

Parallels™ Plesk Billing

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Chapter 3: CONFIGURATION

Sections:

1. System Overview
2. Configuring / Automating Payments
3. Configuring / Automating Server Provisioning
4. Configuring / Automating Domain Provisioning
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Parallels Plesk Billing System Overview

Here, I'm going to give an overview in regards to how all the pieces of Parallels Plesk Billing work together. While it's not necessary to know all of this, I do recommend that you read this section. Understanding how Parallels Plesk Billing works can make conceptualizing and using the system easier as we go forward and work through the configuration of your system.

Parallels Plesk Billing is a robust platform upon which various pieces of functionality are built. At its core, it is a solid recurring billing / invoicing engine. This engine will take care of generating and sending out invoices to your customers on whatever cycle that the good/service your customer has with you renews (monthly, yearly... even hourly – the package renewal cycles are configurable down to the second). The Parallels Plesk Billing core will facilitate credit card, PayPal, etc. payments and appropriately mark invoices as paid and it enforces auto-suspension rules for non-payment.

On top of this invoicing framework is a domain registration, hosting provisioning and gateway charging system. Finally, providing interfaces to these systems you have the “admin” interface, “client” interface, and “order” interface. Let's take a look.

→ **Domain Registration**

Parallels Plesk Billing supports integration with several domain registries including:

- CentralNIC
- DistributeIT
- eNom
- EuroDNS
- OpenSRS
- Register.com
- ResellOne

Parallels Plesk Billing supports instant domain availability checking through your order form regardless of whether you're using one of the above registrars.

However, if you're using one of these registrars, a customer of yours can purchase/transfer a domain name, pay for it, and Parallels Plesk Billing will issue a call automatically to that registrar's API to purchase/transfer the domain name and place it under that client's account in your Parallels Plesk Billing for management (setting name servers, host records, etc.).

You can configure Parallels Plesk Billing to sell one, some, or all of the TLDs available through a particular registrar and charge your customers whatever price you want for their domain registration. Your account with your registrar will be charged whatever your standard reseller rate is for that given domain TLD. One of the clear benefits of this is that you can (for example) process “.com” sales through a certain registrar and “.ca” sales through another registrar, allowing you to use multiple registrars to make sure you're being charged the lowest possible price per TLD for the domains that you resell.

→ **Hosting Provisioning**

Parallels Plesk Billing supports integration with several hosting control panels including:

- cPanel
- cPanel (Reseller)
- DirectAdmin
- eNom Exchange

- eNom Hosting
- Ensim
- EnsimUnify
- FreeRadius
- Helm
- Hostopia
- Hsphere
- Interworx
- Plesk (Windows)
- Plesk (Linux)
- Plesk (Expand)
- Virtuozzo
- and... Parallels Plesk Billing itself (for License Reselling)

When you create a product in Parallels Plesk Billing, it can be configured “provision” to one (or more, simultaneously) of the above hosting control panels. Customers purchasing a product of yours that is connected with one of the above panels can have their service online and login details e-mailed to them within minutes of paying.

In Parallels Plesk Billing, you create “pools” of servers of the same type, called “server groups”. For example, you could have a server group of seven Plesk for Linux machines your company hosts customers on. Your Plesk hosting product(s) would be associated with this server group, and anyone purchasing one would be provisioned onto the Plesk machine in that group which has the fewest accounts on it (for the purposes of pseudo-load-balancing).

After the purchase, most of the above panels support further automation as well. Your customer could upgrade or downgrade their base package, associate additional addons, or cancel their package and Parallels Plesk Billing can (without your intervention needed) collect payment and issue the appropriate API calls to the machine(s) on which their product is provisioned to take care of all of their needs.

