" button.

8. When the page loads, click on the Payment Group ID link and you should see the gateway listed.

Note: Make sure you setup your gateway(s) according to the instructions specific to your gateway(s) in Modules/Gateways.

Add Payment Group

1. Click on the System tab.

2. Click on the "Payment Groups" link in the Payment Settings section.

3. Click on the "add payment group" button.

4. Set the following:

Payment Group Name: Enter the name of your payment group. It can be anything specific to your business.

Payment Group Currency: Enter the 3-character ISO 4217 currency code such as USD, EUR, etc.

Add Primary Gateway: Select your primary gateway from the drop down menu.

Add Secondary Gateway: Select your secondary gateway from the drop down menu.

5. Click on the "add this payment groups" button.

6. When the page loads, you can modify the settings for each of your gateways by clicking on the "pencil" icon. Documentation for each gateway supported is available. View the "Modules/Gateways" category to find your specific gateway.

## Payment Queue

### Payment Queue

System >> Payment Settings >> Payment Queue

1. Click on the System tab.

2. Click on the "Payment Queue" link in the Payment Settings section.

3. When the page loads, set the following:

Payment Queue Action: Select one of the following:

Charge

Authenticate Only

Process New Invoices: Yes/No

Process Declined Transactions: Yes/No

Process Errored Transactions: Yes/No

Charge On Due Date Only: Selecting "Yes" will tell the system to process cards on invoice due dates only. For example, if you have a batch of invoices and their due date is today, the system will process the invoices.

Clear The Payment Queue First:

Try Lesser Amounts: Selecting "Yes" will tell the system to attempt to process amounts less than what's indicated on the invoice. For example, if an invoice is \$200.00 and the customer's card on file does not have enough funds available, the system will attempt to process a lesser amount than \$200.00.

Generate Batch Prior To Due Date (Number of Days): Enter the number of days you

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want the batch to process prior to the invoice due dates. For example, if the invoice due dates are set to the 10th of each month and you want to generate the batch on the 5th day of each month, enter "5" as the value.

4. Click on the "save settings" button.

## Virtual Terminals

### Virtual Terminals

System >> Payment Settings >> Virtual Terminals

The "Virtual Terminals" feature allows you to process a payment based on the gateways you have configured. You **MUST** have a gateway configured and running before you can use the Virtual Terminals feature. In addition, the gateway must support Virtual Terminals ability, otherwise you will not be able to use it to process a payment.

#### Usage

Using the Virtual Terminals feature is for administrators wanting to accept and process payment not related to an invoice. For example, you just want to process a payment for \$200, but no invoice has been created, you would use the Virtual Terminals feature.

1. Click on the System tab.
2. Click on the "Virtual Terminals" link in the Payment Settings section.
3. When the page loads, check the "Generating Income Accounting Entries" if you want full accounting to be created for this payment.
4. Set the following:

- First Name
- Last Name
- Customer Address
- Suite
- City
- State
- Zip
- Customer Country
- Phone
- Fax
- Amount of Payment
- Payment Comments
- Payment Type
- Charge Action
- Credit Card:

- Name on Credit Card
- Credit Card Number
- Expiration Date
- Credit Card Type
- CVV2 Code

4. Click on the "charge" button.

---

# Order Settings

*There are no articles in this category.*

## Order Form Settings

### Order Form Settings

System >> Order Settings >> Order Form Settings

Order Forms are specific to the following:

- Payment Options
- Language
- Country
- Domain Options
- Min/Max Username/Password Settings
- Associated Products
- Associated Coupon

Each Order Form Profile is used during the checkout process. Website widgets are used to advertise products and services on your website. They link directly to your shopping cart which is controlled by the Order Form Profile.

Setting up your order form is essential if you want to sell products, utilize payment gateways, process orders, and use the new localization feature in ModernBill v5. To get started, follow the directions below.

1. Click on the System tab.
2. Click on the "Order Form Settings" link in the Order Settings section.
3. When the page loads, click on  
Add New Order Form

1. Click on the "add new order form" button.
2. By default your system is preconfigured with one (1) order form. You can edit the default order form according to your specific needs by clicking on the "edit" icon in the Actions column. If you want to add a new order form, click on the "add new order form" button.
3. Set the following:

- Order Form Name: Enter the name of your order form.
- Payment Group: Select the payment group you want to use for this order form. To learn more about Payment Groups, view the Adding A Gateway document.
- Company: The default company is what you setup during installation. You cannot modify this setting.
- Language: Select the language you want to use for this order form.
- Country: Select the country you want to use for this order form as default.
- Verify VAT Numbers: Check the box if you want the system to attempt to verify the validity of VAT numbers through this order form and apply VAT only when necessary.
- Domain Options: Check each box that applies to your specific needs.

Perform WHOIS lookups for prospective domains.

---

Allow purchase of new domains.  
Transfer Domain  
Allow customer to use existing domain.  
Allow the customer to skip this step.

'Free' Email Banning: Do you want to allow free emails to be used for ordering?  
Select Yes.  
Continue Shopping URL: Enter the URL that you want your customers to be sent to when they click the continue shopping button in the cart.  
Order Email Banning Message: Enter the message you want users to see on the order form if they are trying to use a free email address.  
IP Banned Message: Enter the message you want users to see on the order form if their IP address is banned from your system.  
Enable Check Option: Do you want users to have the option to pay by check? Select Yes.  
Enable Invoice Option: Do you want users to have the option to pay by invoice? Select Yes.  
Enable Bank Draft Option: Do you want users to have the option to pay by bank draft? Select Yes.  
Minimum Username Length: Enter the minimum number of characters you want the user to enter as their username.  
Maximum Username Length: Enter the maximum number of characters you want the user to enter as their username.  
Minimum Password Length: Enter the minimum number of characters you want the user to enter as their password.  
Maximum Password Length: Enter the maximum number of characters you want the user to enter as their password.  
Terms and Conditions Page: Enter the url to your Terms and Conditions page.  
Product Settings: Move the products from the "Unassigned Products" list to the "Assigned Products" list by double-clicking each product or highlighting each product and click on the left arrow button.

