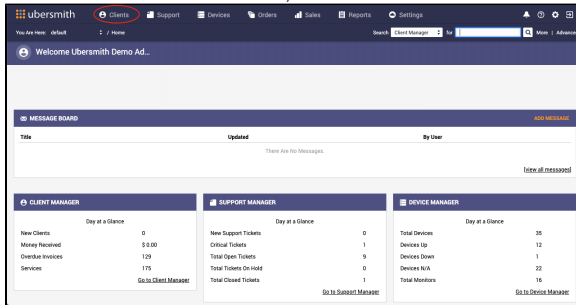


Managing Clients

Once you have [created a client](#), you can perform various actions on it.

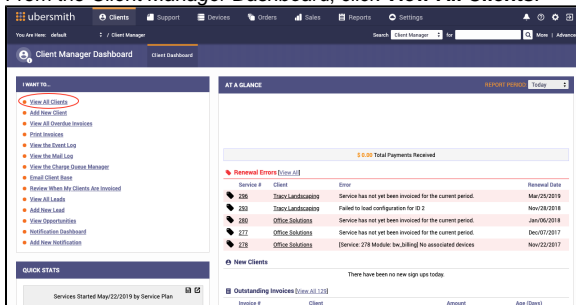
Access the Client Profile Page

1. From the *Ubersmith Dashboard*, click **Clients**.



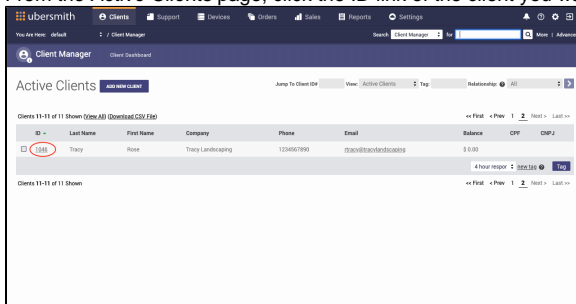
The *Client Manager Dashboard* appears.

2. From the *Client Manager Dashboard*, click **View All Clients**.



The *Active Clients* page appears.

3. From the *Active Clients* page, click the ID link of the client you want to manage.

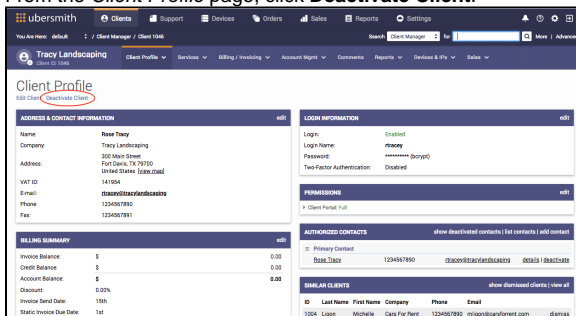


The *Client Profile* page appears.

Deactivating Clients

If you deactivate a client, you will turn off all services and credits, remove any queued charges, and disregard any outstanding invoices. You can use Ubersmith's [API](#) to deactivate many clients at once, using `client.deactivate`. Reactivating a client will not restore deactivated services, credits, queued charges or invoices.

1. [Access the Client Profile page](#).
2. From the *Client Profile* page, click **Deactivate Client**.



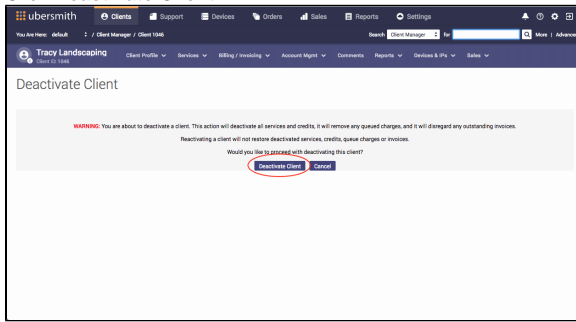
The *Deactivate Client* page appears.

On this page:

On this page:

- [Access the Client Profile Page](#)
- [Deactivating Clients](#)
- [Reactivating Clients](#)
- [Editing Clients](#)
- [Managing Address & Contact Information](#)
- [Managing Login Information](#)
- [Managing Permissions](#)
- [Managing Billing Summary Information](#)
- [Managing Account Information](#)
- [Managing Authorized Contacts](#)
- [Managing Similar Clients](#)
- [Managing Custom Fields](#)
- [Related Topics](#)

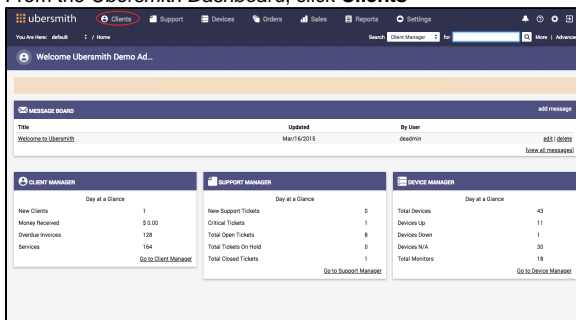
3. Click **Deactivate Client**.