→ **Payment Gateways**

Parallels Plesk Billing supports integration with several payment gateways including:

- Primary Gateways
 - Authorize.net
 - BluePay
 - Echo, Inc.
 - eWay
 - InternetSecure
 - LinkPoint
 - Moneris
 - PayFlowPro
 - ProTX
 - PSiGate
 - Quantum
 - SecurePay AU
 - SecurePay US
 - Velocity Pay
- Third-Party Gateways
 - PayPal
 - WorldPay

On to the most important part of your business: how you're going to get paid. :)

Parallels Plesk Billing's payment gateway system, like the other two systems described above, is modular. This allows you to choose one or more payment gateways through which to process customer payments. The result of this: you can (for example) allow your customers to choose between paying by credit card (and run those charges through your BluePay account) or paying by PayPal.

Taking this a step further, you can even utilize multiple gateway modules to allow for collecting payment in multiple currencies. This can be very useful for customers that (for example) prefer to offer services in both United States and Canadian Dollars to attract a larger customer base.

Most of the supported payment modules allow for charge, pre-auth, finalize, void, and refund abilities through Parallels Plesk Billing.

→ **“Admin” Interface**

The admin interface to Parallels Plesk Billing is where you administrate it. :-) We'll be going into a lot of detail later in this document, so I'll hold off for now.

→ **“Client” Interface**

The client interface to Parallels Plesk Billing is a complete portal for your clients to perform the following actions (and other stuff too):

- Pay invoices
- View past invoices
- Create a support ticket
- Upgrade their package
- Downgrade their package
- Cancel their package
- Manage DNS on their purchased domain name
- Login to the hosting panel associated with their package

The client interface is completely customizable and can be templated to integrate seamlessly into your existing website's look and feel.

→ **“Order” Interface**

Parallels Plesk Billing, unlike most host-based billing platforms currently available, includes support for a “shopping cart” built into your website, making it easier for your clients to purchase more in a single checkout.

As a result, the concept of an “order form” is a little bit different in Parallels Plesk Billing. As it is currently known, an “order form” in Parallels Plesk Billing is primarily a way to group products by currency. Generally speaking, you should only have one order form per currency offered. It is *not* a page where your products are listed with “order now” buttons.

Now, you're probably wondering how clients can add products to their shopping cart if there isn't a page with order buttons. There are two methods. Both are awesome. Below is a brief overview of each. Of course, I'll be getting into far greater detail later in this document.

With the first, we've changed the paradigm in billing solutions a bit with the introduction of “website widgets”. These are little snippets of code you simply drop into your company website that feature any subset of products you want in any format you want (listing, dropdown, etc). As

its merely a snippet of code, these can be dropped anywhere on your website where you want to sell products and they require no special templating as its merely included in your existing website.

The latter is for the customer that prefers a finer grained control of the way they'd like to sell products on their website. By linking anywhere on your website (from text, image, whatever) to specially formed URLs, you can allow your customers to add any product or products to their shopping cart with a single click.

Finally, the shopping cart and checkout processes are completely customizable so you can template them to match the rest of your website seamlessly.

Parallels Plesk Billing → How to Setup Payment Groups

Configuring a payment group is a fairly straightforward process. First, you're going to need to ask yourself a few questions in regards to how your business wants to accept money.

- Do you plan to accept credit cards?
 - If so, will you be storing credit card details (all encrypted, of course) in your Parallels Plesk Billing database?
 - What types of credit cards do you want to accept (Visa/MasterCard/etc.)
- Will you accept forms of payment through a third-party gateway such as PayPal or WorldPay?

If you plan to accept credit cards, you're going to need a merchant account with an online payment processing service. If you don't already have one, I'll take this opportunity to shamelessly plug our own solution for customers from the United States, Canada, or the United Kingdom called ModernAuthorize. For more information, or to check out our extremely competitive processing rates, head over to:

<http://www.pleskbilling.com/products/modernauthorize/>

Including our ModernAuthorize partners, we currently support the following payment processors for the purposes of charging via credit cards (and eCheck, where supported):

- Authorize.net
- BluePay
- Echo, Inc.
- eWay
- InternetSecure
- LinkPoint
- Moneris
- PayFlowPro
- ProTX
- PSiGate
- Quantum
- SecurePay AU
- SecurePay US
- Velocity Pay

If you plan to accept payment from third-party gateways (either solely, or along with accepting credit cards) you will need to have an account at one or more of the below supported third-party gateways:

- PayPal
- WorldPay

After you've finished this section, please see the appropriate pages later in this document for information on the configuration options available on each of the above payment processors.

