

# Associating Devices with Clients and Services

Using the Device Status Page

It is possible to associate a device with a client and service via a particular device's status page. This is useful for organizational purposes, as well as for taking advantage of some of Ubersmith's more advanced features, such as bandwidth billing.

From the device's page in the Device Manager:

- Click the "associate with client" link. This link is located in the upper left hand corner of the device page.
- Find the client you would like to associate the ticket via the search box. You can search based on Company, Contact name, or Mailing Address.
- Choose the client to associate the ticket with, using the radio buttons.
- If appropriate, select a service to associate with the device.
- Click the "Update" button to complete the association.

*Note: If you wish to change the associated client/service again, click 'Edit Device' and go to the 'Ownership Info' tab.*

## Using Dynamic Device Filtering

For clients that add or remove devices from their account frequently, specifying basic rules and parameters within the bandwidth billing service can specify which devices to tabulate in the usage calculation upon service renewal.

- On the Service Details page, in the Bandwidth Billing section, click the edit link. An advanced search window appears.
- Specify one or more rules for Ubersmith to use to determine which devices to include when tabulating bandwidth. Each rule is made up of two main parts, the field being validated and the value being checked for.

Some examples of this rule are "Client id is 1005" and "Device Description contains 'server'".

Multiple rules can be used in conjunction with one another using the 'and' or 'or' operators. For example, if you needed to bill for all server devices under a particular client's account enter client ID is 1005 and device type contains server.

When the service renews it tabulates bandwidth for all devices that are associated with client 1005 and have the word 'server' in their device names.

The 'or' operator can also be used to include disparate devices such as device ID is 123 or device ID is 5390 or device ID is 9213. The resulting query will include bandwidth for all three devices.

- Once the parameters are specified, click Search to run the query. A list of matching devices appear.
- Click Save to activate the rules for the service.

Once set, the devices matching the specified rules will be listed on the service's details window, in the bandwidth billing section.

*Note:* It's possible that a device may match a specified rule, but isn't able to report bandwidth usage. The Inc column indicates whether or not the device is properly configured for bandwidth monitoring. A green icon in the Inc column indicates a properly-configured device, while a red icon indicates a device not configured for bandwidth.

When Ubersmith tabulates bandwidth usage, any dynamic device filters set in a service will override the associated devices field, as well as any direct device-service associations.

## **Using the Associated Devices Custom Field**

This method is primarily for backward compatibility with old Ubersmith versions. It is recommended to configure bandwidth billing for a service using device association or dynamic filter rules.

You can specify the ID number of one or more device that should be included in the bandwidth calculation. If multiple device IDs need to be configured, enter each number in the Associated Devices field, separated by commas.