

HostJourney

Your First 1000 Clients In Web Hosting

Featuring:

- Control Panel: cPanel/WHM (<https://cpanel.net>)
- Client Billing & Automation: Upmind (<https://upmind.com>)

Brought To You By:



<https://verpex.com>

Your Journey To 1000 Clients

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Introduction

The goal of this book is to guide you on how you can start your own web hosting business from an inexpensive reseller account. This book will provide you with the knowledge required so that you will be able to maintain your new web hosting business single-handedly until you have reached your first 1000 clients.

This book is written to guide newcomers who are about to or have just begun their web hosting business. The knowledge and information provided in this book are based on our own personal experiences in starting, growing, managing, and selling my hosting businesses.

By the end of this book, you should have all the necessary knowledge and hopefully passion to go and get your first 1000 clients and manage them, all by yourself.

INTENDED AUDIENCE

This book is written to guide people who are considering entering the web hosting space or who are already running their own web hosting business. In order to grasp the full potential of this book, you should already have a basic understanding of the common terminology and processes involved in operating a web hosting company.

It would be ideal to have a basic understanding of how to set up a website. Having prior knowledge in operating the cPanel hosting control panel will also help you to understand this guidebook much better.

If you are new to the web hosting space and are not familiar with how a domain name works, or what DNS is, we recommend viewing the Verpex knowledge base first where you can gain a vast amount of knowledge in the core basics of web hosting.

Although not required, having a basic understanding of HTML will also prove beneficial throughout sections of this book and in your marketing journey as a web hosting company owner, though this is not an essential requirement.

When starting your own web hosting company, it is important to note the web hosting industry is very competitive. Your journey will see you go through highs and lows though given time, patience, and effort, obtaining your first 1000 clients is very achievable. As you start out, growth may appear slow, however, with time and effort, you will achieve your goal. As time goes on, you will find growth starts to pick up very quickly once you have a customer base you can leverage for your marketing efforts and the reputation your company sits on.

WHAT IS COVERED IN THIS BOOK

This book is a practical guide on how to build your own web hosting company. Everything detailed in this book is based on our experiences, failures, successes, and most importantly, our learnings. While we have provided explanations for the configurations we chose, it is recommended to use the values we reference throughout the book.

It is not the nature of this book to give theories or explanations of the various terms and technologies involved in the web hosting industry. The nature of this book is to equip you with sufficient information which you can immediately implement to get and manage your first 1000 clients.

This book contains certain how-to guides, such as how to set up specifically recommended payment gateways. While you do not need to use those gateways, it is not the nature of this book to cover every payment solution Upmind integrates with. If you wish to use an alternative solution, it is recommended to review the Upmind documentation for the particular gateway you wish to use (the same would apply to domain registrars).

The guides and data provided in this book, including critical server configuration values and other customization techniques, were gained through the many years of going through all the things that do and do not work. The goal of this book is for you to be able to skip all the time and failures which are required to finally get the best settings and setup for your web hosting business.

In the first chapter, we will show you all the required elements for you to begin selling to your clients. We will introduce you to (and in later sections expand on) the following:

- A Name For Your Business
- A Hosting Platform
- A Domain Provider
- A Billing and Support System
- A Payment Gateway
- A Server Provider

The next few chapters following Chapter 1 are entirely dedicated to guiding you through the setup and best practices of the elements mentioned in Chapter 1, they are cPanel/WHM and Upmind.

As a reseller of Verpex, cPanel/WHM will be installed and ready to go out of the box. However, for Upmind, you'll need to create your own hosted instance by signing up on their website: <https://upmind.com>. Sign up takes just a few seconds and they offer a free plan to help you get started.

Going further, this book will also provide you with guides on all the major aspects of starting and running your web hosting business which will cover:

- Sales And Marketing: How To Get Clients
- Best Client Service & Support Practices
- Common Support Cases & Solutions
- Growing Your Hosting Business
- Managing Your Team

Once your business is up and running, you should aim to always keep yourself learning about this business. The day you stop learning, the day you start to lay back, the day you start to point out fingers and tell other people to do what you should be doing yourself, will be the beginning of all the hardship you will have to go through.

Never stop learning, never stop working, or you may lose all you have gained.

BEFORE WE BEGIN

While I still have your attention and before you get busy and begin doing all the practical things in the following chapters below, I would like to point out one very crucial thing. One thing that you can never miss, is the one thing you should always remember when you are in the web hosting business.

Web hosting is about people.

Please grasp that wholeheartedly. If you do not care about other people, it will be harder for your business to flourish. It's about caring for your clients, caring for your co-workers, caring for your employees, and always wanting the best for other people.

Focus on that and always focus on that, and all the other things will fall in place on their own, especially over time.

If you are only focusing your business on getting "new clients" and making "a lot of new sales", it is only a matter of time before your business will crumble into nothingness. It can be five years, it can be ten years, it can be more, but if you simply only care about the sales and do not enjoy your work when servicing other people, then I can tell you upfront, doing web hosting is just not your thing. It will bring more harm to you later.

Your focus should always be "how can I be of your service". Not just to your clients, even to your employees, later when you have them.

Other things are only "supplementary". You don't need a shiny website featuring the latest web technologies to do web hosting properly. All you need is a passion to serve other people. It will bring you a good name, and it will naturally bring you more clients. Be faithful in the little things which have been trusted to you, and greater things will be trusted to you as well.

Treating your clients with the level of respect and service you'd want from a provider will help you in your long-term growth strategies through referrals and word-of-mouth recommendations.

Now, let's begin.

CHAPTER 1 - GETTING STARTED

In this chapter, we will cover the following items:

- Your Company Name
- Your Domain Registrar
- Your Client Billing & Automation Platform
- Your Payment Gateways
- Your SSL Reseller Provider

A GOOD NAME FOR YOUR BUSINESS

Okay, now it's time to choose the name or brand for your web hosting business. What lies in a name? Not much, really. You "build" your name in web hosting. People won't choose your company because of the name. Well yes actually, but not for the actual name, but for the reputation which sits behind that name.

Below are a few points to keep in mind when choosing a name for your web hosting business.

Choosing your company name

When in the market for a domain name it is best to choose a domain that has the most popular TLD extensions available, primarily the .com. Try to secure: .com, .net, .org, and the domain names for any country you intend to conduct business in (For example: If you intend to offer UK-based web hosting it may be beneficial to grab the .UK & .CO.UK variant of your domain). You don't need to make a website for each as you can use the "cPanel Redirection" tool to redirect all your domain names to one.

If you want to change your domain or are unable to find a good name, consider a domain broker service such as sedo.com, buydomains.com, or hugedomains.com. Not only would you be able to find a great domain name, but you would likely have years of 'registration history' which can benefit you if a potential customer decides to run a WHOIS search.

Get a user-friendly domain name

A second consideration is getting a domain name that can be picked up by search engines better. Ideally, you would have "host", "hosting", or "webhosting" somewhere in the name. This will help people instantly recognize what your website is about though again, don't stress if you can't find a domain matching this requirement. It is more about the reputation you build over time that counts.

Domains that pass the radio test

The Radio Test is a good way to gauge how great your domain is for the long term. Ideally, you will want a domain name where people can spell out your domain after hearing it. A bad example of a domain that would fail this test would be HostDeer. While this may seem like a decent name upfront, brandable and playful, if you heard this on the radio the possibilities can be HostDeer, HostDear, and HostDare.

You want a domain name that is easy to spell out, easily remembered, and can't be easily misheard.

Don't 'niche' yourself in

If you ever look online for tips on how to grow and scale a web hosting company you may find one common tip appearing time after time: target a specific niche. This in itself is not bad advice, after all, the web hosting industry is extremely competitive so targeting a smaller niche may make the short-term growth a little easier.

However, it is important not to lock yourself into a niche in your branding. In other words, don't include your niche in your domain name. Let's say you will initially target the lawyers market. It might seem like a good idea to call your company LawyersHosting.com, right? Wrong. If you later want to expand beyond lawyers you'll find yourself having instantly segmented off other niches.

Choosing a generic name will allow you to target any niche you'd like within the website content itself, but also allows for the possibility of you changing that niche or adding additional niches in the future.

Changing your domain name

As an existing reseller of Verpex, you likely already have the primary domain name associated with your reseller package, though if you would like to change it you can do so by submitting a ticket to the Verpex Support Department. Changing your domain before you launch will be much easier than changing it after you have launched.

YOUR DOMAIN RESELLER PROVIDER

When you provide web hosting services, you would also want to provide your clients the ability to register and transfer domains at the time of their hosting order.

There are several domain reseller providers for you to choose from. In this guide, we are going to recommend eNom. eNom has been in the domain reseller space for many years and powers the domain for tens of thousands of web hosting providers worldwide.

We will show you how you can claim your free eNom reseller account later on in this book when we are integrating eNom with Upmind.

YOUR CLIENT BILLING AND AUTOMATION SYSTEM

What is a client management and billing system? Put simply, your client billing and automation system will be the heart of your web hosting company. It will keep the lights on and ensure everything is flowing in an automated fashion so yes, even at 3 am when a client submits an order while you are sleeping. With Upmind, you will gain the following:

- Automated processing of new customer orders (web hosting, domains & SSL certificates)
- Automatically invoice and charge your customers for renewals
- Automatically register/transfer/renew domain names for your clients
- Automatically creates/suspend/unsuspend/terminate web hosting accounts (such as for overdue payments)
- A fully-fledged help desk to cover all of your customer support requirements
- Provides an ideal foundation for other areas of your business such as an announcements system, network status system, affiliates, knowledge base and more.

There are a handful of client billing and management systems on the market today though Upmind has entered the market with a feature-rich system providing you with all the tools you will need to manage & grow your business with ease.

This book will guide you through using Upmind, if you prefer another billing application you are advised to seek guidance on their documentation/support website(s).

Also note that you **can** use your new cPanel/WHM reseller account without a billing application at all. You will just need to manually create and manage your clients and hosting accounts.

YOUR PAYMENT GATEWAY

The payment gateway you choose might seem like a one-sided decision (what can you accept?) though there are important customer considerations in this choice as well. You want your payment solutions to be as widely accepted as possible as after all, what good is a payment gateway if no one uses it, meaning your customers can't pay you? You guessed it, they'll go to your competition.

In the integration chapter of this book we are going to be working with two payment gateways:

- PayPal – With millions of users across the world PayPal has gained a trust factor among its users making it an ideal payment method to offer your clients.
- Stripe – Stripe has grown by leaps and bounds over the years owing to its reliable platform, flexibility, and extensibility.

With the above two payment solutions, you will be able to accept PayPal payments directly on the PayPal website, completely covering that audience though, through Stripe, you will be able to accept all major credit/debit card vendors such as Visa and MasterCard directly on your website!

Thanks to Upmind's Stripe integration, while clients will be entering their card details on your website their card details will actually never touch your servers. As such, Stripe makes PCI compliance easy with the only main requirement being a valid SSL certificate!

With the above two solutions in mind, we appreciate not every country is supported, and/or for other reasons you may not be able to utilize those we recommend. In such cases, we recommend browsing the other payment gateways that Upmind has available.

CONCLUSION

At this point, you have seen that we will further discuss how to run a successful web hosting business based on the following platforms & companies:

- cPanel/WHM (through your reseller account at Verpex)
- eNom to cover the domain registration platform
- Stripe & PayPal to cover your payment gateways
- Upmind where we will put everything together

CHAPTER 2 - SETTING UP YOUR RESELLER ACCOUNT

cPanel/WHM is the actual web hosting platform in which your reseller account runs on.

What is WHM and what is cPanel?

WHM stands for Web Host Manager. WHM can only be accessed by the hosting provider, in this case, you. Through WHM you will be able to manage all the technical side of your hosting business, such as adding hosting packages, adding a client account, suspending or terminating a client account, enabling features to become available to clients, and more.

cPanel is the website control panel interface that will be accessed by your clients. When your client wants to create a website, add a domain name, add an email account, add a database, or perform any other action for their website, they will do it from within their cPanel account.