The general idea behind “payment groups” is for the purpose of multiple currency support. You should have one payment group for each type of currency that you accept. If you only accept one currency, you should, thus, only have one payment group¹.

¹ **IMPORANT:** You can add and remove payment processor *modules* within a payment group as much as you want. But you should never, ever remove a payment *group* once you have customers actively using it. Removing a payment group that is in use will cause customers' billing accounts to no longer be tied to a means of charging them. Basically, it's bad, real bad. Don't do it.

After you've logged into the administrative portion of Parallels Plesk Billing, click on the "System" button at the top of the screen. On the configuration screen that loads, click the option labeled "Payment Groups".

At this point, you should see a default payment group already exists. Click the "Edit" icon to the right side of the payment group (it's the icon with the cute little pencil). On the screen that comes up, you can configure the "Payment Group Name" to be whatever you want, this is purely for your reference and no customer will ever see the "Payment Group Name". By default, the initial payment group is setup with USD (United States Dollars) currency. You may leave this as is, or, if you need to accept a different currency, change this to the appropriate 3-character ISO-4217 currency code.

Now, here's the most important part. You will need to select the primary and third-party gateway(s) you use from the drop down lists. At this time, you can only select one of each category. Don't worry though, if you accept more than one third-party gateway (e.g. PayPal and WorldPay) you can come back to this "Edit" screen later and add it. Please note that you can only configure one primary gateway per payment group.

Ok, so you've selected the gateways you use. Click the "edit payment group" button at the bottom of the screen and it will return you to the "Payment Groups" overview screen. You should now see your newly-modified payment group with the payment processor modules you selected. At this point, you can now click the "Edit" icon next to each of those payment processors listed and configure them appropriately (details for the configuration options available for each payment processor are later in this document).

If you plan to accept multiple currencies, just lather, click the blue "Add Payment Group" button, rinse, and repeat the above detailed procedure.

But, Wait! We're not done yet.

There are two more things that (might) need to be done to properly configure your system to be charge in the proper currency(ies) and by the proper payment processor(s).

If you're planning on accepting credit cards and storing them in your Parallels Plesk Billing database for the purposes of recurring billing, you will need to configure encryption on your system. Parallels Plesk Billing uses a strong encryption algorithm that was developed in-house to keep your data as safe as possible.

To configure encryption, go to System → System Configuration → Encryption Settings.

On this page, you will need to type "agree" in the text area at the top of the screen. Next, choose "Local Encryption Key (LEK)" method for encryption. At this point, you will need to decide two things:

- A 4-digit pin number that will be needed when/if you ever want to manually run billing
- A passphrase (can be any number of characters, upper-case, lower-case, spaces, etc.)

You should never disclose your passphrase to anyone, probably even not to other employees in your organization. For employees who need access to customer credit card numbers of manual billing processes, you can give them the LEK Pin. You cannot change your passphrase. You can change your LEK Pin as often as you like though (for example, if an employee leaves, etc.).

To create or change your LEK Pin, go to:

<http://www.PleskBilling.com/support/lek.php>

On this web page, enter the passphrase you plan to use (or, if changing your LEK, enter the passphrase you used previously), and the LEK you wish to use. After submitting, the web page will present you with an LEK Hash, which you will need to enter on the Encryption Settings page back in your Parallels Plesk Billing.

And, that's about it for encryption. You now just need to remember your LEK Pin whenever you need to manually decrypt a customer's credit card number or manually run a billing process.

Onto the final step of making sure all your payment stuff works: the all-important order form(s).

As previously described in this document, the concept of an "order form" is a little bit different in Parallels Plesk Billing. As it is currently known, an "order form" in Parallels Plesk Billing is primarily a way to group products by currency. Generally speaking, you should only have one order form per currency offered. It is *not* a page where your products are listed with "order now" buttons.

