



Resellers Center

Manual For Resellers

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1. Introduction

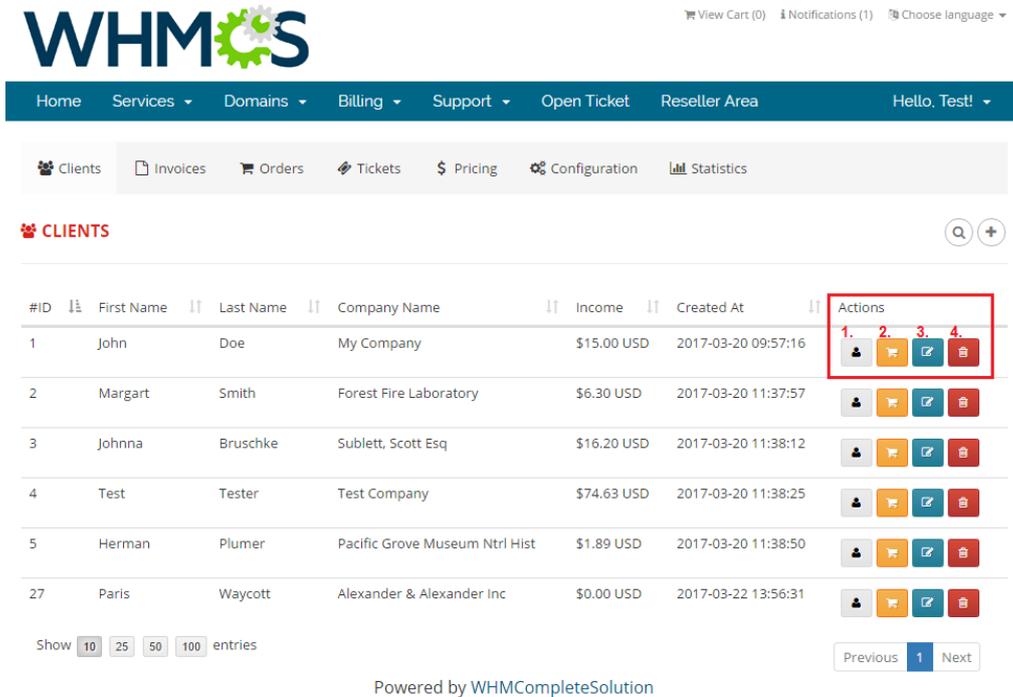
Reseller Area will empower you to carefully manage all acquired customers together with products, services and domains they have obtained. At the same time, your clients will be allowed to readily place orders directly in your customized store and then, log in to their own accounts in order to handle purchases, pay invoices or even create tickets.

Reseller Area gathers all instruments for you to manage every key aspect of your reselling activities. You can handle the particulars of your customers here, define prices of offered products, set up branding of your store, customize email templates, submit tickets and more.

The screenshot displays the WHMCS Reseller Area dashboard. At the top, the WHMCS logo is on the left, and navigation links for 'View Cart (0)', 'Notifications (1)', and 'Choose language' are on the right. A dark blue navigation bar contains links for 'Home', 'Services', 'Domains', 'Billing', 'Support', 'Open Ticket', 'Reseller Area' (highlighted with a red box), and 'Hello, Test!'. The main content area is divided into several sections: 'Your Info' (Reseller's Company: Test Reseller, 114 Bowie Street, San Antonio, Texas, 78205, United States), 'Your Active Products/Services' (no active items), 'Recent Support Tickets' (no recent tickets), and 'Recent News' (welcome message dated 19/09/2016). A central search bar and a 'Register a New Domain' section with 'Register' and 'Transfer' buttons are also visible. The footer indicates the system is 'Powered by WHMCompleteSolution'.

2. Clients

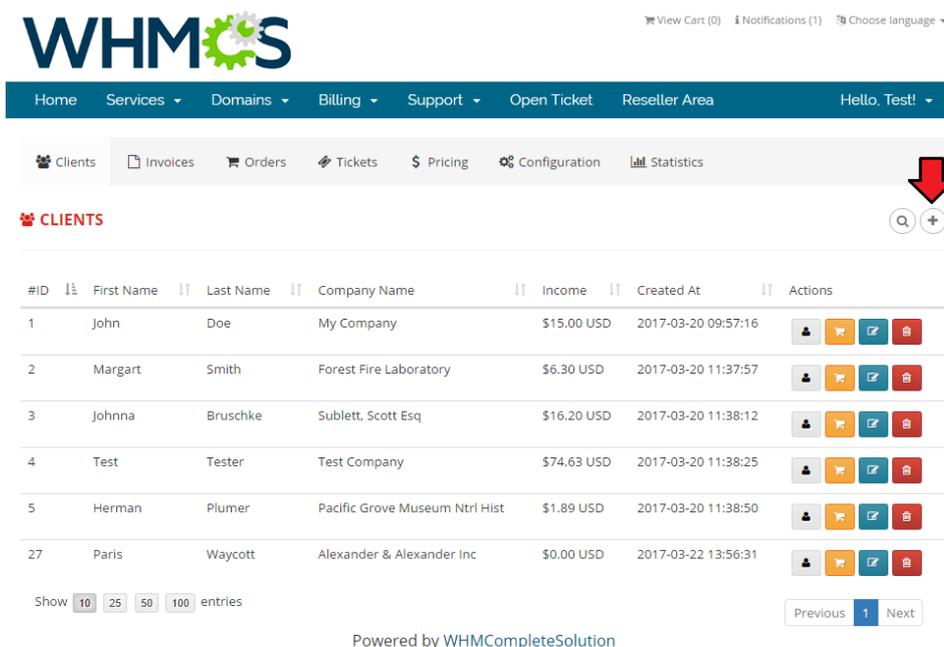
In this section you can view the list of acquired clients as well as perform all customer related actions. These are: logging in as a client (1), placing the order for a client (2), viewing customer details (3) and deleting the account of a given client (4).



