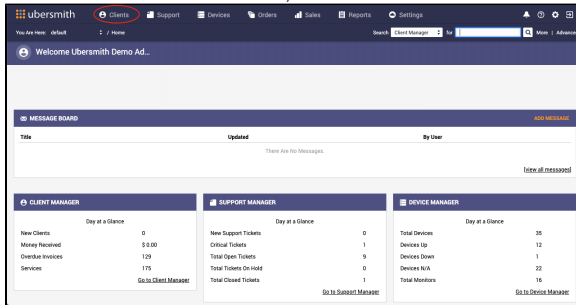


Managing Clients

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

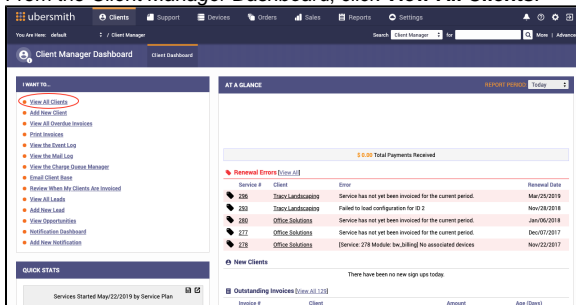
Access the Client Profile Page

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



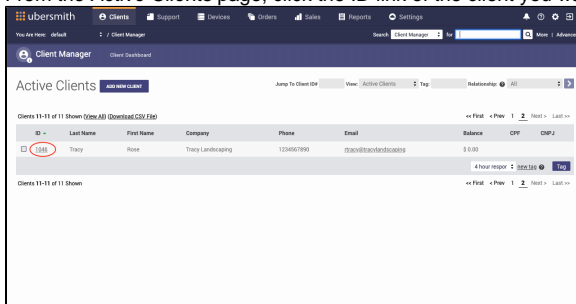
The *Client Manager Dashboard* appears.

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



The *Active Clients* page appears.

3. From the *Active Clients* page, click the ID link of the client you want to manage.

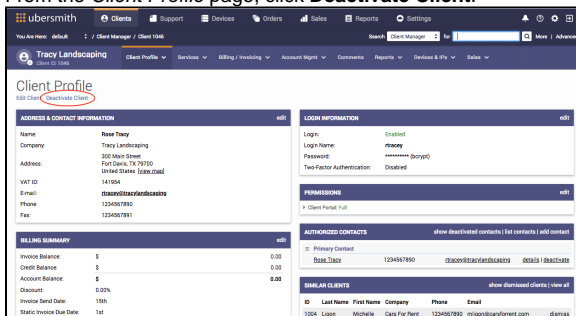


The *Client Profile* page appears.

Deactivating Clients

If you deactivate a client, you will turn off all services and credits, remove any queued charges, and disregard any outstanding invoices. You can use Ubersmith's [API](#) to deactivate many clients at once, using `client.deactivate`. Reactivating a client will not restore deactivated services, credits, queued charges or invoices.

1. [Access the Client Profile page](#).
2. From the *Client Profile* page, click **Deactivate Client**.



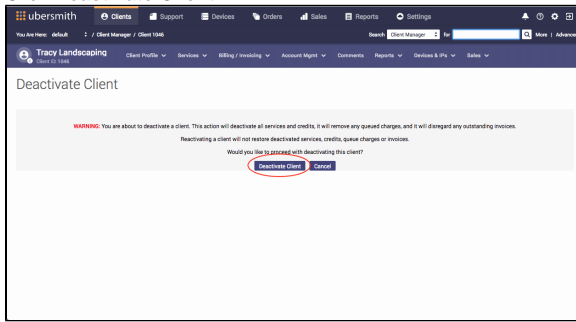
The *Deactivate Client* page appears.

