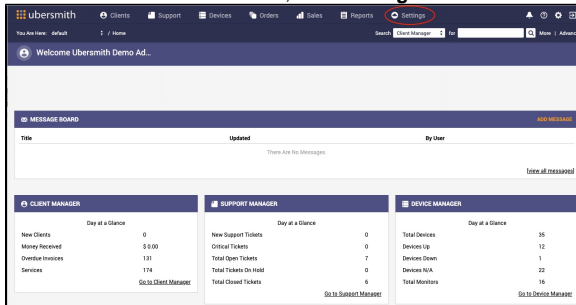


Adding Service Agreements

You can upload master service agreement (MSA) PDF files that are included in the body of finished contracts when quotes are signed. MSAs are signed as part of the service contract.

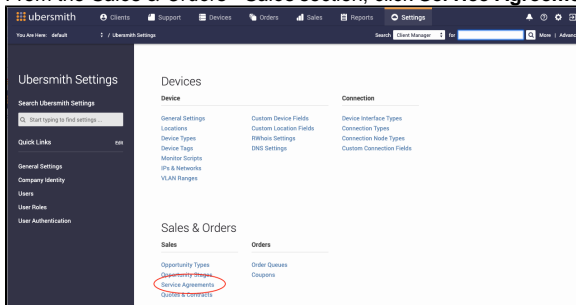
Accessing the Service Agreements Page

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



The *Ubersmith Settings* page appears.

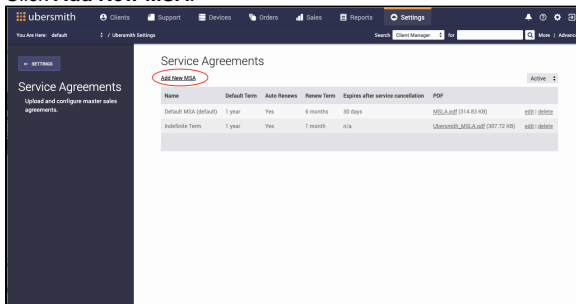
2. From the *Sales & Orders - Sales* section, click **Service Agreements**.



The *Service Agreements* page appears.

Completing the Add Service Agreement Page

1. Click **Add New MSA**.



The *Add Service Agreement* page appears.

2. In the **Name** field, enter the name of the service agreement.
3. In the **Term** field, enter the time frame for the agreement to be active, then select **Months** or **Years**.
4. In the **Auto Renew** field, select **Yes** if you want the agreement to automatically renew once the term has been reached.
5. In the **Renewal Term** field, enter the time frame for the renewal to be active, then select **Months** or **Years**.
6. In the **Expires after service cancellation** field, select **Yes** if you want the agreement to expire after the related service has been cancelled.
7. In the **PDF** field, click **Choose File** and navigate to the location of your PDF to upload.
8. In the **Default** field, select **Yes** to make this agreement your global default agreement.

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9. Click **Save**.

The screenshot shows a web application interface for 'ubersmith' with a header bar. Below the header is a form titled 'Add Service Agreement'. The form contains the following fields and controls:

- Name:** A text input field containing 'Trial to Perm'.
- Term:** A dropdown menu showing '3' and 'Months'.
- Auto Renew:** Radio buttons for 'Yes' (selected) and 'No'.
- Renewal Term:** A dropdown menu showing '9' and 'Months'.
- Expires after service cancellation:** A dropdown menu showing '30' and 'Days'.
- PDF:** A text input field containing 'Choose File', 'Trial to Per...reement.pdf'.
- Default:** Radio buttons for 'Yes' and 'No' (selected).

At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red.

Related Topics