The screenshot shows the WHMCS interface. At the top, there is a navigation bar with links for Home, Services, Domains, Billing, Support, Open Ticket, Reseller Area, and a user greeting 'Hello, Test!'. Below this is a secondary navigation bar with icons for Clients, Invoices, Orders, Tickets, Pricing, Configuration, and Statistics. The main content area is titled 'CLIENTS' and features a search icon and a plus sign. A table lists clients with columns for #ID, First Name, Last Name, Company Name, Income, and Created At. The 'Actions' column for each client contains four icons: a person (1), a shopping cart (2), a magnifying glass (3), and a trash can (4). A red box highlights these icons for the first client. At the bottom, there is a pagination control showing 'Previous 1 Next' and a footer that says 'Powered by WHMCompleteSolution'.

#ID	First Name	Last Name	Company Name	Income	Created At	Actions
1	John	Doe	My Company	\$15.00 USD	2017-03-20 09:57:16	1. 2. 3. 4.
2	Margart	Smith	Forest Fire Laboratory	\$6.30 USD	2017-03-20 11:37:57	
3	Johnna	Bruschke	Sublett, Scott Esq	\$16.20 USD	2017-03-20 11:38:12	
4	Test	Tester	Test Company	\$74.63 USD	2017-03-20 11:38:25	
5	Herman	Plumer	Pacific Grove Museum Ntrl Hist	\$1.89 USD	2017-03-20 11:38:50	
27	Paris	Waycott	Alexander & Alexander Inc	\$0.00 USD	2017-03-22 13:56:31	

If you wish to add a new client, simply press the ‘+’ button as presented below.



This screenshot is identical to the one above, but with a red arrow pointing to the plus sign button in the top right corner of the 'CLIENTS' section, indicating where to click to add a new client.

Then, fill in all required data in both 'General' and 'Address' tabs. Remember to save the changes before moving to another section.

Add Client ×

General **Address**

First Name

Last Name

Company

E-mail Address

Phone Number

Password

Currency

Send a new account information message



Enter 'Client Details' section (3) to view or edit personal data of a given customer as well as access complete information concerning their orders, invoices, services, addons and domains.

WHMCS View Cart (0) Notifications (1) Choose language

Home Services Domains Billing Support Open Ticket Reseller Area Hello, Test!

Clients Invoices Orders Tickets Pricing Configuration Statistics

CLIENT DETAILS Details Orders Invoices Services Addons Domains

First Name **Address 1**

Last Name **Address 2**

Company **City**

Name **State**

E-mail **Postcode**

Address **Country**

Phone

Number

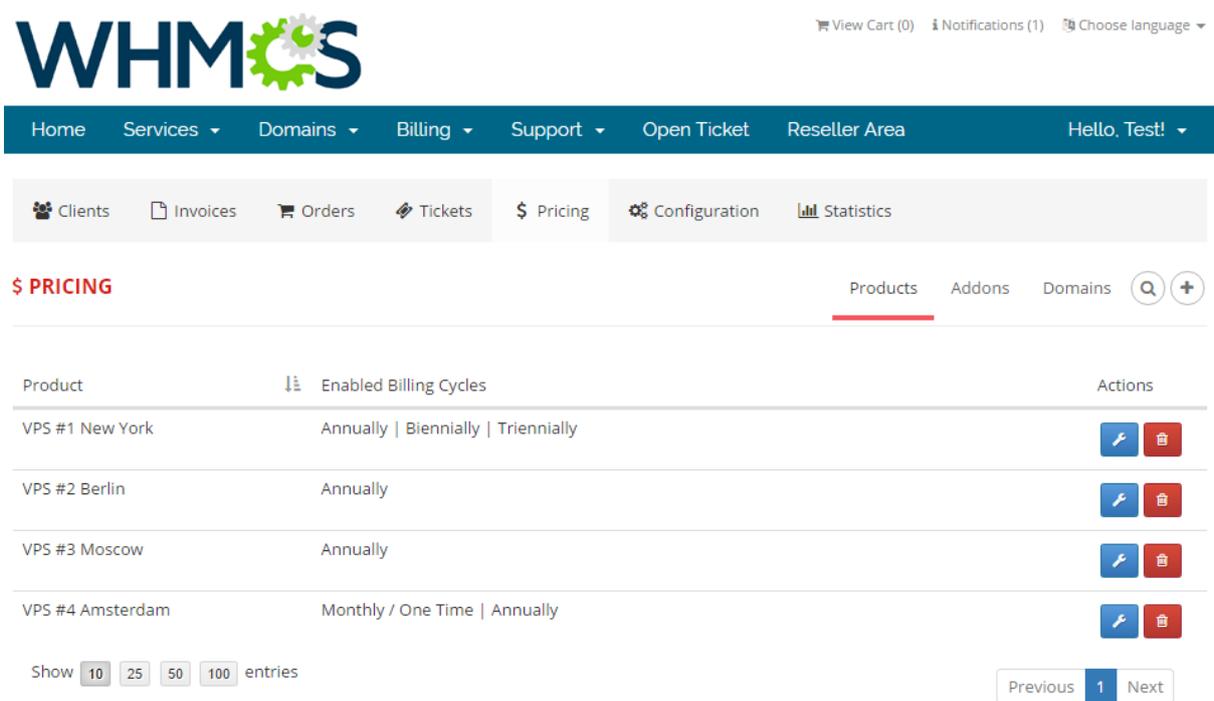
Password

Currency

3. Product Pricing

Before you can offer the products, addons and domains to your clients, you need to establish your own pricing for them. Move to the 'Product Pricing' section to do so.