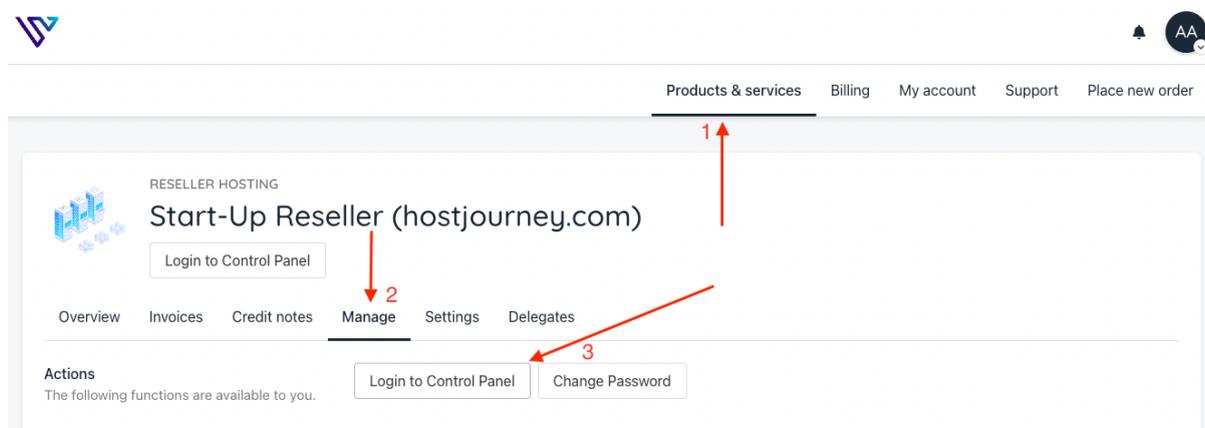
In other words, cPanel is where your clients will live to manage their websites and WHM is where you will live to create and manage those cPanel accounts.

Setting up your reseller account

As a reseller customer of Verpex, you will not have root access to the server. This is great news as it means the server is fully managed by Verpex so all of the essential configuration, optimization, and securing of the server has already been done for you. However, there are some changes you will want to make to ensure your reseller account is ready for your customers.

Ready? Let's get started!

The first step is to log in to your WHM account. You can do this by logging in to the Verpex client area (<https://clients.verpex.com/>). Once logged in, navigate to **Products & Services** (1) -> **Your reseller product** -> **Manage** (2) -> **Login to Control Panel** (3)



Once logged in, see the long navigation menu on the left? Don't be overwhelmed by it, by the end of this section we will go through it all and explain everything you need to know.

BASIC WEB HOST MANAGER SETUP -> NAMESERVERS

The default nameserver configuration

Nameservers are what your clients will point their domain names to so their website reflects the content on the servers at Verpex.

By default, Verpex provides you with a set of white-label nameservers. As these are fully white-label, they have no reference to Verpex so your clients won't know you are a reseller customer of theirs. The default nameservers provided by Verpex are:

- ns1.mysecurecloudhost.com
- ns2.mysecurecloudhost.com
- ns3.mysecurecloudhost.com
- ns4.mysecurecloudhost.com

You will see these are configured as standard in your WHM account under the option *Inherit Nameservers from root*.

If you are hosting your own website from Verpex you should also update your domains nameservers at your domain registrar to point to these nameservers (or to your custom nameservers if you set those following the section below).

Setting up custom nameservers

Note: If you would like to use the default provided nameservers referenced above you can skip this section.

If you would like to change the default nameservers to resemble your own company's domain (such as ns1-4.yourhost.com) you can do so for free though it would require some additional configuration.

First, in WHM select the option **Explicitly Set the Nameservers** and enter your desired nameservers. As Verpex provides 4 nameservers, we recommend setting all 4 though the absolute minimum you should set is 2.

Once you have saved those nameservers in WHM, you need to register them at your domain registrar. Each domain registrar will have a different control panel though the process is pretty much the same for all, within your domain registrar control panel, look for the option to manage/register nameservers.

You should set your custom nameservers to the following IP addresses:

- ns1: 13.248.158.180
- ns2: 75.2.118.134
- ns3: 76.223.26.245
- ns4: 99.83.147.209

Once you have updated your domain nameservers at your domain registrar, it can take up to 48 hours for the DNS propagation process to complete globally. With that being said, this process is typically completed within a few hours.

Protip: Your customers will experience the same DNS propagation delays that you will when initially setting up. There are plenty of tools you can use to gauge how 'complete' the DNS propagation is. A couple of example tools you can use to troubleshoot DNS includes:

- <https://dnschecker.org/> - Through this website, you will be able to see which IP address your website is resolving from across many servers, in many regions.
- <https://intodns.com> - Using this website you can gain a more 'real time' view of which nameservers a specific domain is pointing to.
- <https://www.skipdns.link/> - When a customer requests a website migration, you can test their website from the Verpex server before the DNS is updated on this website.

SECURITY CENTER -> TWO-FACTOR AUTHENTICATION

Today, security can't be an afterthought. To keep your reseller account safe it is recommended to enable two-factor authentication within WHM.

On the Two Factor Authentication page, click on the **Manage My Account** tab, immediately followed by the blue **Set Up Two-Factor Authentication** button.

On your phone, using your preferred authentication app, scan the QR code which is displayed within WHM.

If you do not have a two-factor authentication app install the **Google Authenticator** app. Once you have installed and opened the app click on the **plus (+)** symbol located in the bottom right corner, followed by pressing on the Scan QR Code option.

Now, whenever you log in to your WHM reseller account you will be prompted for your two-factor authentication code. If you use the Google Authenticator app as described above, it will be a simple case of opening the app on your phone each time you wish to log in and enter the code for your WHM reseller account.

UPDATING YOUR SUSPENDED PAGE

From time to time you may need to suspend a client for a variety of reasons, such as: Terms of Service violations, non-payment, or other reasons. When a client's website is suspended they are presented with the default "This Account Has Been Suspended" page.

Now, this can bring a bad image to your clients, which in turn, can result in a bad taste from your client towards your company. It is a good idea to change that to something more reasonable & friendly, such as "WE'RE SORRY, OUR WEBSITE IS TEMPORARILY UNAVAILABLE".

You may be thinking that if a client has been suspended, is it worth the effort to make the page more friendly, especially if they haven't paid and may cancel? The answer is absolutely, yes! Remember earlier on in this book we mentioned web hosting is about

people? Your clients may churn out (cancel) though some may have just forgotten to pay their bill, or need a little extra time. By going the extra mile you are increasing your chances of keeping your customer.

To set up a custom suspended page, while logged in to your WHM account use the search function to search for **Template** and click on the **Web Template Editor** application.

You should now see various tabs for the default pages cPanel makes available. For this section, we're interested in the suspended page so click on the **Account Suspended** tab.

Under the Account Suspended tab, you should see a code editor box. This code editor contains the HTML code that makes up the suspended page. Make the following changes:

Find: (By default this is on line 9)

```
<title>Account Suspended</title>
```

Replace that line with:

```
<title>Site Temporarily Unavailable</title>
```

The above will change the page title which is shown in the browser tabs.

Find: (By default this is on line 104)

```
<i class="fas fa-user-times fa-2x"></i> Account Suspended
```

Replace that line with:

```
<i class="fas fa-user-times fa-2x"></i> Website Temporarily Unavailable
```

Find: (By default this is on line 111)

```
This Account has been suspended.
```

Replace that line with:

```
This website is temporarily unavailable.
```

Once you have made those changes, click on the blue **Save** button.

SETTING UP A DEFAULT INDEX PAGE

When a client orders a hosting package from your web hosting company, by default, they will see an Index Of / page. This will list all the files (if any) of the website and will always be shown until your client uploads their own index file. This is not very welcoming so in this section, we create a custom default page to help your customers get started in building their website.

Here is the outcome we're aiming for:

Congratulations! This website is now live!. This is a temporary page created for your account. The contents of this page can be found in the **index.html** file of your **public_html** directory. Do not forget to delete this file later, after you uploaded/published your own website files.

To get started on building your website, log in to your cPanel account using the credentials that were emailed to you where you can find numerous apps to build your website including but not limited to:

- File Manager to upload your website files
- Email Accounts to create & manage your email accounts
- Softaculous to install numerous popular software applications with one click, such as WordPress

Need a Helping Hand?

We are always a click away! To get in touch with our support team visit <https://webhosting-domain.com/submitticket.php>. Looking for tips on building your website? Then our Knowledge Base is the place you want to be (<https://webhosting-domain.com/knowledgebase.php>).

Don't forget to add your company's header and footer to make it more attractive.

IMPORTANT NOTE: THIS PAGE SHOULD NOT CONTAIN A RELATIVE IMAGE PATH OR RELATIVE LINKS URL.

If you are going to use images and links on this index.html page, make sure you always use absolute paths such as `` and DO NOT use something like `` since the image will be broken. Do the same with links.

To implement this so that your clients will always be presented with this default index page instead of a blank directory listing create a file named index.html where the content should look something like the above example and place it in: `/home/cpanel3-skel/public_html`

This will save you A LOT of getting started questions on “how do I upload my page” and other related questions. Make sure you put a very easy-to-use guide on how your clients should proceed to publish their website.

SETTING UP HOSTING PACKAGES

With your server now fully configured, it is time to set up some web hosting packages. This section won't cover the “marketing” side of creating the hosting plans and will instead focus on the technical side of creating a hosting package.

To get started follow the steps below:

- Log in to your WHM Account
- Under Packages, click on **Add a Package**
- Fill in the package creation form as detailed below:
 - **Package Name:** Give your package a name. This name will also be referenced in Upmind
 - **Disk Space:** Set the amount of disk space (in MB) websites on this plan should be able to utilize. For example, for a 5 GB disk space package, enter 5000
 - **Bandwidth:** Set the amount of bandwidth (in MB) websites on this package will be able to consume each month. For example, for a 100 GB bandwidth package, enter 100000
 - **Max FTP Accounts, Email Accounts, Mailing Lists, SQL Databases, Sub Domains, Addon Domains, Parked Domains, Passenger Applications, and Max Quota per Email Address:** Set the number of resources you'd like to offer for every website on this package. Alternatively, you can click on the Unlimited option to not force any limits for these features.
- Leaving the remaining options to their default values, scroll down and click the blue **Add** button.

Congratulations! You have just created your first package! Repeat the above steps for each hosting package you wish to sell. You may be wondering, where do you set the prices for your hosting plans? Not to worry, prices will come later and will be handled by your web hosting billing system (in this case, Upmind) and we will cover that in a later section.

CHAPTER 3 - FURTHER WHM/CPANEL BRANDING AND CUSTOMIZATION

In this section, we will cover:

- Branding the cPanel look & feel
- Leveraging cPanel's built-in news tool

CPANEL BRANDING LOOK & FEEL

After you're done setting up your WHM/cPanel server in chapter 2, the next step is to do all the basic branding and customization of your cPanel interface.

Branding is very important for your hosting business. Branding cPanel is not an option, it is a requirement. What we want to accomplish is to present your clients with the brand they are using, as often as possible so that the image of your company brand will stick in your client's minds.

You will not accomplish this by utilizing the default and basic cPanel header on your client's cPanel interface which are being displayed by default. What happens is your clients will instead recognize the cPanel brand more than they know your actual company name or brand.

Let's change that, shall we?

The first step you need to do is to change the header of your cPanel interface to your own company logo and header. Follow these steps to accomplish just that:

First, log in to WHM and from the left navigation menu click on the Customization button which can be found under the cPanel category.

From this page, click on the Customize Style tab.

You should now see various cPanel-provided themes. Choose your preferred default theme and click on **Set as Default** link. From experience, the Basic theme works the best in terms of being friendly on the eyes and familiar if a provider is moving from another cPanel provider, though it does come down to personal preference. Your clients will have the ability to choose another style manually, so you are just setting the default theme.

Next, we are going to personalize the theme to resemble your brand. To do so, click on the Customize Branding tab and fill in the form as detailed below:

- **Company Name:** Enter the name of your company
- **Help Link:** If you have a page where users can get support and contact you, enter the link here prefixed with https://
- **Documentation Link:** If you have a knowledge base, enter the link to that here prefixed with https://

- **Company Logo:** Upload your company logo in either .svg or .png formats. Logos should ideally be 250x50 px. Your clients will see this logo in the header section of their cPanel control panel
- **Webmail Logo:** If you would like a separate logo for the header of the webmail interfaces upload that here

If you do not, no worries, you can upload the same logo as your Company Logo

- **Favicon:** Upload your company's favicon (.ICO format). This will be shown throughout the cPanel and Webmail interfaces and will appear in the browser's title bar

Once you have made all the above changes, click on the blue Save button You're done. Now your clients will always see your company brand every time they are using their cPanel interface. They will see your brand repeatedly so that they will eventually know and remember your company name and brand automatically.

LEVERAGING CPANEL'S BUILT IN NEWS TOOL

From time to time, you may want to make an announcement to your clients about an ongoing promotion or sale that is currently available from your company.

The best way to deliver such a message is through the cPanel news module. Simply go to your WHM, under cPanel, and click on **Modify cPanel & WHM News**.

There isn't much to this section, just a large textbox for you to enter your news & announcements. Enter any news you'd like to share and click on the blue **Save News** button.

