

A sub-contact, is an additional person managing a service in Truehost.

Instances it is added are:

- when the domain owner is different from the one managing it
- When a service belongs to an organization and a contact person is provided
- When there is more than one emails for service such as billing contact being different from email account

At Truehost, you can only add a sub-contact when the account holder requests this to be done via email.

Go to menu Client

- select View/Search client
- Select the client holder
- Click contacts , a form will appear as shown below

## Add New Client

First Name	<input type="text"/>	Address 1	<input type="text"/>
Last Name	<input type="text"/>	Address 2	<input type="text"/> (Optional)
Company Name	<input type="text"/> (Optional)	City	<input type="text"/>
Email Address	<input type="text"/>	State/Region	<input type="text"/>
Password	<input type="password"/>	Postcode	<input type="text"/>
Security Question	<input type="text"/> ▼ ⓘ	Country	<input type="text"/> Kenya ▼
Security Answer	<input type="text"/>	Phone Number	<input type="text"/> +254 712 123456
Tax ID	<input type="text"/>		
Late Fees	<input type="checkbox"/> Don't Apply Late Fees	Payment Method	<input type="text"/> Select to Change Default ▼
Overdue Notices	<input type="checkbox"/> Don't Send Overdue Emails	Billing Contact	<input type="text"/> Default ▼
Tax Exempt	<input type="checkbox"/> Don't Apply Tax to Invoices	Language	<input type="text"/> Default ▼
Separate Invoices	<input type="checkbox"/> Separate Invoices for Services	Status	<input type="text"/> Active ▼
Disable CC Processing	<input type="checkbox"/> Disable Automatic CC Processing	Currency	<input type="text"/> KES ▼
Marketing Emails Opt-In	<input type="checkbox"/> Send Client Marketing Emails	Client Group	<input type="text"/> None ▼
Status Update	<input type="checkbox"/> Disable Automatic Status Update	Credit Balance	<input type="text"/> 0.00
Allow Single Sign-On	<input checked="" type="checkbox"/> Tick to allow Single Sign-On		
How did you find us?	<input type="text"/> None ▼	Mobile Number	<input type="text"/>
Mobile Number	<input type="text"/>		
Admin Notes	<input type="text"/>		

Tick this box to send a New Account Information Message

Fill in details of the sub-contact

- Specify Email Notifications the sub-contact can receive by ticking checkbox provided
- Assign permissions to sub-contact

- The permissions are actions the sub-contact can perform on the main account
- Click the Add Client button to save the sub-contact details.

### **1.3 Ordering new services**

- Login as administrator on WHMCS
- Go to client menu
- Select View/ Search to check if client exists
- You can filter with unique email address or name during search
- If client does not exist, use guide for step 1.1 Client registration to register them.
- If client exist, go to their account

Use shortcut Add new order as shown below

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Use shortcut Add new order as shown below

## Products/Services

Shared Hosting	1 (1 Total)
Reseller Hosting	0 (0 Total)
VPS/Server	0 (0 Total)
Product/Service	0 (0 Total)
Domains	1 (1 Total)
Accepted Quotes	0 (0 Total)
Support Tickets	0 (0 Total)
Affiliate Signups	0

 [View Orders](#)

 [Add New Order](#)

A form will appear as below



## 1. DOMAIN ORDERS

Domain orders can be subdivided into 2:

*a. Registration*

*b. Transfers of domain*

Check domain availability first Using WHOIS Lookup tool provided under Utilities module

Only 'available for registration' domains can be invoiced for registration

For transfers, check if domain is expired.

Request for EPP code/ Transfer code from owner (this does not apply for .za domains)

Free domain transfer apply for active .ke domains (Kenyan country level domains) and .co.za domains.

\*for international domains such as com/net/info/org -they cannot be transferred in when expired.

\*Kenya's country level domains ending with .ke , can be transferred when expired, at a fee equivalent to renewal of that domain name.

\*All .ng domains when expired will be transferable within 30 days of expiry at a fee ;after that they cannot be transferred.

\*South Africa country level domains ending with .za such as co.za /.org.za /net.za...if expired are transferable only 4 days from date of expiry , after that they cannot be transferred. A renewal fee will be charged to complete transfer for expired .za domains.

## **2. HOSTING ORDERS**

### **Free hosting: WHO DOES NOT QUALIFY?**

Check domain registrar, if not Truehost, the owner does not qualify for 30-days trial period.

If user has used the trial period for same domain before, they do not qualify for 30-days trial period.

Before placing order for hosting,:

- (i)check if domain is registered. If not registered inform owner to register domain too.
- (ii)Check if domain has an existing hosting in Truehost

If hosting exists , check validity:

- Existing valid hosting will be upgraded
- Existing expired hosting should be renewed.

## **3. VPS/SERVER ORDERS**

Check the data-center location selected, check the operating system selected

Confirm if the needed specifications can be provisioned

### **3. SSL ORDERS**

Check the domain name being secured, if not available contact client to find out which domain.

Check hosting location for the domain being secured, if in Truehost, complete installation:

If hosting away from Truehost guide the client on process of SSL generation and installation; (In some cases clients may share login of hosting being secured.)

### **3. EMAIL ORDERS**

Check if domain indicated on email order is registered, if not advise client to register.

Check if domain has an existing hosting, to know where to update MX records

check the email type selected and set it up correctly once paid

### **COMMON ERRORS ON PLACING ORDERS**

- a. Placing orders of domain that are not available for Registration
- b. Placing orders for hosting without domain name
- c. Initiating transfer without EPP CODE or while domain are locked
- d. Placing free hosting orders for domain that do not qualify.
- e. Placing order with wrong billing period and wrong currency
- f. Missing domains on ssl orders
- g. Missing operating system and location on Servers/ VPS