It is important to define the price of each product, as otherwise, it will not be available for your customers. Keep in mind that your charges have to be chosen only from within the pricing range set by the provider.



The screenshot shows the WHMCS interface for product pricing. At the top left is the WHMCS logo. On the top right, there are links for 'View Cart (0)', 'Notifications (1)', and 'Choose language'. Below the logo is a dark blue navigation bar with links for 'Home', 'Services', 'Domains', 'Billing', 'Support', 'Open Ticket', 'Reseller Area', and 'Hello, Test!'. Underneath is a light grey secondary navigation bar with icons for 'Clients', 'Invoices', 'Orders', 'Tickets', 'Pricing' (selected), 'Configuration', and 'Statistics'. The main content area is titled '\$ PRICING' and has tabs for 'Products', 'Addons', and 'Domains'. The 'Products' tab is active. Below the tabs is a table with columns for 'Product', 'Enabled Billing Cycles', and 'Actions'. The table lists four VPS products: VPS #1 New York, VPS #2 Berlin, VPS #3 Moscow, and VPS #4 Amsterdam. Each row has edit and delete icons. At the bottom left, there is a 'Show' dropdown with options 10, 25, 50, and 100. At the bottom right, there is a pagination control with 'Previous', '1', and 'Next' buttons.

Product	Enabled Billing Cycles	Actions
VPS #1 New York	Annually Biennially Triennially	 
VPS #2 Berlin	Annually	 
VPS #3 Moscow	Annually	 
VPS #4 Amsterdam	Monthly / One Time Annually	 

Show entries

Previous Next

4. Configuration

All fundamental elements, such as your company name, an email signature as well as the logo visible across the client area, emails and invoices, can be defined in the 'Configuration' section.



View Cart (0) Notifications (0) Choose language

Reseller Area

Portal Home / Reseller Area / Configuration

- Clients
- Invoices
- Orders
- Tickets
- Pricing
- Configuration**
- Statistics
- Documentation

CONFIGURATION

General **Email Templates**

Reseller Store URL

Use this link to provide clients with access to your store.

Company Name

Provide the company name that will be visible for your clients.

Email Address

The entered email address will be used to send all information related to the store, such as 'Order Confirmation', 'Invoice Created', etc.

Terms of Service URL

The URL to your Terms of Service page on your site (eg. http://www.example.com/tos.html). Leave this field empty to disable the TOS.

PayPal Email

The PayPal account is required to receive automatic payments of profits.

Store Template

The selected template will be used to customize your store page.

Order Template

This template will be used only in the order process.

Sequential Invoice Number Format

The customized invoice number. Available auto-insert tags are: {YEAR} {MONTH} {DAY} {NUMBER}.

Next Sequential Number

Change this option only if you want to reset the automatic sequential numbering.

Invoice Pay To Text

This text is displayed on the invoices as the 'Pay To' details.

Signature

This signature will be visible in all messages and invoices generated in the order process and in the tickets.