Once you have saved your news, your clients will see an alert icon in the top right corner of their cPanel accounts which will take them to see the news upon clicking this button.

What if you don't have any news or promotions you'd like to announce? It makes sense to utilize this area regardless. For example, you can encourage users to join your affiliate program, forum, blog articles, and/or ask for reviews.

CHAPTER 4 - CONFIGURING UPMIND

You can consider Upmind to be the heart of your web hosting company thanks to its advanced automation features which will keep your web hosting company flowing. For example, did a client order at 3 am while you're sleeping? No worries, Upmind will acknowledge the payment, mark the invoice as paid, send the command to cPanel/WHM to begin the provisioning process, and email the customer with their login details – automatically.

Other features that you'll be able to utilize within Upmind include:

- Processing orders from clients
- Sending out invoices to your clients
- Processing client payments
- Sending out notification emails and hosting account login details
- Registering and/or transferring domain names for your clients
- Accepting new support tickets submitted by clients
- Affiliate tracking & automation tools for your marketing efforts

You will spend most of your time managing your hosting business through Upmind so it is crucial that you set up your Upmind system properly which will be one of the core applications of your business. In this chapter, we will provide you with a thorough guide including tips and tricks for you to be ready to start selling your hosting services to the public.

Where can you get Upmind?

Upmind is a fully hosted (SaaS) billing application for your website. This is great as it saves you the hassle of having to perform installations, updates, and keeps your billing application separate from your clients' websites.

Start by visiting the Upmind website (<https://upmind.com>) and click on the Get Started link located towards the top right corner of the page. You should now be presented with a form where you can create your Upmind account. Fill in the form as detailed below:

Organisation Name	Enter the name of your web hosting company.
Your Name	Enter your full personal name
Your Email	Enter your email address. If you haven't already, we recommend creating an @yourcompany.com email address for this. This email address will be used to log into your Upmind admin area, as well as to receive any notifications from Upmind.
Your Password	Enter a strong password that you will use to log into the Upmind admin area

Once you have filled in the form, click on the blue **Continue** button.

As with any new software, there may be a learning curve but don't worry, we will go through every option within Upmind and guide you through the recommended setup.

Let's get started!

INSTALLING AND CONFIGURING UPMIND

Upmind is a fully hosted (SaaS) client billing automation & client management platform. With that in mind, there is no installation wizard you need to perform as they host everything for you.

SETTING UP A CUSTOM DOMAIN NAME

When you create an Upmind account your instance will be located on a *.upmind.app domain (such as yourhost.upmind.app). This isn't ideal for your customer base as it may cause confusion. Thankfully, Upmind makes it very easy to customize the URL by leveraging a sub-domain of your own domain (for example: clients.yourhost.com).

To get started, log into your Upmind admin area account and navigate to **Settings** -> **Domains**.

You should now see your default *.upmind.app domain name which is marked as default. Towards the top right corner click **Add Domain** to start the process of adding your own branded domain.

An interface will appear on your screen where you can enter your desired domain name. We recommend using a subdomain such as clients.yoursite.com, though you can also use the root of your domain such as yoursite.com. Once you have decided on the domain you'd like to use, enter it in the **Domain** field.

You'll now need to create two A-type DNS records pointing your chosen domain to the IP addresses provided by Upmind.

For a cPanel-based server, click on the **Zone Editor** app and click on the **+A Record** button. In the popup box that appears, enter the domain name as you entered it within the Upmind admin area and paste in the first IP address provided by Upmind. Once done, click on the blue **Add an A Record** button.

Repeat the above step for the second IP address provided by Upmind.

Back into your Upmind admin area, you may find your domain name is marked as Unverified. To resolve that, click on the cog icon next to your domain name and click on the **Verify** button. Note, it can take around 20 minutes or so for the DNS propagation to complete so if you experience any issues while verifying your domain name, try again after a short period of time.

UPMIND SETTINGS: BRAND SETTINGS

The Brand Settings section will give you the option to make basic customizations to the Upmind client area. A consistent brand look & feel will boost confidence among your clients so it is important you don't miss this step.

Get started by opening the Brand Settings page located in **Settings** (towards the bottom left corner) -> **Brand settings**.

Name	This is quite simply the name of your web hosting company. Ideally, this would be similar to your domain name. For example, if your domain is <i>JoesHosting.com</i> your company name might be <i>Joes Hosting</i> .
Country	Select the country where your company is based. You don't have to be a registered company though Upmind will use this country to determine any applicable tax if you set those up.
Supported Languages	From the list of available languages, select any you wish to enable within the client area. Any enabled language will be choosable within the client area.
Default Language	Choose the default language your clients will see when visiting your client area. By default, only English will be available. You can change this by enabling a language under Supported Languages first and then choosing your preferred default language.
Primary Color	The primary color represents the overall color scheme of the client area. Change this to match the general color scheme of your website ensuring a consistent feel throughout.
Brand Logo	Upload your company logo. This logo will be displayed throughout the Upmind client area, as well as in any outbound emails.
Brand Favicon	The favicon will be displayed in the browser tab whenever a client has your client area open (or order form).

You should now be all set! Once ready, click the **Save** button located in the bottom right corner.

The other thing you should set is your default brand currency under Business Settings. This is because once you start using Upmind to invoice clients, you cannot change your default brand currency. We'll guide you through that in a later section.

UPMIND SETTINGS: TERMS & CONDITIONS

The Terms & Conditions will govern how your web hosting company is run, typically covering everything from when and how you bill clients, what happens in the event of going overdue, detailing what is and what is not allowed, and more.

In 2022, most people will not read your Terms & Conditions. However, simply having one enables you to fall back to it should you need to suspend a customer for any reason.

You can navigate to the Terms & Conditions page by navigating to **Settings** (towards the bottom left corner) -> **Terms & conditions**.

If you have a Terms & Conditions (or Terms of Service) page on your website, we highly recommend toggling the **Link to external Terms & Conditions** option and then pasting a link to that page (<https://example.com/terms>). Once done, click on the **Save** button located in the bottom right corner.

We recommend this option as it allows you to maintain a single page for all of your Terms & Conditions. This saves you having to update your Terms & Conditions in multiple places for any change you wish to make.

With that being said, if you do not have a Terms and Conditions page on your website, by leaving the option **Link to external Terms & Conditions** unselected, you will be able to type or paste in your own terms which will be presented to clients at the time of signing up.

The Upmind text editor leverages markdown. If you are not familiar with markdown the few basics you'll want to know are

# Heading 1	### Heading 3	- Unordered List - Item 2 - Item 3
## Heading 2	**Bold Text**	[title](https://url.com)

UPMIND SETTINGS: CLIENT CUSTOM FIELDS

Client custom fields are a great way to store additional information about your customers. However, when starting out the focus should be on your conversion rate optimization so it is important not to overdo it with significant numbers of questions and options.

To put it shortly, your web hosting company is not yet large enough to gain any meaningful (actionable) data so instead, we'll focus on an as clean as possible setup to maximize conversions.

With that being said, we are going to add one optional field to the order form which is asking how clients heard about your web hosting company. This will be a simple text field without any obligation to fill it in.

To add a custom field, navigate to **Settings** (located towards the bottom left corner) -> **Client custom fields** -> **Create custom field**.

In the interface that appears, fill in the form as described as shown below:

CUSTOM FIELD NAME*

Text input 	How did you hear about us?
--	----------------------------

Is this field required? No

Do you want to hide this field from clients? No

Do you want to show this field on registration? Yes

Do you want to display this data on invoices? No

Now, when a client is purchasing a product from you, they will be presented with this single (and simple) question which they can optionally decide to fill in or not.

UPMIND SETTINGS: USER INTERFACE

The User Interface page allows you to change the default behavior of your client area, primarily, what is shown by default to a non-logged-in user. On this page, you are presented with two options: Landing Page & Show Catalog which we cover below.

Landing Page

The landing page is the first page your non-logged-in users will see when they visit your Upmind client area. We recommend leaving this set to the default option: **Login page**. After all, you want most of your potential clients to be coming in through your website and selecting a package there going to the order form. Those going directly to your client area

are most likely your existing clients so giving them the best experience possible will help with customer retention.

Show Catalog

The Show Catalog option determines if the order flow should be publicly accessible without being logged in or not, or to hide it entirely. As you want your web hosting company to grow, it is recommended to leave this option set to **Always Show** ensuring as minimal friction & confusion as possible.

UPMIND SETTINGS: SERVICE DESK

The Upmind service desk settings area will allow you to configure numerous aspects surrounding your support department. This includes departments, when to automatically close tickets, and more.

Upmind can also automatically filter in emails sent to you as support tickets.

To get started, log into your Upmind admin area and navigate to **Settings** (located in the bottom left corner) -> **Service Desk**.

Departments

The first section, called Departments, is where you'll set the numerous support departments your clients will be able to select when contacting you. As you are just starting out, you will be wearing most hats so it doesn't make sense to create a significant number of departments.

Below you can find a list of recommended departments that should set you up for well over 1000 clients:

- Sales
- Billing
- Support
- Abuse (Hidden)
- Affiliates (if you are setting up an affiliate program)

Ready? Let's get started!

From the Service Desk page, under departments, click on the **Add Department** button. A modal interface should appear where you can configure your first support department. Fill in the form as described below:

Display Name	Enter the name of the department you are creating. In this case, we want to create a department called Sales so we'll enter Sales
Code	Enter the same display name entered above in all lower-case characters. With the same example department (Sales), we'll enter sales in this box.
Make default department	We recommend making your Sales department the default mailbox. For any other department, do not select this option.
Allow clients to select this department when opening a new ticket?	Select Yes for all departments <i>except</i> for Abuse, as we don't want your existing clients to see this department.
Destination mailbox	Enter the name of your department in all lower-case

	characters. For the example of a sales department, we'll enter sales .
--	---

Once you have filled in the form, click on the green **Save** button.

Congratulations! You have just created your first support department within Upmind! Repeat the above steps for each department you would like to add.

Note, in a later section we will cover email piping/forwarding which will see your customers emails automatically be routed into tickets within the Upmind service desk.

Ticket Preference

Currently, Ticket preference comes with one singular option which is to set the ticket prefix. The prefix will be the identifier before any and all ticket IDs. While it is nice to have, it is static so it makes sense to make this as small as possible.

With the above in mind, we recommend setting the prefix to the first 2 initials of your company name (or the first 2 letters if you have a one-word company name). For example, if your company name is called Joes Hosting, consider setting the ticket prefix to **JH**. This would mean your client tickets will be given a unique ID matching the format: JH-00001.

Tickets

Enter your desired ticket configuration in the fields below the Tickets section. The recommended options for these fields can be found below:

Close ticket after days	Recommended Value: 30 This setting determines how many days of inactivity should occur before Upmind will automatically close a ticket. You don't want to set this very short as customers can be busy and the last thing they'll want to see is an open ticket being closed prematurely.
Pre-close notification after days	Recommended Value: 25 This setting will determine how many days before a ticket is set to automatically be closed to send a notification to the customer informing them. Anything within a week or the ticket closing should work.
Default ticket priority	Recommended Value: Low
Ticket on cancellation request	Recommended Value: Yes/Enabled. As you start your web hosting company it is important you try to retain as many customers as possible. Enabling this option will create a ticket whenever a cancellation request has been made by a customer, giving you the opportunity to reach out, and resolve any potential issues they may be facing (and most importantly, keep them as a customer).

EMAIL PIPE - USE `REPLY-TO` INSTEAD OF `FROM`	For the method, we will be using in a later section to pipe emails into tickets, it is safe to leave this section blank.
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Once you have made your desired configuration changes, click on the **Save** button.

Creating Your Email Accounts

With the support departments created, it is time to set up the email forwarders so emails arrive at your help desk automatically and most importantly, in the right department. To get started, follow the steps below.

1. Log in to your cPanel account using the credentials provided in your Verpex welcome email.
2. Using the search function at the top, search for **Email Accounts** and click on the respective icon. You can also find this under the **EMAIL** category manually.
3. Towards the right side of the page, click on the blue **Create** button.
4. Fill in the email account creation form for each department you created and click on the blue **Create** button.

Note: As we will set up forwarding, you do not need to remember/note down the passwords for each email account. Simply use the Generate option to create a secure password.

After creating your first email account, repeat the steps above to create an email account for each department you created.

Setting Up The Email Forwarding

By now you should have your support departments created in Upmind, and your email accounts created within cPanel. The final step is to forward any inbound emails to Upmind so a service ticket can be created automatically.

For security you will first need to add your domain to your Domains list (under **Settings** -> **Domains**). You may have already done this when setting up a custom domain, though if your upmind instance runs on clients.domain.com and your email is youremail@yourdomain.com, you should also add yourdomain.com to Upmind.

