

Adding Price Scheduling and Prorating Services

Price scheduling lets you define multiple service prices for one or more future dates. This function sets different price periods for a service and bills your clients the appropriate price automatically, based on the date of the service.

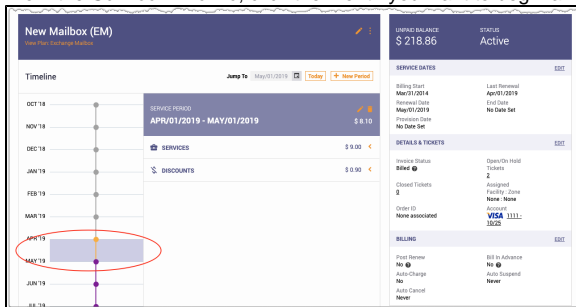
For example, if your service for a dedicated or managed server includes an initial ramping up period, with a flat fee of \$100 for the first month, \$200 the second month, and \$300 the third month, Ubersmith creates an invoice with each new price as time passes.

As the service is renewed and invoiced each month, Ubersmith automatically adjusts the price that is billed. If a particular renewal period crosses over more than one pricing period, Ubersmith automatically prorates both periods to ensure that the proper total is billed.

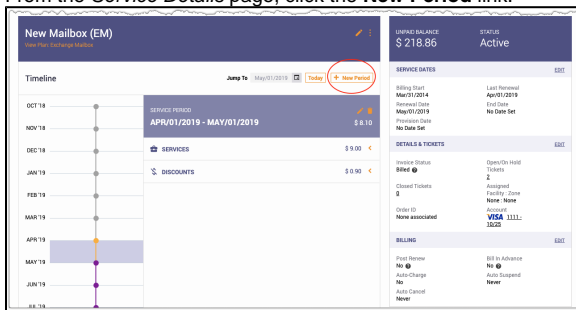
For example, a service renewing on May 1 for \$100 can be configured to increase to \$200 on June 1. With this configuration, Ubersmith automatically bills \$45.16 from 5/1 to 6/14 and \$109.68 from 6/15 to 7/1. This happens automatically without any direct intervention.

Services can also be manually prorated at any time by editing the service and adjusting the renewal date. Ubersmith automatically adjusts the pricing of the service to the second.

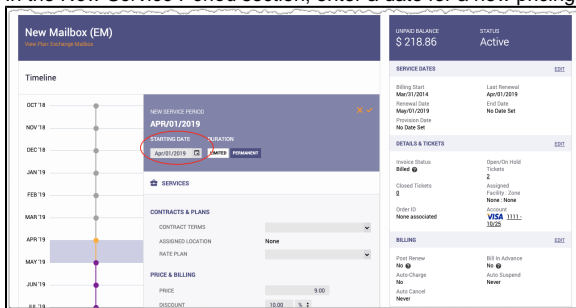
1. [Add a new service](#), if necessary.
2. From the *Service Timeline*, click the month you want to begin a new period.



3. From the *Service Details* page, click the **New Period** link.



4. In the *New Service Period* section, enter a date for a new pricing period to begin.



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5. Select **Permanent** to override any price periods you have set to start after this date. Using the **Limited** setting keep the new period's price until another preexisting period begins.

New Mailbox (EM)

Timeline

NEW SERVICE PERIOD
APR/01/2019

STARTING DATE: APR/01/2019 | DURATION: **Permanent**

PRICE & BILLING

PRICE: \$0.00

DISCOUNT: 10.00 % 5

QUANTITY: 1.00

PERIOD: **Permanent**

BILLING CALCULATED: ☒ By Period ☐ By Month

TOTALS

UPDATES BALANCE: \$218.86 | STATUS: Active

SERVICE DATES

Billing Start: Mar/01/2014 | Last Renewal: Apr/01/2019

Renewal Date: May/01/2019 | End Date: No Date Set

Prepayment Date: No Date Set

DETAILS & TICKETS

Invoice Status: **Send @**

Open/On Hold: 2

Closed Tickets: 0

Assigned: Facility: Zone

Order ID: None associated

BILLING

Post Renew: No ☒ | Bill in Advance: No ☒

Auto-Charge: No | Auto-Renewal: Never

Auto-Cancel: Never

6. In the **Price** field, enter the price for the new pricing period.

New Mailbox (EM)

Timeline

NEW SERVICE PERIOD
APR/01/2019

STARTING DATE: APR/01/2019 | DURATION: Permanent

PRICE & BILLING

PRICE: \$10.00

DISCOUNT: 10.00 % 5

QUANTITY: 1.00

PERIOD: Permanent

BILLING CALCULATED: ☒ By Period ☐ By Month

TOTALS

UPDATES BALANCE: \$218.86 | STATUS: Active

SERVICE DATES

Billing Start: Mar/01/2014 | Last Renewal: Apr/01/2019

Renewal Date: May/01/2019 | End Date: No Date Set

Prepayment Date: No Date Set

DETAILS & TICKETS

Invoice Status: **Send @**

Open/On Hold: 2

Closed Tickets: 0

Assigned: Facility: Zone

Order ID: None associated

BILLING

Post Renew: No ☒ | Bill in Advance: No ☒

Auto-Charge: No | Auto-Renewal: Never

Auto-Cancel: Never

7. Click **Save**.

New Mailbox (EM)

Timeline

NEW SERVICE PERIOD
APR/01/2019

STARTING DATE: APR/01/2019 | DURATION: Permanent

PRICE & BILLING

PRICE: \$10.00

DISCOUNT: 10.00 % 5

QUANTITY: 1.00

PERIOD: Permanent

BILLING CALCULATED: ☒ By Period ☐ By Month

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UPDATES BALANCE: \$218.86 | STATUS: Active

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Billing Start: Mar/01/2014 | Last Renewal: Apr/01/2019

Renewal Date: May/01/2019 | End Date: No Date Set

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DETAILS & TICKETS

Invoice Status: **Send @**

Open/On Hold: 2

Closed Tickets: 0

Assigned: Facility: Zone

Order ID: None associated

BILLING

Post Renew: No ☒ | Bill in Advance: No ☒

Auto-Charge: No | Auto-Renewal: Never

Auto-Cancel: Never

8. Repeat for each new pricing period you need.



Pricing Timeline

The Pricing Timeline displays service information based on the selected point in the timeline. Clicking on a different point updates the service details information, displaying any pricing changes and prorated values during that time.

Once the service and future pricing periods are configured, Ubersmith bills for the upcoming months automatically.

To follow along with the example above, you would do the following:

1. Add the service with a start date of May 1 and a price of \$100.
2. Add a pricing period starting June 1 at \$200.
3. Add another pricing period starting July 1 at \$300.

Related Topics

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