Reactivating Clients

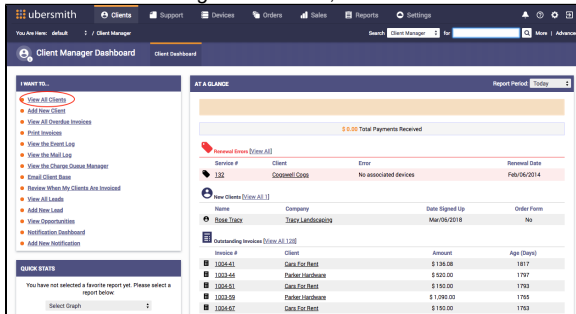
Reactivating clients only reactivates the client account and does not restore deactivated services, credits, queue charges or invoices. You can use Ubersmith's [API](#) to reactivate many clients at once, using client.reactivate.

1. From the *Ubersmith Dashboard*, click **Clients**



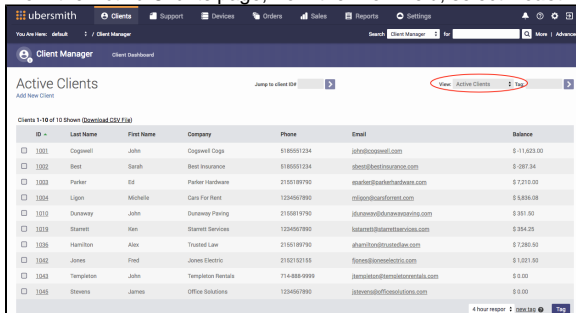
The *Client Manager Dashboard* appears.

2. From the *Client Manager Dashboard*, click **View All Clients**.



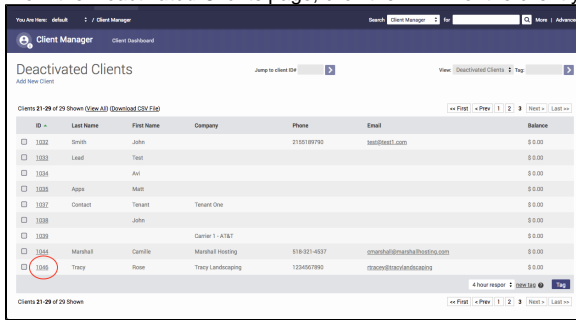
The *Active Clients* page appears.

3. From the *Active Clients* page, from the **View** field, select **Deactivated Clients**.



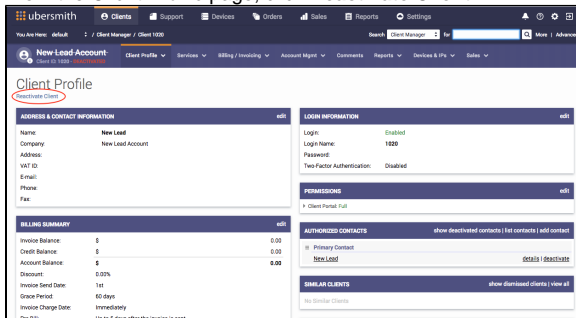
The *Deactivated Clients* page appears.

- From the *Deactivated Clients* page, click the ID link of the client you want to activate.



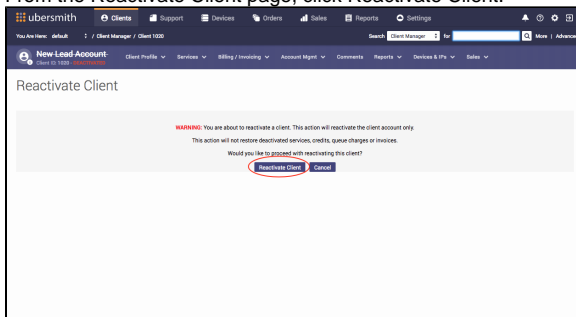
The *Client Profile* page appears.

- From the *Client Profile* page, click **Reactivate Client**.



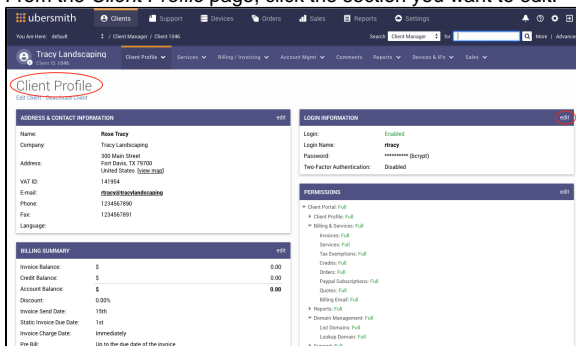
The Reactivate Client page appears.

- From the Reactivate Client page, click Reactivate Client.



Editing Clients

- Access the *Client Profile* page.
- From the *Client Profile* page, click the section you want to edit.



The *Edit* page for that section appears.