The first step is to gather the destination mailbox address provided by Upmind. Start by logging into your Upmind admin area and navigating to **Settings** (located in the bottom left corner) -> **Service Desk** and click on the name of a department you'd like to set up email piping for.

Under Destination Mailbox, copy the full value including the suffix of the field. It should look something like this: mailbox@mycompany.upmind.app.

Once you have that, copy each unique address for each department into a text document so we can reference those easily within the next step.

With that set, let's set up the email forwarders.

1. Log into your cPanel control panel.
2. Using the search function at the top, search for **Forwarders** and click on the respective app. You can also find this manually under the EMAIL category.
3. Click on the blue **Add Forwarder** button.
4. In the text field **Address to Forward**, enter the email address you would like to forward to your help desk (For example: sales).
5. Under **Forward to Email Address**, paste in the corresponding departments Destination Mailbox you obtained from Upmind in the earlier step.
6. Click on the blue **Add Forwarder** button.

Repeat the above step for each department. It is also recommended to test this from a non-administrator email account to verify inbound emails are piping into tickets successfully. After all, the last thing you want is to have a customer trying to contact support and you have no idea about it!

UPMIND SETTINGS: SUBSCRIPTION OPTIONS

The Subscription Options page will allow you to customize the notifications & contract settings within your Upmind instance.

To get started, log into your Upmind admin area and navigate to **Settings** (located in the bottom left corner) -> **Subscription Options** and fill in the form as described below:

Cancellation

Prevent Paid Invoice Cancellation Requests	Recommended Value: No (Disabled)
Auto accept cancellation request for overdue products	Recommended Value: Yes (Enabled)

Notifications

Days notice before invoice due date	Recommended Value: 1 This setting will send a reminder notification to a client before their invoice is due. You want to send at least one reminder as that will give time for your clients to submit a cancellation request if they do not wish to continue (a cancellation request is better than a refund and/or chargeback).
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Overdue reminder interval days	<p>Recommended Value: 2</p> <p>If a customer goes overdue, an overdue email notification will be dispatched to the customer. This setting determines how many days apart that notification is sent out.</p>
Max overdue notifications	<p>Recommended Value: 3</p> <p>This setting determines how many overdue email notifications the customer will receive. When setting this to 3, and the setting above to 2, customers will receive overdue notifications on days: 2, 5, 8.</p>

Contract Settings

Cancel unpaid invoices when closing contract	Recommended Value: On (Enabled)
Cancel future unpaid/overdue invoices when turning renews	Recommended Value: On (Enabled)
Overdue contract suspension delay days	Recommended Value: 10
Overdue contract cancellation delay days	Recommended Value: 30
Overdue contract termination delay days	Recommended Value: 45 (or +5 days of your money back guarantee if it is higher)
Recommended money-back period	<p>Recommended Value: 30 or 45</p> <p>Set your desired money back guarantee window. You'll want to have some sort of money back guarantee for customer confidence with 30 being the industry standard.</p>
Max products per client	<p>Recommended Value: 0</p> <p>Setting this to 0 will allow clients to order as many products as they like.</p>

UPMIND SETTINGS: SECURITY

The Upmind Security settings will allow you to configure numerous security-related settings from logins, link sharing, and more.

To get started, log into your Upmind admin area and navigate to **Settings** (located in the bottom left corner) -> **Security** and fill in the form as described below.

Passwords & Login

Max Failed Attempts	Recommended Value: 10 For the sake of looking out for your customers, we recommend setting a limit on how many login attempts can be made before blocking that user. However, you want to set it to a reasonable limit to avoid customer frustration.
Lockout Minutes	Recommended Value: 5 Enter how long a customer will be blocked after failing to exceed the max failed login attempts (as defined in the setting above). With this value set to the recommended 5, a customer will be blocked for 5 minutes after failing to log in over 10 attempts.

Sharing Links

Link Expiration Days	Recommended Value: 7
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File Uploads

Denied Downloads By Scan Status	Recommended Value: Unsafe & Malformed File / Scan Error
Allowed Upload File Types	Leave these to all of the default selected options which will cover all of the formats your clients should need in attachments. The default selection will cover images, ZIP archives, screen recordings, and more.

UPMIND SETTINGS: CURRENCIES

Currencies in Upmind are added and removed by being associated with payment providers.

On the Currency settings page, you will be able to configure how currencies are handled, should you wish to support multiple currencies.

To access the currencies page, navigate to **Settings** (located towards the bottom left corner) -> **Currencies**.

Recurring Price Recalculation	Recommended Value: Use current rates but keep original price
Calculate Missing Currency Prices	Recommended Value: Enabled / Yes This is a great feature which lets you enter your prices just in your default currency. Upmind will then auto-exchange prices into other currencies for you. Note that the setting here can be overridden for each product.

UPMIND SETTINGS: BUSINESS SETTINGS

To navigate to the Business Settings page, while logged into your Upmind admin area navigate to **Settings** (located towards the bottom right corner) -> **Business settings**

Store Currency

Store Currency	Set the default currency your store will sell in. Once you have made your first sale, this field will be locked and become non-changeable.
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Store contact details

Phone	If you have one, enter your company phone number. The phone number you enter will be presented on customer invoices.
Email	Enter an email address where your clients will be able to contact you. This email address will be presented on customer invoices.

Store address

Legal Business Name	Enter the name of your company. If you are a registered company, enter the full name alongside the registration type (such as Company Name, LLC or Company Name LTD). Your legal business name will appear on all generated invoices.
Business Address	Enter your company address which will appear on company invoices. If you do not have an address, it is highly recommended to consider getting a remote virtual office address for your country.

Applied promotions

Applied Promotions	Recommended Value: Yes / Enabled This setting will determine if promo codes should automatically be applied throughout the store. As you focus on conversions, we recommend enabling this option.
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Once you have configured the above settings click on the **Save** button located in the bottom right corner.

UPMIND SETTINGS: ORDER OPTIONS

Within the Upmind Order Options area, you'll be able to configure numerous settings from invoice numbering, invoice generation, and more.

To get started, log into your Upmind admin area and navigate to **Settings** (located in the bottom left corner) -> **Order Options**. Once there, fill in the form as described below.

Invoice Number

Invoice Prefix	We recommend setting the invoice prefix to the first two initials of your company name. If you have a one-worded company name, set this to the first 2 letters of your company name. For example, if your company name is: Joes Hosting, set the invoice prefix to JH
Start Invoice Number	Recommended Value: 1271 (or any odd number above 1k) You want to spark confidence in your customers so showing them they have the very first invoice your company has generated isn't a good sign. Set this to a reasonable starting number (anything above 1000). Ideally, make it an odd number.
Credit Note Prefix	Enter your company name so your customers can recognize the charges on their bank statements. This is limited to 10 characters, if your company name is longer than 10 characters simply enter as much as you can fill in.

Non-Recurring Invoice Due Dates

Non-recurring Invoice Due Dates	Recommended Value: 0 (Invoices will be due on the day of creation)
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Recurring Invoice Generation

Recurring Invoice Generation	Recommended Value: -1 (Generate invoices a day before renewal)
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Recurring Invoice Due Dates

Recurring Invoice Due Dates	Recommended Value: 0 (Invoices will be due on the day of renewal)
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Guest Checkout

Guest Checkout	Recommended Value: Disabled (Off) As a hosting company you are selling subscriptions so you want your users to create accounts.
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Discount for Options

Discount for Options	Recommended Value: Disabled (Off)
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Basket

Abandoned Basket Hours	Recommended Value: 12
Set basket to account currency after login	Recommended Value: Enabled (On)
Signup Flow	Recommended Value: Register Grabbing your clients email address earlier on in the order flow is beneficial for cart abandonment cases. As such, we recommend setting the signup flow to Register.
Signup Order On	Recommended Value: Registration

Misc

Invoice Notes Create Support Tickets	Recommended Value: Enabled (On)
Auto Cancel Unpaid Initial Invoices	Recommended Value: 5 This setting will determine how long after a customer submits an order but does not pay to automatically cancel the unpaid invoice (and thus the order).

Auto Cancel Unpaid Pro-Rata Invoices	Recommended Value: 3
Enable Pay Later at Checkout	Recommended Value: Disabled (Off)
Display Price Type	Recommended Value: Highest billing cycle divided by months
Display Promo Prices	Recommended Value: Enabled (On)
Manual Price Promotion	Recommended Value: Enabled (On)
Show Promotions On Catalog	Recommended Value: Enabled (On)
Show Promotion As	Recommended Value: Percentage
Default Payment Period	Recommended Value: Lowest Price Per Month
Hide '0' Invoices for Clients	Recommended Value: Enabled (On)

UPMIND SETTINGS: TAX SETTINGS

If you will be charging any form of sales tax and/or VAT to your customers you'll want to configure how taxes are applied within Upmind.

Note that more advanced tax options are coming soon, including for GST and dual-rate tax.

To get started, log into your Upmind area and navigate to **Settings** (located in the bottom left corner) -> **Tax Settings**.

VAT Registered?	If your company is registered for VAT, toggle/enable this option. By doing so, another field will appear enabling you to enter your VAT number.
VAT Inclusion	If you are an EU-based company charging VAT it is recommended to enable this option. If you are a non-EU-based company, registered for VAT, it is recommended to disable this option.
Tax Services	As a web hosting company, most likely you will be classified as a Virtual Services company and as such, you should select that from the drop-down menu.

UPMIND SETTINGS: PAYMENT PROVIDERS

Let's add some payment gateways so your clients can actually pay you. As mentioned above, if your country supports it, we highly recommend going with PayPal and Stripe.

Configuring PayPal with Upmind

Upmind supports PayPal as a native integration option giving you the option to enable PayPal in as little as a few clicks. To enable PayPal, log into your Upmind admin area and navigate to **Settings** (located in the bottom left corner) -> **Payment providers** -> **Add payment provider** -> **PayPal Express** and fill in the form as described below:

Display Name	PayPal is a globally recognized name and as such, we recommend setting the name to PayPal .
Test Mode	Recommended Value: No
API Username	Enter your PayPal API username. You can obtain an API username by logging into your PayPal account and navigating to: Your name (top right corner) -> Account Settings -> Website Payments -> API Access -> NVP/SOAP API integration (Classic)
API Password	Enter your PayPal API password. You can obtain an API password by logging into your PayPal account and navigating to: Your name (top right corner) -> Account Settings -> Website Payments -> API Access -> NVP/SOAP API integration (Classic)
API Signature	Enter your PayPal API signature. You can obtain an API signature by logging into your PayPal account and navigating to: Your name (top right corner) -> Account Settings -> Website Payments -> API Access -> NVP/SOAP API integration (Classic)
Currencies	You should add all currencies you want to support with PayPal here. Given PayPal is a global brand, it is recommended to enable many currencies.
Payment Instructions	Leave blank

Before saving, run a test by clicking on the Test Credentials button. Once you see a green success message, click the **Create** button.

Configuring Stripe with Upmind

Stripe is the second payment solution we will be enabling throughout this guide book. With Stripe, you will be able to accept cards directly on your website, in a PCI compliant way.

To get started, log into your Upmind admin area and navigate to: **Settings** (located in the bottom left corner) -> **Payment providers** -> **Add payment provider** -> **Stripe**. Once there, an interface modal should appear from the left side of your screen. In that modal, fill in the form as described below:

Display Name	Stripe is not as well known as PayPal, especially considering they can be mostly hidden with the card inputs being on your website. With that in mind, we recommend setting the display name to: Credit / Debit Card .
Test Mode	For production environments, set this to No .
API Key	Enter your Stripe secret key here. To obtain your secret key, log into your Stripe account and navigate to: Developers -> API Keys -> Secret Key
Stored	Recommended Value: Yes. This will allow customers to store their card details for future payments. Note that Upmind never actually stores card data itself. Instead it stores a Stripe token.
Card Types	Recommended Value: Enable all of the supported cards to maximize your customer reach.
Currencies	Set all the currencies you wish to enable here.
Payment Instructions	Leave blank

Once ready, click on the **Create** button located in the bottom right corner to save Stripe as an available payment provider.

UPMIND SETTINGS: PAYMENT OPTIONS

In this section, you'll be able to configure various payment options including but not limited to billing automation, client wallet settings, and more.

To get started, log into your Upmind admin area and navigate to: **Settings** (located in the bottom left corner) -> **Payment options**.

