Part II - Linux Server Pools

- Member Tab Bar
- Overview Tab
- Security Tab
- OpenLiteSpeed Tab
- MariaDB/MySQL Tab
- cPanel Tab
- Status Tab
- Cron & Jobs Tab
- Restore Backups Tab
- Recipes Tab
- Monitoring Tab
- Settings Tab

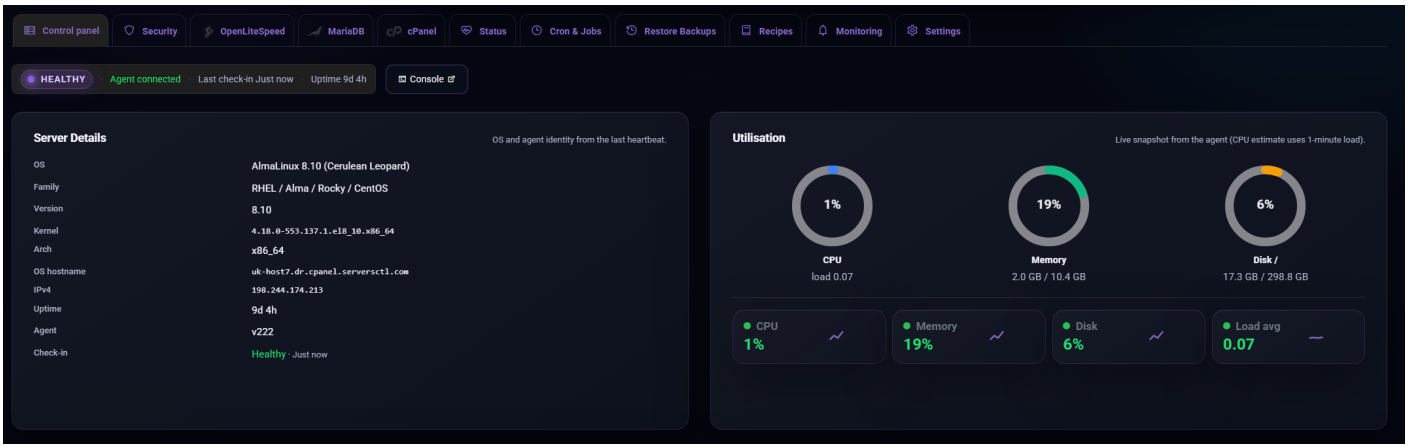
Member Tab Bar

Tab	Always in nav?	Active when
Control panel	Yes	Always
Security	Yes	Always
OpenLiteSpeed	Yes (Generic)	Content when OpenLiteSpeed detected; else frosted not detected overlay
MariaDB	Yes (Generic)	Content when MariaDB/MySQL detected or cPanel-managed MySQL
cPanel	Yes (Generic)	Content when cPanel detected else frosted overlay
Status	Yes	Always — host/agent health summary
Cron & Jobs	Yes	Always
Restore Backups	Yes	Always
Recipes	Yes	Always
Monitoring	Yes	Always
Settings	Yes	Always

Overview Tab

Member Overview

Purpose: Host-level operations on this Server — OS family, uptime, services, quick actions, TLS.



What you see

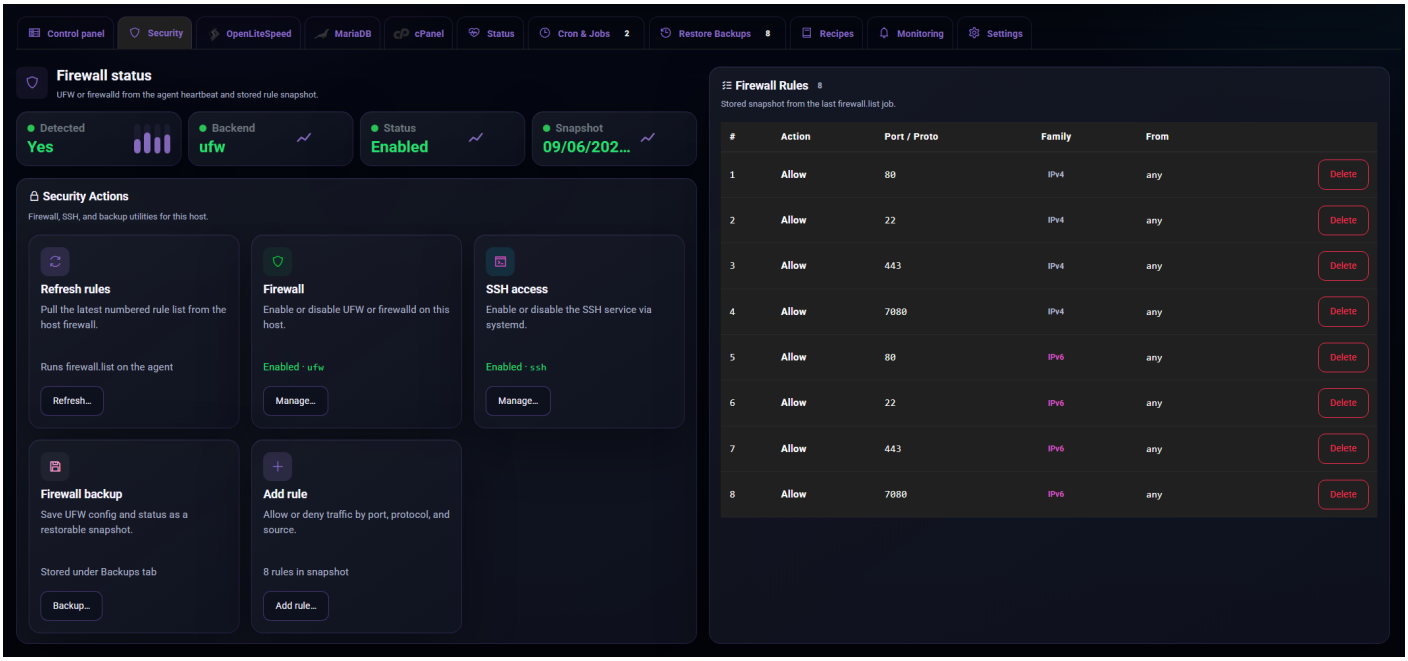
Section	Content
Health strip	Agent version, heartbeat age, firewall summary
Console	Open a secure SSH session to the member
KPI row	CPU, memory, disk, load
Quick actions	Reboot, shutdown, install updates, backup (stack-aware), Let’s Encrypt (when applicable)
Services	Running units relevant to detected stacks
SSL / TLS	Certificate expiry, sync domain from DNS
Recent activity	Latest completed jobs

Security Tab

Member Security

Tab: Security.

