



Integrating Plesk Automation with WHMCS

Plesk Automation 11.5

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CHAPTER 1

About This Document

This document is intended for hosting service providers who provide services using Plesk Automation and want to automate their billing operations with the help of the WHMCS solution.

This document describes how to integrate an existing Plesk Automation installation with WHMCS using the special Plesk Automation WHMCS module. The document covers details on how to install and configure the module as well as how to set up your Plesk Automation hosting offers in WHMCS.

Note: This document does not provide details on how to run your business using WHMCS. For this and other information about configuring and administering WHMCS, refer to the official WHMCS documentation (<http://docs.whmcs.com>).

CHAPTER 2

Introduction

If you provide hosting services using Plesk Automation, you can automate your main business operations using the WHMCS solution. In general, WHMCS will take care of such aspects of your business as how potential customers will find your offerings (online store), how you will subscribe them and take payments, and so on.

WHMCS has its own service templates (*products/services* in terms of WHMCS), subscriptions, and customer accounts that are linked to the corresponding objects in Plesk Automation. This makes it possible to divide the financial and technical information between Plesk Automation and WHMCS. For example, when you need financial details about a certain subscription, you refer to it in WHMCS. When you wish to manage hosting resources, you refer to the subscription in Plesk Automation.

Plesk Automation WHMCS Module

Plesk Automation is integrated with WHMCS by means of the special Plesk Automation WHMCS module (hereafter referred to as the module). Being installed on the WHMCS server, this module allows you to connect the Plesk Automation management node to WHMCS and provides communication between the products.

Integrating Plesk Automation with WHMCS

The process of integrating your Plesk Automation installation with WHMCS consists of three main steps described in this guide:

- 1 [Installing WHMCS on any server in your network](#) (on page 5).
- 2 [Installing and configuring the Plesk Automation WHMCS module on this server](#) (on page 6).
- 3 [Setting up your hosting offer in WHMCS](#) (on page 8).

CHAPTER 3

Installing and Upgrading WHMCS

For instructions on how to install WHMCS, refer to the official WHMCS documentation (http://docs.whmcs.com/Installing_WHMCS).

Before installing WHMCS, check the following requirements:

- Plesk Automation provides the support only for WHMCS 5.x and 6.x (both Linux and Windows versions).
- WHMCS can be installed on the Plesk Automation management node or on *any* server in your network that has connection to the management node.

Note that before you can proceed to serving customers in WHMCS, you should perform its preliminary configuration: configure ordering aspects and invoice issuing, set up payment gateways, and so on. For the instructions on post installation steps, refer to the official WHMCS documentation (http://docs.whmcs.com/Installing_WHMCS#Post_Installation_Suggested_Steps).

Upgrading WHMCS

Before upgrading WHMCS, upgrade the Plesk Automation WHMCS module as described in the [following section](#) (on page 6). For instructions on how to upgrade WHMCS, refer to the WHMCS documentation at <http://docs.whmcs.com/Upgrading>.

CHAPTER 4

Installing and Configuring the Plesk Automation WHMCS Module

Once you have a working WHMCS installation, you can install and configure the Plesk Automation WHMCS module. The module must be installed on *the same server where WHMCS is installed*.

- ***To install and configure the module, perform the following steps:***
 - 1 Download an archive with the module to your WHMCS server from <http://download.automation.odin.com/ppa/11.5/whmcs/PleskAutomation.zip>.
 - 2 Extract the contents of the archive to `<path_to_whmcs>/modules/servers` where `<path_to_whmcs>` is the WHMCS installation directory.
 - 3 For the files and directories you have extracted, set the same access permissions as set for the directory `<path_to_whmcs>/modules/servers`.
 - 4 On WHMCS installation, edit the `/etc/php.ini` file as follows:
 - Locate the *Dynamic Extensions* section.
 - Add the following line to it: `extension=dom.so`
 - Save the file.
 - 5 Connect your Plesk Automation management node to WHMCS. To do this, log in to WHMCS as administrator and run the Add New Server wizard in Setup > Products/Services > Servers. When adding a server, along with a server Name specify the following parameters:
 - Specify Hostname and IP address of the management node.
 - Set the server Type to PleskAutomation.
 - In Username and Password, specify your Plesk Automation administrator's credentials.
 - Turn on the Secure option. This will force WHMCS to use secure connections which are required by Plesk Automation.
 - 6 Make sure that the "php-xml" PHP module is installed on the WHMCS server and SELinux is disabled.
 - 7 If your WHMCS installation is located *not* on the Plesk Automation management node but on a separate server, allow this server to communicate with the management node using the remote API. To do this, log in to Plesk Automation as the administrator and add the IP address of your WHMCS server on the System > Settings > Public API Manager > Allowed Networks tab.