Once there, fill in the form as described below:

Gateway Settings

Payment Capture Mode	Recommended Value: Direct Capture When starting out, we recommend Direct Capture. If you have a lot of pre-paying customers and find they often dispute your charges on the renewals, consider changing this to Capture. However, with a reminder notification this may not be an issue.
Authorization Capture Delay Days	Recommended Value: 3 If Capture mode is enabled in the setting above, charges will be authorized and only officially charged 3 days later.
Enable Partial Payments for Clients	Recommended Value: Disabled (Off)

Statement Description	Recommended Value: :invoiceNum
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Billing Automation

Max Authorization Capture Attempts	Recommended Value: 5
Invoice Charge Attempt interval Days	Recommended Value: 3
Max Invoice Charge Attempts	Recommended Value: 3
Days Notice Before Card Expiry Notification	Recommended Value: 10
Attempt Other Saved Card on Failed Payments	Recommended Value: Disabled (Off)
Invoice Categories for Auto-Charging	Recommended Value: <ul style="list-style-type: none"> ● Recurring Invoice ● Initial Invoice ● Migration ● One Time Service
Charge Interval Before Due Date	Recommended Value: 1
Charge Interval Before Due Date (With Pending Payments)	Recommended Value: 7
Max Days To Attempt Payment After Charge Date	Recommended Value: 3
Payment Days Term Priority	Recommended Value: Bigger
Expiration Notices	Recommended Value: <ul style="list-style-type: none"> ● 14 days before expiration ● 10 days before expiration ● 7 days before expiration ● 3 days before expiration ● 1 day before expiration

Client Wallet

Multi Currency Balance	Recommended Value: Enabled (On)
Auto Consume Balance	Recommended Value: Enabled (On)

On Invoice Due Date	
Disable Top-Up for Clients Without Active Orders	Recommended Value: Enabled (On)

UPMIND SETTINGS: FRAUD

Fraud in the web hosting space has seen a significant increase over the years. Even if you do not yet have a single customer, you should always have a keen eye on the issue that fraud is, and have as much protection in place to protect yourself against such fraudulent activities.

Without adequate fraud protection, you will find yourself having to deal with frequent chargebacks and refunds. Not only does that cost you in chargeback fees and non-refundable gateway fees but more seriously, **your payment gateway vendor (such as Stripe) can remove you from their platform if your chargeback rate goes beyond a certain threshold.**

To access the anti-fraud solutions provided by Upmind, log into your Upmind area and navigate to **Settings -> Fraud.**

Country Fraud Rules

Country fraud rules allow you to set rules for specific countries, namely:

- **Whitelist:** Bypass fraud checks and allow an order to go through (We do NOT recommend setting any country as a whitelisted country)
- **Greylist:** A customer in a greylisted country will be able to submit an order and make a payment. However, their order will not be automatically accepted and will require manual approval.
- **Blacklist:** Any customer who is from a country you have blacklisted will be able to create an order, however, they will not be able to submit a payment until you have manually reviewed the order and approved it.

While you are starting out it'll be hard to gauge how much fraud you will face. As such, to start, we only recommend blacklisting countries that you are prohibited from accepting by law (such as through sanctions). As time goes on, if you notice a number of chargebacks and/or fraudulent orders coming from a specific region, consider adding that country to the greylist or blacklist.

Fraud Detection

Whenever a customer submits an order, the customer goes through a thorough (automated) review service which gives the client a fraud score. In the fraud detection settings area, you can set the threshold of when to submit an order for review, and when to block an order.

Review Score Threshold	<p>Review Score Threshold is based on a percentage basis and anything above the set score will send the order for a manual review.</p> <p>We recommend setting this to around 50 and adjusting it up/down based on if legitimate orders are being caught in the net, or fraudulent orders are making it through.</p>
Fraud Score Threshold	<p>Fraud Score Threshold is based on a percentage basis and anything above the set score will mark the order as Fraud.</p> <p>Like Review Score Threshold, we recommend setting this low (70) and again, adjust it up/down based on if legitimate orders are being caught in the net, or fraudulent orders are making it through.</p>

For the option **Action Upon Review Status**, set this to **Open Ticket**. Many customers these days are traveling, using a VPN, etc. so it is very possible they have just been flagged by the anti-fraud systems doing it's job, but that doesn't mean they are not a legitimate client. By opening a ticket, Upmind will proactively engage that customer giving you the chance to secure a legitimate client (if you deem them to be).

UPMIND SETTINGS: AFFILIATES

Affiliates can serve as a great way for you to grow your web hosting company. As you start out, budgets may be low so you won't be competing against the larger players in the hosting space, especially on affiliate commission rates. In other words, don't expect to gain key placements on the major review sites; however, your existing customer base may want to recommend a friend so offering that little incentive to do so can play to your advantage.

To access the affiliate settings of Upmind, log into your Upmind admin area and navigate to Settings -> Affiliates.

From the affiliate page, click on the **Default Structure** link under **Affiliate tiers** followed by **Add condition**.

A popup interface will appear enabling you to set up your default commission structure. Fill in the form as described below:

Is active?	Recommended Value: Yes
Allocate commissions once per referral?	Recommended Value: Yes
Commission Type	Recommended Value: Percentage
Amount	<p>Recommended Value: 20 - 30%</p> <p>Offer a reasonable (but not bank-breaking) commission rate for any of your early adopters to benefit from. Anything in the 20 – 30% range should work fine. Remember, we're expecting huge</p>

	affiliate gains but it is there should you have a happy camper.
Billing Term	Recommended Value: All
Commission Period	Recommended Value: 6 months
Payout Interval	We recommend setting the minimum commission delay to that of your money-back guarantee. For example, if you offer a 30-day money-back guarantee, set the commission delay to 30.
Invoice Categories	Recommended Value: Initial invoice
Multiple Item Eligibility	Recommended Value: Apply x% commission to the lowest value eligible item only.
Eligible Products	Recommended Value: Selected Products (and select all of your web hosting products)

UPMIND SETTINGS: PRODUCT CATALOGUE

In this section, we are going to add the hosting products to your Upmind installation so they can be ordered by your clients. To get started, click on the **Settings** button located in the bottom left corner -> **Product catalogue**.

To get started, we need to create a product group. Hover over the **Add new** button and click on the **Products category** link and fill in the form as described below:

Category Name	Recommended Value: Shared Hosting Give your product group a name that your clients will see and navigate through on the order form.
This is a subcategory?	Recommended Value: No
Category Description	Give your product group a description that your clients will see throughout the cart flow.
Category Short Description	Based on the description above, enter a short description of your hosting product group.

Once ready, click on the **Create** button located in the bottom right corner.

With your first product group created, it is now time to add the first hosting package! Navigate back to the Product catalogue page and hover over the **Add new** button. This time, click **Product** from the menu that appears.

A modal type interface will appear with a form enabling you to add your new package. Fill in the form as described below:

Product Category	Select the product group you just created in the previous step
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Product Type	Recommended Value: Single product
Is Active?	Recommended Value: Yes
Is visible to clients?	Recommended Value: Yes
Product name	Give your shared hosting product a name, which clients will see throughout the order form and on their product details pages. For example, Startup
Product description	We recommend leaving this blank as you want your customers to leverage your main website for these details, plus, this will take up real estate space on the product configuration page which isn't a good thing.

Once ready, click on the **Create** button located in the bottom right corner.

After clicking on the Create button, you should be redirected to the newly created packages main settings page, split into multiple different categories which you can browse through from the left sidebar. Below, we'll go through each category of the product settings page.

Product Details

The Product Details section will cover all of the key details such as the product name, description, any images you'd like to add, etc. Most of these options would have already been configured at the time of creating your product, so we'll only cover the new options on this page below.

Hide from category view?	Recommended Value: No
Product store link	This is the link you will use on your website order links. Make a note of each package's order link that you create.

Product Billing

Purchase type	Recommended Value: Recurring payment (subscription)
Subscription terms	For each billing cycle, set the prices you would like to sell your web hosting packages for on a per-currency basis.
Multi-currency options	Recommended Value: Inherit brand default We recommend the brand default as it allows you to globally control this setting without having to change it in many places.
Default payment term	Recommended Value: Lowest monthly price This setting determines how to display pricing on your product's order form. With our recommended setting enabled, if a product costs \$6 on a monthly basis and \$60 on a 1-year basis, the shown

	price will be the 1-year price (\$5/mo).
Affiliate Controls	Recommended Value: Yes

Product Automation

Subscription Billing Automation

The Subscription Billing Automation section allows you to override certain global defaults. Unless you specifically need to change those, we highly recommend leaving them to your brand defaults wherever possible as it makes future changes much easier.

Use brand suspend interval value?	Recommended Value: Yes
Use brand cancel interval value?	Recommended Value: Yes
Use brand close interval value?	Recommended Value: Yes
Automatically renew?	Recommended Value: Yes
Lock due date to billing cycle?	Recommended Value: Yes
Restrict future due date?	Recommended Value: No While we recommend setting this to no, lengthy extensions can attract fraud & abuse. If you notice any abuse consider restricting this to 12 months or disabling it entirely.
Restrict reactive status?	Recommended Value: Yes - With the following options selected: Cancelled & Lapsed

Product Cancellation

Cancel anytime?	Recommended Value: Yes
Use brand recommended money back guarantee value?	Recommended Value: Yes For a shared hosting product using your global money-back guarantee makes the most sense, and is easiest to change. However, if you will be reselling VPS packages from a provider or have any upfront cost to provide a service (such as license costs) consider changing this to ~15 days.

Recurring invoice generation

Use brand default?	Recommended Value: Yes
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Recurring invoice due dates

Use brand default?	Recommended Value: Yes
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Provisioning

Under the **Provisioning Blueprint** dropdown, select **Web Hosting**. This will make the provision providers section visible where you will be able to add your Verpex reseller account details.

First, under **Provision providers**, uncheck the **Any provider?** option and click on the **cPanel** logo.

Under **Provider configuration**, click **Add new provisioning configuration** and fill in the form as described below.

Is enabled?	Recommended Value: Yes
Is Web Hosting default?	Recommended Value: Yes
Provider	Click on the cPanel logo
Is cPanel default?	Recommended Value: Yes
Protocol	Recommended Value: HTTPS
Hostname	Enter the server hostname provided to you by Verpex. You should be able to find this in the Verpex welcome email.
WHM Username	Enter the WHM username provided to you by Verpex. This is also your primary cPanel login username. This can also be found in the Verpex reseller welcome email.
API Key	Enter your WHM API key here. To obtain an API key, using the login information provided by Verpex, log into your WHM. Once logged in, use the search function and search for API and then click on the link Manage API Tokens -> Generate Token.
Location	Enter the country you have ordered your Verpex reseller package in.
Hosting Provider	Optionally, enter Verpex. This field is used internally so you can reference where each server is located.
Accepting new accounts?	Recommended Value: Yes

Once done, click on the **Save** button enabling you to continue with the product provisioning configuration.

Once your server has been created, on your package configuration page, under the Provisioning tab you'll see various new options appear. Fill in those as detailed below:

Provision setup functions	Recommended Value: Static
Provider configuration	Ensure this option is set to your newly added server
Provision setup functions	Leave this set to the default option (Create Account)
Provision fields: Package Identifier	Click on the Configure button and then select your hosting product. Once selected, enter the package name exactly as it appears in WHM (including your WHM username prefix, for example: myreseller_package).

Congratulations! You have just created your first package in Upmind. Repeat the above steps for each package you'd like to sell to your customers.

Integrating Your Domain Reseller Account

While there are plenty of domain resellers you can choose from, this guide will focus on eNom. Leveraging the eNom domain reseller platform with the advanced Upmind integration, you'll have this section completed in no time.

As Upmind is a hosted platform, the Upmind server IP address should already be fully whitelisted to make API calls within eNom. However, if you notice any errors related to IP restrictions contact Upmind requesting the IP you should whitelist within the eNom portal.

Note: It can take up to 30 minutes for any IP whitelist changes to fully reflect throughout their system.

To enable eNom follow the steps below:

1. Log into your Upmind admin area
2. From the left sidebar, click **Host Control** -> **Registrars** -> **eNom**
3. Fill in the form as described below and then click the **Save** button

Is Enabled?	Recommended Value: Yes
Name	Enter eNom
Is Domain Names default?	Recommended Value: Yes
Provider	Click on the eNom logo/box.
Is eNom default?	Recommended Value: Yes
Username	Enter your eNom domain reseller username.

Password	Enter your eNom domain reseller password.
Sandbox	For production environments, set this to No .

Once ready, click on the **Create** button to add eNom as a domain provider.

Adding Domain TLDs & Pricing

With your domain registrar not fully set up & integrated, it is time to start adding some domain extensions & their pricing so your customers can purchase those.

To do so, while still logged into the Upmind admin area, navigate to: **Host Control** (left sidebar) -> **Domain names** -> **TLDs** -> **Add new TLD**.