Use the **Security** tab to check and manage host-level firewall and SSH access for one server in a hosting pool. It is for server access control, not website, database, or cPanel account security.



What you can do

Area	What it is for
Firewall status	See whether a supported firewall backend is detected, which backend is in use, whether it is enabled, and when the rule list was last refreshed.
Security actions	Refresh firewall rules, enable or disable the firewall, manage SSH access, back up firewall rules, and add firewall rules.
Firewall rules	Review the latest stored rule snapshot and delete rules when needed.

Supported firewall views are based on what the member reports, commonly UFW or firewalld.

Free and Pro

Feature	Community	Pro
View firewall status from the latest member report	Included	Included
View SSH status from the latest member report	Included	Included
View stored firewall rule snapshots	Included	Included
Refresh firewall rules	Upgrade required	Included
Enable or disable firewall	Upgrade required	Included
Add firewall rules	Upgrade required	Included
Delete firewall rules	Upgrade required	Included
Enable or disable SSH service	Upgrade required	Included
Back up firewall rules	Upgrade required	Included

Community gives visibility. Pro gives controlled action: rule changes, firewall state changes, SSH access control, and firewall backups before risky changes.

Firewall status

Open **Pool**, choose the member, then select **Security**.

The firewall status area shows:

- Whether a supported firewall was detected.
- The firewall backend, such as UFW or firewalld.
- Whether the firewall is enabled or disabled.
- When the rule snapshot was last refreshed.

If the firewall is not detected, the member may not have a supported firewall installed or the agent may not have enough information yet. Refresh rules after fixing the host.

Refreshing rules

Use **Refresh rules** to pull a fresh firewall rule list from the host.

Refresh is useful after:

- You changed firewall rules outside ServersCTL.
- A backup or restore changed host security files.
- The rules table is empty or stale.

- You want to confirm the current live state before editing.

The rules table updates after the job completes. Check **Cron & Jobs** if the refresh does not appear to finish.

Managing the firewall

Use **Firewall** to enable or disable the detected firewall backend.

Before enabling the firewall:

- Make sure SSH is allowed from your access IP or management network.
- Make sure required web, database, control panel, and monitoring ports are allowed.
- Refresh the rule list so you can see what will apply.

Before disabling the firewall:

- Understand that inbound filtering is reduced or stopped until it is enabled again.
- Use this only for controlled troubleshooting or planned maintenance.

Existing rules are preserved. Refresh rules after the job completes so the table reflects the new state.

Adding rules

Use **Add rule** to allow, deny, or reject traffic by protocol, port, and source.

The form asks for:

Field	Meaning
Action	Allow, deny, or reject matching traffic.
Protocol	TCP or UDP.
Port	A single port or a valid range.
Source	`any` or an IPv4 CIDR range.
Comment	Optional note to make the rule easier to identify later.

Use narrow sources where possible. For example, allow SSH from your office or VPN range instead of allowing it from anywhere.

Deleting rules

Use **Delete** from the firewall rules table when a rule is no longer needed.

Deleting a rule can immediately change live traffic. Check the action, port, protocol, source, and comment before confirming.

SSH access

Use **SSH access** to enable or disable the SSH service on the host.

Disabling SSH may close current sessions and block new SSH logins. The balctl agent should continue running, so you can turn SSH back on from the Security tab when the member is still checking in.

Use this carefully. If the agent stops checking in and SSH is disabled, you may need console access from your server provider.

Firewall backup

Use **Firewall backup** before large firewall changes, migrations, or security cleanups.

Firewall backups are stored with the member's backups so they can be found from the backup and restore areas. Keep a backup before removing broad rules or changing access to production services.

What this tab does not manage

The Security tab is host-level only.

Not managed here	Where to manage it
cPanel users, packages, and account access	cPanel tab or WHM
AutoSSL and website certificates	cPanel or OpenLiteSpeed tools, depending on the server
Database users and grants	MariaDB / MySQL tab or database tools
DNS provider security	Managed DNS or provider settings

OpenLiteSpeed Tab

Member OpenLiteSpeed

Tab: OpenLiteSpeed.
Sub Tabs: Overview, Backups, Transfer Wizard

Use the **OpenLiteSpeed** tab to manage standalone OpenLiteSpeed servers in a hosting pool. It gives you one place to check the web server, create recovery points, restore sites, and move sites to another compatible OpenLiteSpeed server.

This tab is for servers running OpenLiteSpeed directly. cPanel servers use the cPanel tools instead.

What is included

Area	What you use it for
Overview	Check server health, open the WebAdmin panel, reload or restart OpenLiteSpeed, test configuration, update PHP packages, and create a server config backup.
Backups	Create site, web-file, database, and full recovery points for OpenLiteSpeed applications.
Transfer Wizard	Move an OpenLiteSpeed site to another compatible OpenLiteSpeed member.

