

# Adding Quotes

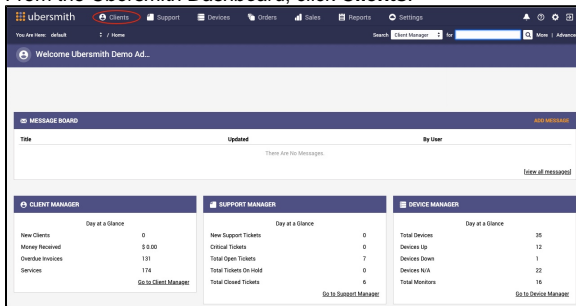
You can build fully customized quotes for new leads and existing clients with service agreements that can be signed online through Ubersmith. Once quotes are internally approved and signed, the included services are automatically moved and processed through Ubersmith's *Order Manager*.

## Accessing the Add Quote Page

Quotes are created from the *Quotes* page, accessed from either the *Client Profile* page, the *View Lead* page, or the *View Opportunity* page.

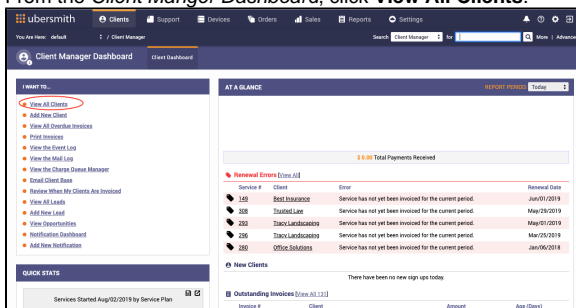
## From the Client Profile Page

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



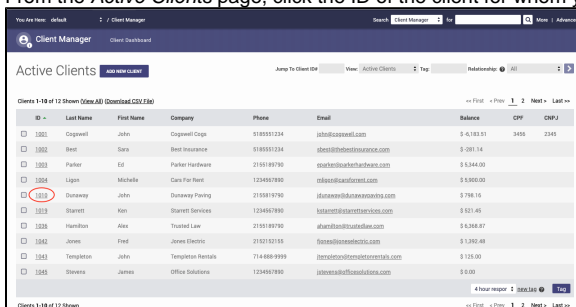
The *Client Manager Dashboard* appears.

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



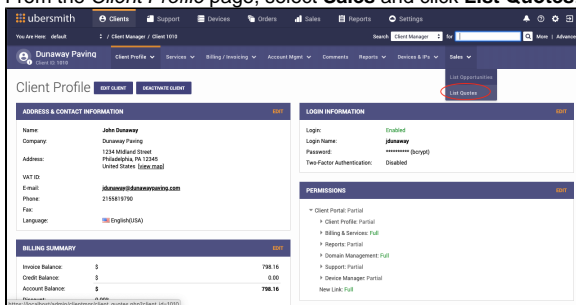
The *Active Clients* page appears.

3. From the *Active Clients* page, click the ID of the client for whom you want to add a quote.



The *Client Profile* page appears.

4. From the *Client Profile* page, select **Sales** and click **List Quotes**.



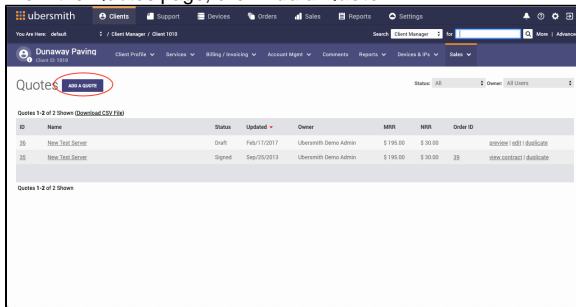
The *Quotes* page appears.

On this page:

On this page:

- [Accessing the Add Quote Page](#)
  - [From the Client Profile Page](#)
  - [From the View Lead Page](#)
  - [From the View Opportunity Page](#)
- [Completing the Add Quote page](#)
- [Completing the Add Services Page](#)
  - [Complete the Service Info Tab](#)
  - [Complete the Taxes Tab](#)
  - [Complete the Notes Tab](#)
  - [Complete the Custom Fields Tab](#)
- [Related Topics](#)

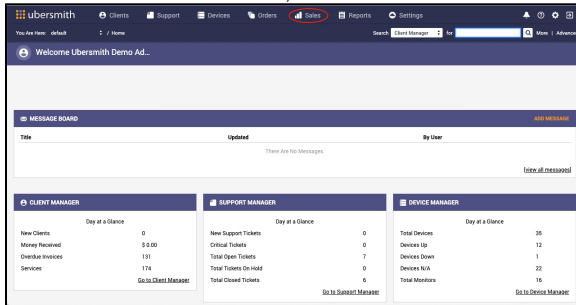
- From the *Quotes* page, click **Add a Quote**.



