

Polyspaston HostDirector

The essential web host management software

DOCUMENTATION FOR POLYSPASTON HostDirector

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Polyspaston

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INSTALLATION AND CONFIGURATION

Installing the HostDirector is a very simple process. Firstly you need to edit the config/config.php file. You can open this in any text editor. Windows users should use Windows Notepad.

VARIABLE NAME	DESCRIPTION
$host	The host name of the server on which your MySQL database is. In the vast majority of cases this can be set to **localhost**
$usr	The username to access your MySQL database.
$pwd	The password to access your MySQL database.
$db	The MySQL database name.
$currency	Your currency symbol - common examples: £ $ € ¥
$currency_code	The corresponding 3 letter currency code – common examples: GBP USD EUR JPY
$tax_rate	Set this value to **on** if you charge tax. Otherwise set this to **off** – instructions for specifying the actual tax rate come later in the document.
$success_url	The full URL your clients are directed to once they have completed a successful payment.
$fail_url	The full URL your clients are directed to if their payment is rejected.
$worldpay_inst	Your Worldpay Installation ID (if appropriate).
$paypal_user	Your PayPal username (if appropriate).
$paypal_notify	The full URL of the paypal_notify.php script (if appropriate).
$secure_url	The full URL of the secure/secure.php script (if appropriate).
$log_searches	Set this value to **yes** if you'd like to log all whois lookups on your site. Otherwise set this value to **no** – you can view the log in the admin area.
$whois_url	The full URL to the directory your whois scripts are in.
$account_url	The full URL to the client area.
$host_email	The e-mail address for general enquiries.
$host_name	Your company name.
$support_email	The e-mail address for support enquries.
$support_name	Name of your support department.
$accounts_name	Name of your accounts department.
$accounts_email	The e-mail address for account enquiries.
$account_cc_email	The e-mail address invoices should be carbon-copied to (can be same as above).
$orders_email	The e-mail address orders are sent to.
$orders_name	Name of your orders department.
$host_address	Your address.
THE FOLLOWING VARIABLES RARELY NEED TO BE CHANGED.	
$none_yet	Text that appears when there are no Domains,

	Hosting Packages or Extra Services currently in the client's cart.
$none_selected	Text that appears in confirmation e-mails when the client did not select a Domain, Hosting Package or Extra Services.
$price_free	Text that appears when a product is free,
$log_per_page	Number of logged whois searches to appear per page in the admin area.
$text_available	Text that is displayed in whois log when a Domain Name is available.
$text_registered	Text that is displayed in whois log when a Domain Name is registered.
$transfer_extra	Text that is displayed next to a Domain Name that is to be transferred in the confirmation e-mails.
$M_text	Text that is displayed for a product or service that is billed monthly.
$Q_text	Text that is displayed for a product or service that is billed quarterly.
$Y_text	Text that is displayed for a product or service that is billed yearly.
$S_text	Text that is displayed for a product or service that has a set-up fee.
$payment_received	Subject of e-mail that notifies you of receiving a payment.
$details_received	Subject of e-mail that notified you that you have received a new order.
$invoice_sent	Subject of e-mail that notified you that a client will pay by invoice.
$order_client_subject	Subject of the e-mail sent to the client after they have placed an order.
$subject60	Subject of e-mail sent to client 60 days before their product is due to expire.
$subject30	Subject of e-mail sent to client 30 days before their product is due to expire.
$subject14	Subject of e-mail sent to client 14 days before their product is due to expire.
$subject7	Subject of e-mail sent to client 7 days before their product is due to expire.
$subject1	Subject of e-mail sent to client 1 day before their product is due to expire.
$subjecte	Subject of e-mail sent to client when their product has expired.
$invoice_subject	Subject of e-mail sent to client when they decide to pay by invoice.
$secure_subject	Subject of e-mail that contains encrypted client payment details.
$forgotten_subject	Subject of e-mail sent to client when they have forgotten their password.
$username_min	Minimum number of characters username can

	contain.
$username_max	Maximum number of characters username can contain.
$password_min	Minimum number of characters password can contain.
$password_max	Maximum number of characters username can contain.
$order_no_prefix	Text to be displayed before order number.
$client_dir	Name of directory that contains the client area.
$admin_dir	Name of the administration area.
$whois_dir	Name of directory that contains the whois scripts.

