



# Integrations

Help Documentation

## Integrations

### Base WHMCS SmarterMail Provisioning Module

#### Package Description

The WHMCS SmarterMail module is an open source module developed in PHP that integrates SmarterMail as an add-on into WHMCS that can be attached to Product/Services to provision SmarterMail domains as well as point MX and CNAME records on WHM/CPANEL to a SmarterMail server using standard settings across all WHMCS users.

#### Package Goals

The primary goal of the WHMCS SmarterMail module was to reduce server administrator labor. Previously, MX and CNAME records would have to be entered manually, as well as the domain creation in SmarterMail. With the module installed, the whole process is automated. Not only is everything created for you on initialization, but also for suspension, deletion, un suspension, and termination.

The package provides the following services:

- Create, Suspend, UnSuspend, Terminate, and Delete Domains from a SmarterMail server using a standard set of defaults.
- Multiple SmarterMail Server Support with Management side interface for adding, deleting, suspending, unsuspending SmarterMail servers as well as setting max domain levels per server.
- Client side link to SmarterMail login.
- SSL support.

#### Prerequisites

- Existing installation of WHMCS (version 5.0 and above)
- Existing installation of WHM/CPanel
- Licensed installation of SmarterMail

#### Installing the SmarterMail Module

Installing the SmarterMail module is no different than installing any modules within WHMCS. Below are the steps necessary to get a SmarterMail installation added to WHMCS.

- Extract the SmarterMail module
- Place contents in your WHMCS directory under "`..modules/addons/smartermail`"
- Navigate to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php`

- Click "Activate" next to the SmarterMail Provisioning Module
- Go back to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php`
- Click "Add New Add On"
- Set desired add-on settings and make sure you attach to at least one product/service
- Next, find the Addon ID
- If this is the first add-on created in this WHMCS instance, then the ID will be 1.
- If there are multiple add-ons in WHMCS, you may need to look in the database to find out the SmarterMail add-on ID.
- To find the add-on ID in the database, use a MySQL database tool like MySQL Workbench
- Connect to your database and run the following query:

```
SELECT addontable.id FROM yourDatabaseName.tblAddons as addontable WHERE
addontable.name=yourAddonName Make sure you replace 'yourDatabaseName' with
the name of your database and 'yourAddonName' with the name of the add-on
you created in Steps 6 - 7.
```

- Go back to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php`
- Click "Configure" (it's to the right of "Activate")
- Fill in the Addon ID you found in Step 8
- Check "Module Logging" (you can turn this off later when everything is running smoothly or simply leave it running indefinitely)
- Check "SSL" if your WHMCS address begins with 'https://'
- If you want to give specific Roles the ability to modify the SmarterMail servers from within the management interface of WHMCS, select them from the list
- Click "Save Changes" and that's it! The SmarterMail module is installed and you can now configure SmarterMail servers

## Configuring Servers

Once the SmarterMail module is installed, you can begin adding new mail servers to your WHMCS installation and begin provisioning domains and mailboxes within SmarterMail.

- Navigate to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php?module=smartermail`
- Here, you're presented with the SmarterMail server interface. This is where you create, suspend, set max domain counts and delete SmarterMail servers
- Click "New Server"
- Fill in the following settings:

- Server Name - The friendly name for your SmarterMail server within WHMCS
- Server URL - The domain name and URL of the server. (E.g., <https://mail.YourDomain.com>)
- Domain Path - The path on the server where you store the Domain folders. (E.g., `c:\\SmarterMail\\Domains`)
- Server Admin Username - The administrator username for this server
- Server Admin Password - The password associated with the Server Admin Username
- Max Domains - The maximum number of domains allowed on the server
- Status - The status of the server. Note: Only "Active" servers will allow provisioning of domains
- Click "Submit" to create the new server
- You can now test provisioning domains and accounts in SmarterMail
- If you experience problems, and Module Logging is enabled, you can go to [http\(s\)://your\\_WHMCS\\_hostname.com/admin/addonmodules.php?module=smartermail](http(s)://your_WHMCS_hostname.com/admin/addonmodules.php?module=smartermail) to check the error logs

## WHMCS Product/Service Module

### Package Description

The WHMCS SmarterMail module is an open source module developed in PHP that integrates SmarterMail as a Product\Service into WHMCS. This allows the ability to create packages based off of custom settings available within the SmarterMail software that can then be used by administrators to offer varying levels of SmarterMail access to end users. For example, the ability to create packages based off of mailbox counts, disk space allocations, etc. Additionally in the Client Area of WHMCS, the ability to manage SmarterMail has been added as well for end users.

