

Adding Services

Once a customer orders a product from your company, you will need to create a service item in their account in order to bill them. Ubersmith guides you through adding a service using a wizard. The number of steps in the wizard depends on the type of service you are adding.



Clicking **Save** at any time creates the service, provided the minimum required data has been provided.

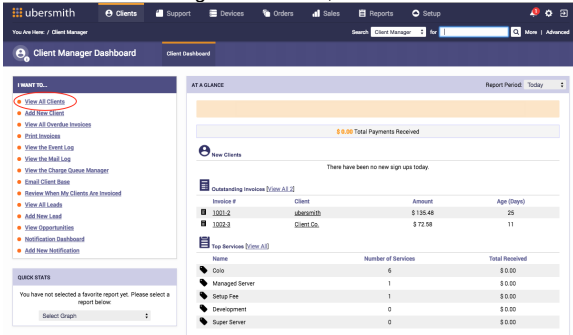
Access the Add Services page

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 add a service.



The *Client Profile* page appears.

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



The *Current Services* page appears.

On this page:

On this page:

- Access the Add Services page
- General Properties
- Tax Assignments
- Billing Info
- Server Info
- Service Notes
- Custom Fields
- Comment
- Usage Plan Rate
- Related Topics

5. Click **Add Service**.



The **Add Service** page appears.

General Properties



The fields and options in this step vary depending on the selected service plan.

1. In the **Description** field, enter a description for the service that will appear on the invoice.
2. In the **Service Plan** field, select the related service plan.
3. In the **Quantity** field, enter the number of this type of service being billed.
4. In the **Billing Period** field, select the renewal period for the service.
5. 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.
6. 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.
7. 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.
8. Select the **Setup Fee Quantity Sensitive** field if you want to multiply the setup fee by the number of services added.
9. In the **Contract Term** field, select an available contract term.
10. In the **Assigned Location** field, select the appropriate location.
11. In the **Rate Plan** field, select an available rate plan.
12. In the **Item** field, three 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.
 - **Client Access** – select either **Visible to client**, **Hidden from client**, **Hidden when \$0.00**.
13. Click **Next**.

Tax Assignments

1. 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.
2. Click **Next**.
 - 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.

1. In the **Situs Rule (US/Canada)** field, either select the appropriate rule from the list or click edit to manually enter a code.
2. In the **Situs Rule (Non US/Canada)** field, either select the appropriate rule from the list or click edit to manually enter a code.
3. In the **Transaction Type Code** field, either select the appropriate rule from the list or click edit to manually enter a code.
4. In the **Zip Code** field, enter the client's zip code.
5. 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.

6. 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.
7. 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.
8. In the **Setup Fee Transaction Type Code** field, either select the appropriate rule from the list or click edit to manually enter a code.
9. In the **Setup Fee Zip Code** field, enter your client's zip code.
10. 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.

ubersmith

Add Service Step 2 of 7
Tax Assignments

TAX ENGINE

Tax Engine: **Surretax** edit

Situs Rule (US/Canada): Two-out-of-Three test using NPA-NEOC (default) edit

Situs Rule (Non US/Canada): Two-out-of-Three test using NPA-NEOC (default) edit

Transaction Type Code: Plan Default (Long Distance Toll) edit

Zip Code: edit

Tax Point to Point Zip Code: edit

Setup Fee Situs Rule (US/Canada): Two-out-of-Three test using NPA-NEOC (default) edit

Setup Fee Situs Rule (Non US/Canada): Two-out-of-Three test using NPA-NEOC (default) edit

Setup Fee Transaction Type Code: Long Distance Toll edit

Setup Fee Zip Code: edit

Setup Fee Tax Point to Point Zip Code: edit

Back Next Save Save & New Cancel

- If you selected **Internal Tax Engine**, select an appropriate applicable tax rate tax for the **Service** and/or **Setup Fee**.

ubersmith

Add Service Step 2 of 7
Tax Assignments

TAX ENGINE

Tax Engine: **Internal Tax Engine** edit

SELECT APPLICABLE TAX RATES

Tax	Service	Setup Fee
New York State (4%)	<input type="checkbox"/>	<input type="checkbox"/>
New York, NY (4.5%)	<input type="checkbox"/>	<input type="checkbox"/>