Once you have edited your config.php file successfully you should upload the administration, config, client, credit_cards, emails, program_images and whois directories plus the install.php script.

Everything should be uploaded in ASCII mode except the program_images directory which should be transferred in BINARY.

Now visit http://www.your-domain.com/install.php

The install.php script will generate the 13 tables required to run HostDirector. If your MySQL details are correct you should see a success message. If you have trouble getting this script to work please contact support@polyspaston.com

IMPORTING AENEAS

If you've been using the Aeneas Customer Manager and would like to import your customers to HostDirector just open the import_aeneas.php file and specify your MySQL database details. You should also enter the names of both the aeneas database and the new database. These can be the same database. Run the script in your browser and then, if successful, delete the script.

HostDirector allows you to charge different rates of tax to each customer depending on their country of residence. As this is not a feature of Aeneas you should set a default tax rate in the import script, once the import is complete you will manually need to go through each client in HostDirector and update their tax rate if required.

1. RUNNING THE SCRIPT FOR THE FIRST TIME

If you saw a success message after you ran the install.php script you are now ready to start using HostDirector. You should delete the install.php script as you will not need this again.

You can log in to the administration area by visiting:
http://www.your-domain.com/administration

The default username is **admin** and password is **password**

If you are able to successfully log in to the admin area then you can be confident that the installation has worked correctly.

2. THE ADMINISTRATION AREA

ADDING DOMAIN NAME EXTENSIONS

The whois script can check the availability of any Domain Name extension. All you need to do is click the 'New Domain Name Extension' link and enter the appropriate details. The script comes pre-loaded with over 20 extensions so it is unlikely that you will need to add any more.

After you've added the extension to the database you will need to add a checkbox to the whois/template_whois.html template. It should be in the same format as the other boxes. For example, if you add the .com.cn extension you should add …

<input type="checkbox" name="extensions[]" value=".com.cn">

FIELD NAME	DESCRIPTION
Extension	The Domain Name extension – e.g. .com
Product Code	The product code – this is up to you, by default .com Domain Names are set to DOM-COM. The product code is displayed in confirmation e-mails and the admin/client areas.
Look-up Type	Either 'Uses Whois Server' or 'Uses URL' – this depends on the whether the extension has a working whois server or not.
Whois Server	Whois server address or URL of whois results page. For URL whois searches XdomainX is replaced with the actual Domain Name the client searches for.
'No Match' Text	The text in the whois look-up that indicated a Domain Name is available.
Price 1 - Year	The price of 1 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 2 – Year	The price of 2 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 3 – Year	The price of 3 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 4 – Year	The price of 4 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 5 – Year	The price of 5 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this

	period then leave this box blank.
Price 6 – Year	The price of 6 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 7 – Year	The price of 7 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 8 – Year	The price of 8 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 9 – Year	The price of 9 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Price 10 – Year	The price of 10 years Domain Name registration (format should be 10.00 – no other characters). If you do not want to allow registration for this period then leave this box blank.
Transfer Price	The price for transferring a Domain Name with this extension to you – e.g. 0.00
Transfer Text	The text that represents the price shown above. Z~ is replaced with your currency symbol – e.g. Free Transfer
Display Price	The text that is displayed when a Domain Name is available – e.g. Z~ 10 per year

If you are unsure what the whois server address is for a particular Domain Name go to http://www.geektools.com/whois.php and perform a whois look-up. At the top of the results page you'll see the whois server address. If you're still unsure contact support@polyspaston.com

ADDING HOSTING PACKAGES

The hosting packages you enter here will be listed on the hosting section of the whois script automatically.