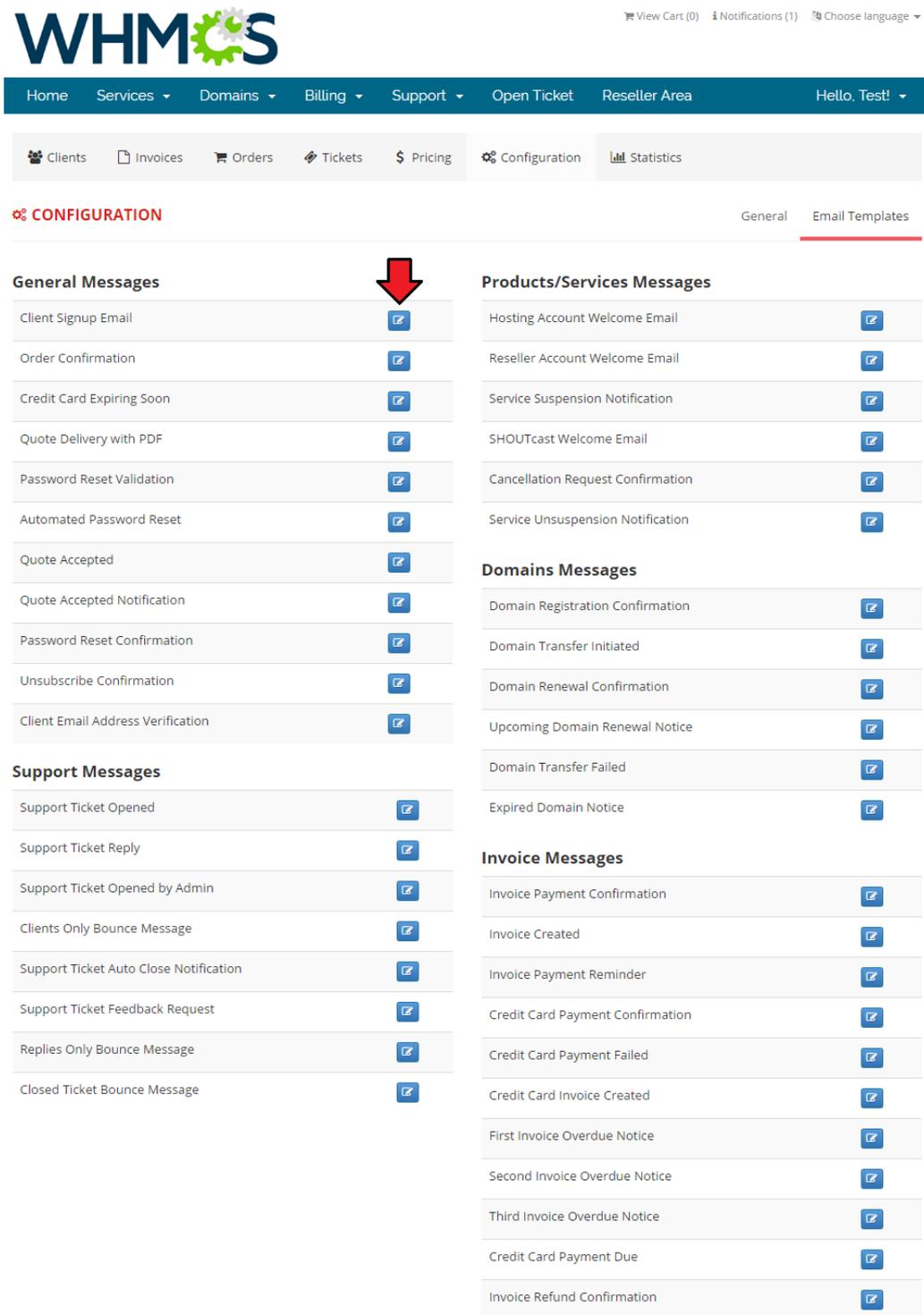
Store Logo

You can set a custom logo for your store. Please note that the logo has to be in .jpg or .png format and should meet WHMCS logo requirements. To edit, click on the logo above.

Save Configuration

Additionally, the 'Configuration' section contains the 'Email Templates' tab where you can view and manage templates of email notifications sent to your clients.

Press 'Edit' button next to a given template to modify its content and other details.



The screenshot shows the WHMOS Configuration interface. At the top, there is a navigation bar with 'Home', 'Services', 'Domains', 'Billing', 'Support', 'Open Ticket', 'Reseller Area', and 'Hello, Test!'. Below this is a secondary navigation bar with 'Clients', 'Invoices', 'Orders', 'Tickets', 'Pricing', 'Configuration', and 'Statistics'. The 'Configuration' section is active, with sub-tabs for 'General' and 'Email Templates'. The 'Email Templates' tab is selected, showing a list of templates categorized into 'General Messages', 'Products/Services Messages', 'Domains Messages', and 'Invoice Messages'. A red arrow points to the 'Client Signup Email' template in the 'General Messages' section. Each template has an 'Edit' icon (a blue square with a white pencil) next to it. At the bottom of the page, there is a green 'Save Configuration' button.

Category	Template Name	Edit	
General Messages	Client Signup Email		
	Order Confirmation		
	Credit Card Expiring Soon		
	Quote Delivery with PDF		
	Password Reset Validation		
	Automated Password Reset		
	Quote Accepted		
	Quote Accepted Notification		
	Password Reset Confirmation		
	Unsubscribe Confirmation		
	Client Email Address Verification		
	Products/Services Messages	Hosting Account Welcome Email	
Reseller Account Welcome Email			
Service Suspension Notification			
SHOUTcast Welcome Email			
Cancellation Request Confirmation			
Service Unsuspension Notification			
Domains Messages		Domain Registration Confirmation	
		Domain Transfer Initiated	
		Domain Renewal Confirmation	
		Upcoming Domain Renewal Notice	
	Domain Transfer Failed		
	Expired Domain Notice		
	Invoice Messages	Invoice Payment Confirmation	
Invoice Created			
Invoice Payment Reminder			
Credit Card Payment Confirmation			
Credit Card Payment Failed			
Credit Card Invoice Created			
First Invoice Overdue Notice			
Second Invoice Overdue Notice			
Third Invoice Overdue Notice			
Credit Card Payment Due			
Invoice Refund Confirmation			

Save Configuration

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Remember to press the 'Save Changes' button once all necessary alterations are made.

Note: When editing the template, you can easily add merge fields using dropdown menus indicated on the following screen.

WHMCS View Cart (0) Notifications (1) Choose language

Home Services Domains Billing Support Open Ticket Reseller Area Hello, Test!

Clients Invoices Orders Tickets Pricing Configuration Statistics

EDIT EMAIL TEMPLATE Client Signup Email Default +

Subject

Dear {client_name},

Thank you for signing up with us. Your new account has been setup and you can now login to our client area using the details below.