Note: If you want to sell domains, you must associate a Domain Registration product.

Product Addon Settings: N/A

Coupon Settings: If you have created coupons in your system, they will appear in the "Unassigned Coupons" list. To associate coupons you want to have available on this order form, move the coupons from the "Unassigned Coupons" list to the "Assigned Coupons" list by double-clicking each coupon or highlighting each coupon and click on the left arrow button. If you need to learn how to create coupons, view the Creating Coupons document.

4. Click on the "Submit" button.

5. With ModernBill 5.0, you do not need to create multiple order forms. The new logic uses "website widgets" as the starting point for ordering a product off your website. Each website widget is linked directly to the ModernBill 5.0 shopping cart. The shopping cart allows the customer to add as many products and continue through the order process when ready to make the final transaction. Website widgets can be placed anywhere on your website and can be customized to the "look and feel" of your website.

Once you have setup your order form and you want to view your products, go to <http://yourdomain/modernbill-dir/app-modernbill-order/products.php>. You will see your products and services on the page as "website widgets." If a product is not showing up on the products.php as a widget, you need to add your products to the website widget list by following the instructions in the Setting Up Website Widgets document.

Note: For information on branding each order form, view the Branding Multiple Order Forms document.

# Manage Fraud Settings

## Manage Fraud Settings

System >> Order Settings >> Manage Fraud Settings

You can setup fraud protection to help identify fraudulent orders. Follow the directions below to get started.

Note: Before you can continue, make sure you have your FraudGuardian account details available. If you do not have a FraudGuardian account, signup at [www.fraudguardian.com](http://www.fraudguardian.com).

1. Go to System/Other Settings/Fraud Modules.
2. When the page loads, click on the FraudGuardian link.
3. Set the following:

Enabled: Select Yes.  
Username: Enter your FraudGuardian username.  
Password: Enter your FraudGuardian password.

4. Click on the "Submit" button. The page will reload. Once this is complete, continue on to Step 5 below.
5. Click on the "Manage" link.
6. Set the following:

Fraud Set Name: Enter the name of the Fraud Set.  
Fraud Set Email: Enter the email you want to use to email your FraudGuardian reports.

7. Click on the "Define New Fraud Set" link.
8. Now you need to define your country specific thresholds for your Fraud Set. Set the following:

Threshold Name: Enter the name of your threshold.  
Threshold Type: Select one of the following:

Apply to ALL countries - This will apply to all countries.  
Apply to ONE country - This will apply to only one country. Select from the drop down menu.

Apply to REGION of countries - You select a parent country such as North American or child countries such as the Caribbean, Central America, or Northern America.

9. Click on the "Define New Country Threshold" link.
10. Click on the "Configure" link in the Actions column.
11. Set the following:

---

## Configure Fraud Score Threshold Action

Score 1: There are two steps for the Score 1 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Select the score you want to use for Score 1 in the Score drop down menu.

Note: Score 1 is considered to be the best score.

Score 2: There are two steps for the Score 2 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Select the score you want to use for Score 2 in the Score drop down menu.

---

Note: Score 2 is considered to be the 2nd best score and should be higher than what you set for Score 1.

Score 3: There are two steps for the Score 3 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Select the score you want to use for Score 3 in the Score drop down menu.

Note: Score 3 is considered to be the 3rd best score and should be higher than what you set for Score 1 and Score 2.

Score 4: There is only one step for the Score 4 setting. Notice the Score column shows "> Score 3" which means the action you choose in A below will occur when the score is greater than what you have set for Score 3.

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

---

## Configure Amount Override Threshold Action

Amount 1: There are two steps for the Amount 1 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Enter the amount you want to set for this action in the Amount column. Each amount you enter will be less than or equal to the order amount the user purchases.

Note: Amount 1 is the lowest amount.

Amount 2: There are two steps for the Amount 2 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

---

B: Enter the amount you want to set for this action in the Amount column. Each amount you enter will be less than or equal to the order amount the user purchases.

Note: Amount 2 should be greater than what you entered for Amount 1 above.

Amount 3: There are two steps for the Amount 3 setting. See A and B below:

A: Select from the following in the Action column.

Activate with Auth/Capture

Activate with Auth/Capture

Pending with Auth/Capture

Pending with Auth/Only

Soft Reject (Display decline notice)

Hard Reject (Display reject notice)

B: Enter the amount you want to set for this action in the Amount column. Each amount you enter will be less than or equal to the order amount the user purchases.

Note: Amount 3 is the greatest amount and should be more than what you entered for Amount 1 and Amount 2.

12. Next, choose either "Use Default Fraud Score" or "Use Adjusted Fraud Score" for the ADJUST FRAUD SCORE TRIGGERS section. There are ten (10) "Triggers" that are used to generate the total Fraud Score. Each "Trigger" is weighted by what you set. If the "Trigger" is greater than 0, it will multiply a value of 1 times the score you set for that "Trigger." The sliders and/or textboxes in the Adjust Value column allow you to give each "Trigger" a "weight" according to your specific needs.

Each "Trigger" value that you assign will be added if it is met by the order. Keep in mind if you set the value at 0, the "Trigger" will not be used during the order process. View the example below:

Trigger
Adjusted Value
Default Value

Email is Free:

---

2.5

Email is High Risk:

5.0

Country Matches IP:

2.5

Country is High Risk :

---

5.0

IP Distance From Country:

10.0\*

BIN Country Match:

2.0

BIN Bank Match:

1.0

Shipping is High Risk:

---

5.0

IP is Anon Proxy:

5.0

IP is Open Proxy:

2.5

Using the table above you'll see the following will be triggered IF the order parameters indicate possible fraud:

Email is Free:  $2.5 \times 1 = 2.5$   
Country Matches IP:  $1 \times 1 = 1$   
Country is High Risk:  $5 \times 1 = 5$

---

Total: 7.5

If all of the above are triggered, the score would be 7.5. If you "weighted" each trigger according to your specific needs, the score would be lower or higher depending on the values you set.