FIELD NAME	DESCRIPTION
Package Name	Name of hosting package.
Package Code	Product code of hosting package.
Standard Price	Price (format – 10.00)
Billing Frequency	Yearly, Monthly, Quarterly or One-Off
Set-Up Fee	Set-up fee for hosting package to be billed once.
Importance	The lower this value the higher the hosting package will appear in the list of packages in

	the whois stage. By default packages are listed in alphabetical order.
Description	Description of package. Can contain HTML

ADDING EXTRA SERVICES

This is similar to adding hosting packages.

FIELD NAME	DESCRIPTION
Extra Name	Name of extra service
Extra Product ID	Product code of extra service
Extra Price	Price (format – 10.00)
Billing Frequency	Yearly, Monthly, Quarterly or One-Off
Set-Up Fee	Set-up fee for hosting package to be billed once.
Importance	The lower this value the higher the extra service will appear in the list of services in the whois stage. By default services are listed in alphabetical order.
Description	Description of service. Can contain HTML

THE KNOWLEDGE BASE

Here you can add and edit the answers to frequently asked questions. The search feature uses a MySQL FULLTEXT search, in order for this to work you must have at least 3 questions and answers in your database and the string you search for must contain more than 3 characters.

SEARCHING FOR CLIENTS

You can search for any client in the database by supplying as much or as little information as you want.

CLIENT WELCOME MESSAGE

When clients log in they will see a generic welcome message. You can edit this via the admin area. This can contain HTML and should probably include instructions to the client about how to navigate through HostDirector.

MANUALLY ADD CLIENT

You can add a client to the database via this page. This is essential if you do not use the whois script.

WHOIS SEARCH LOG

If you opted to log all whois searches in the config.php file then this page displays the log. You can empty the log by clicking the appropriate link at the bottom of the page.

ADMIN REPORTS

From this page you can view all products that meet your search criteria. The status menu is dynamically generated and contains, as options, all unique statuses in the database. You can search for all products and users that have outstanding invoices, all which are awaiting payment authorisation and all that are complete.

PRODUCT STATISTICS

From here you can see at a glace which products and services are your most popular. It lists each unique product along with the number you have sold.

INVOICES/REMINDERS

Run this script and the billing.php script will go through each and every product in the database and send an e-mail to the client if the product is due to expire soon. Messages are sent as soon as the product is within 60, 30, 14, 7 and 1 day(s) from expiry. A further e-mail is sent when the product has expired. You can customise the e-mails sent by looking in the emails directory.

Products that are billed automatically through Worldpay or PayPal will not be subject to this script and no renewal reminders will be sent. If you'd like to send renewal reminders you should locate the client in the admin area, view their products and click 'edit'. At the bottom of the edit product page are a series of checkboxes. Select the intervals at which you'd like reminders to be sent.

Once a renewal reminder has been sent the client will be able to renew the product through the client side of HostDirector.

4. THE CLIENT AREA

MY PRODUCTS

Here the client will see all the products they have ordered along with the status, renewal price, expiry date, link to send you an e-mail to query the product and if appropriate a link to renew the product.

ORDER EXTRAS

All the extra products/services set up in the admin area will be visible on this page.

SUPPORT AREA

From here the client is able to send you an e-mail requesting support. The advantage of this form is that along with the message you will be sent the client's account details.

KNOWLEDGE BASE

All questions and answers set up via the admin area will be visible here.

UPDATE DETAILS

The client may keep their contact details up to date here.

5. THE WHOIS STAGE

ADDING DOMAIN NAME EXTENSIONS

This can be done via the admin area of HostDirector.

HOSTING PACKAGES

This can be done via the admin area of HostDirector.

EXTRA SERVICES

This can be done via the admin area of HostDirector.

TAX

You can charge different rates of tax depending on the country in which your client is from. This is particularly useful if you want to charge VAT to EU customers, but not to others. To set your tax rates open the whois/template_checkout_tax.html template. View the options for the drop-down menu.

<option value="BE|1.175">Belgium

Here BE represents the two letter country code for Belgium and 1.175 represents the value the total price will be multiplied by to add on 17.5% tax.

All other countries have a tax value of 1 – this means no tax.