Community and Pro

Feature	Community	Pro
View detected OpenLiteSpeed status	Included	Included
Open WebAdmin link and view basic server details	Included	Included
Refresh detected applications	Included	Included
View linked databases when discovered	Included	Included
Create OpenLiteSpeed backups	Upgrade required	Included
Restore OpenLiteSpeed backups	Upgrade required	Included

Feature	Community	Pro
Transfer sites between OpenLiteSpeed servers	Upgrade required	Included
Automatic DNS cutover after restore or transfer	Upgrade required	Included

Pro turns this tab from a read-only view into a recovery and migration workspace. It is designed for operators who need to move sites quickly, keep usable recovery points, and reduce manual rebuild work.

Overview

Open **Pool**, choose the OpenLiteSpeed member, then select **OpenLiteSpeed**.

The **Overview** area shows:

- WebAdmin access for the selected member.
- Current service state and key server details.
- Actions for reload, restart, configuration test, backup, upgrade, and PHP package updates.
- Recent log output when available.

Use **Config test** before restarting a busy server. If the test fails, fix the configuration first so the web server does not reload into a broken state.

Backups

Open **Backups** to work with detected OpenLiteSpeed applications.

Each application card shows the site name, document root, PHP and TLS information when available, linked databases when discovered, and the latest recovery point.

To create a recovery point:

1. Select the application.
2. Choose **Backup now**.
3. Pick the backup type.
4. Confirm the storage estimate and start the backup.

Common backup types:

Backup type	Use it when
Full site backup	You want the safest recovery point for a real application.

Backup type	Use it when
Files only	You only changed web files, themes, plugins, uploads, or static content.
Databases only	You only need a database snapshot for a linked schema.

Recovery points can be restored, downloaded, inspected, or deleted from the same workspace.

OpenLiteSpeed Transfer Wizard

Use the OLS **Transfer Wizard** when you want to move an OpenLiteSpeed site to another compatible OpenLiteSpeed member.

Transfer a Site (OpenLiteSpeed to OpenLiteSpeed)

To transfer a site:

1. Open **Transfer Wizard**.
2. Select the source application.
3. Choose a compatible destination member.
4. Confirm whether DNS will be updated manually or automatically.
5. Start the transfer and watch the progress panel.

Destination servers must be compatible. cPanel servers are not valid OpenLiteSpeed transfer targets, even if they also run LiteSpeed or expose similar services.

DNS cutover

After a restore or transfer, DNS still decides where visitors go.

Option	Availability	What happens
Manual DNS update	Community and Pro	The site is moved or restored, then you update the A record yourself.
Automatic DNS update	Pro	The platform updates the saved DNS provider record after the operation completes.

Automatic DNS is useful when you want a cleaner migration flow and already have a DNS key saved for the domain or account.

Good operating habits

- Run a full backup before major changes.
- Use configuration test before restarting OpenLiteSpeed.
- Keep enough storage for at least one known-good recovery point per important site.
- Confirm DNS after any restore or transfer.

- Use Pro for production migration and recovery workflows where speed matters.

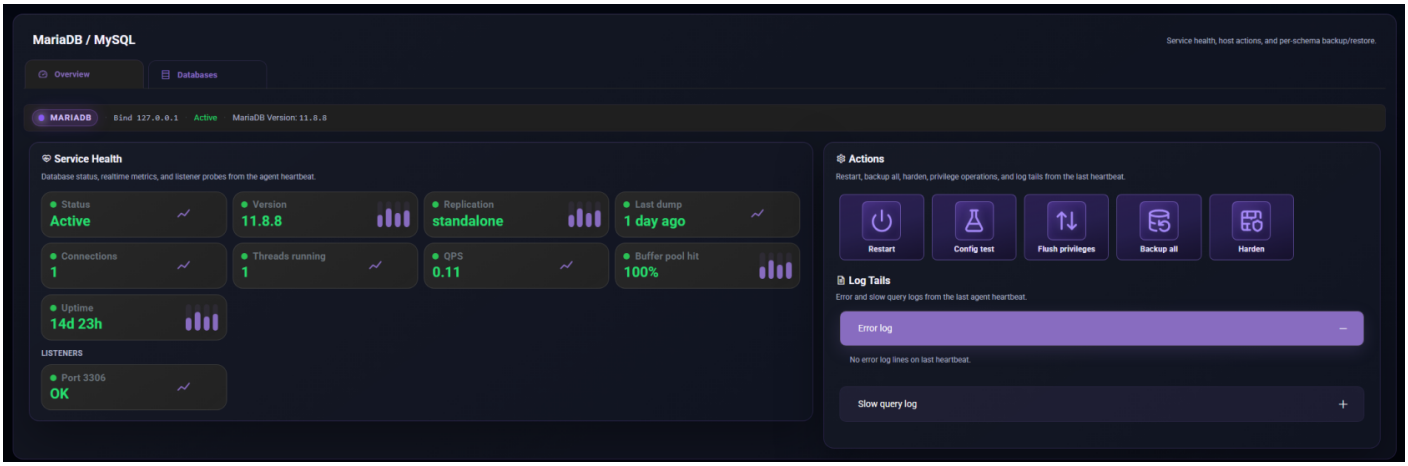
MariaDB/MySQL Tab

Standalone database server

Overview

Use the **MariaDB** / **MySQL** tab to check database service health, refresh the live database inventory, create database backups, and restore database versions when needed.

This tab appears for Generic Linux members. It is useful for dedicated database servers, OpenLiteSpeed servers with local databases, and cPanel servers where MySQL is managed by WHM.



What is included

Subtab	What you use it for
Overview	Check database service health, listener status, version, replication role, recent backup age, logs, and service actions.
Databases	View live schemas, refresh discovery, see backup versions, back up selected schemas, restore versions, and delete old database backups.