Email Address: {client_email}
 Password: {client_password}

To login, visit {whmcs_url}

{signature}

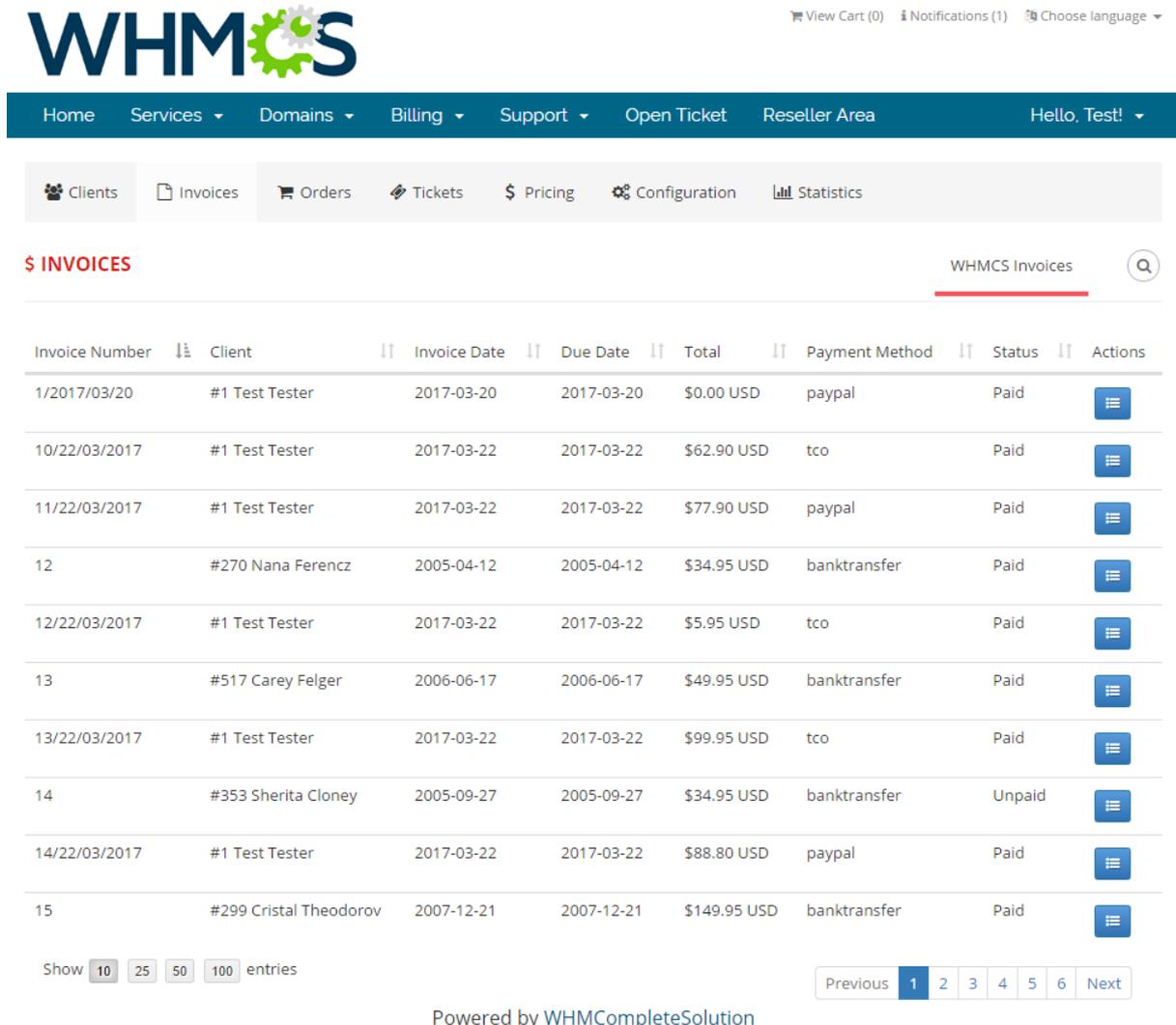
[Save Changes](#) [Go Back](#)

AVAILABLE MERGE FIELDS

Client Related		Other	
ID	{client_id}	Company Name	{company_name}
Client Name	{client_name}	Domain	{company_domain}
First Name	{client_first_name}	Logo URL	{company_logo_url}
Last Name	{client_last_name}	WHMCS URL	{whmcs_url}
Company Name	{client_company_name}	WHMCS Link	{whmcs_link}
Email Address	{client_email}	Marketing Unsubscribe...	{unsubscribe_url}
Address 1	{client_address1}	Signature	{signature}
Address 2	{client_address2}	Full Sending Date	{date}
City	{client_city}	Full Sending Time	{time}
State/Region	{client_state}		
Postcode	{client_postcode}		
Country	{client_country}		
Phone Number	{client_phonenumber}		
Password	{client_password}		
Sing-up Date	{client_signup_date}		
Credits	{client_credit}		
Card Type	{client_cc_type}		
Card Last 4	{client_cc_number}		
Expiry Date	{client_cc_expiry}		
Remote Gateway Token	{client_gateway_id}		
Client Group ID	{client_group_id}		
Client Group Name	{client_group_name}		
Total Due Invoices Bala...	{client_due_invoices_balance}		
Custom Fields	{client_custom_fields.1}		
Status	{client_status}		

5. Invoices

The 'Invoices' section provides the list of all invoices generated for your clients along with their current statuses.



The screenshot shows the WHMCS interface. At the top left is the WHMCS logo. On the right, there are links for 'View Cart (0)', 'Notifications (1)', and 'Choose language'. Below the logo is a dark blue navigation bar with links: Home, Services, Domains, Billing, Support, Open Ticket, Reseller Area, and Hello, Test!. Underneath is a light grey menu bar with icons for Clients, Invoices, Orders, Tickets, Pricing, Configuration, and Statistics. The main content area is titled '\$ INVOICES' and includes a search icon and 'WHMCS Invoices'. A table lists 15 invoices with columns for Invoice Number, Client, Invoice Date, Due Date, Total, Payment Method, Status, and Actions. At the bottom, there are pagination controls showing '1' of 6 pages and a 'Show 10 25 50 100 entries' selector. The footer text reads 'Powered by WHMCompleteSolution'.

Invoice Number	Client	Invoice Date	Due Date	Total	Payment Method	Status	Actions
1/2017/03/20	#1 Test Tester	2017-03-20	2017-03-20	\$0.00 USD	paypal	Paid	
10/22/03/2017	#1 Test Tester	2017-03-22	2017-03-22	\$62.90 USD	tco	Paid	
11/22/03/2017	#1 Test Tester	2017-03-22	2017-03-22	\$77.90 USD	paypal	Paid	
12	#270 Nana Ferencz	2005-04-12	2005-04-12	\$34.95 USD	banktransfer	Paid	
12/22/03/2017	#1 Test Tester	2017-03-22	2017-03-22	\$5.95 USD	tco	Paid	
13	#517 Carey Felger	2006-06-17	2006-06-17	\$49.95 USD	banktransfer	Paid	
13/22/03/2017	#1 Test Tester	2017-03-22	2017-03-22	\$99.95 USD	tco	Paid	
14	#353 Sherita Cloney	2005-09-27	2005-09-27	\$34.95 USD	banktransfer	Unpaid	
14/22/03/2017	#1 Test Tester	2017-03-22	2017-03-22	\$88.80 USD	paypal	Paid	
15	#299 Cristal Theodorov	2007-12-21	2007-12-21	\$149.95 USD	banktransfer	Paid	

Show entries

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6. Orders

Each order placed by your clients along with the payment method they have chosen and the current status of a transaction is presented on a transparent list in the ‘Orders’ section.

