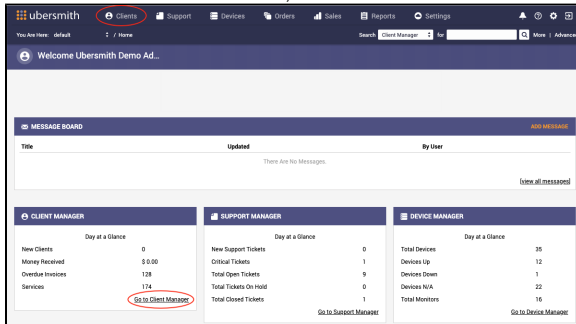


Managing Services

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

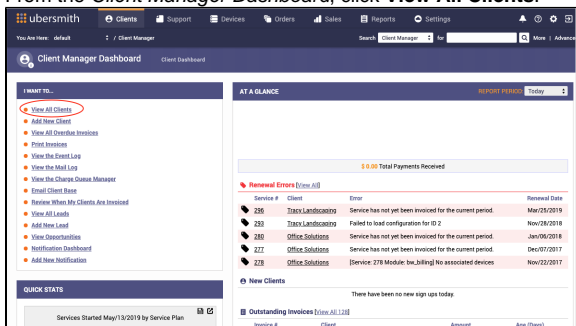
Access the Service Details Page

1. From the *Ubersmith Dashboard*, click either **Clients** or **Go to Client Manager**.



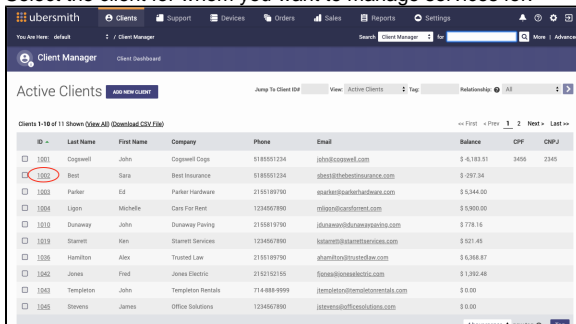
The *Client Manager Dashboard* appears.

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



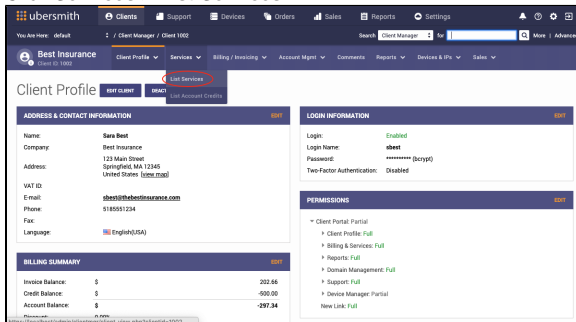
The *Active Clients* page appears.

3. Select the client for whom you want to manage services for.



The *Client Profile* page appears.

4. Click **Services > List Services**.



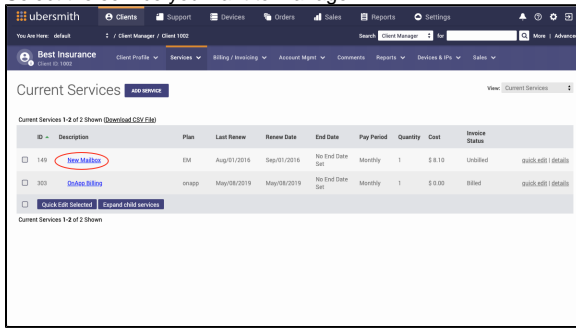
The *Current Services* page appears.