13. Once you have configured all of your settings, click on the "Click here to save all settings" button.

## ModernAdvertise Settings

### **ModernAdvertise Settings**

System >> Order Settings >> ModernAdvertise Settings

**NOTICE: YOU MUST HAVE AT LEAST 100 USERS IN YOUR DATABASE BEFORE YOU CAN ENABLE THE MODERNADVERTISE MODULE.**

If you have at least 100 customers in your database and you have signed up at <http://www.modernadvertise.com>, continue with the following instructions.

1. Click on the System tab.
2. Click on the "ModernAdvertise Settings" link in the Order Settings section.
3. Set the following:

    Enable ModernAdvertise: Select Yes to enable ModernAdvertise.  
    ModernAdvertise Username: Enter the username you created when you signed up for a ModernAdvertise a  
    ModernAdvertise Password: Enter the password you created when you signed up for a ModernAdvertise account.

4. Click on the "submit" button.

## Custom Attributes

### **Custom Attributes**

Please see document <http://manual.modernbill.com/v5co/index.php?article=65> for more information.

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## Server Settings

*There are no articles in this category.*

## Server Group Settings

### Server Group Settings

System >> Server Groups >> Server Group Settings

A Server Group contains one or more control panel modules. Each Server Group can only use one type of control panel. For example, if you use cPanel and Plesk, you need to setup a separate Server Group for each control panel. Each Server Group supports unlimited servers per control panel type. Follow the instructions below to setup a Server Group.

1. Go to System/Server Settings/Server Group Settings.
2. By default you will see "1 List Servers" in the Server Group ID column. You can start with the default Server Group and add your control panel modules accordingly. To do so, follow the document specific to your control panel in Modules/Control Panels.
3. If you want to add a new Server Group, click on the "Add" link.
4. When the page loads, enter the name of the server group you are adding in the Server Group Name textbox.
5. Select how you want accounts to be created on the servers associated with this Server Group in the Server Group Fill Type drop down menu.

You can select either "Least Full" where accounts are created on servers with the fewest amount of accounts or you can select "Fill One At A Time" where accounts are created on one server at a time.

6. Click on the "Submit" button.

## Product Settings

*There are no articles in this category.*

## Product Settings

### Product Settings

System >> Product Settings >> Product Settings

1. Click on the System tab.
2. Click on the "Product Settings" link in the Product Settings section.
3. On the left main sub nav you will see a list of the following links:

- Products
- Pricing
- TLDs
- Website Widgets
- Coupons
- Time Cycles
- Cycle Discounts
- Product Relations
- Product Groups
- PPC

To learn how to use any of these features, please view the Products section in the Operations Manual located at:

<http://manual.modernbill.com/v5op/>

## Product Management Settings

*There are no articles in this category.*

## Cycle Settings

### Cycle Settings

System >> Product Settings >> Cycle Settings

1. Click on the System tab.
2. Click on the "Cycle Settings" link in the Product Settings section.
3. To learn how to use and configure cycle settings, please view the Products/Time Cycles section in the Operations Manual located at:

<http://manual.modernbill.com/v5op/>

## Domain Settings

*There are no articles in this category.*

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## Domain TLD Settings

### Domain TLD Settings

System >> Domain Settings >> Domain TLD Settings

1. Click on the System tab.
2. Click on the "Domain TLD Settings" link in the Domain Settings section.
3. To learn how to use any of the Domain TLD Settings, please view the Products/TLDs section in the Operations Manual located at:

<http://manual.modernbill.com/v5op/>

## Domain Sync Settings

*There are no articles in this category.*

## Registrar Modules

*There are no articles in this category.*

## Invoice & Billing Settings

*There are no articles in this category.*

## Invoice Settings

### Invoice Settings

System >> Invoice & Billing Settings >> Invoice Settings

1. Click on the System tab.
2. Click on the "Invoice Settings" link in the Invoice & Billing Settings section.
3. When the page loads, set the following:

Billing Mode: Select from the following:

Anniversary - This setting will set the cycle renew date from the day the customer signed up. For example, if the customer signed up on October 10th, their cycle renew date will be November 10th.

Monthly - This setting will set the cycle renew date to the same day every month. Select the day you want the cycle renew date to be in the "Day of month to bill" drop down menu as described in the next setting.

Day of month to bill: If you selected "Monthly" billing mode above, select the day of the month you want packages to renew from the drop down menu.

Monthly proration threshold: The monthly proration threshold day sets the amount of the invoice to be generated for the given month.

Invoice Active Clients: If you want to generate invoices for Active clients only, select Yes.

Invoice Suspended Clients: If you want to

Invoice Active Packages: If you want to invoice active packages, select Yes.

Invoice Suspended Packages: If you want to invoice suspended packages, select Yes.

Invoice Active Domains: If you want to invoice active domains, select Yes.

Send Invoice e-mail notification: If you want to send an email notification to each customer after their invoice has been generated, select Yes.

Invoice Number Template: Select the invoice number template you want to use from the drop down menu. Your choices include:

ID

SEQ, example: 123

YEAR-ID, example: 01-2006-12345

MONTH-YEAR-ID, example: 01-2006-12345

VATYEAR-ID, example: 10-2006-12345

VATMONTH-VATYEAR-ID, , example: 10-2006-12345

YEAR-SEQ, example: 2006-1

MONTH-YEAR-SEQ, example: 01-2006-1

VATYEAR-SEQ, example: 2006-1

VATMONTH-VATYEAR-SEQ, example: 10-2006-1

Invoice Sequence: Enter the number value for your invoice starting ID. For example, if you want to start invoices at 1000, enter "1000" without quotes in the textbox.