The *Add Quote* page appears.

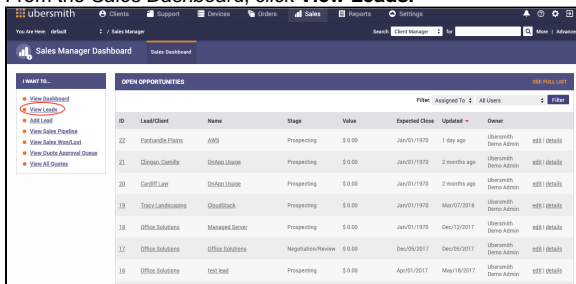
## From the View Lead Page

- From the *Ubersmith Dashboard*, click **Sales**.



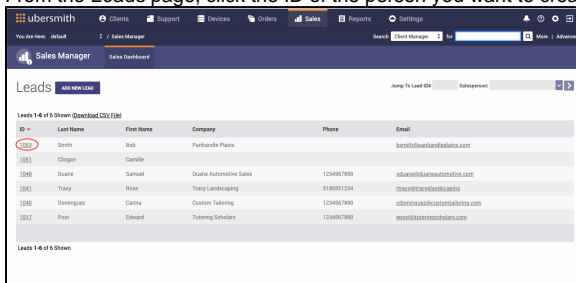
The *Sales Dashboard* appears.

- From the *Sales Dashboard*, click **View Leads**.



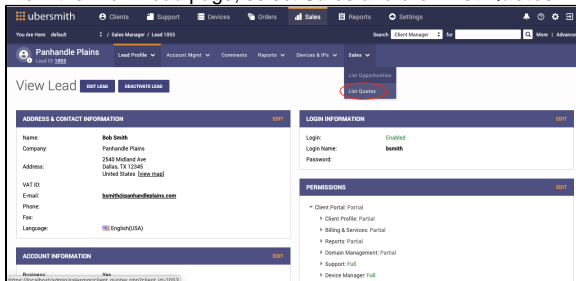
The *Leads* page appears.

- From the *Leads* page, click the ID of the person you want to create a quote for.



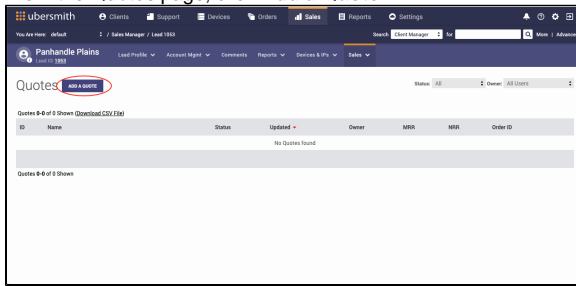
The *View Lead* page appears.

- From the *View Lead* page, select **Sales** and click **List Quotes**.



The *Quotes* page appears.

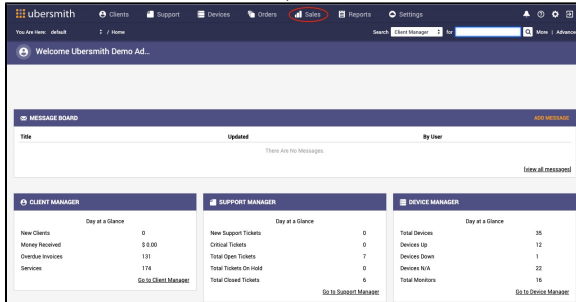
- From the *Quotes* page, click **Add a Quote**.



The *Add Quote* page appears.

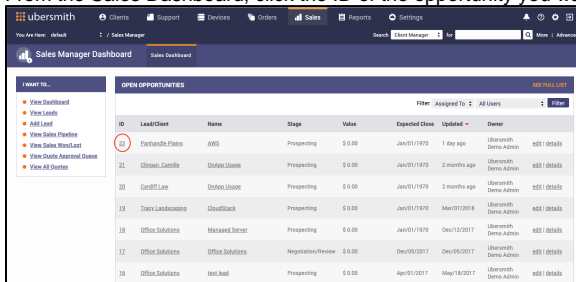
## From the View Opportunity Page

- From the *Ubersmith Dashboard*, click **Sales**.