On this page:

On this page:

- [Access the Service Details Page](#)
- [Viewing and Resending the Welcome Letter](#)
- [Provisioning the Service](#)
- [Deactivating the Service](#)
- [Renewing the Service](#)
- [Viewing the Service Event Log](#)
- [Changing the Service Plan and Parent Service](#)
- [Adding and Editing Service Periods](#)
- [Viewing Service Periods](#)
- [Editing Service Dates](#)
- [Editing Details and Tickets](#)
- [Editing Billing Details](#)
- [Adding and Editing Applicable Taxes](#)
- [Viewing Outstanding Invoices](#)
- [Adding and Viewing Child Services](#)
- [Editing Usage Plan Rates](#)
- [Editing Usage Plan Data Sources](#)
- [Editing Custom Fields](#)
- [Adding Comments](#)
- [Editing Comments](#)
- [Deleting Comments](#)
- [Viewing Notes](#)
- [Related Topics](#)

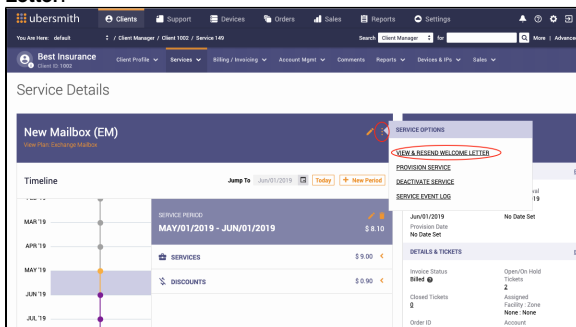
5. Select the service you want to manage.



The *Service Details* page appears.

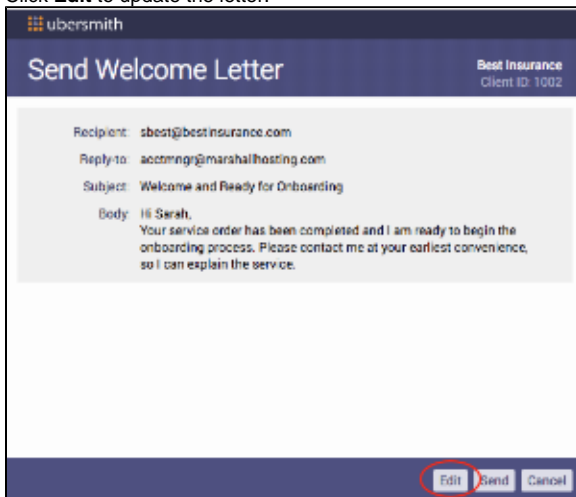
Viewing and Resending the Welcome Letter

1. Access the *Service Details* page.
2. In the *Service Description* bar, click the **vertical ellipsis** and select **View & Resend Welcome Letter**.



The *Send Welcome Letter* page appears.

3. Click **Edit** to update the letter.



- Click **Send** to email it to your client.

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Send Welcome Letter Best Insurance Client ID: 1002

Recipient: sbest@bestinsurance.com

Reply to: acctmgr@marshallhosting.com

Subject: Welcome and Ready for Onboarding

Body:

Hi Sarah,

Your OnApp service order has been completed and I am ready to begin the onboarding process. Please contact me at your earliest convenience, so I can explain the next steps.

[View Variables](#)

[Preview](#) [Send](#) [Cancel](#)

Provisioning the Service

Provision Service runs the onprovision() function for any enabled service modules on the service.

- Access the [Service Details](#) page.
- In the *Service Description* bar, click the **vertical ellipsis** and select **Provision Service**.

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Service Details

New Mailbox (EM)

Timeline

Jump To: Jan/01/2019 Today New Period

SERVICE PERIOD: MAY/01/2019 - JUN/01/2019 \$ 8.10

SERVICES \$ 9.00

DISCOUNTS \$ 0.90

SERVICE OPTIONS

VIEW A NEW WELCOME LETTER

PROVISION SERVICE

DEACTIVATE SERVICE

SERVICE EVENT LOG

DETAILS & TICKETS

Invoice Status: Open/On Hold

Bill #: 2

Assigned: Facility Zone

Order ID: Account

A confirmation message appears.

- Click **Yes**.

Deactivating the Service

Deactivating a service permanently terminates all billing and cannot be undone. Any outstanding balances are automatically credited immediately.

- Access the [Service Details](#) page.
- In the *Service Description* bar, click the **vertical ellipsis** and select **Deactivate Service**.