### Package Goals

The primary goal of the WHMCS server module is to give server administrators more flexibility in regards to how SmarterMail is offered as a service. With the use of this SmarterMail Server module, Product\Service items can be created specific to the SmarterMail settings. This means that Parallels users can create custom packages, unique to users across the Parallels install versus standard packages that are applied to all users. These customizable features include but not limited to: specifying the number of domain users, domain size limits, number of aliases, etc.

The package also provides the following services:

#### Admin Area Features

- Create Domain
- Suspend Domain

- Unsuspend Domain
- Terminate Domain
- Change Package
- Change Password

#### Client Area Features

- Manage Mailboxes
  - Add Mailboxes
  - Delete Mailboxes
  - Modify Mailbox Settings
  - Change Mailbox Password
  - Manage User Aliases
- Add Aliases
- Delete Aliases
- Change Password

### Prerequisites

- Existing installation of WHMCS (version 5.0 and above)
- Existing installation of WHM/CPanel
- Licensed installatino of SmarterMail (10.x and above)

### Installing the SmarterMail Server Module

First the package will need to be installed in the WHMCS Control Panel. To do so, use the following instructions:

- Download ZIP package to your WHMCS server
- Navigate to `../modules/servers/` and create a folder called 'smartermail', all lower case
- Extract and upload contents of the zip file you downloaded into the smartermail folder you created

### Configure WHMCS to Access and Group SmarterMail Servers

Once the SmarterMail package has been added, you now have the ability to configure the SmarterMail servers to be used. To configure the SmarterMail servers to be used, do the following:

- Login to WHMCS as a system administrator
- Click Setup → Products\Services → Servers
- Click add new server across the top

- Enter Server information for the SmarterMail server to be added
- Under Server Details, select the Type of 'smartermail' and enter system administrator credentials
- Save your changes

Once the server has been added, you then have the ability to create a group of SmarterMail servers.

- Click Create New Group across the top
- Enter a name for the group of SmarterMail servers, select and add your server that was recently added
- Save your changes

## Configure Your Product/Service

Now that the package has been added and the SmarterMail servers have been configured, you now have the ability to configure individual Product\Service packages within WHMCS. To do so:

- Click Setup → Products\Services → Products\Services
- You have the option of creating a new product group if you see fit, otherwise click Create a new product
- Select product type, product group, and give product name
- Click continue
- Edit the various product tabs as you see fit such as details and pricing
- For the Module Settings Tab - Select Smartermail as the Module Name, and select the appropriate Server Group that was created earlier
- This will then allow you to configure data specific to the packages being created

## WHMCS Client Area

The WHMCS SmarterMail module also allows WHMCS users to interact with their SmarterMail domain. Abilities include actions such as adding and editing both users as well as user aliases. To access this feature as a WHMCS end user:

Client Area To access SmarterMail through the client area:

- Click My Services → Product details
- Click Manage SmarterMail Users and Aliases
- You will find the option to add both users as well as aliases. Also the option to edit each of the corresponding items

Add User To add a user:

- Click Add SmarterMail User
- Enter requested information
- Click Create SmarterMail User

Edit User To edit a user:

- From the Manage SmarterMail Users page, select the user to edit, and click Edit SmarterMail User
- Change or update any of the specified fields for each user
- Also note the ability to change the status of an account or delete an account. NOTE: deleting the account is permanent

Add Alias To add an alias:

- Click Add SmarterMail Alias
- Enter name for alias
- Enter accounts the alias will send too
- Click Create SmarterMail Alias

Edit Alias To edit an alias:

- From the Manage SmarterMail Aliases page, select the alias to edit, and click Edit SmarterMail Alias
- Add or remove any email addresses that you'd like
- Also note the ability to delete an alias. NOTE: deleting the alias is permanent

## **Parallels APS (Automated Provisioning System) Package for SmarterMail**

### **Package Description**

The SmarterMail APS package is designed to integrate SmarterTools' SmarterMail email server software within the Parallels Operations Automation system. SmarterMail can then be used as the mail server of choice for Parallels administrators when creating hosting plans for resale, when adding domains that require email services and more.