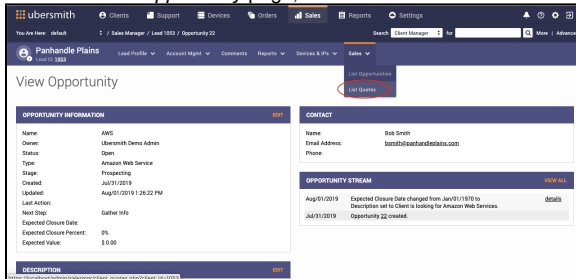
The *Sales Dashboard* appears.

- From the Sales Dashboard, click the ID of the opportunity you want to create a quote for.



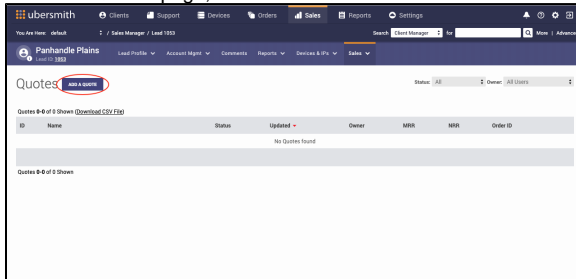
The *View Opportunity* page appears.

- From the *View Opportunity* page, select **Sales** and click **List Quotes**.



The *Quotes* page appears.

- From the *Quotes* page, click **Add a Quote**.



The *Add Quote* page appears.

## Completing the Add Quote page

1. In the **Name** field, enter the name of the quote.
2. In the **Assigned To** field, select the user who is responsible for the quote.
3. In the **Status** field, select the initial status of the quote.
  - Select **Draft** if the quote is in process and not yet ready for internal approval.
  - Select **Waiting Approval** if the quote is ready for internal approval.
  - Select **Open** if the quote has been internally approved and ready to be signed by the client.
  - Select **Persistent** if the quote can be signed multiple times by the client any time additional services are desired. When signing a persistent quote, the quote is duplicated, then signed again for the new service, so there is a separate record.
  - Select **Cancelled** if the quote is no longer valid.
4. In the **Order Queue** field, select the appropriate order queue the quote will be processed by, once the quote has been internally approved and signed by the client.
5. In the **Term** field, enter the contract's length of time and then select either Months or Years.
6. In the **Expires on** field, enter the date the quote expires, and is no longer valid..
7. In the **Notes** field, enter any sort of additional information about the quote.
8. Click **Save & Add Service**.

The screenshot shows the 'Add Quote' form in the Ubersmith system. The form has a dark blue header with the 'ubersmith' logo and the title 'Add Quote'. Below the header, there are several input fields: 'Name' (Professional Services), 'Assigned to' (Ubersmith Demo Admin), 'Status' (Draft), 'Order Queue' (Professional Services), 'Term' (6 Months), 'Expires on' (Sep/06/2019), and 'Notes' (Professional services to help client set up and get going with AWS). At the bottom of the form, there are three buttons: 'Save', 'Save & Add Service', and 'Cancel'. The 'Save & Add Service' button is highlighted with a red circle.

## Completing the Add Services Page

After you have started a quote for a lead or client, you need to add one or more services, that your clients will be using and eventually billed for. If you did not click Save & Add Service in the previous step above, See [Adding Services](#) for instructions.

## Complete the Service Info Tab

1. In the **Description** field, enter a description for the service that will appear on the quote.
2. In the **Service Plan** field, select the related service plan.
3. In the **Opportunity** field, select the related opportunity.
4. In the **Quantity** field, enter the number of this type of service being quoted.
5. In the **Billing Period** field, select the renewal period for the service.
6. In the **Discount** field, enter the amount of the discount as a percent or monetary sum, then select either % or \$ to signify the type of discount.
7. In the **Billing Calculated** field, select either **By Month** or **By Period**. The monthly setting will bill on a month-to-month basis, the periodic setting bills at the interval specified in the Price field in the Item section.
8. In the **Setup Discount** field, enter the amount of the setup discount as a percent or monetary sum, then select either % or \$ to signify the type of discount.
9. Select the **Setup Fee Quantity Sensitive** field if you want to multiply the setup fee by the number of services added.
10. In the **Contract Term** field, select an available contract term.
11. In the **Assigned Facility** field, select the appropriate location.
12. In the **Rate Plan** field, select an available rate plan.

13. In the **Item** field, two separate pieces of information are needed: **Price/Billing Period** – enter the cost of the service per period selected in the Billing Period field, **Setup Fee** - enter the fee for setting up this service.