Invoice Generate Days Before Renew Date: Enter the number of days you want invoices to generate prior to their renew dates. For example, if an invoice has a renew date of the 10th every month and you want to generate the invoice on the 5th of every month, enter "5" without quotes in the textbox.

Invoice Due Days After Generation: Enter the number of days you want to set the due date AFTER the invoice has been generated. For example, if you leave the value at "9" and invoices are generated on October 1st, the invoice due date would be October 10th.

Invoice Due Days After Generation: Enter the number of days you want the invoice to be due after the invoice is generated. For example, if you generate invoices on the 5th of the month and you enter "9" as the value, the due date will be set to the 14th day of the month.

Invoice Line Item Threshold: Think of the line item threshold as a way to balance server load. Each line item refers to a package. The default setting of "50" will process invoices with a combined total of 50 packages. If you have 10 invoices and each of them have 5 packages each,  $10 \times 5 = 50$  Line Items will be generated until the queue runs again.

4. Click on the "save settings" button.

## Tax Settings

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## Setting Up Taxes

ModernBill v5 provides the ability to setup taxes for each product or service you provide and based on city, state, or country. First you need to familiarize yourself with the terms "tax zone" and "tax zone group" as shown below:

Tax Zone: A tax zone is a specific city or city and state and country. For example, you have a hosting product you are selling to the US and the UK. You will create a tax zone for each of the different taxes that could apply to your hosting product depending on the location of your customers. You can setup each tax zone to represent a percentage or flat tax.

Tax Zone Group: A tax zone group is a collection of tax zones.

Notes: Tax zones are created for specific products and services and then applied to a tax group. For example, you have a hosting product you are selling to the US and UK. You will create a tax zone for each of the different taxes that could apply to your hosting product depending on your customers location. Tax zones are created for specific products and services and then applied to a tax zone group.

You will also need to understand what a General Ledger account is in your system. This is based on standard accounting practices and defined as the "books" of your system that comprise your company's financial records. Every transaction in your system must flow through the general ledger account. This allows you to have a complete history of all financial transactions from the first day your company started doing business. To learn more about General Ledger Accounts, consult your Accountant or view the following website:

<http://www.businesstown.com/accounting/basic-general.asp>

For tax purposes, the General Ledger Accounts will be used as a "Tax Payable Account" or "Liability Account." First you will need to create a General Ledger account for each state, city, or country that requires a taxation. This includes any type of taxes for any type of product or service. The best way to accomplish this is to divide everything you sell into groups based on your products and services.

### Getting Started

1. Go to Finances/Accounting/Chart of Accounts.
2. When the page loads, click on the "Add Ledger Account" link.
3. Set the following:
  - Ledger Account Type: Liability Accounts
  - GL Number: Typically starts with a 2 and is generally five (5) digits.
  - Parent GL Account: Optional, but can be Taxes Payable. (Consult your Accountant for additional assistance)
  - Account Label: Enter any text name that represents the type of account you are creating. Ex. Kentucky Taxes Payable
  - Account Access Key: Optional. Not needed unless modifications are made to your ModernBill system.
4. Click on the "save ledger account details" button.
5. When the page loads, the details of your new Ledger Account will be shown. Click on the Chart of Accounts link under the left-side Accounts subsection.
6. Go to System/Tax Settings.
7. Click on the "Tax Zone Groups" link.
8. Click on the "add tax zone group" link.
9. Set the following:
  - Tax Zone Group Name: Enter a name for this tax group such as Products,

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Educational, Media, Services, Contracts.

Tax Zone Group Active: Select Active from the drop down menu.

10. Click on the "save" button.
11. Click on the "Tax Zones" link under the left-side Tax Settings subsection.
12. Click on the "add tax zone" link.
13. Set the following:

Country: Select the country specific to where you want to apply taxes.

Name: Enter the state or province of where you want this tax to apply.

Notes: Enter an asterisk (\*) or leave blank to apply to all.

Can be two character state abbreviation or a combination of a two character state abbreviation and city.

Example: KY or KY-Louisville (When using the city associated with the two character state abbreviation, the tax zone only applies taxes to the specified city.)

Type: Select Percentage or Flat Fee from the drop down menu.

Tax Amount: If you selected Percentage for the Type, enter the percentage value. If you selected Flat Fee for the Type, enter the flat fee value.

Note: Percentage values get entered as a whole number, not a decimal number. Ex. 6, not .06

Description: Enter the description of this tax zone. Your customer will see this description.

Tax Zone Active: Select Active from the drop down menu.

Ledger Account: Select the Ledger Account you created in Step 3 above.

Tax Zone Groups: Highlight the group(s) that you want this tax zone to be associated with in the Selectable menu. Double-click or click on the left arrow button.

14. Click on the "save" button.
15. Go to Products.
16. Click on the "edit" icon for the product you want to assign a Tax Group to in the Actions column.
17. When the page loads, click on the "Set Pricing" link.
18. Click on the "edit" icon for each Product Variant you want to assign a Tax Group to in the Pricing column.
19. Select the Tax Zone Group you want to use from the Tax Zone Group drop down menu.
20. Click on the "edit product variant prices" button.

## Setting Up VAT Tax

The following must be done in order to get your system ready for VAT taxes:

1. A tax zone for each country that you are charging VAT taxes.
2. A tax zone group for VAT taxes.
3. Apply to products.
4. Your VAT number.

- 
5. The tax id field in your invoice e-mail templates.
  6. The VAT verification settings on your order form(s).

### 1. Tax Zones

Each of the different countries that you are going to charge VAT requires their own tax zone. Read the following steps to create "Tax Zones."