On this page:

On this page:

- [Access the Client Profile Page](#)
- [Deactivating Clients](#)
- [Reactivating Clients](#)
- [Editing Clients](#)
- [Managing Address & Contact Information](#)
- [Managing Login Information](#)
- [Managing Permissions](#)
- [Managing Billing Summary Information](#)
- [Managing Account Information](#)
- [Managing Authorized Contacts](#)
- [Managing Similar Clients](#)
- [Managing Custom Fields](#)
- [Related Topics](#)

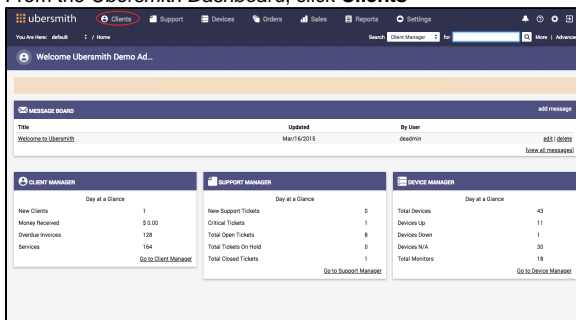
3. Click **Deactivate Client**.



Reactivating Clients

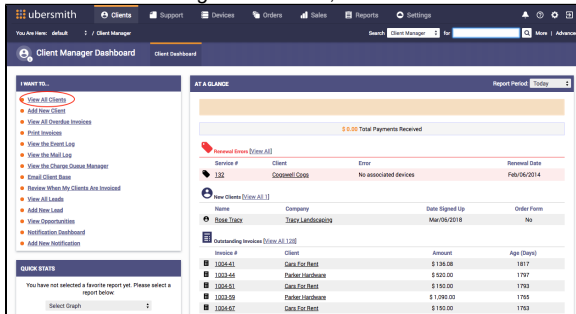
Reactivating clients only reactivates the client account and does not restore deactivated services, credits, queue charges or invoices. You can use Ubersmith's [API](#) to reactivate many clients at once, using client.reactivate.

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



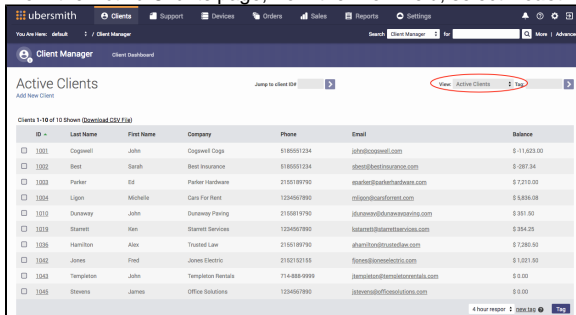
The *Client Manager Dashboard* appears.

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



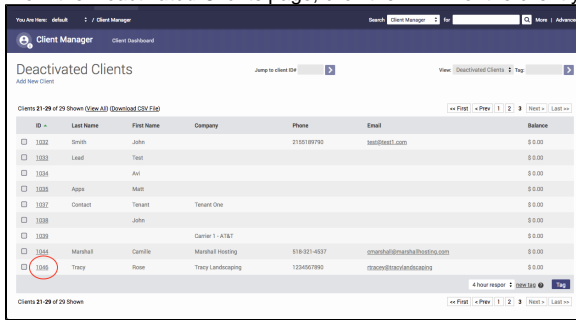
The *Active Clients* page appears.

3. From the *Active Clients* page, from the **View** field, select **Deactivated Clients**.



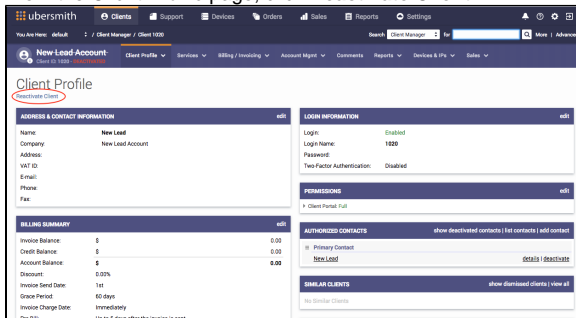
The *Deactivated Clients* page appears.

- From the *Deactivated Clients* page, click the ID link of the client you want to activate.



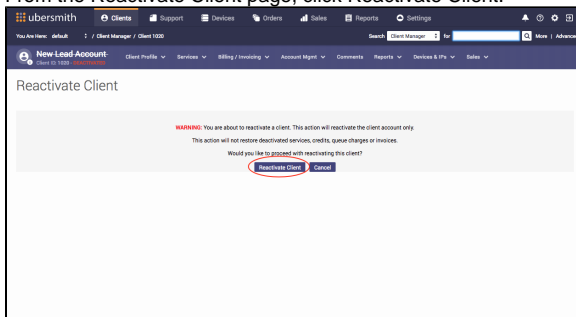
The *Client Profile* page appears.