- Make any necessary updates.
- Click **Save**.

Managing Address & Contact Information

- Access the *Client Profile* page.

- Click **edit** in the *Address & Contact Information* section.

The *Edit Client* page appears.

- Make any necessary updates.

Note

If you need to change the client's email address, you must first provide ***your*** current password.

- Click **Save**.

Managing Login Information

- Access the *Client Profile* page.
- Click **edit** in the *Login Information* section.

The *Login Options* page appears.

- Make any necessary updates.

4. Click **Save**.

Managing Permissions

1. Access the [Client Profile](#) page.
2. Click **edit** in the *Permissions* section.

The *Client Permissions* page appears.

3. Make any necessary updates. See [Client](#), [Contact](#), and [Leads Permission Details](#) for more information.
4. Click **Update**.

Managing Billing Summary Information

1. Access the [Client Profile](#) page.

- Click **edit** in the *Billing Summary* section.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Billing/Invoicing' tab is selected. The 'Billing Summary' section is highlighted with a red box, and the 'edit' link next to it is also highlighted. The 'Billing Summary' section includes fields for Invoice Balance, Credit Balance, Account Balance, Discount, Invoice Send Date, Static Invoice Due Date, Invoice Charge Date, Pre Bill, Default Auto-Payment Method, Late Fee Schedule, Invoice Delivery, Account Credits, and Client Since.

The *Edit Client* page appears with the *Billing/Invoicing* tab active.

- Make any necessary updates.
- Click **Save**.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Billing/Invoicing' tab is selected and highlighted with a red box. The page shows various client details and billing settings. The 'Save' button is highlighted with a red box.

Managing Account Information

- Access the *Client Profile* page.
- Click **edit** in the *Account Information* section.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Account Info' tab is selected. The 'Account Information' section is highlighted with a red box, and the 'edit' link next to it is also highlighted. The 'Account Information' section includes fields for Business, Referral by, Default Ticket Priority, Avatar, User, Relationship, Subperson, and Custom Fields.

The *Edit Client* page appears with the *Account Info* tab active.

- Make any necessary updates.

- Click **Save**.

Managing Authorized Contacts

See [Managing Contacts](#) for more information.

Managing Similar Clients

The similar clients section lists other clients with similar demographic information, such as address and phone number. This functionality aids in fraud detection. You can review similar clients to ensure that the clients listed are not related.

- Access the [Client Profile](#) page.
- Click the **ID** link to view the similar client.

ID	Last Name	First Name	Company	Phone	Email
1084	Spinn	Michael	Cars For Rent	1234567890	spinn@carsforrent.com
1083	Stewart	Ken	Stewart Services	1234567890	stewart@stewartservices.com
1085	Stevens	James	Office Solutions	1234567890	stevens@officesolutions.com

The similar client's *Client Profile* page appears.

- Review the similar client to ensure they are not related to the original client.
- Click **dismiss** in the *Similar Clients* section.

ID	Last Name	First Name	Company	Phone	Email
1084	Spinn	Michael	Cars For Rent	1234567890	spinn@carsforrent.com
1083	Stewart	Ken	Stewart Services	1234567890	stewart@stewartservices.com
1085	Stevens	James	Office Solutions	1234567890	stevens@officesolutions.com
1086	Tracy	Rose	Tracy Landscaping	1234567890	tracy@tracylandscaping.com

A confirmation message appears.

- Click **Yes**.

Managing Custom Fields

- Access the [Client Profile](#) page.

2. Click **edit** in the *Custom Fields* section.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Custom Fields' tab is selected and highlighted with a red circle. The page is divided into several sections: 'Overview' (top left), 'ACCOUNT INFORMATION' (middle left), 'USER RELATIONSHIPS' (bottom left), 'SIMILAR CLIENTS' (bottom left), 'AUTHORIZED CONTACTS' (top right), 'SIMILAR CLIENTS' (middle right), 'TAGS' (bottom right), and 'LATEST COMMENT' (bottom right). The 'Custom Fields' section is currently empty, showing a table with columns for 'Field' and 'Value'.

The *Edit Client* page appears with the *Custom Fields* tab active.

3. Make any necessary updates.
4. Click **Save**.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Custom Fields' tab is selected and highlighted with a red circle. The page is divided into several sections: 'Cloud Billing', 'SolusVM', 'Boleto', and 'Similar Clients'. The 'Cloud Billing' section has a 'Cloud Account ID' field. The 'SolusVM' section has fields for 'SolusVM Client ID', 'SolusVM Client Username', 'SolusVM Client Password', and 'SolusVM Host Device ID'. The 'Boleto' section has fields for 'CNPJ', 'CPF', and 'Similar Clients'. The 'Similar Clients' section has a 'Retail' field with radio buttons for 'Yes' and 'No'. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red circle.

Related Topics

[Adding Clients](#)

[Adding Contacts](#)

[Managing Contacts](#)

[Using the Ubersmith API](#)