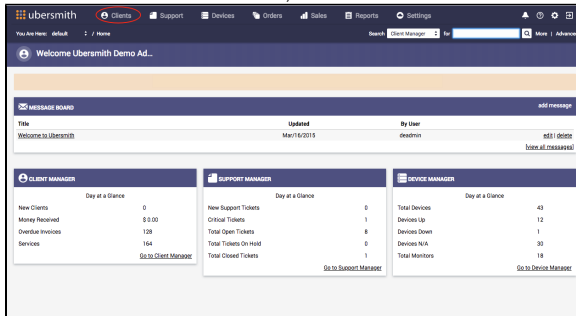


Adding Clients

Adding clients begins the process of billing for services. You can use Ubersmith's [API](#) to add many clients at once, using `client.add`.

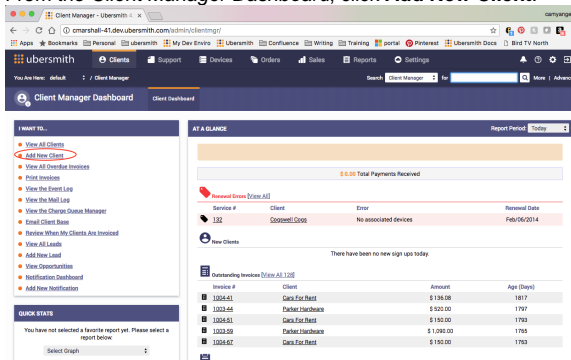
Access the Add New Client page

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



The *Client Manager Dashboard* appears.

2. From the *Client Manager Dashboard*, click **Add New Client**.



The *Add New Client* page appears.

On this page:

On this page:

- [Access the Add New Client page](#)
- [Complete the Contact Info Tab](#)
- [Complete the Login & Password Tab](#)
- [Complete the Billing/Invoicing Tab](#)
- [Complete the Account Info Tab](#)
- [Complete the Permissions Tab](#)
- [Complete the Custom Fields Tab](#)
- [Related Topics](#)

Complete the Contact Info Tab

1. In the **First Name** field, enter the client's first name.
2. In the **Last Name** field, enter the client's last name.
3. In the **Company** field, enter the client's company.
4. In the **Country/Territory** field, select the country or territory the client's company resides in.
5. In the **Address** field, enter the client's address.
6. In the **City** field, enter the client's city.
7. In the **State** field, select the client's state.
8. In the **ZIP Code** field, enter the client's ZIP code.
9. In the **VAT ID** field, enter the client's value added tax ID number.
10. In the **Phone** field, enter the client's telephone number.
11. In the **Fax** field, enter the client's fax number.
12. In the **Email** field, enter the client's email address, which will be used as the default address for billing and account-related emails.

13. In the **Salesperson** field, select the client's sales person.

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Add New Client

Contact Info | **Login & Password** | Billing/Invoicing | Account Info | Permissions | Custom Fields

First Name: Pete
Last Name: Tracy
Company: Tracy Landscaping
Country/Territory: United States
Address: 303 Main Street
City: Fort Davis
State: Texas ZIP Code: 79708
EXT ID: 141554
Phone: 1234567890 Fax: 1234567890
Email: tracy@tracylandscaping
Salesperson: Ubersmith Demo Admin

Fields marked with a red asterisk are required.

Save Save & New Cancel

Complete the Login & Password Tab

1. Click the *Login & Password* tab.
2. Select the **Enable Login** field to give the client user access to Ubersmith's Client Portal.
3. In the **Login** field, enter the client's login ID.
4. In the **Password** field, enter the client's password.
5. Click the **auto generate** link to have Ubersmith generate a password.
6. In the **Confirm Password** field, enter the client's password a second time.

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Add New Client

Contact Info | **Login & Password** | Billing/Invoicing | Account Info | Permissions | Custom Fields

Password Requirements:
- Password must not be the same as the username
- Password must be at least 7 characters
- Password must contain both alphabetic and numeric characters
- Password cannot be one of the last 4 passwords used

Enable Login: ☒
Login: Tracy
Password: Pete [auto generate]
Confirm Password: Pete

Fields marked with a red asterisk are required.

Save Save & New Cancel

Complete the Billing/Invoicing Tab

1. Click the *Billing/Invoice* tab.
2. In the **Brand** field, select the appropriate brand to list the client under.
3. In the **Default Discount Level** field, enter the discount amount to be applied to any service. You can further customize the amount by selecting percent or dollars. This discount will be applied to any new service added after this field is populated.
4. In the **Invoice Send Date**, select the day of the month to invoice the client. This field displays only if you selected monthly invoicing.
5. In the **Invoice due dates determined by** field, select **Grace Period** to set a range of days the invoice can be paid before its late or select **Static Due Date** to set the date the payment is due each month.
6. In the **Invoice Grace Period** field, enter the number of days between when an invoice is generated and when payment is due. This field displays only if you selected Grace Period.
7. In the **Monthly Invoice Due Date** field, enter the day of the month the invoice is due. This field displays only if you selected Static Due Date.
8. In the **Pre Bill** field, select either **Do not pre-bill**, **Pre-bill up to the [number] days after the invoice is generated**, or **Pre-bill up to the invoice due date**. This determines how far ahead the invoice generation will bill for upcoming service starts or renewals.
9. In the **Invoice Charge Date** field, select **Immediately** to charge the client's credit card as soon as the invoice is generated, **After [number] days** to charge the client's credit card on the date you set, or **On Invoice Due Date**. This determines when Ubersmith will automatically charge the client's card after the invoice is generated.