In the modal interface that appears, enter the domain extension you would like to add (one at a time). For example, if you want to sell .COM domain names, enter **.com**.

You should now see a much larger form allowing you to configure all of the specific options and attributes specific to this domain extension. Fill in the form as described below:

Is available for sale?	Recommended Value: Yes
Registrar	Click on the eNom logo to associate this domain with your added domain registrar
Late Renewal	Late renewals allow customers to renew the domain at normal prices before entering the redemption period. While this differs per TLD, the average range is 30 - 40 days.
Max Registration Period	Recommended Value: 10 Years
Redemption Period	Redemption periods can differ per TLD though on average, this period also lasts around 30 - 40 days.
Recurring invoice generation	Recommended Value: Use Brand Default
Recurring invoice due dates	Recommended Value: Use Brand Default
Pricing configuration	Set the price you would like to sell the domain for next to each currency column. You can add additional billing terms by clicking on the Add new term link.
Multi-currency options	Recommended Value: Inherit brand default

Once ready, click on the green Create button, and congratulations! You have just added your first domain extension! Repeat this step for each domain name you would like to sell.

CHAPTER 5 - SALES & MARKETING: GETTING NEW CLIENTS

What You Will Accomplish in This Chapter:

- Establishing Your Company Website
- Customizing Your Upmind Shopping Cart
- Setting Up Your Products & Services
- Getting Your First 100 Clients

This might be the part you have been waiting for. Setting up your website and actually growing your web hosting company. Before we get started, I want to reiterate that web hosting requires patience, time, and effort, not necessarily money.

It should be stressed that you won't magically get clients coming through your door, the first set of clients will always require hard work. After all, your brand isn't known so we have to make sure it becomes known.

What it Will Take

As with any business, the first 100 clients are going to be the hardest. Well, that isn't entirely true. If you have tens of thousands of dollars you can probably make it happen quite easily, but that is the worst thing you can do. **Don't spend a single dollar getting your first 100 clients!** Instead, spend time.

If you spend money to get your first set of clients not only will you be hurting any runway you may have, but your cost per acquisition is not going to be profitable. When you are starting out you have no reputation, no one has heard of you. You're going to spend a lot of money getting into people's faces but when they see you, they won't know who you are. Below we will focus on methods to get that initial traction which in turn will help you build trust and awareness for your brand, giving you the ability to compete online.

The only money you should be spending is on your reseller account, Upmind account, and a budget-friendly template.

You vs The Competition

Don't be discouraged by all the large web hosting firms, trust me, there are plenty of fish in the sea. These large web hosting firms can only take a little chunk of the client base that is ready to be reaped by much smaller web hosting companies. Your company!

You have the ability to provide what larger web hosting providers won't be able to provide, personal touch. If you currently have a hosting account with one of those larger hosting companies, try asking them for something "personal", not one of them will be able to deliver personal care to their clients, simply because it is impossible for them to do so.

Try asking them for a personal opinion about something or have them install something, which you know only takes ~5 minutes to complete. Either one of their template "policy" messages will be thrown at you or it's going to cost you a lot to get it done.

Another angle of approach? Most large web hosting companies won't migrate a website for free if there is not a control panel match. Some of the largest web hosting companies around today leverage a custom control panel and just as with any host, they have unhappy customers looking to leave. This is where you fit in, with your personal service, determined for success, solve the issue and offer a free manual migration.

So don't be afraid of the competition. Focus on your brand and you will make it!

WEBSITE BASICS: YOUR COMPANY WEBSITE

First things first, you need to have "the right kind of website". You don't have to have a \$5,000 website to get you started. A simple website with the right messaging and gradually increasing traffic WILL convert! A \$5,000 fancy website with no traffic WON'T convert.

It's not about the design. It's how you deliver the information to your website visitors and how you can relate to what they are looking for. Though today you can buy a very nice website design from www.themeforest.com at a price range of \$10 - \$20.

Here are a few very important factors for you to implement to your own company website:

- Keep your website as clean and simple as possible. Don't overwhelm your website visitors with too much information. There is a balance between enough information and too much to the point of confusion.
- Place your web hosting packages upfront on your website front page, complete with pricing and basic features and a button to order (when you expand beyond regular shared hosting, such as into VPS hosting, branch out and make these product groups instead of individual packages).
- Do not get flashy with animated images appearing everywhere, using Flash/Java everywhere, etc.
- Provide noticeable contact information. Customers won't look very hard to find a way to contact you, they will just go to the competition. Make it easy for them to ask their questions!
- Set up a favicon - We cover this in more detail below
- When you start to collect customer reviews, make them visible and noticeable on your website

When you are ready to actually build your website, if you do not already have a theme to use, take a look at <https://themeforest.net/search/hosting>. From here, you should be able to find a variety of WordPress-based and static HTML templates which you can use as a starting base for your own website, heck, it would be fine to use the template as-is and just edit the content on it.

After you grow and you have more cash flowing in, you can look to upgrade with a custom website based on your specific needs.

WEBSITE BASICS: SEARCH ENGINE OPTIMIZATION

Search Engine Optimization (or SEO) is the process of optimizing your website to be more favorable in the search engine rankings. Through that, you will find yourself increasing what we call organic traffic with the hopes they will convert on your website into a paying customer.

Don't be under the assumption you will rank highly for very competitive keywords anytime soon, such as hosting. However, there are steps you can take to tune your website for better SEO which will enable you to target specific, less competitive keywords.

To set your website on a good footing for future SEO efforts ensure your website has the SEO basics covered:

- **Title Tag:** The title tag appears in visitors' browser tab and in most cases, as the name in the SERP results. Each page should have one (and no more than one) unique title tag and between 50 and 60 characters in length.
- **Description Tag:** The description tag explains what the page is about and in most cases, will appear as the subtext in the SERPs. Each page should have one unique description tag between 120 and 150 characters in length.
- **Keywords Tag:** Google doesn't look at the keywords tag anymore but other search engines do! Include keywords for each page to maximize your SEO efforts over the long term across multiple search engines.
- **H1 Tag:** The H1 tag should appear towards the top of your website and ideally, you would only have 1 H1 tag per page. This will be the main visible to clients on the page. For example, on your Shared Hosting page, you might have an H1 tag with Fast WordPress Hosting
- **Sitemap:** Your website should have a proper sitemap covering all of the public & accessible pages. Have two versions of your sitemap, an HTML human-readable sitemap and an XML sitemap which you should submit in the Google Search Console.
- **Cross Link:** Crosslink between your pages in a non-spammy way as Google loves cross-linkage. For example, if you do web development you may have a section on your shared hosting page offering web development services and a link to that page.
- **Regular Content:** Unique, regular, and quality content such as on your blog or knowledge base will not only enable you to rank for more keywords but will naturally result in backlinks landing on your website which will help both your short-term & long-term SEO efforts.

WEBSITE BASICS: ABOUT US PAGE

Your about us page is your chance to show your potential customers who you are and what you are about. It is your chance to appear personal, friendly, and inviting. Include details about what your story is, who you are, and most importantly, show them why they should be doing business with you vs any other web hosting provider online.

Web hosting companies have been around for years and years and sadly, over those years a small reputation has been built up about fly-by-night hosts. These are essentially hosts that start up with a dream, gain a few customers, and then shut down. To avoid being considered a fly-by-night risk host, don't reference the fact your web hosting company was founded this year and instead focus on positives.

WEBSITE BASICS: CONTACT DETAILS

For your website contact page, you want to appear as accessible as possible, within reason. Make the following options available on your contact page:

- Email is a given, ideally your contact page would have the email addresses for multiple departments (sales, support, etc) as well as a form that will forward to the relevant email address.
- Address: This can be your actual home address or a virtual address (such as through <https://virtualpostmail.com>)
- Phone Number: Even if you don't monitor the phone lines, have a number as it sparks confidence yet most people won't call you. For a phone number, you can use <https://twilio.com> and have an automated message stating no agents are available and to please email sales@
- Live Chat: You should always consider a live chat solution so you are around to answer your customers questions as they make purchases. Crisp.Chat is a great solution for this.

WEBSITE BASICS: CAREERS SECTION

Are you currently hiring? Of course not! But always have a jobs or careers section on your website. This will give the presumption that your web hosting company is not a one-man band and is actively growing with a growing team. You could argue it is not good to 'lie' to your potential customers but in reality, you can and should be using this channel as a means of collecting potentially qualified applicants for the day you are hiring.

If you decide to deploy a careers page ensure you don't overdo it with 100 job listings. Just a reasonable 2 - 3 job postings should do it. For ideas on the types of career listings you can publish, Google **Web Hosting Careers** to get a feel of the type of roles you can include, and the duties that they can include for your own page.

WEBSITE BASICS: YOUR PRODUCTS & SERVICES

When adding your packages to your website the general rule of thumb we follow is to keep it simple. Have 2 - 4 packages giving your clients a plan to choose from with plenty of upgrade options ahead of them. As a reseller client, you wouldn't have had the option to create an unlimited GB disk space and bandwidth package but don't worry, this will actually save you some headaches down the line.

Below is a reasonable example approach you can take when displaying your packages on your website:

<p>BRONZE \$2.95/mo 50% Off (Was \$7.90) ORDER NOW</p>	<p>SILVER \$4.95/mo 50% Off (Was \$9.90) ORDER NOW</p>	<p>GOLD \$8.95/mo 50% Off (Was \$17.90) ORDER NOW</p>
<p>1 Website 5 GB Disk Space 50 GB Bandwidth Unlimited Email Accounts FREE Website Migration</p>	<p>Unlimited Websites 10 GB Disk Space 100 GB Bandwidth Unlimited Email Accounts FREE Website Migration</p>	<p>Unlimited Websites 20 GB Disk Space 200 GB Bandwidth Unlimited Email Accounts FREE Website Migration</p>
<p>Have a Question?</p>	<p>Have a Question?</p>	<p>Have a Question?</p>

A couple of things you should notice, first, the price is the largest element on the pricing card and the product name is the smallest. We're also making the discounted price stand out slightly as we want people to focus on the price they will pay today, and the amount they will be saving if they purchase right away. It should be mentioned, that every audience is different. Depending on who you are targeting, you may find the above doesn't work for you. Always test, and adapt to maximize your own conversion rates.

PRODUCT PRICING TIPS

I will only give you one piece of advice when it comes to defining the price for your hosting business. Always give an option for your clients to pay monthly for your hosting products. This will set your business apart from a good number of the larger web hosts out there as they only accept annual or higher payment cycles which will cost clients to make their initial payment around \$100 or even more. While this is nice to have, it leaves a huge gap in the market for smaller providers such as yourselves.

Remember, you're not competing in the affiliate space. You're not competing in the PPC space yet. At least you shouldn't be, while your costs are low you can easily afford to justify having a monthly billing cycle.

Let your customers sign up on a month-to-month basis and who knows, maybe they will be satisfied with the level of services you're providing that they decide to upgrade to a higher billing cycle down the line.

So again, always have a monthly payment as an option without charging any kind of setup fees while you are starting out. You can give discounts for your annual payment plan, but never close the option for new clients to initially buy through your monthly payment plan (with no setup fees).

Once they are comfortable with your service and you've proven to them that you are providing professional web hosting services, most clients will comfortably upgrade their payment plan to an annual payment plan without even being asked to, simply because they know you now and they would like to save some money on future payments.

Now let's go to the good stuff, client hunting!

I will discuss several places which you can work on to get your first 100 clients, but before continuing I want to warn you about pay-per-click advertising or any form of paid advertising.

GETTING YOUR FIRST 1000 CLIENTS

At this stage in the book you should have the following completed:

- A working website
- Upmind configured and ready to go including
 - Packages & pricing all set
 - Support departments configured
 - Numerous optimal setting configurations

So what are we missing here? You guessed it, actual clients!

GETTING THE FIRST HANDFUL OF CLIENTS

The best field for you to get closer to your first 1000 clients goal is to reach out to all the people whom you personally know. The second best field is to reach clients in your own local area, which is the city where you live now. We'll cover both in this section.

We will cover the basic channels that you should cover when you are promoting your web hosting company. It is important to keep in mind, that web hosting is an ever-changing game. What works today might not work tomorrow. Take the ideas below and expand on them as best you can, and keep whatever works to yourself. After all, if you find a profitable channel the larger web hosting providers would love to put their marketing dollars there and squeeze you out of that space.

PROMOTING TO PEOPLE YOU KNOW

The best promotion you can ever do is to promote your new business through social network communities that you are actively involved in. Post a message to your friends on these social network sites such as FaceBook, Twitter, Google+, etc, and brag to your friends about your new business which you just launched.