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Service Details

New Mailbox (EM)

Timeline

Jump To: Jan/01/2019 Today New Period

SERVICE PERIOD: MAY/01/2019 - JUN/01/2019 \$ 8.10

SERVICES \$ 9.00

DISCOUNTS \$ 0.90

SERVICE OPTIONS

VIEW A NEW WELCOME LETTER

PROVISION SERVICE

DEACTIVATE SERVICE

SERVICE EVENT LOG

DETAILS & TICKETS

Invoice Status: Open/On Hold

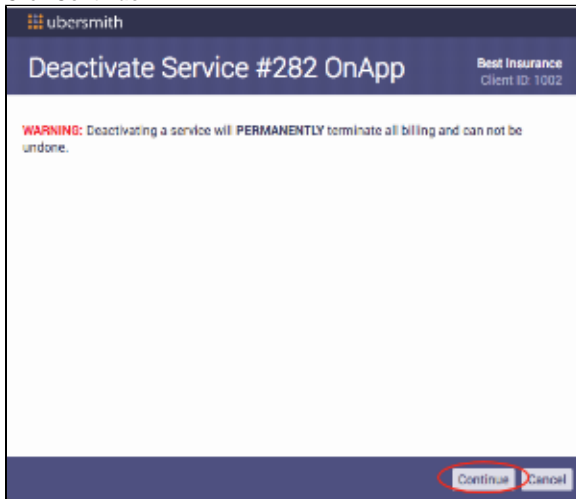
Bill #: 2

Assigned: Facility Zone

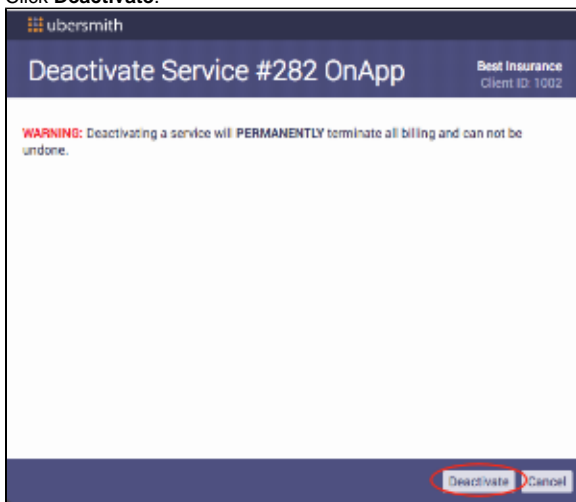
Order ID: Account

The *Deactivate Service* page appears.

3. Click **Continue**.



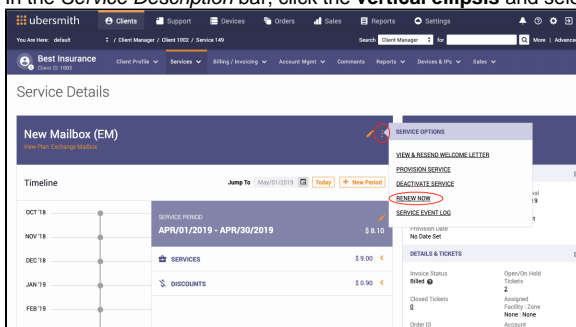
4. Click **Deactivate**.



Renewing the Service

Renewing a service is only available when the service is able to be renewed.

1. Access the [Service Details](#) page.
2. In the *Service Description* bar, click the **vertical ellipsis** and select **Renew Now**.

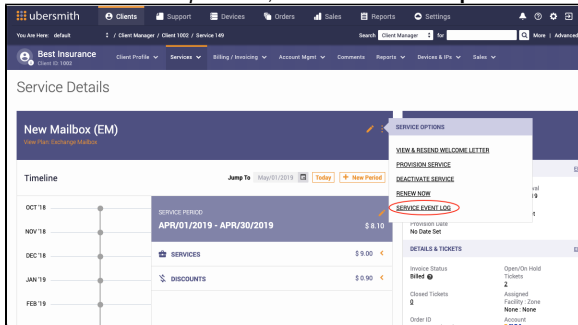


Manually Renewing

Set the **Last Renewal** and **Renewal** date fields to the current date or earlier, ensure the **Service Status** field is billed, click **Renew Now**, then send the invoice.