### **Package Goals**

The goal of the SmarterMail APS package was to provide a means of easily managing domains, mailboxes, mailings lists and aliases. To those ends, services provided include:

- Domain Services

- Add / Remove Domains
- Add / Edit / Remove Domain Aliases
- Add / Edit / Remove User Aliases
- Domain Disk Space Reporting
- Mailbox Services
  
- Add / Edit / Remove Mailboxes
- Configure Email Forwarding Settings
- Configure Auto-responder Settings
- Mail List Services
  
- Add / Edit / Remove Mailing Lists
- Add / Edit / Remove Mailing List Subscribers

## Prerequisites

This goes over the list of requirements that are needed before installing, configuring and using the SmarterMail APS package. These requirements are as follows:

- Existing installation of Parallels Operations Automation (PoA)
- Existing, licensed installation of SmarterMail 9.x or above
- Required knowledge in the following areas:
  - Application Manager
  - APS catalog
  - Importing packages
  - Provisioning Manager
  
  - Resource templates
  - Service templates
  - Customer Manager
  
  - Creating of customers
  - System director
  
  - Task manager

## Installation

This covers getting the APS package set up with the PoA system. There are two ways to install the SmarterMail APS package within PoA using the Application Manager: from Applications or the APS Catalog



- Applications
- Expand Service Director
- Expand Application Manager
- Select Applications
- Click on “Import Package”
- Select “local file” option and click “Choose File”
- Provide the path to the SmarterMail APS
- Check “Enabled” option
- Finally click “Submit” and the package will be scheduled for importing
- APS Catalog
- Expand Service Director
- Expand Application Manager
- Select APS Catalog
- Select the “Application” field and search for ‘SmarterMail\*’
- ‘SmarterMailAPS’ package should appear in the list
- Check the box next to the Application column and click “Import Package”
- On the next screen click “Import Packages” and the package will be scheduled for importing

## Configuration

This covers the configuration of the SmarterMail APS package after it has been installed/imported into the PoA system.

### Resource Types

Resource Types are used to define activation parameters, which are:

- General package settings
- Global settings
- Default settings
- Services

### Creating an Application

The application resource is the crucial part of setting up the SmarterMail APS package. This defines the global settings that are used by each application service.

- Expand Service Director
- Expand Application Manager
- Select Applications

- Select the “Application” field and search for ‘SmarterMail\*’
- The results should yield the ‘SmarterMailAPS’ package that was installed prior (where applicable)
- Select the ‘SmarterMailAPS’ package
- Click the “Resource Type” tab
- Click “Create”
- Select Application from the Resource Class list
- Give it a name (Ex: SmarterMail App) & Description, click “Next”
- Fill in the following fields under the “Global application settings” section:
  - SmarterMail public site URL
  - SmarterMail installation host
  - SmarterMail installation IP
  - Primary System Administrator Login
  - Primary System Administrator Password
  - Primary MX
- Click “Next”
- Uncheck “Automatically provision application,” click “Next”
- Check “External Provisioning,” click “Next”
- Click “Finish”

### **Creating an Application Service**

The application service is what defines the defaults for each service that used by the SmarterMail APS package (domains, mailboxes, etc) .An application service will have to be created for each service that you want to provide.

- Navigate to the “Resource Types” section of the SmarterMail APS package. Follow the same steps when creating an application resource to get to this section.
- Click "Create"
- Select Application Service from the Resource Class List
- Give it a name (Ex: SmarterMail App Domain Service) & Description, click “Next”
- Select from the list of services the application service will be (Ex: SmarterMail Domain Service)
- Provide default values for this resource, then click “Next”
- Priority can be any number, so let’s go with 1, Click “Next”
- Click “Finish”

Again, these steps must be repeated for each application service that is offered with the package.