To configure your order form(s) go to System → System Settings → Order Form Settings. You will see that one default order form already exists in your Parallels Plesk Billing². Go ahead and click the "edit" button next to it. On this page, you should select the payment group, default language, and default country to be used on this order form. There are also a variety of other options on this page you can choose, but those three are the most important to getting you up and running right now. The other options are described in detail later in this document.

For each payment group you have, create a new order form, and assign it to that payment group.

That's it! Your Parallels Plesk Billing is now configured to accept payment from customers.

² Never, ever, delete an order form that already has had packages purchased through it.

Parallels Plesk Billing → How to Setup Control Panels

Parallels Plesk Billing supports integration with a variety of control panels including:

- cPanel
- cPanel (Reseller)
- DirectAdmin
- eNom Exchange
- eNom Hosting
- Ensim
- EnsimUnify
- FreeRadius
- Helm
- Hostopia
- Hsphere
- Interworx
- Plesk (Windows)
- Plesk (Linux)
- Plesk (Expand)
- Virtuozzo Containers
- and... Parallels Plesk Billing itself (for License Reselling)

In this section, I'm going to outline the steps you need to take in order to get your Parallels Plesk Billing installation to successfully store the connection information needed to provision customers' packages to your servers³.

For each *type* of control panel that you offer, you should have one “Server Group”. For example, if you provide cPanel and Plesk for Linux hosting, you would need two server groups – one for each control panel.

Within each of these server groups, you will add a “Server Module” for each physical server of that type. Going on our above example, if you had 7 machines running cPanel and 5 machines running Plesk for Linux, you would need 7 cPanel server modules in your cPanel server group and 5 Plesk for Linux modules in your Plesk for Linux server group.

To create or manage server groups just go to System → Server Settings → Server Groups. If you've just installed Parallels Plesk Billing, you will see that we've created your first server group for you.

In the drop down menu labeled “Add a Panel” within this first server group, select the type of server you're going to add. Once you've selected a server, you will be taken to a screen showing all of the configuration parameters you can use for that server. Detailed instructions for each type of server module we offer are available later in this document. Right now, I'll just go over some of the general concepts you need to keep in mind as you configure, then you can reference the sections for each specific interface afterward.

After you've added the first control panel module to a server group, you can click on “List Servers” on the Server Group to see the server you just added. Underneath that, you will see the little icon with the green “+” sign on it, you can use this link to add additional control panel modules within this server group.

³ **IMPORTANT:** Control panel modules within server groups to which you do not intend on provisioning anymore packages (e.g. a server that you're slowly trying to move clients off of, or a test server for testing settings), set its status to “Enabled: No”. This will cause accounts that have already been provisioned to it to still be fully automated (suspend, unsuspend, cancellation, etc), but no new accounts will try to provision to that server.

Finally, the most impacting parameter across most all the types of server modules we offer is “Server Weight”. You can give each of your products a specific “weight” (typically, this would refer to the number of resources this product is going to use once provisioned, in terms of disk space, bandwidth, etc.). Each control panel module you add can have a “Maximum Server Weight”. Configure this setting appropriate to how you plan to specify “weights” on your products so you can be confident you will not be overselling your equipment – as each time a package is provisioned to one of your servers, the “weight” of that package will be added to the total “weight” already provisioned on the server.

You can use this so as to implement a pseudo-load-balancing setup. If you go back to your Server Groups settings page and click the “edit” icon next to your server group, you can specify whether provisioned packages will be provisioned onto each server you have, filling them one-by-one, or (more preferably, for most) provisioned onto the server with the least server weight.

Once you've configured a server group for each type of server you offer, and the appropriate control panel modules for each physical server you have within each group, your Parallels Plesk Billing will have been successfully connected to automate package provisioning.

Parallels Plesk Billing → How to Setup Registrar Modules

Parallels Plesk Billing supports integration with a variety of registrars including:

- CentralNIC
- DistributeIT
- eNom
- EuroDNS
- OpenSRS
- Register.com
- ResellOne

There are two steps in getting your system configured with one or more of the domain registrar through which you resell and to tie to appropriate TLDs to each of those registrars. We're going to start with actually getting your Parallels Plesk Billing to communicate with your registrars' APIs.