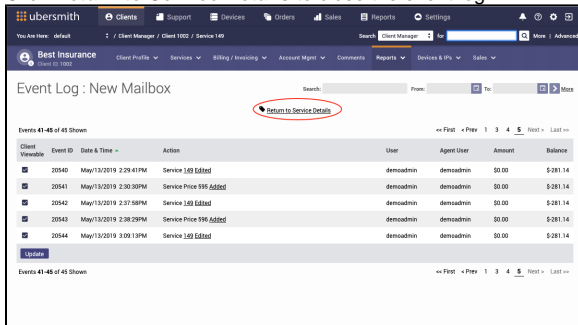
Viewing the Service Event Log

1. Access the [Service Details](#) page.
2. In the *Service Description* bar, click the **vertical ellipsis** and select **Service Event Log**.



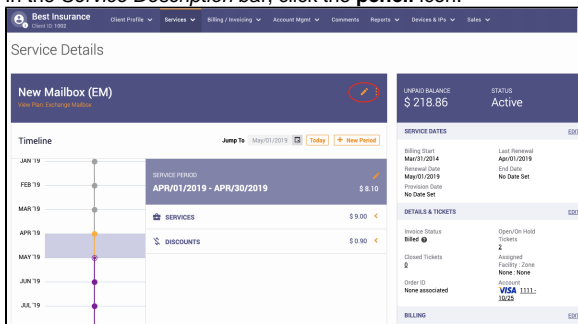
The *Event Log* page appears.

3. Click **Return to Service Details** to close the event log.



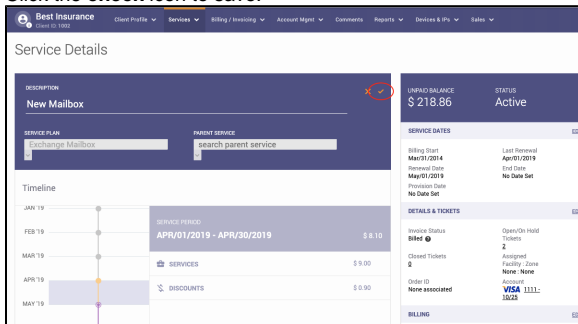
Changing the Service Plan and Parent Service

1. Access the [Service Details](#) page.
2. In the *Service Description* bar, click the **pencil icon**.



The *Service Description* bar enables.

3. Make any necessary changes. Refer to [Adding Services](#) for more information.
4. Click the **check icon** to save.



Adding and Editing Service Periods

You can add or update service-level contract terms, assigned locations, rate plans, pricing, discounts, quantity, billing periods, and billing calculations.

1. Access the [Service Details](#) page.

2. In the *Service Timeline* section, click **New Period** to add or click the **pencil** icon for the period you want to edit.

The screenshot shows the 'Service Details' page for 'New Mailbox (EM)'. The 'Timeline' section displays a calendar view from January 2019 to July 2019. A red circle highlights the 'New Period' button in the top right corner of the timeline area. The 'Service Period' is currently set to 'APR/01/2019 - APR/30/2019' with a price of '\$ 8.10'. Other sections include 'UNPAID BALANCE' (\$ 218.86), 'STATUS' (Active), 'SERVICE DATES', 'DETAILS & TICKETS', and 'BILLING'.

The *New Service Period* fields or *Edit Service Period* fields display.

3. Make any necessary changes. Refer to [Adding Services](#) and [Adding Price Scheduling and Prorating Services](#) for more information.
4. Click the **check** icon to save.