## **Service Templates**

This covers the creation of service templates for the package. A service template defines both subscription limits as well as what services are provided when using the package.

### **Creating a Service Template**

- Expand Service Director
- Expand Provisioning Manager
- Select Service Templates
- Click “Add New Service Template”
  
- Provide a name & description
- Uncheck “Autoprovisioning”
- Set “Type” to Custom
- Click “Next”
- A list of available Resources will be shown
  
- Select the Resource Application that was created earlier as well as any of the Resource Application Services that were just created. For example, "SmarterMail App" and "SmarterMail App Domain Service"
- Click "Next"
- Set the limits of the service template
  
- Check Unlimited for the Resource Application (Ex: SmarterMail App), Application Backup and Application User
- Resource Application Services (Ex: SmarterMail App Domain Service) can be either set to unlimited or can have a limit applied to them
- Home Visibility is an optional field that can be checked, if desired, that provides usage information for the user when they log in
- Click "Next"
- Review your settings, then click "Finish"

## **Subscriptions**

This covers the how to apply subscriptions to customers using the service template that was created early.

### **Creating a Subscription**

- Expand Service Director
- Expand Provisioning Manager
- Select Service Templates

- Select the “Service Template” field and search for, then select, the service that was created prior
- Click “Activate” under the General section of the service template (the service template must be activated prior to adding a subscription)
- Click “Subscriptions” tab
- Click “Create New Subscription”
- Select the “Company” field and search for the company that will be subscribing to this template, then select the company from the search results
- Set additional resource limits for the subscription if desired (subscriptions will inherit the values from the service template by default)
- Click “Next”
- Review the settings and click “Finish”

The company selected now has the ability to use the SmarterMail APS package.

### **Package Setup and Usage**

This covers the steps required before provisioning and usage of the package can be conducted.

#### **Setup**

##### Creating a Domain

- Expand Operations Director
- Expand Customer Manager
- Select Customers
- Select the "Company" field and search for a company, then select the company from the search results
- Click the Resources tab
- Click "Add New Domain"
  
- Provide a domain name (e.g., example.com)
- Check "Set Registrar Status to Ready"
- Select the SmarterMail APS subscription from the "Subscription" dropdown
- Click "Next"
- Click "Next" again
- Review the settings and click "Finish"

A domain is required to be associated with the package so the domain can be properly added with the package. After a domain has been added, the package can start being used.

## Usage

This covers an example usage of using the package by creating a domain as a customer.

## Login

- Expand Operations Director
- Expand Customer Manager
- Select Customers
- Select the “Company” field and search for the company, then select the company from the search results
- Click “General” tab
- Click “Staff Members” and a list of staff members will be shown
- Click “Login as Customer”

## Configure

- Click the “SmarterMailAPS” link towards the bottom of the page
- Click “Add New”
- Fill in the following fields:
  - Display Name
  - Check “Login in existing domain”
  - Fill in the user name
  - Fill in the password (Generate New Password can be used to generate a random password for this account)
  - Click “Next”
  - If “Display Name” was supplied from the previous step, the System Administrator’s first & last name will be filled in. If not, it is optional to provide a first & last name
  - Click “Next”
  - Review the settings and click “Finish”
- The account and the domain will be scheduled for provisioning

The steps when configuring each service are the same for each service the package provides. Simply fill out the required fields for each service and follow through each wizard.

# Website Panel Module for SmarterMail

## Package Description

WebsitePanel is a multi-tenant, enterprise hosting automation tool with support for private cloud servers. It enables you to centralize the management of your hosting infrastructure and share resources

across multiple customer accounts. This product can be used with SmarterMail and SmarterStats to deploy users and domains/sites from a single interface.

## Package Goals

The SmarterMail WebsitePanel module allows the administrator to create, remove, and manage domains, users, mailing lists, and aliases. User settings that can be modified include the ability to change mailbox size, manage passwords, set domain admins, manage autoresponders and mail forwarding. Advanced settings and server settings are managed from within the SmarterMail Domain and / or System Administrator logins in SmarterMail itself. Server defaults will want to be configured prior to integrating with WSP.