Free and Pro

Feature	Community	Pro
View service health and heartbeat-reported database status	Included	Included

Feature	Community	Pro
View version, listener, uptime, and basic metrics when available	Included	Included
View live database inventory	Included	Included
Refresh live database discovery	Included	Included
View existing backup versions	Included when available	Included
Back up all databases	Upgrade required	Included
Back up selected schemas	Upgrade required	Included
Restore database backup versions	Upgrade required	Included
Delete managed database backup versions	Upgrade required	Included
Choose a Storage Pool for database backups	Upgrade required	Included

Pro is for real database operations: scheduled recovery coverage, one-click backups before risky changes, schema-level restore, and storage-aware backup management.

Overview subtab

Open **Pool**, choose the member, select **MariaDB / MySQL**, then open **Overview**.

The Overview subtab shows:

- Database service status.
- Server version.
- Replication or Galera role when reported.
- Last all-databases backup age.
- Listener status, usually port 3306.
- Connections, running threads, queries per second, uptime, and buffer pool signals when available.
- Error and slow-query log tails from the latest member report.

Available actions include:

Action	Use it when
Restart	The database service needs a controlled restart.
Config test	You want to check database configuration before restarting.
Flush privileges	Database grants or users were changed and privileges need reloading.
Backup all	You want one recovery point containing all databases on the member.

Action	Use it when
Harden	You want the platform to apply supported database hardening guidance or actions.

On cPanel servers, the tab may show a cPanel host notice. Use the cPanel tab for WHM account work, but use **Databases** here to refresh and back up discovered application schemas.

Databases subtab

Open **Databases** to work with the live schema inventory.

The Databases subtab shows:

- Live schemas currently found on the server.
- Size and table count when available.
- Database engine details where reported.
- Backup version count for schemas with stored recovery points.
- The latest backup age for each backed-up schema.
- A discovery cache age so you know how fresh the list is.

Use **Refresh live** when you have added databases, restored accounts, moved sites, or changed application database settings. On cPanel and web hosts, discovery can also find application-linked schemas from known config files.

Backing up databases

To back up all databases:

1. Open **Overview**.
2. Choose **Backup all**.
3. Pick the Storage Pool if more than one is available.
4. Review the estimate and start the backup.

To back up selected schemas:

1. Open **Databases**.
2. Open the menu on the schema card.
3. Choose **Backup**.
4. Confirm the schemas and Storage Pool.
5. Start the backup.

The backup modal warns when the selected Storage Pool does not have enough remaining space.

Restoring versions

To restore a database version on Pro:

1. Open **Databases**.
2. Open the menu on a schema with backup versions.
3. Choose **Versions**.
4. Select the version you want.
5. Choose **Restore** and confirm.

Restoring a database can overwrite live data. Check the version date, source member, and schema name before confirming.

Deleting versions

Use **Delete** from the versions modal when you no longer need a stored database backup. Deletion is permanent, so keep at least one known-good recovery point for important schemas.

cPanel-managed MySQL

On cPanel servers, MySQL is shared across accounts. That means:

- WHM account tasks stay in the cPanel tab.
- Database inventory and schema backups stay in MariaDB / MySQL.
- Use **Refresh live** after adding or restoring cPanel accounts.
- Application-linked schemas may appear after discovery even when root-level metrics are limited.

Galera (`wsrep`) (In Alpha)

When Galera is enabled, the agent will report the wsrep state. ServersCTL does not run quorum, SST, or writer election. DNS is active ≠ Galera primary.

cPanel Tab

Use the **cPanel** member tab to manage a WHM server in a ServersCTL hosting pool. It brings server health, WHM accounts, account transfers, recovery actions, and cPanel service controls into one workspace for the selected server.

The cPanel tab is for WHM/cPanel servers. OpenLiteSpeed-only servers use the OpenLiteSpeed tab instead.

Free and Pro

Feature	Community	Pro
View cPanel overview and service state	Included	Included
View Operations health, metrics, logs, and WHM API status	Included	Included
View all WHM accounts and account details	Included	Included
Manual Agent Transfer between cPanel servers	Included	Included
Create, suspend, unsuspend, modify, or terminate accounts	Upgrade required	Included
One-time cPanel login links	Upgrade required	Included
cPanel account backups and AutoSSL actions	Upgrade required	Included
cPanel service restarts, config checks, hardening, and config backup	Upgrade required	Included
Automatic DNS update during Agent Transfer	Upgrade required	Included
Migrate & Recovery live WHM transfers	Upgrade required	Included
Pool Protection and scheduled replication	Upgrade required	Included

Community is enough for visibility and manual account copy workflows. Pro is for production hosting operations: account management, automated DNS cutover, recovery, live transfers,

backups, and service control.

Requirements

For the full cPanel workspace:

- The server must be enrolled as a pool member.
- The balctl agent must be checking in.
- cPanel/WHM must be detected.
- WHM must be linked for account and migration tools.
- A second compatible cPanel member is needed for transfer workflows.
- Saved DNS keys are needed for automatic DNS updates.

If the tab is visible but actions are unavailable, check the member **Status** tab, WHM link state, and plan level.

Subtabs

Subtab	What you use it for
Overview	See cPanel protection state, service badges, quick actions, WHM links, and account recovery topology.
Operations	Check cPanel service health, disk, network, WHM API status, metrics, logs, and server-level actions.
Accounts	List WHM accounts, inspect account details, create accounts, suspend, unsuspend, back up, log in, run AutoSSL, and terminate accounts.
Agent Transfer	Copy one account directly to another compatible cPanel server using the installed agents.
Migrate & Recovery	Start and monitor WHM live transfer sessions between cPanel members.

Some subtabs only appear after the server is detected as cPanel and WHM is linked for the pool.

Overview subtab

Use **Overview** as the first stop for a cPanel member.

The Overview subtab shows:

- The cPanel protection and recovery topology.
- Whether accounts are protected or have standby coverage.
- Service stack badges.
- Quick links to WHM and Webmail when available.
- Quick actions such as account creation or backup where available.
- WHM audit information when the server is linked.

Use this subtab to understand whether the selected server is acting as the live source, standby, or an unprotected cPanel host.