Click through to System → Domain Settings → Registrar Modules. On this page, you can see all of the available registrar integrations we provide with Parallels Plesk Billing. Simply click on the “Edit” button next to any of the registrars you plan to use and configure them according to the information on their specific interfaces later in their document. The most important thing to keep in mind is that only registrars with “Enabled: Yes” will be used in your Parallels Plesk Billing.

After configuring your registrars, you now just need to configure the TLDs you wish to sell through them. Head over to Products → TLDs → Show TLDs. You will see, if you just installed Parallels Plesk Billing, that we've gone ahead and added pretty much every TLD imaginable. Go ahead and click the “Edit” button next to any of them that you wish to sell. I'll describe the specifics of this screen later in this document (most are fairly self-explanatory anyway), but the most important thing to keep in mind here is to tie that TLD to the appropriate registrar module that you configured earlier. For example, if you want to sell “.com” domain names through eNom, make sure you have “Registrar: enom” selected.

And, that's about it. This was a short section, I know. You do have to worry about tying them to your domain product and setting pricing any everything, but we have a whole other section for that in the “Operations” section of this manual.

Parallels Plesk Billing → How to Setup Fraud Prevention

Parallels Plesk Billing by default places all new customers into a “Pending” status so that you, as the Parallels Plesk Billing administrator, can review each customer prior to accepting them in order to be sure they're not fraudulent. Of course, our goal here is to allow you to automate as much as possible, which is why we developed Parallels FraudGuardian. If you would like to learn more about Parallels FraudGuardian, or apply for an account, please head over to:

<http://www.PleskBilling.com/products/fraudguardian/>

To configure your Parallels Plesk Billing to automatically accept or reject new orders, head on over to System → System Configuration. From here, click on “Fraud Modules”, then click on “FraudGuardian”. Enable the module, enter your username and password for it, and click “Submit”. Afterwards, click on the “Fraud Sets” button below to begin setting some of the automation rules.

The first thing you will want to do is create a default fraud set. You can simply give it a name of “Default” (or whatever you want). Enter the e-mail address you wish to receive fraud reports sent to, then click on “Define New Fraud Set”.

Next, you will want to develop at least one “Threshold”. These can be applied to all new orders, orders from certain countries, or even orders from certain regions of certain countries. For now, lets just create one set to “Apply to ALL countries”, and you can come back and add more specific ones later (if needed). You can name this anything you like, such as the highly original name “Default”. Afterward, click on “Define New Country Threshold”.

Once you've created your first threshold, click on the “Manage” button next to the Fraud Set you created earlier. On this screen, associate the Fraud Set with any order forms and thresholds you wish. Potentially, this gives you extremely granular control over the fraud rules you apply to incoming orders. For now, just go ahead and associate it with all of your order forms and the Threshold you just created. Once you're done, click on “Save All”.

Going back to the Fraud Settings screen, click on the “Configure” button next to the Threshold you created earlier. This interface has a lot to take in on it, and we'll have a more detailed page later in this document to go over all of the options. For now, just to get everything working, the only thing you need to worry about are the “Fraud Score Threshold Actions”. Below, I'm going to give some settings that should work for most people⁴ to get them started. As you monitor your incoming orders, you are encouraged to tweak these settings to fit your business model and order activity.

Score 1	Active w/ Auth Capture	<= 2.5
Score 2	Pending w/ Auth Capture	<= 5.0
Score 3	Soft Reject	<= 7.5
Score 4	Hard Reject	

And that's it! All new orders coming into your system should reach out to our FraudGuardian system, return a fraud score and follow the rules you've just setup.

⁴ We in no way promise that these fraud settings are going to be optimal for your particular industry, customer audience, etc. There are a number of factors that are going to affect the number and type of fraud orders you receive and you should weigh these factors carefully when configuring any fraud prevention automation.