The screenshot shows the 'Service Details' page for 'New Mailbox (EM)'. The 'Timeline' section displays a calendar view from January 2019 to July 2019. A red circle highlights the checkmark icon in the top right corner of the timeline area. The 'Service Period' is currently set to 'APR/01/2019' with a price of '\$ 8.10'. Other sections include 'UNPAID BALANCE' (\$ 218.86), 'STATUS' (Active), 'SERVICE DATES', 'DETAILS & TICKETS', and 'BILLING'.

Viewing Service Periods

1. [Access the Service Details page.](#)
2. Select the month you want to display in the *Service Timeline* section.

The screenshot shows the 'Service Details' page for 'OnApp (onapp)'. The 'Timeline' section displays a calendar view from January 2018 to May 2018. A red circle highlights the 'JAN/14/2018' date in the timeline area. The 'Service Period' is currently set to 'JAN/14/2018' with a price of '\$ 0.00'. Other sections include 'UNPAID BALANCE' (\$ 0.00), 'STATUS' (Active), 'SERVICE DATES', 'DETAILS & TICKETS', and 'BILLING'.

The selected month's information displays. Refer to [Adding Services](#) and [Adding Price Scheduling and Prorating Services](#) for more information.

3. Click the **Services** arrow to toggle the services details on.

The screenshot shows the 'Service Details' page for 'New Mailbox (EM)'. The 'Timeline' section displays a calendar view from January 2019 to July 2019. A red circle highlights the 'Services' arrow in the timeline area. The 'Service Period' is currently set to 'APR/01/2019 - APR/30/2019' with a price of '\$ 8.10'. Other sections include 'UNPAID BALANCE' (\$ 218.86), 'STATUS' (Active), 'SERVICE DATES', 'DETAILS & TICKETS', and 'BILLING'.

Editing Service Dates

1. [Access the Service Details page.](#)

- In the *Service Dates* section, click **edit**.

The screenshot shows the 'Service Details' page for a client named 'New Mailbox (EM)'. The page includes a timeline on the left and a main content area on the right. The 'Service Dates' section is highlighted, showing the current service period from APR/01/2019 to MAY/01/2019. The 'EDIT' button in the top right corner of the 'Service Dates' section is circled in red.

The *Edit Service* page appears.

- Make any necessary changes. Refer to [Adding Services](#) and [Adding Price Scheduling and Prorating Services](#) for more information.
- Click **Save**.

The screenshot shows the 'Edit Service 282' page. The page contains various service settings, including Status (Active), Billing Start Date (Jan/14/2018), Last Renew Date (Jan/14/2018), Renew Date (Feb/14/2018), Planned Activation Date, Activation Date, Client Acceptance Date, Expected Cancellation Date, End Date, Post Renew (Yes/No), Bill In Advance (Yes/No), Auto Charge (Yes/No), Automatic Payment Method (No Accounts on File), and Invoice Status (Un-billed/Billed/Pre-Billed). The 'Save' button at the bottom right is circled in red.

Editing Details and Tickets

- Access the *Service Details* page.
- In the *Details & Tickets* section, click **edit**.

The screenshot shows the 'Service Details' page for a client named 'New Mailbox (EM)'. The page includes a timeline on the left and a main content area on the right. The 'Details & Tickets' section is highlighted, showing the current service period from APR/01/2019 to MAY/01/2019. The 'EDIT' button in the top right corner of the 'Details & Tickets' section is circled in red.

The *Edit Service* page appears.

- Make any necessary changes. Refer to [Adding Services](#) for more information.

4. Click **Save**.

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Edit Service 282 Best Insurance Client ID: 1002

Status: **Active**

Billing Start Date: Jan/14/2018

Last Renew Date: Jan/14/2018

Renew Date: Feb/14/2018

Planned Activation Date:

Activation Date:

Client Acceptance Date:

Expected Cancellation Date:

End Date:

Post Renew: ☒ Yes ☐ No

Bill In Advance: ☐ Yes ☒ No

Auto Charge: ☐ Yes ☒ No

Automatic Payment Method: No Accounts on File.