Operations subtab

Use **Operations** for server-level cPanel health and maintenance.

The Operations subtab shows:

- cPanel health and license state.
- Web, mail, cPanel, database, and related service state.
- Listener and network information.
- Disk usage and server metrics.
- WHM API status and DNS drift information.
- cPanel and mail log tails.

Common Pro actions:

Action	Use it when
Restart web	Apache/httpd is down or web traffic needs a controlled restart.
Restart mail	Exim or Dovecot needs a controlled restart.
Restart cPanel	WHM/cPanel services are unhealthy.
Config check	You want to check cPanel configuration health before changes.
Backup config	You want a cPanel metadata/config recovery point.
Harden ports	You want supported cPanel firewall/service hardening.
Refresh snapshot	You want the latest WHM service snapshot and DNS drift state.

Check **Cron & Jobs** after starting any action.

Accounts subtab

Use **Accounts** to work with WHM accounts on the selected server.

The Accounts subtab shows:

- All WHM accounts returned for the member.
- Domain, username, IP, plan, email, disk usage, and status where available.
- Filters for all, active, and suspended accounts.
- Account details in a drawer or modal.
- Protection and DNS hints when configured.

Community users can view the full list and inspect details. Pro users can also run account actions.

Pro account actions:

Action	What it does
Create account	Creates a WHM account with username, domain, password, plan, and contact email.
Suspend / Unsuspend	Changes whether an account can be used.
Login	Opens a one-time cPanel login session.
Backup	Creates a cPanel account backup.
Change package	Moves the account to another WHM package.
Reset password	Generates and shows a new password once.
Run AutoSSL check	Starts an AutoSSL check for accounts.
Terminate	Permanently removes the account after confirmation.

Termination is destructive. The confirmation asks you to type the domain so accidental deletion is harder.

Agent Transfer subtab

Agent Transfer is the member **cPanel** inner tab for one-shot **cPanel → cPanel** account copies between enrolled pool members. Agents package the source account, move the archive over a direct route or through user storage, restore on the destination with `restorepkg`, and optionally swing the DNS after the copy succeeds.

Direct Transfer security model

Direct Transfer is not an open file receiver and it is not general-purpose SSH access. The API acts as the control plane for a single copy operation:

1. **The authenticated operator starts a transfer.** The dashboard calls the Worker with the selected source member, destination member, cPanel username, route mode, and DNS handling choice. The Worker checks plan access, pool ownership, WHM/cPanel compatibility, account state, agent versions, destination disk, and route availability before creating the run.

2. **API creates a one-use session.** The Worker mints a random session ID, records the exact source node, destination node, account username/domain, expected byte count, destination address, source IP filter, status, and expiry. Session APIs reject unknown, expired, terminal, wrong-role, or wrong-status sessions.
3. **Only enrolled agents can advance it.** Source and destination agents call back using their normal enrolled heartbeat credentials. The Worker verifies that the calling node is the recorded source or destination for that session before accepting prepare, public-key registration, progress, transfer-complete, or restore-complete updates.
4. **The source generates an ephemeral SSH key.** The source agent creates a session-scoped keypair for this transfer. The private key stays on the source server. The public key is sent to the Worker, which queues an authorised job for the destination agent.
5. **Destination installs a restricted receiver key.** The destination agent writes the public key to root `authorized_keys` with a forced command for chunk receive only, plus `from=<source-ip>`, `no-port-forwarding`, `no-X11-forwarding`, `no-agent-forwarding`, `no-pty`, and `no-user-rc`. A matching `session.json` must exist before any chunk is accepted.
6. **Chunks are individually checked.** The source agent streams fixed-size chunks over SSH. The forced receiver accepts only `sessionId`, chunk index, and chunk SHA-256, reads the chunk from stdin, verifies the chunk hash, and writes it under that session's temporary receive directory.
7. **Archive integrity is checked before restore.** After transfer, the destination agent assembles the archive and verifies the final SHA-256 recorded on the session/run before calling `restorepkg`.
8. **Session cleanup is automatic.** On success, failure, expiry, or revoke, the destination removes the matching `authorized_keys` line and deletes the temporary session directory. The Worker will also queue `cpanel_account_sync_revoke` if the run fails before normal cleanup.

The session lifetime is time-limited. It has a 30-minute minimum and scales with package size using a conservative transfer-rate estimate, so a large package has enough time to complete without leaving a permanent receiver open.

This is the direct account transfer workspace. It is separate from scheduled Protection and separate from the WHM live transfer wizard.

To transfer an account:

1. Open **Agent Transfer** on the source cPanel member.
2. Choose or drag an active account.
3. Choose a compatible destination cPanel member.
4. Review the route preflight.
5. Choose DNS handling.
6. Start the transfer.
7. Watch the transfer spotlight until it completes.

DNS handling:

Option	Availability	What happens
Manual DNS update	Community and Pro	The account is copied. You update DNS yourself when ready.
Update A record automatically	Pro	ServersCTL uses a saved Cloudflare or cPanel DNS key after restore succeeds.

The direct route is preferred. If direct transfer cannot work and user storage is available, the transfer can use storage as the fallback route. If storage is required but unavailable, add storage or use another transfer method.

After a successful direct transfer, the temporary transfer access is cleaned up. The account archive may remain on the destination server for the user to remove when they are finished with it.

Migrate & Recovery subtab

Use **Migrate & Recovery** for live WHM transfer sessions between cPanel members.

This is a Pro workflow for native WHM transfers. It shows outgoing and incoming sessions for the selected server, including route, direction, status, DNS cutover state, and last update time.

To start a live WHM transfer:

1. Open **Migrate & Recovery**.
2. Choose **Start transfer**.
3. Pick the account.
4. Pick the target cPanel server.
5. Review preflight checks.
6. Decide whether DNS cutover should run.
7. Confirm and monitor the session.