The SmarterStats WebsitePanel module allows site and user creation, and allows the ability to link directly to the site to view reports as a particular user. Server and site/domain settings will need to be managed on the server itself.

## Prerequisites

- You will need to be registered with WebsitePanel in order to access the download links
- Microsoft.NET framework 4.0 (ensure this is registered within IIS)
- IIS 6.0 or higher
- Microsoft SQL Server, installed locally or hosted remotely
- Licensed install of SmarterMail 9.x or higher and / or SmarterStats 7.x or higher

## Configuration

Once all of the prerequisites are met, configuring the modules is fairly straightforward. The steps below cover adding a new server to your environment, creating a hosting plan, and creating a customer account to utilize the server resource that was set up.

### Adding a Server

When you're ready to add a new server, ensure the server password is configured in the Website Panel installer.

- Navigate to Configuration -> Servers
- Click Add Server
- Enter in the Server Name, the URL, and Server Password (this is configured in the WebsitePanel installer)
- Server URL: http://127.0.0.1:9003 (default)
- Enter the password configured during the initial setup
- Ensure "Check for installed software" is selected

- SmarterMail and SmarterStats should be picked up during the installed software check. These services will need to be configured separately, however. Navigate to Configuration -> Servers. You should see your server, and the services associated.

- Click on SmarterMail 10.x +
- Set the SmarterMail web services URL
- Select a public IP address
- Set the Admin Login
- Configure any additional options
- Click Update
- You should be back in the server configuration page.
- To configure SmarterStats, scroll down and Click SmarterStats 5.x +. Otherwise, skip to step 5

- Set the SmarterStats web service URL
- Specify admin credentials
- Select the SmarterStats server
- Click Update
- You should now have a server set up for the particular service resource.

### **Creating a Hosting Plan**

Below you will find the steps for creating a hosting plan that uses the particular server and service resource you've created.

- Navigate to Account Home
- Click on hosting plans in the left hand menu
- Click Create Hosting Plan
  
- Set the Plan Name
- Set the target server to your desired server with the particular service resource attached
- Set your quotas
  
- Check System, then set desired options
- Check Websites (Only necessary for SmarterStats) , then set desired options
- Check Mail, then set desired options
- Check Statistics, then set desired options
- Click Save
- You should now have a hosting plan set up that uses the particular service resource.

## **Creating a Customer Account**

Below are the instructions for creating a customer account that will utilize the resource and hosting plan created.

- Navigate to Account Home
- Select Customers from the left hand menu
- Click Create user
  
- Enter in a Username and Password
- Fill in all other required information
- Click Create
- It will bring you to a new window with an option to create a new hosting space. Click Create hosting space to begin the process
  
- Select your hosting plan that this will apply to, fill out required fields and select Create Space
- After the space has been created you will need to create a domain for your users within SmarterMail
  
- Sign into WSP with the newly created user
- Navigate to Domains, and select Add Domain
- Set the domain name, ensure create website is checked (for SmarterStats)
- Leave the other checkboxes unticked
- Click Add Domain
- Using the hosting space menu on the left, navigate to Mail -> Accounts, and select Create Mail Account
  
- Fill in the e-mail address, and select the domain that was created in step 6
- Enter a Password
- Set the Mailbox Size Limit
- Specify customer information, and a signature if necessary
- Enable\Disable Autoresponder
- Enable\Disable Mail forwarding
- Click Save
- This will prompt WSP to call the SmarterMail web services to create the domain, and the newly created user. I have not found a way to purely add just a domain to SmarterMail using WSP. A user must be created to prompt the domain creation
- Using the hosting space menu on the left, navigate to Advanced Web Statistics and click Add Statistics Site



- Select the website that was created in step 6c, the site ID will populate on it's own once the site is created
- Specify your users, and passwords
- Click Add Site
- The statistics site will then be added into SmarterStats. You can view the site statistics by navigating to Advanced Web Statistics and click View Statistics, you will automatically be signed in as the user.
- You should now have a new customer set up that can take advantage of your hosting plan that uses SmarterMail.