- *To upgrade the module, if you already have an earlier version installed:*
 - 1 Download an archive with the module to your WHMCS server from <http://download.automation.odin.com/ppa/11.5/whmcs/PleskAutomation.zip>.
 - 2 Extract the contents of the archive to the directory where the module is installed, overwriting the existing files.
 - 3 For the files and directories you have extracted, set the same access permissions as set for the directory `<path_to_whmcs>/modules/servers`.

CHAPTER 5

Setting Up Your Hosting Offer

After your Plesk Automation management node is connected to WHMCS, you can proceed to transferring your service offers from Plesk Automation to WHMCS.

Serving Hosting Customers

WHMCS has its own service templates (products/services in terms of WHMCS), subscriptions, and customer accounts that reflect the corresponding objects in Plesk Automation. Subscriptions in WHMCS and Plesk Automation are different objects. The same approach applies to templates/products and customer accounts.

The typical workflow of serving customers using WHMCS is as follows:

- 1 You create a service template in Plesk Automation. Learn how to create templates in the Plesk Automation: Administrator's Guide, section Service Templates and Resources.
- 2 You create the corresponding product in WHMCS and link it to the template in Plesk Automation. Learn how to create products in WHMCS and link them to templates in the section Creating Products in WHMCS (on page 10).

Note: Before you start creating products, we recommend that you set up configurable options for the product. Learn more in the section Setting Up Configurable Options (on page 9).

- 3 Customer purchases the product (template) through an online store provided by WHMCS.
- 4 WHMCS creates a new customer account, subscribes them to the product, and generates an invoice.
- 5 When the customer pays the invoice, WHMCS propagates the customer account and subscription to Plesk Automation.
Note that the username and password for the Plesk Automation customer account are generated automatically. The password can be changed by the customer or the administrator anytime. The username is based on a subscription's domain name and cannot be changed.

Note: This behavior may vary depending on product settings. For example, the account and subscription may be propagated right after customer places an order or only after you manually accept the order.

- 6 Plesk Automation allocates the subscription and grants the customer permissions to log in to the Hosting Panel and use services provided with the subscription.

According to the workflow, the only manual steps are creating a template/product in Plesk Automation and WHMCS (steps 1-2). All further steps are performed by WHMCS and Plesk Automation automatically.

Serving Resellers

The current module version does not support serving resellers through WHMCS. You can create resellers only directly in Plesk Automation.

Syncing Objects Between Plesk Automation and WHMCS

Note that the current module version does not provide full syncing of objects between WHMCS and Plesk Automation. In more details:

- Products in WHMCS are not synced with corresponding templates in Plesk Automation. This means that changes in templates' resource limits are not propagated to corresponding WHMCS products and vice versa. WHMCS knows nothing about the corresponding Plesk Automation template, it only sends the request to create a subscription based on a certain template.
- Subscriptions in WHMCS are not synced with corresponding subscriptions in Plesk Automation. If you want to change resource limits of a certain subscription, you should do this directly in the Plesk Automation Administration Panel.
- There is a one-way sync for customers contact information between WHMCS and Plesk Automation. This means that when you change contact information of an account in WHMCS, these changes are propagated to the corresponding account in Plesk Automation. Alternatively, changes made to an account in Plesk Automation will not be propagated to WHMCS.

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Setting Up Configurable Options

Before creating your product in WHMCS, we recommend that you set up configurable options for your products. Configurable options are the WHMCS mechanism that allows you to give your clients variables which alter the price of a product. If the product is associated with a certain configurable options group, customers (when subscribing to the product through the store) are able to add a certain option from that group to their subscription.

Plesk Automation uses this mechanism to allow your customers to customize subscription's hosting settings when purchasing a product. For example, customers are able to buy a dedicated IP address instead of the shared one provided by the product or purchase any amount of additional disk space.

When you install the Plesk Automation WHMCS module, it automatically adds the following configurable options groups:

- **General Options**
These are options that are available for all types subscriptions regardless of the services they provide. For example, a number of additional domains.
- **Hosting Options**
These are options that a customer can add to the purchased hosting service: additional disk space, mailboxes, dedicated IP address, and so on.
- **Windows Hosting Options**
These are hosting options available only on Windows platforms: additional CPU usage limit, a number of additional MS SQL databases, and so on.

All options in the groups are predefined and you cannot add, remove them, or change their names.

Before you start working in WHMCS, you should set prices for all the options.