- From the *Client Profile* page, click **Reactivate Client**.



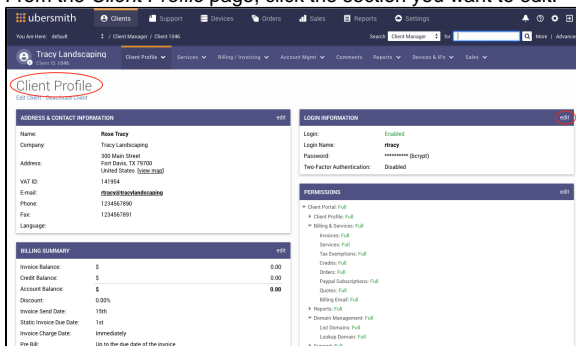
The Reactivate Client page appears.

- From the Reactivate Client page, click Reactivate Client.



Editing Clients

- Access the *Client Profile* page.
- From the *Client Profile* page, click the section you want to edit.



The *Edit* page for that section appears.

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

Managing Address & Contact Information

- Access the *Client Profile* page.

2. Click **edit** in the *Address & Contact Information* section.

ADDRESS & CONTACT INFORMATION	
Name	Rose Tracy
Company	Tracy Landscaping
Address	300 Main Street Fort Davis, TX 79703 (United States: ZIP+City)
VAT ID	141954
Email	tracy@tracylandscaping.com
Phone	1234567890
Fax	1234567891
Language	

BILLING SUMMARY	
Invoice Balance	\$ 0.00
Credit Balance	\$ 0.00
Account Balance	\$ 0.00
Discount	0.00%
Invoice Send Date	10th
Status Invoice Due Date	1st
Invoice Change Date	Immediately
Pre-Bill	Up to the due date of the invoice

LOGIN INFORMATION	
Login	Enabled
Login Name	Rosey
Password	***** (strong)
Two-Factor Authentication	Disabled

PERMISSIONS	
Client Portal	Full
Client Profile	Full
Billing & Services	Full
Services	Full
Trac Desktops	Full
Credits	Full
Orders	Full
Report Subscriptions	Full
Quotes	Full
Billing Email	Full
Requests	Full
Domain Management	Full
Lost Domains	Full
Control Domains	Full
Support	Full

The *Edit Client* page appears.

3. Make any necessary updates.

Note

If you need to change the client's email address, you must first provide **your** current password.

4. Click **Save**.

Edit Client	
First Name	Sara
Last Name	Best
Company	Best Insurance
Country/Territory	United States
Address	123 Main Street
City	Springfield
State	Massachusetts
ZIP Code	12345
VAT ID	
Phone	5185511234
Fax	
Email	steng@thebestinsurance.com
Language	English(USA)

Authentication	
Current password	

Save **Cancel**

Managing Login Information

1. Access the *Client Profile* page.
2. Click **edit** in the *Login Information* section.

ADDRESS & CONTACT INFORMATION	
Name	Rose Tracy
Company	Tracy Landscaping
Address	300 Main Street Fort Davis, TX 79703 (United States: ZIP+City)
VAT ID	141954
Email	tracy@tracylandscaping.com
Phone	1234567890
Fax	1234567891
Language	

BILLING SUMMARY	
Invoice Balance	\$ 0.00
Credit Balance	\$ 0.00
Account Balance	\$ 0.00
Discount	0.00%
Invoice Send Date	10th
Status Invoice Due Date	1st
Invoice Change Date	Immediately
Pre-Bill	Up to the due date of the invoice

LOGIN INFORMATION	
Login	Enabled
Login Name	Rosey
Password	***** (strong)
Two-Factor Authentication	Disabled

PERMISSIONS	
Client Portal	Full
Client Profile	Full
Billing & Services	Full
Services	Full
Trac Desktops	Full
Credits	Full
Orders	Full
Report Subscriptions	Full
Quotes	Full
Billing Email	Full
Requests	Full
Domain Management	Full
Lost Domains	Full
Control Domains	Full
Support	Full

The *Login Options* page appears.