View Cart (0) Notifications (1) Choose language

[Home](#) [Services](#) [Domains](#) [Billing](#) [Support](#) [Open Ticket](#) [Reseller Area](#) Hello, Test!

[Clients](#) [Invoices](#) [Orders](#) [Tickets](#) [Pricing](#) [Configuration](#) [Statistics](#)

ORDERS

Q

Rows marked in yellow mean that order was accepted and it is waiting for your payment

Order Number	Date	Client Name	Payment Method	Total	Status	Payment Status	Actions
1016105992	2017-03-22 11:04:36	Test Tester	paypal	77.90	Pending	Completed	 
1198064712	2017-03-01 08:06:57	Test Tester	banktransfer	4.95	Active	Incomplete	
1270235945	2005-03-03 22:37:50	Sharika Paulas	banktransfer	154.95	Pending	Completed	 
1630820352	2017-03-20 13:08:53	John Doe	paypal	104.90	Pending	Completed	 
1819850714	2017-03-22 11:05:48	Test Tester	paypal	88.80	Pending	Completed	 
1994002915	2017-03-22 08:51:16	Margart Smith	paypal	72.90	Pending	Completed	 
2235049459	2017-02-15 12:49:10	Test Tester	banktransfer	59.70	Active	Completed	
2386114277	2017-03-22 11:06:13	Test Tester	tco	88.80	Pending	Completed	 
3312627896	2007-12-21 02:31:41	Cristal Theodorov	banktransfer	149.95	Pending	Completed	 
3654428633	2017-03-22 11:04:12	Test Tester	tco	62.90	Pending	Completed	 

Show entries

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7. Promotions

Provided that you are given access to the 'Promotions' section, you are able to create fully customizable promo codes, which can be later on offered to your clients and applied to products, addons or domains in your store.

View Cart (1) Notifications (1) Choose language

[Home](#) [Services](#) [Domains](#) [Billing](#) [Support](#) [Reseller Area](#) Hello, Test!

Reseller Area

Portal Home / Reseller Area / Promotions

[Clients](#) [Invoices](#) [Orders](#) [Tickets](#) [Pricing](#) [Promotions](#) [Configuration](#) [Statistics](#) [Documentation](#)

PROMOTION

Promotion Code 1PXKAJZ3TI <small>Code required in cart to validate promotion. Generate random code.</small>	Applies To *#1 AutoRelease <small>Select products, addons and domains that applies to the promotion.</small>
Type Percentage <small>Select how promotion should be applied to the cart.</small>	Requires Please select... <small>Select products, addons and domains that are required to apply promotion.</small>
Recurring <input type="checkbox"/> Disabled For 0 <small>When enabled the discount will apply to renewal invoices. Set the Recur For field to 0 for all future renewals to be discounted or enter a different number to specify the number of times the discount can be used.</small>	Billing Cycles / Periods *One Time <small>Select billing cycles and periods required to apply this promotion.</small>
Value 10 <small>Provide amount of the discount.</small>	

Start Date 2018-01-08 <small>Optional. If filled out, the coupon will only start working once the date is set.</small>	Lifetime <input checked="" type="checkbox"/> Enabled <small>Clients will retain this discount even if they perform a future upgrade/downgrade of their service.</small>
Expiry Date 2018-01-31 <small>Optional. If filled out, the coupon will stop working after the selected date.</small>	Apply Once <input type="checkbox"/> Disabled <small>If the client orders multiple qualifying products the discount is applied only once.</small>
Max Uses 10 <small>Optional. Enter the number of uses you want to allow.</small>	New Sign Ups <input checked="" type="checkbox"/> Enabled <small>Only new clients can use the promotion.</small>
Uses <small>Current usage of the promotion code.</small>	Once Per Client <input checked="" type="checkbox"/> Enabled <small>If a client has already an existing active order using this promotion, another use of the code will not be accepted.</small>
	Existing Client <input type="checkbox"/> Disabled <small>Only existing clients with 1 or more active orders can use the promotion.</small>

Upgrades / Downgrades <input type="checkbox"/> Disabled <small>Enabling this options means the promo code can be used by the client when placing an upgrade/downgrade order.</small>

Notes
Notes are visible only for you and for admins.

8. Ordering

There are two methods to add a product to your customer's account, below both of them are explained in detail.

8.1 Product Assignment

You can place a new order for your client as you would do normally when purchasing services for yourself.

The screenshot displays the WHMCS 'Review & Checkout' interface. At the top, the WHMCS logo is visible on the left, and navigation links for 'View Cart (1)', 'Notifications (1)', and 'Choose language' are on the right. A dark blue navigation bar contains links for 'Home', 'Services', 'Domains', 'Billing', 'Support', 'Open Ticket', 'Reseller Area', and 'Hello, Test!'. The main content area is divided into three sections:

- Categories:** A sidebar menu with 'VPS Hostings' and 'Product Addons'.
- Actions:** A sidebar menu with 'Domain Renewals', 'Register a New Domain', 'Transfer in a Domain', and 'View Cart'.
- Review & Checkout:** The central area showing the cart items and order summary.

Product/Options	Price/Cycle
PrestaShop Installation Service	\$12.95 USD *
VPS #1 New York hmm.com \$0.00 USD Setup Fee	+ \$0.00 USD Setup Fee One Time

Below the cart items, there is an 'Apply Promo Code' section with a text input field containing the placeholder 'Enter promo code if you have one' and a 'Validate Code' button. An 'Empty Cart' button is also present.

Order Summary:

- Subtotal: \$12.95 USD
- Totals: \$12.95 USD (Total Due Today)

At the bottom of the order summary, there is a green 'Checkout' button and a 'Continue Shopping' link.