▪ ***To set the price for a certain configurable option:***

- 1 Log in to WHMCS as the administrator.
- 2 Open a certain option group for editing in Setup > Products/Services > Configurable Options.
- 3 Edit the option. For more information about editing configurable options, refer to the official WHMCS documentation.

Creating Products in WHMCS

As described in the chapter Setting Up Your Hosting Offer (on page 8), to start serving customers with the Plesk Automation - WHMCS bundle, you should first create your hosting offer - a service template in Plesk Automation (if it does not yet exist) and then create the corresponding product in WHMCS as described below.

Important: When you connect Plesk Automation to WHMCS, the module automatically creates products (and specifies configurable options for them) for all the templates that exist in Plesk Automation. Follow the instruction below to create products for templates that were added after you set up integration between Plesk Automation and WHMCS.

▪ ***To create a product in WHMCS and link it to a Plesk Automation service template:***

- 1 Log in to WHMCS as administrator.
- 2 Create a product in Setup > Products/Services > Products/Services > Create a New Product.
- 3 Specify the product name and set the Product Type to Hosting Account.
- 4 Set the resource limits for Plesk Automation services. To do this, switch to the Module Settings tab of the product properties:
 - Set the Module Name to PleskAutomation.

- In the Package Id field, specify the ID of the corresponding service template in Plesk Automation. The templates' IDs are shown in the ID column of the templates list located in the Plesk Automation Administration Panel > Products > Service Templates.
- Specify resource limits (see the full list of limits in Appendix A. Properties of Shared Hosting Products in WHMCS (on page 12)). If you leave a certain setting value blank, Plesk Automation will use the value specified in the Plesk Automation template when subscribing customers. Otherwise, Plesk Automation will use the value specified in WHMCS.

Note: The list of limits contains resource limits for all available hosting services (mail, database, Apache and IIS web hosting). If the corresponding Plesk Automation template does not provide some of the services, leave the particular limit values blank.

- 5 Define how the system should create customers' subscriptions. By default, the system is set to Do not automatically set up this product, which means that you will have to create customer subscriptions manually after an order is placed. To set up automatic subscription provisioning, we recommend that you choose from one of the three automatic options. For more information on this options, refer to the official WHMCS documentation (http://docs.whmcs.com/Configuring_Products/Services#Module_Settings_.28aka_Provisioning.29).
- 6 On the Configurable Options tab, select configurable options groups you want to associate with the product:
 - General Options
 - Hosting Options
 - Windows Hosting OptionsCustomers will be able to buy the associated options when subscribing to the product in the store.
- 7 In order to allow customers to upgrade and downgrade their subscriptions, specify which products can be upgraded to and downgraded from the created product. This is done on the Upgrades tab of the product. Learn more about upgrades and downgrades in the official WHMS documentation (http://docs.whmcs.com/Products_Management#Upgrades.2FDowngrades).

Note: The specified products should be provided on the same operating system with the created product. For example, Plesk Automation does not allow switching from the Apache-based hosting to the IIS-based hosting.

CHAPTER 6

Appendix A. Properties of Products in WHMCS

The table below provides details about WHMCS products properties for Plesk Automation shared hosting module.

Property	Description
Package ID	The ID of the corresponding service template in Plesk Automation
Disk space	The maximum amount of disk space (in KB)
Traffic	The maximum monthly traffic (in KB)
Domains	The number of domains
Maximum bandwidth usage (KB/s)	The maximum speed (KB per second) that a website can share between all its connections
Connections	The maximum number of simultaneous connections
Hard disk quota	Disk space that a separate system user is allowed to use
Java applications	The number of Java apps customers can install on their sites
MySQL databases	The number of MySQL databases
Microsoft SQL Server databases	The number of Microsoft SQL Server databases
PostgreSQL databases	The number of PostgreSQL databases
Additional FTP accounts	The number of additional FTP accounts
Sites published with Presence Builder	The number of sites published with Presence Builder
Mailbox size	The maximum size of a separate mailbox (in KB)
Mailboxes	The number of mailboxes
Maximum CPU use (%)	(IIS hosting) The amount of CPU resources that the IIS application pool can use
ColdFusion DSN connections	(IIS hosting) The number of connections to external databases that customers can create for web apps written in Adobe ColdFusion
FrontPage accounts	(IIS hosting) The number of Microsoft FrontPage accounts.
ODBC DSN connections	(IIS hosting) The number of connections to external databases that customers can create for their web apps
Shared SSL links	(IIS hosting) The number of websites that a customer can secure with an SSL certificate shared by the provider