**ubersmith**

## Add Service

**Service Info** Taxes Notes Custom Fields

### GENERAL SERVICE DETAILS

Description: Professional Services

Service Plan: Professional Services

Opportunity: 1053 - AWS

Quantity: 1.00 Billing Period: Monthly

Discount: 0 % Billing Calculated: ☒ By Month ☐ By Period

Setup Discount: 0 % Setup Fee Quantity Sensitive: ☒

### PRICING & OPTIONS

Contract Term:

Assigned Facility:

Rate Plan:

Item	Price/Month	Setup Fee	Client Access
Professional Services	60.00	0.00	
Discount:	0.00	0.00	
Quantity:	1	1	
<b>Total Monthly Cost:</b>	<b>60.00</b>	<b>0.00</b>	

Save Save & New Cancel

## Complete the Taxes Tab

1. Click the **Taxes** tab.
2. In the **Tax Engine** field, select **Internal Tax Engine** if you are manually adding tax rates through the Ubersmith *Clients Settings* page, or select **SureTax** if you are using SureTax as a third-party tax engine to automatically calculate your taxes. If you selected SureTax, complete the additional fields that become enabled.

The Situs Rule and Transaction Type Code fields are defined by SureTax. They are set to the default values on the service plan and can be changed as needed on the actual service.

The situs rule, transaction code and zip code are sent to SureTax before an invoice is generated. SureTax then returns the individual tax rates and amounts that need to be billed, which is then included in the invoice.

These fields tell SureTax what service is actually being billed. Ubersmith uses the recorded zip code to determine the location to tax for. If there is no zip code set on the service, it looks to see if a device or location is set on the service, if no zip code is found after that, the client's zip code specified in their primary contact details is used.

- a. In the **Situs Rule (US/Canada)** field, either select the appropriate rule from the list or click edit to manually enter a code.
- b. In the **Situs Rule (Non US/Canada)** field, either select the appropriate rule from the list or click edit to manually enter a code.
- c. In the **Transaction Type Code** field, either select the appropriate rule from the list or click edit to manually enter a code.
- d. In the **Zip Code** field, enter the client's zip code.
- e. In the **Tax Point to Point Zip Code** field, enter a point to point zip code if you wish to use one specific to the service.
- f. In the **Setup Fee Situs Rule (US/Canada)** field, either select the appropriate rule from the list or click edit to manually enter a code.
- g. In the **Setup Fee Situs Rule (Non US/Canada)** field, either select the appropriate rule from the list or click edit to manually enter a code.
- h. In the **Setup Fee Transaction Type Code** field, either select the appropriate rule from the list or click edit to manually enter a code.
- i. In the **Setup Fee Zip Code** field, enter your client's zip code.
- j. In the **Setup Fee Tax Point to Point Zip Code** field, enter a setup fee point to point zip code if you wish to use one specific to the service.

The screenshot shows the 'Add Service' form in the ubersmith application. The 'Taxes' tab is selected and highlighted with a red circle. The form includes a 'TAX ENGINE' section with a dropdown menu set to 'Internal Tax Engine'. Below this is a 'SELECT APPLICABLE TAX RATES' section with two checkboxes: 'New York, NY (4.5%)' and 'New York State (4%)'. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

## Complete the Notes Tab

Notes are visible on your quote.

1. Click the *Notes* tab.
2. In the **Notes** field, enter any information that you want to appear as a note in the quote.

The screenshot shows the 'Add Service' form in the ubersmith application. The 'Notes' tab is selected and highlighted with a red circle. The form includes a 'Notes' field with a text area containing the text: 'Professional services to assist client with the setup, deployment, and training for AWS.' At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

## Complete the Custom Fields Tab

The fields and options in this tab vary depending on the custom fields you have configured. See [Custom Service Fields](#) for more information.

1. Click the *Custom Fields* tab.
2. For each appropriate custom field, enter or select the corresponding input.

3. Click **Save** or **Save & New**.

The screenshot shows the 'Add Service' form in the 'ubersmith' application. The form has four tabs: 'Service Info', 'Issues', 'Notes', and 'Custom Fields'. The 'Custom Fields' tab is selected and circled in red. The form contains several sections with input fields:

- Shoulder Multiplier:** Includes 'Shoulder Rate:', 'Peak Multiplier:', and 'Peak Rate:' fields.
- Backup Billing:** Includes a 'Billing Method:' dropdown menu (currently set to 'Not Billed') and 'Included:', 'Overage Rate:', and 'Associated Devices:' fields.
- SolusVM VServer Management:** Includes 'SolusVM Host Device ID:' and 'SolusVM VServer Root Pass:' fields.
- Professional Services:** This section is circled in red and includes an 'Existing Client:' field with radio buttons for 'Yes' and 'No' (the 'No' button is selected).

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' and 'Save & New' buttons are circled in red.

## Related Topics

[Managing Quotes](#)

[Processing Quotes](#)

[Using the Order Manager](#)