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In this scenario, order confirmation email will be sent to both you and your client. Your customers will be able to view and handle all previously ordered products once they log in to the WHMCS client area. They will be also permitted to pay invoices and submit tickets (provided that these options are enabled).

View

- Active 0
- Pending 1
- Suspended 0
- Terminated 0
- Cancelled 0

+ Actions

- [Place a New Order](#)
- [View Available Addons](#)

My Products & Services

Portal Home / Client Area / My Products & Services

Showing 1 to 1 of 1 entries

Product/Service	Pricing	Next Due Date	Status
Cloud #1 New York	\$149.95 USD Annually	22/03/2017	Pending

Show 10 entries [Previous](#) [Next](#)

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8.2 Access Order From The Client Area

In the WHMCS client area, your customers can view the order form containing the list of all products you have on offer. They can easily place orders using this very form.

Product Addons

[Choose Another Category](#)

Magento Installation \$12.95 USD One Time Service

Choose Package

VPS #1 New York - mytestdomain.com [Order Now](#)

PrestaShop Installation \$12.95 USD One Time Service

Choose Package

VPS #1 New York - mytestdomain.com [Order Now](#)

WordPress Installation \$12.95 USD One Time Service

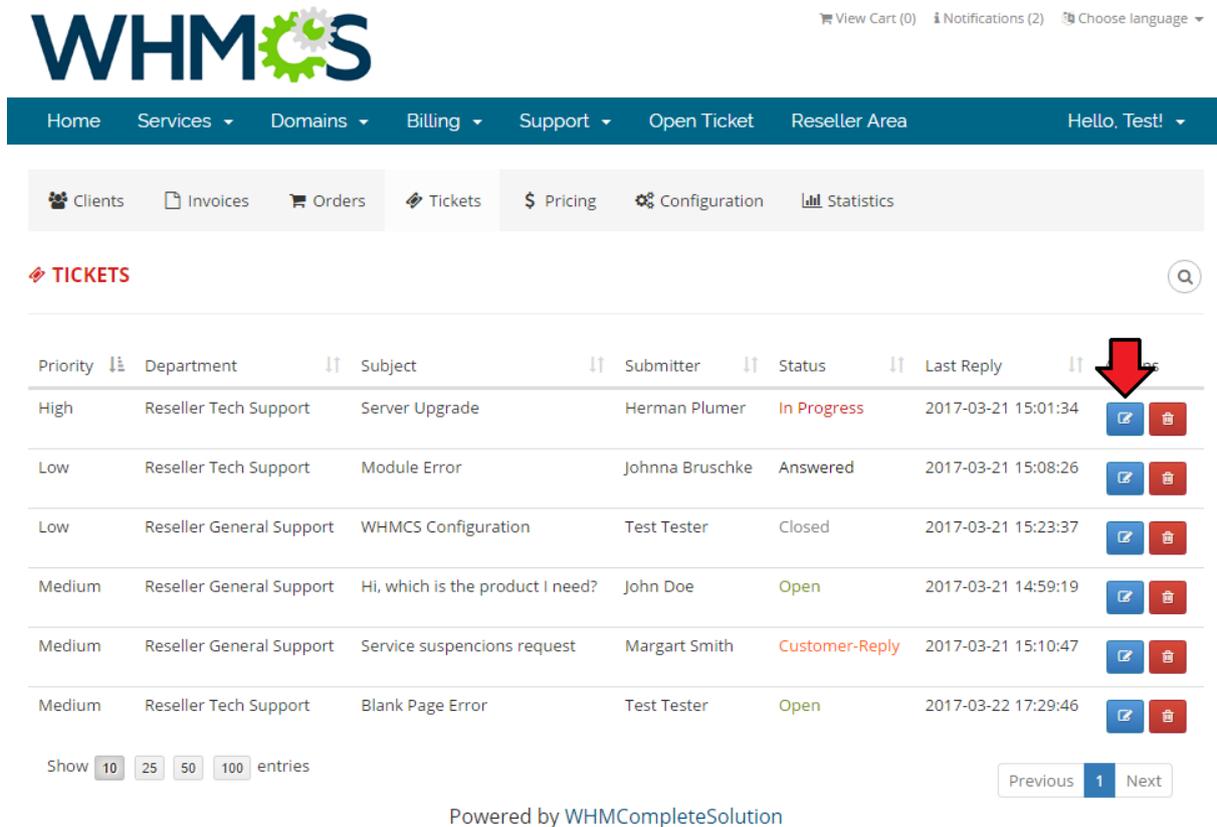
Choose Package

VPS #1 New York - mytestdomain.com [Order Now](#)

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9. Tickets Management

As a reseller, you are given access to separate tickets departments created by the provider. Enter the 'Tickets' section to view a complete list of tickets submitted by your customers from the WHMCS client area.



The screenshot displays the WHMCS interface for ticket management. At the top, the WHMCS logo is on the left, and navigation links for 'View Cart (0)', 'Notifications (2)', and 'Choose language' are on the right. Below the logo is a dark blue navigation bar with links for 'Home', 'Services', 'Domains', 'Billing', 'Support', 'Open Ticket', 'Reseller Area', and 'Hello, Test!'. A secondary navigation bar contains icons for 'Clients', 'Invoices', 'Orders', 'Tickets', 'Pricing', 'Configuration', and 'Statistics'. The main content area is titled 'TICKETS' and features a search icon. A table lists several tickets with the following columns: Priority, Department, Subject, Submitter, Status, and Last Reply. A red arrow points to the 'In Progress' status of the first ticket. At the bottom, there are options to show 10, 25, 50, or 100 entries, and a pagination control showing 'Previous 1 Next'. The footer text reads 'Powered by WHMCompleteSolution'.