Invoice Status: ☐ Un-billed ☒ Billed ☐ Pre-Billed

Save **Cancel**

Editing Billing Details

1. Access the [Service Details](#) page.
2. In the **Billing** section, click **edit**.

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Service Details Best Insurance Client ID: 1002

BILLING **edit**

Next Renew: No ☒ Bill In Advance: No ☒
 Auto Charge: No ☒ Auto Suspend: No ☒
 Auto Cancel: No ☒

APPLICABLE TAXES **edit**

There Are No Taxes Assigned To This Service

OUTSTANDING INVOICES

Invoice #	Date Due	Outstanding
1002.210	May/01/2014	\$ 0.46
1002.207	Jul/01/2014	\$ 16.30
1002.202	Aug/01/2014	\$ 8.19
1002.201	Oct/01/2014	\$ 16.30
1002.205	Dec/01/2014	\$ 16.30
1002.203	Jan/01/2015	\$ 8.19
1002.200	Mar/01/2015	\$ 16.30
1002.202	May/01/2015	\$ 16.30

The **Edit Service** page appears.

3. Make any necessary changes. Refer to [Adding Services](#) for more information.
4. Click **Save**.

ubersmith

Edit Service 282 Best Insurance Client ID: 1002

Status: **Active**

Billing Start Date: Jan/14/2018

Last Renew Date: Jan/14/2018

Renew Date: Feb/14/2018

Planned Activation Date:

Activation Date:

Client Acceptance Date:

Expected Cancellation Date:

End Date:

Post Renew: ☒ Yes ☐ No

Bill In Advance: ☐ Yes ☒ No

Auto Charge: ☐ Yes ☒ No

Automatic Payment Method: No Accounts on File.

Invoice Status: ☐ Un-billed ☒ Billed ☐ Pre-Billed

Save **Cancel**

Adding and Editing Applicable Taxes

If you have a SureTax integration enabled, you can turn it on or off for each service. You would also configure the situs rule and transaction type code. See [Managing Tax Engines](#).

1. Access the [Service Details](#) page.
2. In the [Applicable Taxes](#) section, click **edit**.

The screenshot shows the 'Service Details' page for 'Tracy Landscaping' (Item ID: 1046). The 'Applicable Taxes' section is highlighted with a red box and the word 'edit' next to it. Below this section, there is a table of 'OUTSTANDING INVOICES'.

Invoice #	Date Due	Outstanding
1002-210	May/01/2014	\$ 6.45
1002-207	Jul/01/2014	\$ 16.20
1002-267	Aug/01/2014	\$ 8.10
1002-281	Oct/01/2014	\$ 16.20
1002-308	Dec/01/2014	\$ 16.20
1002-335	Jan/01/2015	\$ 8.10
1002-350	Mar/01/2015	\$ 16.20
1002-383	May/01/2015	\$ 16.20

The *Edit Service* page appears.

3. Make any necessary changes. Refer to [Adding Services](#) for more information.
4. Click **Save**.

The screenshot shows the 'Edit Service' page for 'Tracy Landscaping' (Item ID: 1046). The 'TAX ENGINE' section is highlighted with a red box. It contains fields for 'Situs Rule (US/Canada)', 'Situs Rule (Non US/Canada)', 'Transaction Type Code', 'Tax Zip Code', and 'Tax Point to Point Zip Code'. The 'Save' button is circled in red.

Viewing Outstanding Invoices

1. Access the [Service Details](#) page.
2. In the [Outstanding Invoices](#) section, click on an invoice number.


The screenshot shows the 'Service Details' page for 'Tracy Landscaping' (Item ID: 1046). The 'Outstanding Invoices' section is highlighted with a red box. It contains a table of 'OUTSTANDING INVOICES'.

Invoice #	Date Due	Outstanding
1002-210	May/01/2014	\$ 6.45
1002-207	Jul/01/2014	\$ 16.20
1002-267	Aug/01/2014	\$ 8.10
1002-281	Oct/01/2014	\$ 16.20
1002-308	Dec/01/2014	\$ 16.20
1002-335	Jan/01/2015	\$ 8.10
1002-350	Mar/01/2015	\$ 16.20
1002-383	May/01/2015	\$ 16.20

The *Invoice* page appears.