1. Go to System/Invoice & Billing Settings/Tax Settings.
2. Click on the "Tax Zones" in the "Tax Settings" sub-menu on the left side of the page.
3. Next, click on the "add tax zone" button.
4. Set the following:

Country: Select the country specific to where you want to apply taxes.  
Name: Enter the state or province of where you want this tax to apply.

Notes: Enter an asterisk (\*) or leave blank to apply to all.

Can be two character state abbreviation or a combination of a two character state abbreviation and city.

Example: KY or KY-Louisville (When using the city associated with the two character state abbreviation, the tax zone only applies taxes to the specified city.)

Type: Select Percentage or Flat Fee from the drop down menu.

Tax Amount: If you selected Percentage for the Type, enter the percentage value. If you selected Flat Fee for the Type, enter the flat fee value.

Note: Percentage values get entered as a whole number, not a decimal number. Ex. 6, not .06

Description: Enter the description of this tax zone. Your customer will see this description.

Tax Zone Active: Select Active from the drop down menu.

Ledger Account: Select the Ledger Account appropriate to your tax zone. To learn more, read the Setting Up Taxes document.

Tax Zone Groups: Highlight the group(s) that you want this tax zone to be associated with in the Selectable menu. Double-click or click on the left arrow button. If the groups are not available, continue on to 2. Tax Zone Groups below.

5. Click on the "save" button.

### 2. Tax Zone Groups

Once you have created your "Tax Zones," you need to create "Tax Zone Groups."

1. Go to System/Invoice & Billing Settings/Tax Settings.
2. Click on the "Tax Zone Groups" in the "Tax Settings" sub-menu on the left side of the page.
3. Next, click on the "add tax zone group" button.
4. Enter "VAT Tax Zones" or a name that represents your Vat Tax Group in the "Tax Zone Group Description" textbox.
5. Select "Active" from the "Tax Zone Group Active" drop down menu.
6. Highlight the group(s) that you want this tax group to be associated with in the Selectable menu. Double-click or click on the left arrow button.
7. Click on the "save" button.

### 3. Apply to products.

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Now you need to assign the tax groups to your products. Follow the instructions below:

1. Click on the main products tab.
2. When the page loads, find the first product you want to require VAT.
3. Click on the details icon in the Actions column for that product.
4. Next, click on the "prices" link.
5. When the page loads you will see the Product Variants. Click on the pricing icon in the Pricing column.

Note: For non-domain hosting products you will only see one entry. Click on the edit icon in the pricing column for that entry.

6. Select the "Tax Zone Group" you want to associate with this product in the "Tax Zone Group" drop down menu.
7. Click on the "edit product variant prices" button.

Note: For domain products the process is slightly different as you may want to charge VAT for certain TLD's (.co.uk) and not others (.com). Each TLD that you have for the domain product will display as a different variant. Edit the pricing of each variant that you wish to charge VAT for and associate it with the VAT tax zone group.

8. For each of your products repeat the preceding steps.

#### 4. Your VAT number.

Now you need to enter your VAT number in the system.

1. Go to System/Company Settings.
2. When the page loads, enter your VAT number at the bottom in the "Company Tax ID Number" textbox.
3. Click on the "save changes" button.

#### 5. VAT Number in Invoice E-mails.

To make sure that your VAT number shows up in your invoice e-mails (per the law), follow the instructions below:

1. Go to System/Email Template Groups.
2. Find all your invoice email templates. Click on the edit icon for each template. When the page loads, click on the edit icon in the Actions column.
3. Enter the following variable in each template accordingly:

{companyTaxIDNumber}

4. Click on the "save" button.

#### 6. VAT verification settings.

You have the option to have your system verify VAT numbers provided by your clients at the time of order and apply taxes accordingly. If you do not set this setting it will charge clients tax regardless of whether they supply a valid VAT number or not. To turn this feature on, follow the instructions below:

1. Go to System/Order Form Settings.
2. Click on the edit icon in the Actions item for the order form you want to verify VAT tax.
3. When the page loads, check the box next to "Verify VAT Numbers."

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4. Click on the "save" button.

Once you have gone through these steps you have your system set up to handle VAT taxation.

## Tax Settings

System >> Invoice & Billing Settings >> Tax Settings

ModernBill v5 provides the ability to setup taxes for each product or service you provide and based on city, state, or country. First you need to familiarize yourself with the terms "tax zone" and "tax zone group" as shown below:

Tax Zone: A tax zone is a specific city or city and state and country. For example, you have a hosting product you are selling to the US and the UK. You will create a tax zone for each of the different taxes that could apply to your hosting product depending on the location of your customers. You can setup each tax zone to represent a percentage or flat tax.

Tax Zone Group: A tax zone group is a collection of tax zones.

Notes: Tax zones are created for specific products and services and then applied to a tax group. For example, you have a hosting product you are selling to the US and UK. You will create a tax zone for each of the different taxes that could apply to your hosting product depending on your customers location. Tax zones are created for specific products and services and then applied to a tax zone group.

You will also need to understand what a General Ledger account is in your system. This is based on standard accounting practices and defined as the "books" of your system that comprise your company's financial records. Every transaction in your system must flow through the general ledger account. This allows you to have a complete history of all financial transactions from the first day your company started doing business. To learn more about General Ledger Accounts, consult your Accountant or view the following website:

<http://www.businessstown.com/accounting/basic-general.asp>

For tax purposes, the General Ledger Accounts will be used as a "Tax Payable Account" or "Liability Account." First you will need to create a General Ledger account for each state, city, or country that requires a taxation. This includes any type of taxes for any type of product or service. The best way to accomplish this is to divide everything you sell into groups based on your products and services.