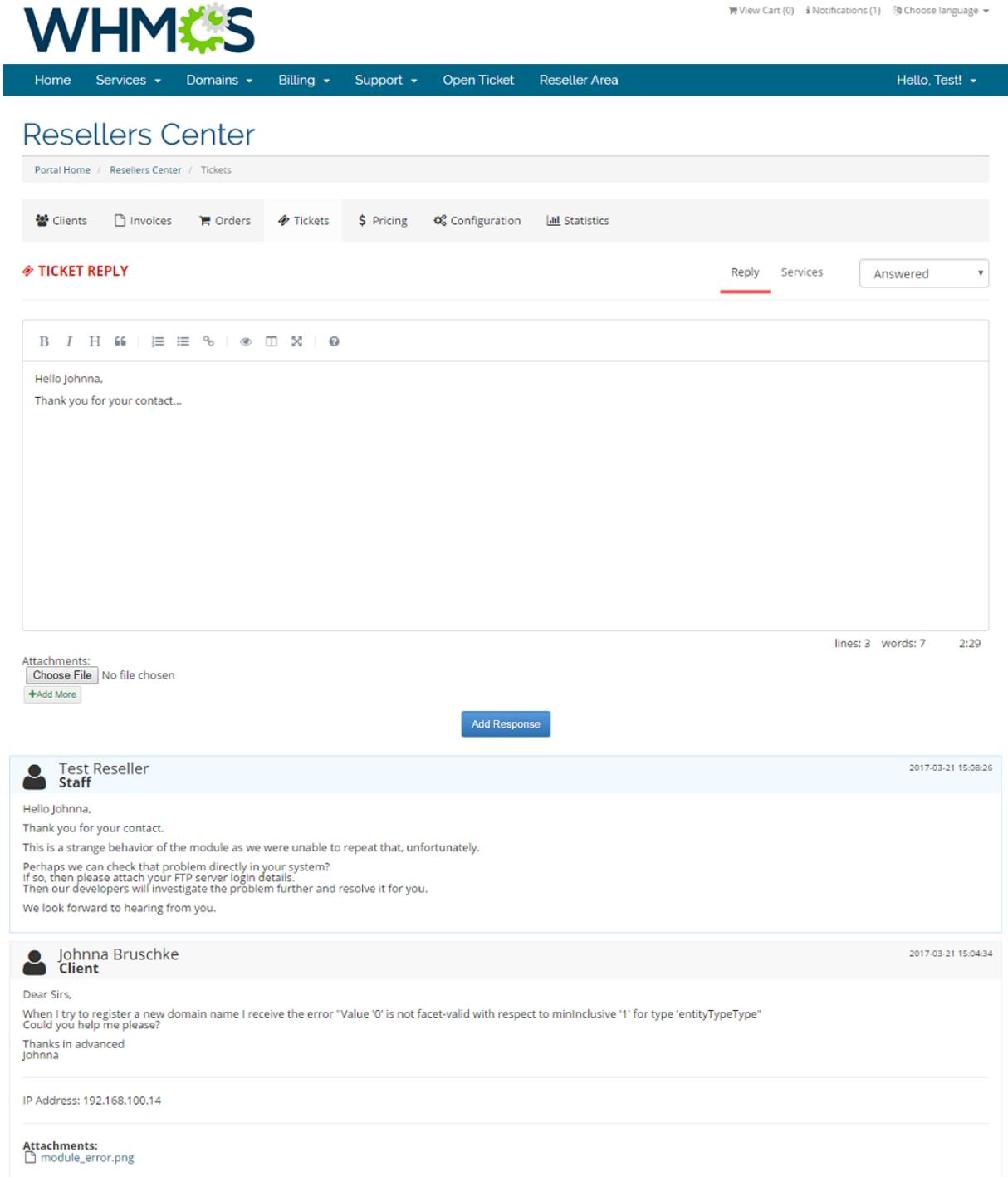
Priority	Department	Subject	Submitter	Status	Last Reply	Actions
High	Reseller Tech Support	Server Upgrade	Herman Plumer	In Progress	2017-03-21 15:01:34	 
Low	Reseller Tech Support	Module Error	Johnna Brusckke	Answered	2017-03-21 15:08:26	 
Low	Reseller General Support	WHMCS Configuration	Test Tester	Closed	2017-03-21 15:23:37	 
Medium	Reseller General Support	Hi, which is the product I need?	John Doe	Open	2017-03-21 14:59:19	 
Medium	Reseller General Support	Service suspencions request	Margart Smith	Customer-Reply	2017-03-21 15:10:47	 
Medium	Reseller Tech Support	Blank Page Error	Test Tester	Open	2017-03-22 17:29:46	 

Show entries

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Additionally, you can respond to the tickets opened by your clients.



The screenshot shows the WHMCS Resellers Center interface. At the top, there is a navigation bar with links for Home, Services, Domains, Billing, Support, Open Ticket, and Reseller Area. The user is logged in as 'Hello, Test!'. The main heading is 'Resellers Center', with a breadcrumb trail: Portal Home / Resellers Center / Tickets. A secondary navigation bar includes Clients, Invoices, Orders, Tickets (active), Pricing, Configuration, and Statistics. The 'TICKET REPLY' section is active, showing a 'Reply' button and a dropdown menu set to 'Answered'. The reply text area contains: 'Hello Johnna, Thank you for your contact...'. Below the text area, it shows 'Attachments: Choose File No file chosen' and an 'Add More' button. An 'Add Response' button is also present. The ticket history shows two messages: one from 'Test Reseller Staff' (2017-03-21 15:08:26) and one from 'Johnna Bruscke Client' (2017-03-21 15:04:34). The client's message includes an IP address: 192.168.100.14 and an attachment named 'module_error.png'. The footer indicates the system is 'Powered by WHMCompleteSolution'.