Use the refresh button to update transfer sessions. If a completed transfer had DNS cutover enabled but DNS failed, use the retry option after fixing the DNS key or zone issue.

Agent Transfer vs Migrate & Recovery vs Protection

Tool	Best for
Agent Transfer	One-off account copy using ServersCTL agents. Community can use manual DNS; Pro can automate DNS.
Migrate & Recovery	Pro live WHM transfer sessions between cPanel members.
Pool Protection	Pro scheduled standby replication and failover readiness across protected accounts.

Use Agent Transfer when you want a direct copy now. Use Protection when you want ongoing standby coverage. Use Migrate & Recovery when you specifically want the WHM transfer workflow.

WHM Binding

Full WHM API when member matches pool `host`. Run WHM link check recipe after DNS connect.

Status Tab

Use the **Status** tab to see whether a server is online, reporting correctly, and ready for work. It is the first place to check when a member looks stale, jobs are not moving, or a server has not checked in recently.

What you can see

The Status tab shows a live operational summary for the selected member:

Area	What it tells you
Heartbeat	Whether the member is checking in and how recent the last signal was.
Agent version	The installed agent version and whether an update is available.
Host details	Hostname, operating system, uptime, and basic identity details.
Resources	CPU, memory, disk, and other capacity signals when reported by the member.
Security basics	Firewall and SSH status when available.
Updates	Whether the server appears to need package updates.

Some specialist members may show a tailored status view for their role, such as HAProxy.

Free and Pro

Feature	Community	Pro
View heartbeat and online state	Included	Included
View agent version and host details	Included	Included
View reported resource usage	Included	Included
View firewall, SSH, and update signals when reported	Included	Included
Use advanced tabs that act on status signals	Limited	Included

Feature	Community	Pro
Faster operational recovery using backup, transfer, and automation tools	Upgrade required	Included

The Status tab is included because every user needs to know whether their member is healthy. Pro adds the tools around that signal: backup, restore, transfer, scheduling, and automation.

How to use it

1. Open the pool.
2. Select the member.
3. Open **Status**.
4. Check the heartbeat first.
5. Review resource, update, firewall, and agent signals.

If the server is online but a feature is not behaving as expected, check **Cron & Jobs** next. That tab shows whether recent actions are queued, running, completed, or failed.

Common checks

What you see	What it usually means
Recent heartbeat	The agent is checking in and the member can be managed.
Stale heartbeat	The server, network, or agent may need attention.
Agent update available	Update the agent before testing new features.
High disk usage	Backups, restores, and transfers may fail unless space is freed.
Firewall warning	Remote access or service traffic may be blocked.

Cron & Jobs Tab

Member Cron & Jobs

Use **Cron & Jobs** to see scheduled work and recent server tasks for a member. It helps you confirm whether backups, discovery runs, refreshes, and other actions are queued, running, completed, or failed.

What it is for

Area	What you use it for
Schedules	View and manage recurring jobs for the selected member.
Recent jobs	Check the latest actions sent to the member.
Run now	Trigger a supported scheduled task immediately when available.
History	See whether work completed or needs attention.

Times are shown in the product interface for easy reading. When you are coordinating with logs or support, include the member name and the job time shown in the UI.

Free and Pro

Feature	Community	Pro
View recent jobs and outcomes	Included	Included
See existing schedules	Included	Included
Create recurring schedules	Upgrade required	Included
Edit, pause, resume, or delete schedules	Upgrade required	Included
Run scheduled jobs on demand	Upgrade required	Included
Use backup and discovery automation	Upgrade required	Included

Pro is where Cron & Jobs becomes automation instead of just visibility. It is intended for teams that want regular backups, routine discovery refreshes, and repeatable maintenance without manual

checklists.

Using recent jobs

Open **Cron & Jobs** and look at the recent job list.

Each job usually shows:

- What action was requested.
- The current state.
- When it started or finished.
- The member that handled it.
- Any visible failure reason.

If a job fails, use the failure message to decide the next step. Common causes are stale agent heartbeat, missing storage, low disk space, incompatible service type, or a feature that requires Pro.

Using schedules

Schedules are useful for repeated operational work.

To create a schedule on Pro:

1. Open **Cron & Jobs**.
2. Choose **Add schedule**.
3. Pick the job type.
4. Set the timing.
5. Confirm the target and save.

Use schedules for routine backups and refresh tasks. Avoid scheduling risky changes unless the result is easy to verify and recover from.

Good operating habits

- Check recent jobs after starting a backup, restore, transfer, or discovery run.
- Keep schedules simple and clearly named.
- Pause schedules during major migrations if they could interfere.
- Use Pro schedules for regular backup and discovery coverage.

Restore Backups Tab

Use **Restore Backups** to find recovery points for a member and put them back when something needs to be recovered. It is the recovery workspace for server backups, service backups, application backups, and other stored recovery points that belong to the member.

What you can do

Area	What it is for
Recovery timeline	Browse available backups by date and type.
Backup details	Inspect size, source, version, and what the recovery point contains.
Restore	Put a compatible backup back onto a server.
Download	Download a recovery point when available.
Delete	Remove old backups you no longer want to keep.
Run backup	Create a fresh backup when the member and plan support it.

Free and Pro

Feature	Community	Pro
View available recovery points	Included when storage is connected	Included
Inspect backup details	Included	Included
Download supported backups	Included when allowed by storage policy	Included
Create new cloud backups	Upgrade or storage required	Included with connected storage
Restore backups from the UI	Upgrade required	Included
Delete managed recovery points	Upgrade required	Included
Cross-member restore to compatible servers	Upgrade required	Included

Pro gives you the recovery controls that matter during an incident: create fresh backups, restore faster, and recover to compatible members without turning the process into manual file handling.

Finding a backup

1. Open the pool.
2. Select the member.
3. Open **Restore Backups**.
4. Use the timeline or filters to find the backup type you need.
5. Open the backup details before restoring.