3. You can review the invoice or mark a payment. See [Marking Payments](#) for more information.

[Mark Payment](#) | [Print](#) | [PDF](#) | [Close](#)



Remit to:
Marshall
Hosting
1234
Broadway
Troy, NY
12108

Invoice Date: Apr/01/2014
Invoice Due Date: May/01/2014
Invoice Number: INV-1002-210

Customer I Need Cloud, INC
Attn: Cloud Customer
123 Fake Lanes
Springfield, MA 12345
United States

Client Ledger

Prior Balance	\$ 1,172.00
Payments / Refunds	\$ 0.00

Current Charges

Service Items	\$ 16.46
Taxes	\$ 0.00
Invoice Total	\$ 16.46

Account Balance as of Apr/01/2014 **\$ 1,188.46**

This invoice has been sent manually without automatically processing a payment. Please contact us if you wish to arrange an alternate method of payment.

Service Items

ID#	Service Description	Date Range	Unit Price	Quantity	Discount	Total Due
149	New Mailbox (EM) Hardware Specifications	Mar/31/2014 - May/01/2014	\$ 9.00	1	10.00%	\$ 8.36
149	New Mailbox (EM) Hardware Specifications	May/01/2014 - Jun/01/2014	\$ 9.00	1	10.00%	\$ 8.10
Invoice Total:						\$ 16.46

Adding and Viewing Child Services

1. [Access the Service Details page.](#)
2. In the *Child Services* section, click **add child service**. The *Add Service* page appears, or click the name of the service you want to view. Refer to [Adding Services](#) for more information.

BANDWIDTH NOTIFICATION

Bandwidth Notification: None

POWER CIRCUIT BILLING

Billing Method: Not Billed

PROFESSIONAL SERVICES

Existing Client: Unchecked

QUICKBOOKS

Quickbooks Class: Not Classified

BACKUP BILLING

Billing Method: Not Billed

ID#	Service Description	Date Range	Unit Price	Quantity	Discount	Total Due
1002-483	Aug/01/2013	\$ 8.10				
1002-484	Dec/01/2013	\$ 16.20				
1002-527	Dec/01/2013	\$ 16.20				
1002-573	Jan/01/2014	\$ 8.10				
1002-593	Mar/01/2014	\$ 16.20				
1002-640	May/01/2014	\$ 16.00				
1002-698	Jun/12/2014	\$ 16.20				

CHILD SERVICES [add child service](#)

This Service Does Not Have Any Child Services

SERVER DETAILS [edit](#)

User ID:
Password:
Domain Name:
IP Address:

COMMENTS / NOTES [add comment](#)

There Are No Comments

The *Service Details* page for the select child service appears.

Editing Usage Plan Rates

1. [Access the Service Details page.](#)
2. In the *Usage Plan Rate Properties* section, click **edit**.

FEB '20

MAR '20

APR '20

APPLICABLE TAXES [edit](#)

There Are No Taxes Assigned To This Service

OUTSTANDING INVOICES

There Are No Outstanding Invoices For This Service

CHILD SERVICES [add child service](#)

This Service Does Not Have Any Child Services

SERVER DETAILS [edit](#)

User ID:
Password:
Domain Name:
IP Address:

COMMENTS / NOTES [add comment](#)

There Are No Comments

USAGE PLAN RATE PROPERTIES [edit](#) [download properties](#)

Usage Plan Rate Name: **OutApp Billing**

ONAPP BILLING (ONAPP BILLING) [edit](#)

Markup: 0.00000000%

CUSTOM FIELDS [edit](#)

BANDWIDTH BILLING	QUICKBOOKS
Billing Method: Not Billed	Quickbooks Class: Not Classified
ONAPP BILLING	TICKET BILLING
Credit Limit: 0	Billing Method: Send Overage Notification
OnApp Billing Method: User ID - VM resource only	Not Billed: Yes

The *Edit Usage Plan Rate* page appears.