3. Make any necessary updates.

4. Click **Save**.

Managing Permissions

1. Access the [Client Profile](#) page.
2. Click **edit** in the *Permissions* section.

The *Client Permissions* page appears.

3. Make any necessary updates. See [Client](#), [Contact](#), and [Leads Permission Details](#) for more information.
4. Click **Update**.

Managing Billing Summary Information

1. Access the [Client Profile](#) page.

- Click **edit** in the *Billing Summary* section.

ADDRESS & CONTACT INFORMATION [edit](#)

Name: Rose Tracy
Company: Tracy Landscaping
Address: 300 Main Street, Fort Worth, TX 76103 (United States: 5026.036)
VAT ID: 141954
E-mail: tracy@tracylandscaping.com
Phone: 1234567890
Fax: 1234567891
Language:

LOGIN INFORMATION [edit](#)

Login: Enabled
Login Name: tracy
Password: ***** (toggle)
Two Factor Authentication: Disabled

PERMISSIONS [edit](#)

- Client Profile: Full
- Client Profile: Full
- Billing & Services: Full
- Invoice: Full
- Service: Full
- Not Completed: Full
- Credits: Full
- Online: Full
- Project Subscriptions: Full
- Quotes: Full
- Billing Email: Full
- Requests: Full
- Domain Management: Full
- Lost Domains: Full
- Lookup Domains: Full
- Support: Full
- Domain Manager: Full
- New Link: Full

AUTHORIZED CONTACTS [show deactivated contacts](#) [add contact](#)

Primary Contact: Rose Tracy, 1234567890, tracy@tracylandscaping.com, [details](#) [deactivate](#)

SIMILAR CLIENTS [show deactivated clients](#) [view all](#)

BILLING SUMMARY [edit](#)

Invoice Balance: \$ 0.00
Credit Balance: \$ 0.00
Account Balance: \$ 0.00
Discount: 0.00%
Invoice Send Date: 15th
Static Invoice Due Date: 1st
Invoice Charge Date: Immediately
Pre Bill: Up to the due date of the invoice
Default Auto-Payment Method: No default auto-payment method on file
Late Fee Schedule: No Late Fees
Invoice Delivery: Email Only
Account Credits: Automatically Apply to All Invoices
Client Since: Mar/16/2018 (8 months, 6 days)

The *Edit Client* page appears with the *Billing/Invoicing* tab active.

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

ubersmith Edit Client Tracy Landscaping Client ID: 1046

Contact Info **Billing/Invoicing** Account Info Custom Fields

Default Discount Level: 0.00 %

Invoice Send Date: 15

Invoice due dates determined by: ☐ Grace Period ☒ Static Due Date

Monthly Invoice Due Date: 1

Pre Bill: ☐ Do not pre-bill ☐ Pre-bill up to 0 days after the invoice is generated ☒ Pre-bill up to the invoice due date

Invoice Charge Date: ☒ Immediately ☐ After 1 days ☐ On Invoice Due Date

Retry Failed CC Charges Every: 1 days

Default Auto-Payment Method: No auto-payment methods on file

Late Fee Schedule: No Late Fees

Invoice Delivery: Email Only

Default Renewal Date: Do Not Auto-Prorate

Automatically Apply: ☒ Automatically Apply to All Invoices ☐ Automatically Apply to New Invoices

Account Credits: ☐ Automatically Apply to New Invoices

Save **Cancel**

Managing Account Information

- Access the *Client Profile* page.
- Click **edit** in the *Account Information* section.

ubersmith Edit Client Tracy Landscaping Client ID: 1046

Contact Info **Billing/Invoicing** **Account Info** Custom Fields

Discount: 0.00%
Invoice Send Date: 15th
Static Invoice Due Date: 1st
Invoice Charge Date: Immediately
Pre Bill: Up to the due date of the invoice
Default Auto-Payment Method: No default auto-payment method on file
Late Fee Schedule: No Late Fees
Invoice Delivery: Email Only
Account Credits: Automatically Apply to All Invoices
Client Since: Mar/16/2018 (8 months, 6 days)