Check the source member, backup type, date, and size before you restore. For full server or site backups, confirm the destination is compatible.

Restoring a backup

To restore on Pro:

1. Select the recovery point.
2. Choose **Restore**.
3. Review the compatibility and warning messages.
4. Confirm the target.
5. Start the restore.
6. Watch the job progress in **Cron & Jobs** if needed.

Restores are intentionally gated because they can overwrite live files, service configuration, databases, or accounts. If a restore target is incompatible, choose another server or use the correct product tab for that service.

Creating a fresh backup

Use **Run backup** when you want a new recovery point before maintenance, upgrades, migrations, or risky changes.

If the button is unavailable, the member may need connected storage, a supported backup type, a healthy agent heartbeat, or a Pro plan.

Compatibility rules

Backups should be restored to compatible servers.

Backup type	Restore expectation
OpenLiteSpeed site backups	Restore to compatible OpenLiteSpeed members.

Backup type	Restore expectation
cPanel account backups	Restore to compatible cPanel members.
Database backups	Restore where the database engine and target are suitable.
Service configuration backups	Restore only where the operating system and service match.

Do not use a backup to push Ubuntu service files onto a RHEL server, or cPanel account backups onto a non-cPanel host.

Tips

- Create a fresh backup before major work.
- Check Status before restoring.
- Check Cron & Jobs after starting the restore.
- Keep storage connected and healthy so recovery points can be created automatically.
- Use Pro for production recovery, cross-member restores, and faster rollback.

Recipes Tab

Use the **Recipes** tab to run guided setup, hardening, verification, TLS, and maintenance actions on one server. Recipes are designed for repeatable server tasks where the platform can do the routine work and then show whether the result is active, inactive, running, or needs review.

Recipes apply to the selected member only. Pool-wide features such as Protection, Managed DNS, and Storage Pools are managed from their own pool tabs.

What recipes are

Recipes are guided actions for common server tasks:

- Enable or disable SSH access.
- Harden cPanel, OpenLiteSpeed, or database firewall rules.
- Verify cPanel services.
- Check WHM linking.
- Back up cPanel configuration.
- Run AutoSSL after failover.
- Issue Let's Encrypt certificates where supported.
- Update the balctl agent.
- Show Galera state when detected.

The Recipes tab shows only recipes that make sense for the selected server. A cPanel server will show cPanel recipes. A database server will show database recipes. An OpenLiteSpeed server will show OpenLiteSpeed recipes.

Free and Pro

Feature	Community	Pro
View available recipe cards	Included	Included
View Active, Inactive, Running, and Needs review state	Included	Included
View read-only detected recipes such as Galera state	Included	Included
Run agent update when available	Included where allowed	Included
Run service verification recipes	Upgrade may be required	Included

Feature	Community	Pro
Run hardening recipes	Upgrade required	Included
Run TLS and certificate recipes	Upgrade required	Included
Run cPanel, OpenLiteSpeed, database, SSH, and backup actions	Upgrade required	Included
Disable supported recipe changes	Upgrade required	Included

Community is useful for visibility. Pro turns Recipes into a guided operations toolkit for production hosts.

Recipe card states

State	Meaning
Inactive	The recipe is available but not currently active on this member.
Running	A recipe job has been queued or is still being applied.
Active	The member reports the expected result.
Needs review	The recipe was seen before or may need attention, but the latest member report does not show it as fully active.

If a card says the agent must be updated first, run **Update balctl agent**, wait for the member to check in again, then return to the recipe.

Running a recipe

1. Open the pool.
2. Select the member.
3. Open **Recipes**.
4. Choose the recipe card.
5. Select **Enable**, **Run again**, **Verify link**, or **Update agent**, depending on the card.
6. Watch the card state.
7. Check **Cron & Jobs** if you want more job detail.

Some recipes can be disabled again from the card menu. Disable actions can affect access or service behavior, so read the confirmation before continuing.

Common recipes

Recipe	Use it when
Enable SSH access	SSH is disabled and you want the host SSH service available again.
Harden cPanel ports	You want cPanel/WHM service ports allowed and reviewed.
Verify cPanel services	You want a read-only cPanel health refresh without restarting services.
WHM link check	You want to confirm the server matches the linked WHM host and DNS setup.
Backup cPanel configuration	You want a WHM/cPanel configuration recovery point before changes.
AutoSSL after failover	DNS has moved to this cPanel host and you want AutoSSL checked.
Harden database	You want MySQL/MariaDB access rules reviewed.
Harden OpenLiteSpeed	You want HTTP, HTTPS, and WebAdmin access rules reviewed.
Let's Encrypt (this server)	You want host TLS for a domain under a linked DNS provider.
Let's Encrypt (failover / HAProxy)	You want TLS for a failover hostname on a HAProxy member.
Update balctl agent	A newer agent is available or a feature requires a newer agent.
Galera cluster	Galera has been detected and you want to see cluster-related status.

Install recipes for cPanel, OpenLiteSpeed, and MariaDB/MySQL may be launched from the relevant product area instead of appearing as general recipe cards. After installation is detected, the matching member tab becomes available or active.

TLS recipes

TLS recipes need a compatible DNS setup because certificate validation may require DNS changes.

Before running TLS recipes:

- Make sure the domain is controlled by a saved DNS provider.
- Confirm the member is healthy and checking in.
- Update the agent if the recipe asks for a newer version.
- Know where the certificate will be used after it is issued.

Use the Control panel or service-specific tab after the certificate is issued if the web server still needs configuration.

Hardening recipes

Hardening recipes usually adjust or verify firewall/service access for the selected stack.

Before running a hardening recipe:

- Check the **Security** tab so you understand current firewall state.
- Make sure SSH remains allowed from a trusted source.
- Confirm the service ports you expect customers to use.
- Create a backup where available before major changes.