People within your existing network will naturally have a higher level of trust vs those that randomly find you online as such, it will be an easier sell. They will also be easier to leverage for a review & testimonials which will be used to build the trust of the people outside your network later on.

Give out special promotional codes and discounts to your personal colleagues and friends, give out something that you would not give out to strangers. These friends and colleagues of yours will be the best assets you will ever have to promote your web hosting business.

Do personal favors for them. Offer “website setup” promotions, even simple website design promotions for the first 100 clients that sign up with you. After all, it’s about HARD WORK and TIME to get your first 100 clients.

I am sure you are familiar with all the various website applications that are available today, such as WordPress, Joomla, Drupal, MyBB (message forum), and other well-known popular website creation or application software. Utilize these free web applications to create amazing websites for your first 100 clients, free of charge, as your personal favor to them when they sign up for your new hosting business.

Offer a free domain registration AND renewals as well when they sign up with your hosting plan, do all the confusing work for your first 100 clients, until their website is online and ready to use.

If you’re thinking that it’s too much work to be done, then I can simply tell you, that you will have to spend at least \$10,000 USD to get your first 100 clients. Which one do you have? Tons of money OR hard work plus the time required to get your first 100 clients?

All the hard work starts here. Once you’ve secured your first 100 clients, growing it will be MUCH easier, trust me. But first, you must “earn” your first 100 clients and once you get them, make sure you can get honest positive testimonials from all 100 of them.

These testimonials will be the very “evidence” that shows how professional your company truly is and how you treat your clients. Once you get these testimonials, you can rest assured strangers will be confident enough to buy your services directly from your website.

I will show you later on how to publish these testimonials on the internet so that when people are searching for your company name, they will find your clients’ testimonials on independent sources, not on your own website.

Aside from social networking websites, simply call your friends, email them, text them, or whatever, saying “Hey, I just started up a new business. I can make a website for you for free as a promotion. Let me know if you’re interested and I’ll call you.”

These people know you, you don’t have to break their “trust barrier” since they already trust you thanks to your personal relationship. You simply just need to do the hard work for them. It’s that simple.

Before proceeding, I will say the harder you work on these initial stages, the harder you push to build credibility, the faster you will grow in the later steps of this book.

PROMOTING TO YOUR LOCAL MARKET

By now, you should hopefully have a small handful of clients signed up through your personal audience.

The next step is to pursue getting clients locally from businesses in your own local area where you live. You must be aware that web design companies or ISPs charge a few hundred dollars to a few thousand dollars for a simple company website. That is a fact. The first thing you need to do is:

Find as many large ISP (internet service providers) and web design companies residing in your local area and get the price list for a website design (and hosting if available) from them. Get their official price catalog from their website or from their brochures. This is important.

The next thing you need to do is to create and print out your own brochures or leaflets describing your own company's services which will certainly be MUCH MORE affordable than what these large ISPs and web design firms have to offer.

On that brochure, provide a side by side comparison of your own company's services compared to all these other well-known local ISPs and web design firms in your city or country, for example:

YOUR COMPANY	ISP-A	ISP-B	WEB DESIGN FIRM-A
20 Website Pages	5 Website Pages	20 Website Pages	20 Website Pages
Unlimited Emails	20 Emails	10 Emails	5 Emails
Free Domain Name	Domain Name: \$50/yr	Domain Name: \$25/yr	Domain Name: \$20/yr
eCommerce Ready	N/A	N/A	N/A
\$3.95/mo	\$25/mo	\$100/mo	\$50/mo

Also, on that brochure you should provide a working sample of your previous clients websites (hopefully you got some from step 1), give their website addresses and also print out their website screenshots to be presented along with your brochure – Only do this if your clients consent to be shared! You do not want to lose the trust factor among any of your client base.

So now you have at your hands a brochure describing your web hosting and design services comparing your company with some of the largest ISPs known in your city. Don't forget the website samples/screenshots on these brochures or leaflets.

The next thing you need to do is to present these brochures personally to the local businesses and stores in your area. Pursue these businesses from top to bottom. The top categories listed will most likely buy your services more than the bottom ones.

- Restaurants
- Cafés
- Internet Cafés
- Fitness Centers

- Bars or Nightclubs
- Small Hotels/Motels
- Travel Agencies/Tour Operators
- Photo Studios
- Beauty Salons
- Retail Stores
- Businesses/Companies

As you may have guessed, you must target businesses that are in the “hospitality” industry as your priority. These businesses are the ones that need the most public exposure, which means they are more likely to buy your website hosting services.

When reaching out to anyone, try to leverage your skillset, if you specialize in any related industry. Include that for your first 100 customers at no additional cost. In other words, if you are in any way a marketing specialist, offer marketing services to your clients for free for the first year. If you are a web designer, offer a free website design with any hosting package and so on. Leverage your skillset as best you can to make the most out of converting businesses in your local area.

EXPANDING ON LOCAL MARKETING

Through social media, you can take your offline marketing online. This can prove beneficial if the above offline marketing didn't go as far as you'd hoped, or if you are looking to expand into the next region having gained all you can from your local area.

To start this process, open Google Maps and zoom in so you can see a wide area of a city. While you are zoomed in, search for different types of companies such as hair salons, tattoo shops, restaurants, and so on. Google will take your input and put a red marker on the map for all the registered businesses in the area you have zoomed in for.

Now, click through each business on the map and make a note of the type of website they have. Some will have a legitimate business website, you can ignore those. Others may have no website or just a FaceBook page, these are the customers you can and should reach out to.

For one reason or another, these customers are exclusively using their FaceBook page to market their business online, perhaps it is a cost thing, perhaps it is a lack of knowledge to get online, who knows. What we do know is most businesses would love to get online if it doesn't break the bank which is where you step in.

B2B PARTNERSHIPS

B2B partnerships can be a great source to gain new clients. You can think of it almost like an affiliate program, without the huge costs associated with it. Best of all, the right kind of partnership will have your target audience by the boatloads and what they won't have... your competition.

For example, co-working spaces would be a great avenue to target. What type of audience can you expect from a co-working space?

- Web Designers
- Web Developers
- Photographers
- Video Editors
- Small-Medium Sized Businesses

Reality is, co-working spaces contain the perfect audiences for your web hosting business and no one is bidding on them! No one is paying them crazy commission amounts per sale! They are open to you.

Contact all of the co-working spaces in your area and offer them a proposal, \$50 credit for any of their subscribers. They get value added to their package prices, you get in the faces of clients and benefit from the signups it brings (and recurring revenue).

If they agree, print out a hundred or so flyers per co-working space which will allow them to claim their free credit and get signed up with you.

BEFORE DOING ONLINE MARKETING

I want to stress, that before proceeding to do any online marketing your best bet is to push the offline strategies as much as you can. The more you gain from local businesses the easier it will be to sell when going online!

With that in mind, let's work on a few online marketing strategies you can use.

With tens of thousands of web hosts in existence, it is going to be a very crowded place.

You should also take a moment to step back and try to leverage however many clients you currently have. By leverage, I mean to collect a review. If they are your friends and family this should be an easy ask though the local businesses may need a little incentivizing.

Considering running a little competition, whoever submits a review will be entered into a draw for a chance to win a free 1-year renewal in exchange for an honest review.

PRESS RELEASES

Now that you have a handful of clients, it is time to bring your web hosting business to the next level. The next step is to issue an ongoing press release about your company's services through the various web hosting directory and news sites that are available today.

I want to stress the "ongoing" part of this method. Why does it have to be ongoing, and not a one-time or several time press releases which can be launched during the initial stage of establishing your web hosting business? When people are signing up for a web hosting service, they always prefer going with a company that is up to date.

Always put yourself in the shoes of your potential client. Imagine if you yourself are looking for a web hosting provider, or maybe in this case for a server provider or a data center provider, or whatever. Once you have narrowed down the list of companies that you are interested in signing up with, what would you do? You would do more research on this small list of companies you have.

The same goes for other people. They will search for your “company name” or “domain name” through their favorite search engine. Here is where all the press releases come into play.

When you have ongoing press releases posted out to all major web hosting news and directories, what happens is when people search for your company name or domain name, all these press releases would come up on the very first page of the search results.

It is true, that your press releases might not be read however, Google won't be showing irrelevant results (or other companies' results). Instead, anyone that researches your company will find details and news of and about your company only, which is what you want.

There is also another known benefit to distributing press releases, as your website gets picked up on other websites the backlinks you gain will have positive effects on your SEO efforts. In the long term, this will start to play out quite well.

So we're going to do some press releases, but, what kind of press releases?

As above, your press releases might not even be read so don't worry too much about the content. If you ever partner with a company (such as a local co-working space) get them in on it and write a press release about that. If you launch a new feature, write a press release on that. Anything and everything can be put into a press release form.

How often should you issue a new press release?

Not too often. If I were to make a personal recommendation, I wouldn't issue a press release more than quarterly. There comes a point where things start to come across as overly spammy and that isn't the look you want for your company. A quarterly press release will keep fresh content out, while giving you those backlinks and keeping your competitors away from your brand keywords.

GET LISTED ON WEB HOSTING REVIEW SITES (NON-AFFILIATE BASIS)

Web hosting review sites can be a great way to build credibility and awareness for your brand. However, with the profitability of affiliate programs at larger companies, it can be very difficult to crack. On the plus side, while you won't gain mainstream coverage on these websites there are a few you can leverage at any time for free which can act as a great place to collect and showcase your reviews.

In the long-term, as you have been building your profiles on these sites over a multi-year period you should put yourself in a good position should you ever decide to later expand into playing the affiliate game.

A few sites you should consider registering to:

- HostAdvice.com: <https://hostadvice.com/submit-web-host/>
- HostSearch: <https://www.hostsearch.com/register.asp>
- WebHostingGeeks: <https://webhostinggeeks.com/hosting-provider-registration>
- Hosting-Review.com: <https://www.hosting-review.com/hosting-directory/submit.shtml>

Once you have registered your profiles, you may need to wait for their manual approval process. Once approved, gradually build your reviews on each website by simply asking your customers.

CONTENT, CONTENT, CONTENT

Content is king for search engines. If you ever log in and are not sure what to do next consider writing a blog post or a knowledge base article. Over time, you will start to rank for a variety of different keywords which in turn will bring organic traffic to your website.

The more you are seen the higher chance you'll convert a visitor into a paying customer. Remember, when someone has seen your website for the first time they will know your brand, they will know you exist. Granted, they might not end up being a paying customer right away but when the time comes that they are looking for a web hosting provider and they see your name on another website, there is a much higher chance they will end up converting with you.

Knowledge bases also serve another purpose outside of organic traffic, they can help your customers with the issues they are experiencing. This in turn will reduce your support ticket load and have less of a chance of a customer needing to submit a ticket at 3 am while you are asleep and unavailable to answer.

GET LISTED ON EXCLUSIVE DEAL SITES

Deal websites such as AppSumo and StackSocial/StackCommerce can bring you a significant number of customers. Here is how it works:

AppSumo

AppSumo features two marketplaces, their 'featured' marketplace where they promote your product heavily and in turn takes a commission, as well as a community marketplace where you can be found on their site and you receive the full payment. It is worth mentioning, on this website you will have to sell your product at a heavy discount, and I mean a heavy discount (\$10-15 for the first year).

You might be asking, why would you go to all the effort of getting listed for a mere \$10-15? While they will be sold at a loss, you are in it for the renewals. Think about the potential future revenue vs the short-term revenue.

To get started with AppSumo, register from the link below. Once registered, you will be able to create a profile for your web hosting company and finally, after a lengthy approval process, you should find yourself selling web hosting like hotcakes.

StackCommerce

StackCommerce / StackSocial has a very large reach. Getting on StackSocial is not just about the added revenue and clients it can bring, but also the long-term backlink gains you get from it. See, StackSocial works with several top-ranking websites such as Mashable

which syncs the deals from StackSocial over to their websites, in turn, earning you a nice backlink portfolio and brand awareness.

However, its wide reach advantage aside there are two quite significant disadvantages when compared to AppSumo. First off, you have to pay. The cost isn't excessive at \$50/mo though there is that added cost you should keep in mind. The second, main disadvantage would be they keep a hefty commission on each product sold (as high as 60%). It may be worth experimenting with StackCommerce for a few months to see what sort of returns you can get, what sort of initial reputation you can get, and then when you are ready it is recommended to cancel.

TWITTER MONITORING

Your competitors have customers, and you want them. Best of all, these customers can be found on social channels such as Twitter where they often tweet out their frustrations when they are not getting the support they expect and deserve.