### Getting Started

1. Go to Finances/Accounting/Chart of Accounts.
2. When the page loads, click on the "Add Ledger Account" link.
3. Set the following:

Ledger Account Type: Liability Accounts  
GL Number: Typically starts with a 2 and is generally five (5) digits.  
Parent GL Account: Optional, but can be Taxes Payable. (Consult your Accountant for additional assistance)  
Account Label: Enter any text name that represents the type of account you are creating. Ex. Kentucky Taxes Payable  
Account Access Key: Optional. Not needed unless modifications are made to your ModernBill system.

4. Click on the "save ledger account details" button.
5. When the page loads, the details of your new Ledger Account will be shown. Click on the Chart of Accounts link under the left-side Accounts subsection.
6. Go to System/Tax Settings.

- 
7. Click on the "Tax Zone Groups" link.
  8. Click on the "add tax zone group" link.

9. Set the following:

Tax Zone Group Name: Enter a name for this tax group such as Products, Educational, Media, Services, Contracts.

Tax Zone Group Active: Select Active from the drop down menu.

10. Click on the "save" button.

11. Click on the "Tax Zones" link under the left-side Tax Settings subsection.

12. Click on the "add tax zone" link.

13. Set the following:

Country: Select the country specific to where you want to apply taxes.

Name: Enter the state or province of where you want this tax to apply.

Notes: Enter an asterisk (\*) or leave blank to apply to all.

Can be two character state abbreviation or a combination of a two character state abbreviation and city.

Example: KY or KY-Louisville (When using the city associated with the two character state abbreviation, the tax zone only applies taxes to the specified city.)

Type: Select Percentage or Flat Fee from the drop down menu.

Tax Amount: If you selected Percentage for the Type, enter the percentage value. If you selected Flat Fee for the Type, enter the flat fee value.

Note: Percentage values get entered as a whole number, not a decimal number. Ex. 6, not .06

Description: Enter the description of this tax zone. Your customer will see this description.

Tax Zone Active: Select Active from the drop down menu.

Ledger Account: Select the Ledger Account you created in Step 3 above.

Tax Zone Groups: Highlight the group(s) that you want this tax zone to be associated with in the Selectable menu. Double-click or click on the left arrow button.

14. Click on the "save" button.

15. Go to Products.

16. Click on the "edit" icon for the product you want to assign a Tax Group to in the Actions column.

17. When the page loads, click on the "Set Pricing" link.

18. Click on the "edit" icon for each Product Variant you want to assign a Tax Group to in the Pricing column.

19. Select the Tax Zone Group you want to use from the Tax Zone Group drop down menu.

20. Click on the "edit product variant prices" button.

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## Tax Zones

### **Tax Zones**

System >> Invoice & Billing Settings >> Tax Settings >> Tax Zones

Please see the Tax Settings document to learn about Tax Zones available at:

<http://manual.modernbill.com/v5co/index.php?article=95>

## Tax Zone Groups

### **Tax Zone Groups**

System >> Invoice & Billing Settings >> Tax Settings >> Tax Zone Groups

Please see the Tax Settings document to learn about Tax Zone Groups available at:

<http://manual.modernbill.com/v5co/index.php?article=95>

## Prepay Discount Tiers

### **Prepay Discount Tiers**

Not available in 5.1. Will be released post 5.1 stable. No ETA has been set.

## Email Settings

*There are no articles in this category.*

## Email Settings

### **Email Settings**

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System >> Email Settings >> Email Settings

You can set your "Email Method" to the following:

PHP Internal - Email options specific to PHP Internal settings. You can learn more at <http://www.php.net>.

Sendmail - According to WikiPedia, "Sendmail is a mail transfer agent (MTA) that is a well known project of the open source and Unix communities and is distributed both as free software and proprietary software."

SMTP - According to WikiPedia, "Simple Mail Transfer Protocol (SMTP) is the de facto standard for e-mail transmissions across the Internet."

None - Setting the option to "None" disables all email functions in the system.

Click on the "save" button when you have select the "Email Method" you want to use from the drop down menu.

## Email Template Groups

### Email Template Groups

System >> Email Settings >> Email Template Groups

ModernBill v5 provides an extensive email system that allows you to send emails based on locale.

Before you get started, review the following terms:

Email Actions: Email actions are specific to each type of email group you will use in your system specific to the following:

- Packages
- Invoices
- Credit Card Payment
- eCheck Payment
- Bank Draft Payment
- Manual Payment
- Secondary Gateway Payment
- Declined Payment
- Payment Error
- Domain Renewal
- Domain Transfer - Success Email
- Domain Transfer - Failure Email
- Credit Card Expiration Notification
- Package Suspension
- Package Enable

Note: Email Actions are predefined by default and cannot be modified.

To get started, follow the instructions below.

1. Go to Events/Emails.
2. Find the Email Template Group you want to add an email template to and click on the "add" button.
3. Set the following options:

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Email Template Group Name: Enter the name of template group you want to create.  
Email Action: By default, the email action you selected on the previous page will already be selected. If not, select the type of email action from the Email Action drop down menu.

Email From: Name: Enter the "From" name.  
Email Reply-To: Name: Enter the "Reply-To" name.  
Email CC: Address: Enter the "CC" email address.  
Email From: Address: Enter the "From" email address.  
Email Reply-To: Address: Enter the "Reply-To" email address.  
Email BCC: Address: Enter the "BCC" email address.

4. Click on the "save email template group data" button.

5. When the page loads, you will see a checkmark next to Email Templates at the bottom of the page. Click on the "add locale" button.

6. Set the following options:

Locale Language: Select the locale language you want to use from the drop down menu.

Locale Region/Country: Choose how you want to apply this email template.

Apply to All countries  
Apply to ONE country  
Apply to REGION of countries

Locale Language Default: This is used to indicate that the system should use this email template if it cannot match any another template to the contact's locale

Email Template Subject: Enter the subject of your email.

Email Template HTML Body: Enter the body of your email template in html format.

Email Template Text Body: Enter the body of your email template in text format.