ACCOUNT INFORMATION [edit](#)

Business: Yes
Referral by: Duration Parking
Default Ticket Priority: Normal
Avatar:

USER RELATIONSHIPS [edit](#)

User: Relationship: Subperson [edit](#) [delete](#)

CUSTOM FIELDS [edit](#)

SIMILAR CLIENTS

Similar: Unchecked

AUTHORIZED CONTACTS [show deactivated contacts](#) [add contact](#)

Primary Contact: Rose Tracy, 1234567890, tracy@tracylandscaping.com, [details](#) [deactivate](#)

SIMILAR CLIENTS [show deactivated clients](#) [view all](#)

10 Last Name First Name Company Phone Email

1004 Login Michelle Car For Rent 1234567890 login@carforrent.com [details](#)

1003 Stewart Ken Stewart Services 1234567890 stewart@stewartservices.com [details](#)

1002 Stevens James Office Solutions 1234567890 james@officesolutions.com [details](#)

LOGS [edit all logs](#) [add log](#)

No Logs

LATEST COMMENT [add comment](#)

Updated by: Admin
Time: 2:56:58 PM Mar/17/2018
Client Viewable: PUBLIC
Comment: Using CloudCheck plugin. [view all comments](#)

The *Edit Client* page appears with the *Account Info* tab active.

- Make any necessary updates.

- Click **Save**.

Managing Authorized Contacts

See [Managing Contacts](#) for more information.

Managing Similar Clients

The similar clients section lists other clients with similar demographic information, such as address and phone number. This functionality aids in fraud detection. You can review similar clients to ensure that the clients listed are not related.

- Access the [Client Profile](#) page.
- Click the **ID** link to view the similar client.

ID	Last Name	First Name	Company	Phone	Email
1084	Spinn	Michael	Cars For Rent	1234567890	spinn@carsforrent.com
1083	Stewart	Ken	Stewart Services	1234567890	stewart@stewartservices.com
1085	Stevens	James	Office Solutions	1234567890	stevens@officesolutions.com

The similar client's *Client Profile* page appears.

- Review the similar client to ensure they are not related to the original client.
- Click **dismiss** in the *Similar Clients* section.

ID	Last Name	First Name	Company	Phone	Email
1083	Stewart	Ken	Stewart Services	1234567890	stewart@stewartservices.com
1085	Stevens	James	Office Solutions	1234567890	stevens@officesolutions.com
1086	Tracy	Rose	Tracy Landscaping	1234567890	tracy@tracylandscaping.com

A confirmation message appears.

- Click **Yes**.

Managing Custom Fields

- Access the [Client Profile](#) page.

2. Click **edit** in the *Custom Fields* section.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Custom Fields' tab is selected and highlighted with a red circle. The page is divided into several sections: 'Overview' (top left), 'ACCOUNT INFORMATION' (middle left), 'USER RELATIONSHIPS' (bottom left), 'SIMILAR CLIENTS' (bottom left), 'AUTHORIZED CONTACTS' (top right), 'SIMILAR CLIENTS' (middle right), 'TAGS' (bottom right), and 'LATEST COMMENT' (bottom right). The 'Custom Fields' section is currently empty, showing a table with columns for 'Field' and 'Value'.

The *Edit Client* page appears with the *Custom Fields* tab active.

3. Make any necessary updates.
4. Click **Save**.

The screenshot shows the 'Edit Client' page for 'Tracy Landscaping' (Client ID: 1046). The 'Custom Fields' tab is selected and highlighted with a red circle. The page is divided into several sections: 'Cloud Billing', 'SolusVM', 'Boleto', and 'Similar Clients'. The 'Cloud Billing' section contains fields for 'Cloud Account ID'. The 'SolusVM' section contains fields for 'SolusVM Client ID', 'SolusVM Client Username', 'SolusVM Client Password', and 'SolusVM Host Device ID'. The 'Boleto' section contains fields for 'CNPJ' and 'CPF'. The 'Similar Clients' section contains a 'Retail' checkbox, which is currently checked. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red circle.

Related Topics

[Adding Clients](#)

[Adding Contacts](#)

[Managing Contacts](#)

[Using the Ubersmith API](#)