I can't think of a better time to outreach to potential clients than when they are already angry and frustrated at their current hosting provider. So what do you do? First, get a Twitter desktop application such as Tweetbot and run multiple searches for your competitor's Twitter handles (@compayname). After each search, save that search in Tweetbot so they remain accessible.

Now, every now and then go through each search and look for potential tweets you can reply to. Ultimately, you should be looking for angry and frustrated customers, customers that are mentioning repeated issues, slow response times, email issues, etc. You get extra points if you can land a web design or web development agency as they will typically bring their client base with them.

For each 'lead' you identify, reply to their tweet (but make sure to remove the competing host from the response) with a simple message offering help, such as:

Hi there! Came across your tweet to {company-name}! I'm with {your-company} and you'd never have that experience with us! If you are open to a more reliable host with 24/7 support to die for, let me know and I'll be happy to hook you up with a free trial.

Twitter will be a numbers game. Most may not respond, and a few may vent some frustrations and anger, though most importantly if you keep at it, you will get clients from this strategy.

BE ACTIVE IN COMMUNITY CHANNELS

Forums and communities can be a great way to spread awareness of your brand, and gain clients while doing so. There are two types of communities you can participate in, mainstream web hosting forums such as WebHostingTalk, and software platform forums.

For the mainstream web hosting forums as you might have guessed, it is all about web hosting. You will be talking with your competitors and customers alike on all the forms of hosting. You typically should also see an option to create advertisements which we

recommend you do whenever you can (typically the limit is 1 advertising thread per week) so make sure to leverage all of those opportunities when permitted.

The second type of community is a software platform forum. These are more specific to the software application that it is for so you may find this one more difficult unless you are familiar with a certain software platform. Take MyBB as an example, everyone needs a host for their MyBB forum so why not show the MyBB users that your company is familiar with all topics of MyBB? While you can't directly advertise on these forums you can leverage your signature space to build brand awareness (and customers).

MOBILIZE YOUR EXISTING CLIENT BASE

When you have a fair number of active clients it is important to mobilize them to help your marketing strategies. The more you leverage your existing client base, the quicker you will grow. From there it is just a repeating cycle, leverage your existing clients to make it easier to get new clients, then mobilize those new clients to get even more new clients.

So what do we mean by mobilizing your existing client base? There are two things we recommend.

Customer Reviews

Reviews are an essential part of any web hosting provider. Customers want to know their business is going to be hosted with a reliable, safe and trustworthy hosting provider, and what better way to know that than, by seeing what existing customers are saying about you?

Contact your customers anytime between 30 - 90 days of their signup asking for a review. That should give them plenty of time to experience your hosting service and enable them to offer you an honest review. You would be surprised how many are willing to help, but you have to ask.

Reviews will play a significant part in your future growth, the more reviews you have, the more credibility you'll have. If you source these on a certain platform (such as TrustPilot), you'll be able to showcase your reviews on your website.

Affiliate Platform

At least once per year, send an email blast to your customers in the form of a newsletter highlighting your affiliate program. This will serve as an annual reminder for any existing clients you have that they can be rewarded with account credit and/or payouts should they bring their friends to your host. With this, you'll also grab any new customers you have obtained since your last email letting them know about your affiliate program.

Your email should be kept very clean and simple, making it feel like the customer is going to win (financially). To encourage opens, you can set the subject to something very enticing such as "Never pay for hosting again", then inside the email explain what type of commission they can get and how they can request their affiliate link.

KEEP SCALING & REPEATING ALL OF THE ABOVE TO 1000

Repeating the above steps is without a doubt, the most important part of this book. Without repeating all of the above your growth will slow down and reaching your goals will get further and further away. Don't stop once something has been tried, keep repeating all of the above methods for growth and reiterate on them. If you tried one campaign, maybe try it again with different verbiage or graphics. It might perform worse, but it might perform better – at least you'll know.

Repeat the above steps until you have reached 1000+ customers and you'll be rolling from there.

CHAPTER 6 - DAILY HOSTING OPERATIONS

In this chapter I will provide you with guides and best practices on how to manage your day-to-day operations using both Upmind and WHM/cPanel servers. By following my example, I assure you that you should be able to manage your entire 1,000 clients all by yourself, no help required.

Always know the true potential you have in yourself. Never assume you cannot do many things all by yourself, I have proven it and so have many other people. Never underestimate your own power. Challenge yourself and prove to yourself that you are an image of your Creator.

FACING UNEXPECTED PROBLEMS

It is never enough for me to keep stressing this over and over again.

Never treat your existing client as a thing of the past. Your true sales and marketing sales force lies in the relationship you have with your **existing** clients. Treat them wrong, ignore them, and it will be the downfall of your hosting company.

Look at it this way. You should always treat your existing clients as if you are trying to get them to become your new clients because in fact, that is the case. You should always have this mindset:

- One Unsatisfied Customer = One Less New Client
- One Angry Client = Five Less New Customers
- Ten Angry Customers = One Hundred Less New Customers

See, happy customers tend not to naturally leave positive reviews when they are happy unless you incentivize them. On the flip side, on the flip side, angry customers will make sure their voice is heard. They will leave a negative review after going through the process of migrating their websites away from you.

What will a new customer do before signing up? Check out your reviews and see what people are saying about you. Imagine searching your company name and see 10 back-to-back negative reviews? Do you think they will sign up and chance it vs the next host who has 4 - 5 star reviews throughout?

If we put the above into financial terms, let's say the average cost to acquire a customer is around the \$100 mark (which is a very realistic number). In the long run, when you participate in affiliate marketing, PPC, etc. those 10 angry customers have already cost you \$1000. If you don't treat them fairly, as you would want to be treated, they can cost you a further \$10,000 in lost sales. Can you afford to write off \$11,000 in sales?

Note: Don't mistake the above as 'the customer is always right. But try to be fair, maybe even more so in the early days as you are trying to establish a good reputation for yourself.

To help you with that, we'll cover some common cases and how you can react to those.

A RESELLER ACCOUNT WAS DOWN FOR SEVERAL HOURS

We partnered with Verpex because they have a very strong reputation in the market. However, no company is perfect, and the buck doesn't stop at Verpex. They work in datacenters that may have a power failure, they have software partners which may introduce bugs, a server might crash, a DDoS attack might occur, and so on. The point is, that any company can and will have issues at some point. Heck, even Amazon and Google Cloud have experienced downtime. At some point, you will face downtime regardless of where you host.

So what do you do? Apologize, apologize, apologize. Even if it is not your fault, you need to act like it is. Always be transparent and communicate the truth. Take responsibility for the downtime and own it. You might not have all the details upfront and that is fine, just communicate what you can.

First, start by checking the Verpex status pages and social channels to see if they have announced what is going on. If they haven't, send your customers a notification being generic but acknowledging the issue confirming to your clients that you are aware and are working on it. For example:

Our monitoring tools have alerted us to an outage on {servername}. Our system administrators alongside our datacenter partner are working as quickly as possible to find the root cause of the issue and restore services as quickly as possible.

We apologize to everyone affected by this and can assure you we will bring all of the downed websites back online as quickly as possible. More details will be provided once the issue has been identified and SLA credits will be offered.

Once you have collected enough information about the outage from Verpex ensure those are re-worded into your brand feel and let your customers know.

Now the most important, most large companies will require customers to submit a billing ticket for any SLA credits. Don't do that, especially as you start up. Go through each website on the server and add their respective SLA credits to their account and reference that in the final update you send out to these customers confirming the issue has been resolved.

While outages are naturally frustrating to customers, most will understand there may be an issue here and there. The outage is not the most frustrating part to the customer. A lack of communication takes the cake easily, if their website is down, they just want to know if their website is safe (will it come up, or do you have backups) and how long the outage will last. Everything else is secondary. If needs be, over-communicate just to get any latest news & information in the customers hands as quickly as possible.

FACING A FURIOUS CLIENT DUE TO AN ISSUE

If a customer is outright furious for any reason, be it an extensive downtime period, repeated outages, or just about anything, think about what you can do to keep the client happy. It is important to note, that this section does not apply to clients that have caused issues themselves.

This only applies to a legitimate issue such as downtime causing a customer to genuinely be frustrated.

If it was a downtime event, you may have already offered SLA credits. Of course, sometimes that doesn't work, a customer may still be frustrated but the last thing you want is for them to start trashing your brand online. Instead, respond in a way that is showing flexibility and understanding of their frustrations, go above and beyond, and even offer a year of free hosting to make them happy.

This does two things, first, if they have already made their mind up and will be leaving you it may settle them down a little as it shows the type of company you are. It might save you from the public backlash caused by this single client.

The second thing, if they decide to take you up on this offer, well, you haven't lost anything from the revenue as that customer was likely already out the door. Instead, you've gained by keeping them as an active client which will hopefully continue to renew once that year is up.

FACING AN ABUSIVE CLIENT

A furious client explained above means that they have every right to be angry. An abusive client means a client who has no right to be angry at your company or business. This type of client is simply trying to abuse your web hosting business. What I mean by abusive clients is a client who violates your company's terms of service.

One example is a client who is trying to send out 100,000 emails through their shared hosting account. Now that would violate your AUP (it should). You ended up having to suspend their hosting account. This action will result in the client being frustrated at your service since they cannot accomplish their abusive tasks.

Some abusers will "try" to threaten your business by throwing all kinds of stuff at you. If they do that, simply ignore them. You can rest assured that these abusive clients will not hurt your business because they are not real businesses or real clients. They are abusers who will take their business to the next hosting company when they realize their gig is up at yours.

They will not waste their time bragging about how bad your company is because they were unable to send out their spam emails from your server. They will simply move on to the next host to be their victim.

Even if they do provide a terrible testimonial, simply provide a counterclaim to their statement stating how their account was abusing your server. Nobody will back up these abusers' statements because they are alone and no other client would confirm this fact to be true, which only proves they are an abuser.

Clients sometimes threaten to sue you when they are angry. 99% of the time this is an attempt to make you scared of what's next and to do as they say. It sucks when this happens but when it does, you should keep a log of all communication you have with the client and have their legal representatives contact yours. Take a backup of the account at the moment and ensure you store that so if you are sued, you have the account exactly as it was. Now, resolve the issue (if anything is outstanding and reply letting them know threatening legal action likely won't get them anywhere. For example:

Dear {firstname},

First of all, please do accept my sincerest apologies for the issues you experienced on date. We have set a very high standard for our services which we aim to deliver consistently though on {date}, we experienced an outage which was out of our control and caused by {cause}.

While I can understand and fully appreciate you are frustrated by this event, threatening legal action is never the way to go. While it is your right, I must say any further threats of such nature would require us to cease all communications with you and you would only be able to communicate with our legal team.

DOING SUPPORT WITHIN UPMIND

When you are working on your Upmind support tickets, always work your way from top to bottom. That is to answer all newer tickets first making your way to older tickets. Don't use a first in first out method (FIFO). Why would you want to do that? It's because you are doing everything by yourself.

If you start to have employees working for you 24/7, then yes, the best way is to do your support tickets on a first in first out basis. But since you're still doing everything solo, all by yourself, always answer the newest ticket first.

This way, you will give a very good impression to all the clients which have just recently submitted their tickets and got a very quick response. When people get a response to their ticket in less than an hour, or maybe even within a few minutes after submitting it, they will just be amazed. They do not expect it, catch them by surprise.

This is how you will build your many client testimonials because some of your clients will get almost instantaneous support, while some will have to wait 12 hours or so to get your response. You can't improve your response rate with clients who submitted their support from the other side of the world ticket while you are sleeping, but you can give a truly amazing response to clients who submitted their ticket while you are sitting there in front of your computer.

That is not to say a client in the other part of the world is less valuable. Just you have to

manage what you can with the timeframes that you are online and available. If a customer has been waiting for 6 hours, the response time expectations have already taken a hit. This way, only a portion of your clients take a hit on the response times while others can still compliment your support response times.

For the delayed responses, start by apologizing for the delayed response and do your best to provide them with a resolution on the first reply. Did they ask for a script installation? Go in and install it for them, even if you typically wouldn't. The quality of the response can make up for the time delay. At least they weren't waiting for nothing.

Now that you know that you always do your tickets from newest to oldest, I will guide you on how to approach each ticket when you are working on them.

THE END

Congratulations! You've made it to the bottom of this tutorial and this eBook. If you have read the book throughout and will take on board the suggestions, and configuration tips, and adapt to what was communicated within the eBook within a few years you will have a flourishing web hosting company.

As you continue to grow and scale beyond 1000 clients, you may find yourself looking to hire new staff. Try to keep the same principles you have adopted for yourself throughout the staff you hire. You want your staff to treat your clients the same way you have been, the way that is what has brought you the success you now have.

Good luck!