Note: All contacts are set to receive HTML by default when they come through the order form. If you do not want a specific client to receive HTML emails, go to the client's account details page and click on the "edit primary" button. When the page loads, uncheck "HTML" for the Email Format. Click on the "edit contact" button.

7. Reload Options (New in 5.1.3): If you need to reload the original email templates, perform the following steps:

- a. Select the template you want to reload.
- b. Reload HTML: Select Yes.
- c. Reload Text: Select Yes.

Caution: this will replace this existing template. Please make a backup of your existing template if you do not wish to lose it.

8. Click on the "save" button.

9. When the page loads, you will see your new template added with the locale you want to use for the email template group you selected. You can add as many email templates to this group or any other group as you need based on your specific needs.

10. Repeat Steps 1-8 above until you have created all the templates you need specific to your needs.

## Reloading Email Templates

1. Click on the System tab.

2. When the page loads, click the Email Template Groups link under Email Settings.

3. Click the pencil icon next to each email template you want to reload.
  4. When the page loads, email templates for each locale you have setup will display at the bottom of the page. Click the pencil icon in the Actions column.
  5. At the bottom of the Edit Email Template page are the Reload Options. Select the template you want to reload from the dropdown box.
  6. Select "Yes" for both Reload HTML and Reload Text.
  7. Click the "reload" button. The template has now been reloaded.
  8. Repeat steps 3-7 for each email template you wish to reload.
- TIP: If you are reloading all 25 email templates, save time by opening each email template in step 3 in a new window or tab, and go through the remaining steps one screen at a time.

## Converting v4 Email Templates to v5

ModernBill 5.1 includes newly rewritten and redesigned email templates. If you would like to update your system to use the new email templates, please refer to the Reloading Email Templates document. Alternatively, you can convert your v4 specific email templates to v5 using the v4 to v5 Email Template Converter described below. This tool replaces the variables in your v4 templates to v5 variables.

1. Login to the members area: [www.modernsupport.com/modernbill](http://www.modernsupport.com/modernbill)
2. Once you are logged in, click on the following link:  
<http://www.modernsupport.com/modernbill/index.php?type=templatefixer>
3. Copy the email template you wish to update from v4 and paste it in the "Insert Your Old Template Here" box.
4. Click "Submit Query". Your v4 email template has now been modified to include v5 variables.
5. Copy the output from the second box.
6. Log into your v5 admin interface and click on the System tab.
7. When the page loads, click the Email Template Groups link under Email Settings.
8. Click the pencil icon next to each email template you want to reload.
9. When the page loads, email templates for each locale you have setup will display at the bottom of the page. Click the pencil icon in the Actions column.
10. Paste your updated email template into the boxes labeled "Email Template HTML Body" and "Email Template Text Body", respectively.
11. Click the "save" button. The template has now been updated.
12. Repeat for each v4 template you wish to copy to v5.

## Customizing the Email Templates

All email templates in the system have special variables that are parsed at run-time. This means that the variables are replaced with the data they represent PRIOR to being sent to the client. Some general client variables may be shared and available in all templates, however many specific variables are unique to a particular template set (invoice data, package data, etc). It is important to understand that not all variables can be used in all templates. To view

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a list of variables, see the Email Template Variables document.

The new email template system in 5.1.3 allows you to update all your HTML email templates by making adjustments to a few template files in the `/lib-themes/default/lib-modernbill/templates/emails/widgets/` directory.

#### Updating the email header

1. Open the following file in your ModernBill fileset:

`/lib-themes/default/lib-modernbill/templates/emails/widgets/header.tpl`

2. The code below controls the header of the email. Modify it to fit your needs.

```
{$smarty.const[$headerTitle]|default:$headerTitle}
```

#### Updating the email layout

The email templates are made up of several template files which control the display and layout of all 25 default email templates. To see which template files are used by each email template, either navigate to the Email Template Groups page in the admin interface and click the "pencil" icon to edit an individual email template and view the source of the Email Template HTML Body, or find the corresponding file in the `/lib-themes/default/lib-modernbill/templates/emails/` directory.

Each component of the HTML email templates has its own header and footer file to make it easy to update each instance of that component throughout the email template set. For example, if you would like to edit the display of the information boxes that appear in any Package Info email template, simply edit the `boxHeader.tpl` and `boxFooter.tpl` files and the change will take effect across the entire email template system. Likewise, tables that uses an if statement to display or hide information, such as in the New Order email templates, can be customized by editing the `codeBoxHeader.tpl` and `codeBoxFooter.tpl` files, and so on. The default email templates we provide are designed to serve as examples that can be used by any business. You are encouraged to edit the colors, font styles, and layout to match your specific needs.

## **Punch List to Get Your System Ready to Send Email Templates**

Some users have reported instances where the email templates in v5, particularly the lost password emails, are being sent with the content missing. Below are some points to look over to ensure that your system is setup properly to send email messages:

#### Are email templates set?

First, check to make sure you have an email template set for each template group and locale. To do so, perform the following steps:

1. Click on the Events tab.
2. Click on the "Emails" link in the left main sub nav.
3. Click on the "Email Template Groups" link in the left sub nav.
4. When the page loads, click the pencil icon next to each email template you want to view.
5. An email templates for each locale you have setup will display at the bottom of the page. Click the pencil icon in the Actions column.
6. When the page loads, you will see an HTML email template and plain text email template.

If these fields are blank, you will need to reload your email templates as described in the Reloading Email Templates document:

7. Test to see if the email was sent out successfully. If it is still blank, see below.  
The second thing to check is whether the temp directory is set properly in your smarty.php file.