CHECKOUT

If you've set the $tax_rate variable in config.php to **on** then clients will be prompted to select their country so the tax rate can be determined. Otherwise this step will be skipped out and the client will go straight to the next stage.

Current customers can log in with their normal username and password and their contact details will be displayed. N.B. No payment details are held by HostDirector.

6. PAYMENT

WORLDPAY

To use Worldpay you must configure a callback.

- Log in to http://www.worldpay.com/admin
- Click ‘configuration options’ for your Installation
- Enter the URL of your callback_worldpay.php file in the callback URL field.
- Select ‘callback enabled’
- Select ‘use callback response’
- Put an e-mail address in the ‘callback failure alert e-mail address’ field.
- Save changes

By default the Worldpay payment buttons are set-up in testMode 100. This means that all transactions passed via Worldpay are trials and no money is taken from the card entered. To go live open credit_cards/worldpay.txt, credit_cards/worldpay-M.txt and credit_cards/worldpay-q.txt and delete the following line:

<input type=hidden name="testMode" value="100">

Automatic invoices are not sent for any product that has been set-up to use a Worldpay FuturePay agreement. See the INVOICES/REMINDERS section of this document for more information.

PAYPAL

There is nothing you need to do in order to configure PayPal except specify the correct details in the config.php file.

Automatic invoices are not sent for any product that has been set-up to use a PayPal recurring billing agreement. See the INVOICES/REMINDERS section of this document for more information.

PROCESSING DETAILS MANUALLY

You should upload the contents of the secure directory to webspace on a secure server and then set the correct URL in the config.php file. The sensitive card details are encrypted and e-mailed to you. Use the decryption.exe application that came with HostDirector to decrypt this. When running the decryption.exe file the e-mail address is the address of the client.

If you have trouble with the decryption.exe file or require secure webspace please contact support@polyspaston.com

7. CUSTOMISING

Customising HostDirector is very simple. Every page can be opened in a normal HTML editor such as Frontpage or Dreamweaver. So long as you leave anything that starts and ends with an X – e.g. XdomainsX in place and do not change the form actions or hidden fields you can achieve anything.

In both the admin and client area the header.html file is displayed at the top of each page and the footer.html file at the bottom. The stylesheet.css file contains all the styles for the appearance.

See appendix A for an explanation of each template.

The text of e-mails can easily be modified. Just open the emails folder and take a look. The file names are pretty self explanatory.

Should you require any help with customising please contact support@polyspaston.com

8. TROUBLESHOOTING

I'm unable to run the install.php script.

Check that your server meets the minimum system requirements.

- PHP is installed.
- You have a MySQL database and have entered the correct username, password, database name and host name in the config.php file.
- You uploaded the file in ASCII mode.

I need help installing the script.

Send your FTP and MySQL database details to support@polyspaston.com

I see a strange error message.

If you're unable to decipher the message please contact support@polyspaston.com and explain fully the problem.

APPENDIX A

ADMIN TEMPLATES

TEMPLATE NAME	BRIEF DESCRIPTION
admin_add_client.html	Manually add a client to the database.
admin_add_product.html	Manually add a product to a client's record.
admin_billing.html	Confirmation page before automatic billing wizard is run.
admin_change_password.html	Change the admin password.
admin_client_search.html	Search for a client in the database.
admin_client_search_row.html	Displayed for each record found when client search performed.
admin_client_welcome.html	Specify the message your clients see when they log in to their account.
admin_edit_client.html	Edit client's details.
admin_edit_extension.html	Edit Domain Name extension in the database.
admin_edit_extra.html	Edit additional service in the database.
admin_edit_header.html	Displayed above all domains/hosting packages/extras on the edit pages.
admin_edit_hosting.html	Edit hosting packages in the database.
admin_edit_kb.html	Edit knowledge base entry.
admin_edit_product.html	Edit client's product details.
admin_invoice_row.html	Displays time automatic invoice was sent to client.
admin_kb_add.html	Add knowledge base entry.
admin_kb_header.html	Header for knowledge base search results.
admin_kb_row.html	Displayed for each knowledge base entry found when search is performed.
admin_kb_search.html	Knowledge base search page.
admin_login.html	Login page.
admin_login_error.html	Login error page.
admin_log_search.html	Search whois search log.
admin_log_searches_footer.html	Shown at bottom of whois search log page.
admin_log_searches_header.html	Shown at top of whois search log page.
admin_log_searches_row.html	Displayed for each whois search log when search is performed.
admin_new_extension.html	Add new Domain Name extension.
admin_new_extra.html	Add new extra service.