10. In the **Retry Failed CC Charges Every [number] days** field, enter the number of days to retry automated payments after a transaction has failed.
11. In the **Late Fee Schedule** field, select a late fee schedule to charge the client if they do not pay their invoice on time. See Late Fee Schedules in Settings to configure these options.
12. In the **Invoice Delivery** field, select the invoice delivery method. See Clients Billing Settings to configure these options.
13. In the **Default Renewal Date** field, select either **Do No Auto-Prorate** or the number of days to specify what day of the month new services should be automatically prorated to when created. For example, if you select 1, then add a service on the 10th, it will be auto prorated from February 10th to March 1.
14. In the **Automatically Apply Account Credits** field, select either **Automatically Apply to All Invoices**, **Automatically Apply to New Invoices**, or **Do Not Automatically Apply**.

The screenshot shows the 'Add New Client' form with the 'Billing/Invoicing' tab selected. The 'Retry Failed CC Charges Every' field is set to 1 day. The 'Automatically Apply Account Credits' field is set to 'Automatically Apply to All Invoices'. Other fields include Branch (default), Default Discount Level (15%), Invoice Due Date (15), Invoice due dates determined by (Grace Period), Monthly Invoice Due Date (1), Pre Bill (Do not pre bill), Invoice Charge Date (Immediately), Retry Failed CC Charges Every (1 days), Late Fee Schedule (No Late Fee), Invoice Delivery (Email Only), and Default Renewal Date (Do Not Auto-Prorate).

Complete the Account Info Tab

1. Click the *Account Info* tab.
2. In the **Business** field, select **Yes** if your client is a business or **No** if your client is an individual.
3. In the **Referred By** field, enter the name of the person who referred your client.
4. In the **Default Ticket Priority** field, select the priority of any submitted support tickets.
5. In the **Status** field, select **Active** if the client is a current customer or **Lead** if the client is only a potential customer.
6. In the **Avatar** field, select either **Gravatar** or **Custom Avatar**. If you selected Custom Avatar the **Choose File** field enables. Click **Choose File**, navigate to the location of your avatar file, and click **Open**. A 50 x 50 pixel GIF, JPG, or PNG file can be uploaded and used. In order to enable the **Avatar** field, you must select **Admin & Client Interface** in the *Avatar Settings* section on the Support General Settings page. To display client avatars using Gravatar, your client needs to upload a file to gravatar.com, which Ubersmith will pull from.

The screenshot shows the 'Add New Client' form with the 'Account Info' tab selected. The 'Business' field is set to Yes, 'Referred By' is empty, 'Default Ticket Priority' is Normal, 'Status' is Active, and 'Avatar' is Gravatar. The 'Choose File' field is disabled.

Complete the Permissions Tab

This tab sets permission for Ubersmith's Client Portal.

1. Click the *Permissions* tab.

2. **Expand** each appropriate Ubersmith section.
3. In the **View**, **Create**, **Update**, and **Delete** column select the appropriate permission for each system function. Select **Allow** to let the client view the section, select **Inherit** to use the previously assigned permission, or select **Deny** to not allow the client access. See [Client, Contact, and Leads Permission Details](#) for more information.

The screenshot shows the 'Add New Client' form in Ubersmith. The 'Permissions' tab is selected and highlighted with a red circle. The form displays a table of permissions for various resources, with columns for View, Create, Update, and Delete. The 'Permissions' tab is selected, and the 'Custom Fields' tab is also visible.

Resource	View	Create	Update	Delete
Client Portal	Allow	Allow	Allow	Allow
Client Profile	Inherit	Inherit	Inherit	Inherit
Billing & Services	Inherit	Inherit	Inherit	Inherit
Reports	Inherit	Inherit	Inherit	Inherit
Device Management	Inherit	Inherit	Inherit	Inherit
Support	Inherit	Inherit	Inherit	Inherit
Device Manager	Inherit	Inherit	Inherit	Inherit
Role Link	Inherit	-	-	-

Complete the Custom Fields Tab

1. Click the *Custom Fields* tab.
2. If you have any custom client fields set up in your Ubersmith instance, they will display here. See [Adding Custom Client Data Fields](#) to configure these options.
3. Click **Save** or **Save & New**.

The screenshot shows the 'Add New Client' form in Ubersmith. The 'Custom Fields' tab is selected and highlighted with a red circle. The form displays fields for Client Billing, Client Account ID, SoluVM Client ID, SoluVM Client Username, SoluVM Client Password, and SoluVM Host Device ID. The 'Custom Fields' tab is selected, and the 'Permissions' tab is also visible.

Related Topics

[Managing Clients](#)

[Using the Ubersmith API](#)