3. Make any necessary changes. Refer to [Adding Services](#) and [Managing Usage Plans](#) for more information.

4. Click **Update**.

Editing Usage Plan Data Sources

1. [Access the Service Details page.](#)
2. In the *Usage Plan Rate Properties* section, click **Configure Datasource**.

The *Usage Plan* page appears.

3. Make any necessary changes. Refer to [Adding Services](#) and [Managing Usage Plans](#) for more information.
4. Click **Save**.

Editing Custom Fields

1. [Access the Service Details page.](#)
2. In the *Custom Fields* section, click **edit**.

The *Edit Service* page appears.

3. Make any necessary changes. Refer to [Adding Services](#) for more information.
4. Click **Save**.

Adding Comments

1. [Access the Service Details page.](#)

- In the *Comments/Notes* section, ensure comments is enabled by clicking **Comments**.

Service details page showing various billing and service options. The 'COMMENTS' tab is highlighted with a red circle, and the 'ADD COMMENT' button is visible next to it.

- Click **Add Comment**.

Service details page showing various billing and service options. The 'ADD COMMENT' button is highlighted with a red circle.

The *Add Service Comment* page appears.

- Complete the comment fields. Refer to [Adding Services](#) for more information.
- Click **Save** or **Save & New**.

'Add Service Comment' page. The 'Save' and 'Save & New' buttons are highlighted with a red circle.

Editing Comments

- Access the *Service Details* page.
- In the *Comments/Notes* section, ensure comments is enabled by clicking **Comments**.

Service details page showing various billing and service options. The 'COMMENTS' tab is highlighted with a red circle, and the 'ADD COMMENT' button is visible next to it.

- Click **edit** next to the comment you want to update.

The screenshot shows the 'Service Details' page for 'OnApp Billing'. The 'COMMENTS' tab is selected, displaying a comment: 'The OnApp service is set to begin at midnight.' by 'Ubersmith Demo Admin'. An 'edit' link is visible next to the comment, circled in red.

The *Edit Service Comment* page appears.

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

The 'Edit Service Comment' page shows the comment text in a large text area. Below the text area, there is a 'Client Viewable' checkbox and an 'Attachments' section. At the bottom right, there are 'Update' and 'Cancel' buttons, with the 'Update' button circled in red.

Deleting Comments

- Access the *Service Details* page.
- In the *Comments/Notes* section, ensure comments is enabled by clicking **Comments**.

The screenshot shows the 'Service Details' page for 'OnApp Billing'. The 'COMMENTS' tab is selected, displaying a comment: 'The OnApp service is set to begin at midnight.' by 'Ubersmith Demo Admin'. A 'delete' link is visible next to the comment, circled in red.

- Click **delete** next to the comment you want to remove.

This is another view of the 'Service Details' page, showing the 'COMMENTS' section with the 'delete' link circled in red next to the comment.

A confirmation message appears.

- Click **Yes**.

Viewing Notes

1. [Access the Service Details page.](#)
2. In the *Comments/Notes* section, ensure notes is enabled by clicking **Notes**.

APR 20

TOTALS\$ 0.00

OUTSTANDING INVOICES

USAGE PLAN RATE PROPERTIESDETAILS

Usage Plan Rate Name:Outage Billing

CHILD SERVICESADD CHILD SERVICE

CUSTOM FIELDSNOT

BANDWIDTH BILLING

Billing Method:Not Billed

CLOUD BILLING

Credit Limit:0

Usage Status:Account

TICKET BILLING

Billing Method:Not Billed

Send Overage Notification:Yes

BANDWIDTH NOTIFICATION

Bandwidth Notification:None

QUICKBOOKS

Quickbooks Class:Not Classified

POWER CIRCUIT BILLING

Billing Method:Not Billed

BACKUP BILLING

Billing Method:Not Billed

PROFESSIONAL SERVICES

Existing Client:Unchecked

SERVER DETAILSNOT

User ID:
Password:
Domain Name:
IP Address:

COMMENTSNOTESNOT

There are no Notes for This Service

Related Topics

[Adding Services](#)