admin_new_hosting.html	**Add new hosting package.**
admin_products_row_display.html	**Displays for each domain extension/hosting package/extra from where you can select edit or delete.**
admin_product_row.html	**Displayed for each product client ordered.**
admin_reports.html	**Search page for running admin reports.**
admin_reports_footer.html	**Shown at bottom of reports search page.**
admin_reports_header.html	**Shown at top of reports search page.**
admin_reports_row.html	**Displays each result in reports search.**
admin_stats_header.html	**Shown at top of product statistics page.**
admin_stats_row.html	**Displays each product statistic result.**
admin_view_client.html	**View client's details.**
admin_welcome.html	**First page admin users sees after logging in.**
error.html	**All error messages displayed using this template.**
footer.html	**Shown at bottom of all pages.**
header.html	**Shown at top of all pages.**
message.html	**Displays confirmation/success messages.**

APPENDIX B

CLIENT TEMPLATES

TEMPLATE NAME	BRIEF DESCRIPTION
client_cart_empty.html	Shown when client removes all extras/renewals from their cart.
client_cart_footer.html	Shown at bottom of extras/renewals cart.
client_cart_header.html	Shown at top of extras/renewals cart.
client_cart_row.html	Displays each item in client's extras/renewals cart.
client_change_password.html	Allows client to change their password.
client_extra_packages.html	Template for displaying each extra service.
client_forgot.html	Shown if client has forgotten their password.
client_invoice.html	Invoice
client_kb.html	Knowledge base search page.
client_kb_entry.html	Knowledge base entry.
client_kb_header.html	Shown at top of knowledge base search.
client_kb_row.html	Displays each knowledge base result.
client_login.html	Login page.
client_login_error.html	Login error page.
client_payment_options.html	Displays payment options – shown at end of extras/renewals cart.
client_products_header.html	Shown above all products client has ordered.
client_product_row.html	Displays products client has ordered.
client_support.html	Support template.
client_view_contact_details.html	Allows client to update their contact details.
client_welcome.html	Shown when client first logs in.
error.html	All error messages displayed using this template.
footer.html	Shown at bottom of all pages.
header.html	Shown at top of all pages.
message.html	Displays confirmation/success messages.

APPENDIX C

WHOIS TEMPLATES

TEMPLATE	BRIEF DESCRIPTION
message.html	Displays confirmation messages.
payment_failure.html	Shown after unsuccessful payment.
payment_received.html	Shown after successful payment.
template_checkout.html	Page where new clients enter their details.
template_checkout_existing.html	Page where existing clients can confirm their details.
template_checkout_tax.html	Where client can select their billing country so the tax rate can be calculated.
template_extras.html	Displays extra services.
template_extras_packages.html	Displays each extra service.
template_forgotten_password.html	When client has forgotten their password.
template_hosting.html	Displays hosting packages.
template_hosting_package.html	Displays each hosting package.
template_hosting_package_header.html	Shown above each set of hosting packages.
template_hosting_package_selected.html	Shown where client has already selected hosting package.
template_invoice.html	Invoice.
template_login.html	Login to account.
template_payment_options.html	Displays payment options at end of order process.
template_quick_whois.html	Full whois results.
template_results.html	Displays Domain Name status after whois.
template_results_available_row.html	Displayed for an available Domain Name.
template_results_registered_row.html	Displayed for a registered Domain Name.
template_whois.html	Page from which whois lookups are performed.
terms.html	Your terms & conditions.