1. Open up the file /modernbill/lib-modernbill/include/config/smarty.php

2. a. Find the line `$CONF["smarty"]["compileDirectory"] =`

b. Make sure the path to your temp directory is set correctly after the = sign. Examples are provided below:

On Linux, this is typically `$CONF["smarty"]["compileDirectory"] = "/tmp";`

On Windows, this is typically `$CONF["smarty"]["compileDirectory"] = "C:\Temp";`

3. a. Find the line `$CONF["smarty"]["cacheDirectory"] =`

b. Make sure the path to your temp directory is set correctly after the = sign. Examples are provided below:

On Linux, this is typically `$CONF["smarty"]["cacheDirectory"] = "/tmp";`

On Windows, this is typically `$CONF["smarty"]["cacheDirectory"] = "C:\Temp";`

4. Save the file and test to see if your emails are being sent out successfully.

## Automation Settings

*There are no articles in this category.*

## System Queue Settings

### System Queue Settings

System >> Automation Settings >> System Queue Settings

Utilize the new System Queue to process all automated items in your ModernBill v5 system. You will also need to configure the Payment Queue.

System Queue  
Payment Queue  
Setting Up The Cron Job

#### System Queue

The System Queue allows you to process:

- Run any amount of items at a time.
- Create accounts on any supported control panel.
- Auto-Suspend/Enable accounts on any supported control panel.
- Process payments.
- Process domains.

The first thing you want to do is configure your System Queue settings. Follow the directions below to get started.

1. Go to System/Automation Settings/System Queue Settings.

---

2. Enter the number of items you want the System Queue to process at a time in the Number of System Queue items to run a time textbox. The default value is set to "3."

3. You can choose to process Active Clients based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the Active Clients Run If drop down menu.

4. You can choose to process New Clients based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the New Clients Run If drop down menu.

5. You can choose to process New Client Domain Orders based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the New Client Domain Orders drop down menu.

6. You can choose to process Active Domains based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the Domain Active Type drop down menu.

7. You can choose to process Domain Renewals based on the following:

Do not run these items.  
Client does not have a balance due.  
Customer paid this item's invoice.  
Even if the invoice has not been paid.

Make your selection in the Domain Renewals Run If drop down menu.

8. You can choose to process Domain/Hosting calls based on the following:

Run the panel call first.  
Run after the panel call, even.....  
Ignore the panel call order.....

Make your selection in the Domain/Hosting calls drop down menu.

9. Click on the "Save Settings" button.

#### Payment Queue

1. Go to System/Payment Settings/Payment Queue.

2. Set the following:

Payment Queue Action: Your choices are:

Charge - This determines whether the items in the payment queue get sent to the gateway as Charge, also called AUTH\_CAPTURE.

Authenticate Only - Authorization Only and requires a payment capture at a later point in time.

Process New Invoices: Do you want to process new invoices? Select Yes/No.

Process Declined Transactions: Do you want to process declined transactions? Select Yes/No.

Process Errored Transactions: Do you want to process errored transactions? Select Yes/No.

Only Charge on the Due Date? Do you want to charge and process invoices on their due date only? Select Yes/No.

Clear the Payment Queue first: Do you want to clear the payment queue first? If you set this to No, invoices could get charged twice. Select Yes.

Try Lesser Amounts: If a transactions fails, do you want to try to process for lesser amounts on the credit card? This will process a partial payment if the lesser amount is successfully charged.

Batch Days Before Due: How many days do you want to batch invoices before their due date? Enter the number of days according to your specific needs.

3. Click on the "Save Settings" button.

### Setting Up The Cron Job

The system automatically adds an administrator user called "Cron User." This user has a Remote Access Hash needed to run the System Queue for complete automation. Follow the steps below to get your Cron Job setup.

1. Go to System/System Settings/Admin Settings.

2. Find the "Cron User" record.

3. Click on the magnifying glass icon.

4. Copy the Remote Access Hash.

5. Open your /path/to/mb/lib-modernbill/include/config/config.php/ file and paste the "Remote Access Hash" as shown below.

```
$CONF["remoteAccessHash"] = "f2ad7647377beb58808b8ffceff5527d4f9d4c1d";
```

6. Save the file.

7. Next, setup your cron job on your server to run the /path/to/mb/app-modernbill-admin/sbin/runevents.php file. View the example below.

```
*/* * * * * /path/to/php /path/to/mb/app-modernbill-admin/sbin/runevents.php
```

\*/\* \* \* \* \* (This sets it to run every five (5) minutes. You can set this to run whenever you need based on your specific needs. The recommended time is every five (5) minutes.)

## IP Queue Settings

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## IP Queue Settings

System >> Automation Settings >> IP Queue Settings

Currently the "IP Queue Settings" feature is not used for any particular control panel. However, you can use it for your own custom application or specific needs.

## Auto-Suspend Settings

### Auto-Suspend Settings

System >> Automation Settings >> Auto-Suspend Settings

1. Click on the System tab.
2. Click on the "Auto-Suspend Settings" link in the Automation Settings section.
3. Set the following:

- Enable Auto-Suspend: To enable auto-suspend settings, select Yes.
- Auto-Suspend First Notice: Set the number of days after the unpaid invoice is due to send the first notice email.
- Auto-Suspend Second Notice: Set the number of days after the unpaid invoice is due to send the second notice email.
- Auto-Suspend Third Notice: Set the number of days after the unpaid invoice is due to send the third notice email.
- Auto-Suspend Clean Notice: Set the number of days after the unpaid invoice is due to send the clean notice email. This email indicates the package has been removed from the server completely.
- Enable Auto-Suspend Send Email: Select Yes to enable all emails.

4. Click on the "save settings" button when you have completed the above settings.

REMEMBER!

The auto-suspend settings will not be automated until you setup the cron job. View the Setting Up The Cron Job document to learn more.

### Un-Suspend/Auto-Enable

If you have Auto-Suspend setup according to the Auto-Suspend Settings document, the "Events" queue will automatically check suspended packages every twenty (20) minutes to see if the associated invoice has been paid. If it has been paid, the system will Un-Suspend/Auto-Enable the package.