Hardening helps with standard access rules, but it does not replace a full security review.

WHM and cPanel recipes

cPanel recipes appear when cPanel is detected.

Use them to:

- Check the WHM link.
- Verify cPanel services.
- Harden cPanel ports.
- Back up cPanel configuration.
- Trigger AutoSSL after failover.

Account management still belongs in the **cPanel** tab. Scheduled standby replication still belongs in the pool **Protection** tab.

Monitoring Tab

Use the member **Monitoring** tab to choose alert thresholds for one server. This is different from pool **Monitoring**, which handles fleet-level and protection/failover alerts.

Member Monitoring answers: when should this specific server email me because heartbeat, CPU, memory, disk, cPanel service, or cPanel account quota needs attention?

What you configure

Area	What it is for
Heartbeat	Email when the agent stops checking in.
CPU	Email on sustained high CPU usage.
Memory	Email on sustained memory pressure.
Disk space	Email when the root filesystem reaches a selected usage level.
cPanel service alerts	Email when selected core cPanel services are down.
Hosting account disk quota	Email when WHM accounts on the member reach a disk threshold.
Recovery notifications	Email when the member recovers after an alert state.

Alert recipients are managed in member **Settings**. Monitoring controls what triggers an alert; Settings controls who receives it.

Free and Pro

Feature	Community	Pro
View live monitoring state	Included	Included
Heartbeat alert at community timing	Included	Included
Faster heartbeat alert presets	Upgrade required	Included
CPU, memory, and disk threshold alerts	Upgrade required	Included

Feature	Community	Pro
cPanel service-down alerts	Upgrade required	Included
cPanel hosting account quota alerts	Upgrade required	Included
Recovery notification emails	Upgrade required	Included

Community gives basic heartbeat awareness. Pro gives proper server operations alerts, with faster timing and resource/service thresholds.

Alerts

Infrastructure alerts

The first section covers the server itself.

Alert	Useful when
Heartbeat	You want to know the agent stopped checking in.
CPU	You want alerts for sustained compute pressure.
Memory	You want alerts before memory pressure affects services.
Disk space	You want warnings before the root filesystem fills.

CPU and memory alerts need telemetry from the agent and are based on sustained usage, not one short spike.

cPanel alerts

When cPanel is detected, Monitoring also shows cPanel-specific alert presets.

Use cPanel service alerts for services such as web, mail, database, and other core WHM services reported by the member. Use hosting account disk quota alerts to watch WHM account disk usage across accounts on that server.

These alerts are Pro features because they are production hosting controls, not just basic host reachability.

Saving monitoring settings

1. Open the pool.
2. Select the member.
3. Open **Monitoring**.
4. Choose the alert presets you want.
5. Click **Save monitoring settings**.

If a preset is disabled, it usually requires Pro or an active trial, or the matching service has not been detected on that member.

Settings Tab

Use member **Settings** to manage identity, allowed source IPs, alert recipients, agent update behavior, WHM access, and member removal for one enrolled server.

This tab is for the selected member only. Pool name, pool deletion, Managed DNS, Storage Pools, and Protection settings live in their own pool-level areas.

What you can manage

Section	What it is for
Member details	Friendly name, agent hostname, and allowed source IPs.
Alert recipients	Account email toggle and additional team email addresses for monitoring alerts.
Agent updates	Installed agent version, update channel, and auto-update setting.
WHM API key	cPanel account discovery and recovery access for this member.
Danger zone	Remove the member from the pool.

Free and Pro

Feature	Community	Pro
View member details	Included	Included
View alert recipient settings	Included	Included
Send alerts to account email where available	Included	Included
Edit member name, hostname, and allowed IPs	Upgrade required	Included
Add extra team alert recipients	Upgrade required	Included
Change agent update channel and auto-update	Upgrade required	Included

Feature	Community	Pro
Add, edit, rotate, or remove WHM API key	Upgrade required	Included
Remove member from pool	Upgrade required	Included

Community keeps settings visible. Pro gives the operational controls needed for teams and production hosting.

Member details

Member details control how the server is identified and allowed to connect.

Field	Meaning
Friendly name	Display name shown in the pool UI.
Agent hostname	Hostname the member should report as.
Allowed source IPs	Public egress IP addresses allowed to contact ServersCTL for this member.

Be careful when editing allowed IPs. If the member's real egress IP is removed, the agent may stop checking in until the allowed list is corrected.

Alert recipients

Settings controls who receives monitoring emails.

You can:

- Send alerts to the account email.
- Add extra team email addresses on Pro.
- Remove extra recipients.
- Save recipient changes.

The alert rules themselves are configured in the member **Monitoring** tab.

Agent updates

The Agent updates card shows the installed agent build and lets Pro users choose:

Setting	Meaning
Production	Normal release channel for most users.
Stable	Conservative channel when available.
Development	Early channel for testing newer builds.
Auto-update	Lets the member update itself according to the selected channel.

Use Production for normal production servers unless support asks you to use another channel.

WHM API key

When cPanel is detected, Settings shows a **WHM API key** card.

The member WHM key is used for cPanel account discovery and local WHM operations for that server, such as account management and recovery checks. It is not the same as a DNS provider key.

Available Pro actions:

Action	What it does
Add WHM API key	Links this cPanel member to WHM access.
Rotate key	Replaces the saved key.
Edit	Updates WHM connection details.
Remove	Removes the saved WHM access for this member.

DNS cutover keys belong in Managed DNS, not in member Settings.

Remove member

The Danger zone lets Pro users remove the member from the pool.

Removing a member detaches it from the pool so it can be enrolled again with a fresh key. Do this only when you are sure the server should no longer be managed from this pool.

Before removing a member:

- Check whether it is used by Protection, Agent Transfer, or recovery workflows.
- Confirm you no longer need its backups or history from the pool view.
- Make sure you know how to reinstall or re-enrol the agent if needed.