Back Next Save Save & New Cancel

Billing Info

1. In the **Planned Activation Date** field, enter the estimated date the service is expected to begin.
2. In the **Activation Date** field, enter the actual date the service is scheduled to begin.
3. In the **Client Acceptance Date** field, enter the date your customer's contract agreement was completed.
4. In the **Billing Start Date** field, enter the date to begin billing for the service. The field defaults to the current date.
5. In the **Expected Cancellation Date** field, enter the estimated date the service is expected to end.
6. In the **End Date** field, enter the actual date the service ended.
7. In the **Bill in Advance** field, select either **Yes** or **No** if you want to bill in advance.
8. In the **Auto Charge** field, select either yes or no if you want to automatically process payments through an on-file payment method.
9. In the **Automatic Payment Method** field, select the method of payment for the auto charge.
10. In the **Auto-Suspend** field, select the field and enter the number of days to automatically suspend the service if payment is overdue.
11. In the **Auto-Cancel** field, select the field and enter the number of days to automatically cancel the service if payment is overdue.
12. In the **Post Renew** field, select either **Yes** or **No** to bill the service in arrears.

13. Click **Next**.

ubersmith

Add Service

Step 3 of 6
Billing Info

BILLING INFO

Planned Activation Date:

Activation Date:

Client Acceptance Date:

Billing Start Date: Apr 01/2016

Expected Cancellation Date:

End Date:

Bill in Advance: ☐ Yes ☒ No

Auto Charge: ☒ Yes ☐ No
This service will not be automatically charged until a payment method is added.

Automatic Payment Method: No Accounts on File

Auto-Suspend: ☒ After: 15 Day(s) Overdue

Auto-Cancel: ☐ After: 0 Day(s) Overdue

Post Renewal: ☐ Yes ☒ No

Back Next Save Save & New Cancel

Server Info

i Complete this step in order for Ubersmith to automatically interface with Control Panel.

1. In the **User ID** field, enter the service's User ID.
2. In the **Password** field, enter the service's password.
3. In the **Domain Name** field, enter the service's domain name.
4. In the **IP Address** field, enter the service's IP address.
5. Click **Next**.

ubersmith

Add Service

Step 4 of 6
Server Info

SERVER INFO

User ID: exampleID

Password: examplepassword

Domain Name: example

IP Address: mm.mmm.mmm.mmm

Back Next Save Save & New Cancel

Service Notes

i Notes are visible to your client.

1. In the **Notes** section, click **add note**.

ubersmith

Add Service

Step 5 of 6
Service Notes

NOTES

There are no notes for this service

add note

Back Next Save Save & New Cancel

The *Add Service Note* page appear.

2. Enter any information regarding your client's service that you want to appear as a line item when the service is invoiced and click **Save**.

The *Notes* section appears.

3. Click **Next**.

Custom Fields

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

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

Comment



Comments can be used for internal-only information and are not related to invoices.

1. In the *Comments* section, enter any information regarding your client's service, as necessary. You can also attach any file.

2. Click **Next** or **Save** or **Save & New**.

The screenshot shows the 'Add Service' form at Step 5 of 6, titled 'Comment'. The form has a dark blue header with the 'ubersmith' logo and the title 'Add Service'. The main content area is light blue and contains a 'COMMENT' section with a text area containing the placeholder text 'This is an example comment.' Below the text area is an 'Attachments' section with a 'Choose File' button and the text 'No file chosen'. At the bottom of the form is a dark blue bar with five buttons: 'Back', 'Next', 'Save', 'Save & New', and 'Cancel'. The 'Next', 'Save', and 'Save & New' buttons are highlighted with red boxes.

Usage Plan Rate

This step appears if you are using a service to calculate usage data.

1. In the **Name** field, confirm the appropriate usage plan is listed. If not, type or select the appropriate entry.
2. Click **Save**.

The screenshot shows the 'Add Service' form at Step 6 of 6, titled 'Usage Plan Rate'. The form has a dark blue header with the 'ubersmith' logo and the title 'Add Service'. The main content area is light blue and contains a 'USAGE PLAN RATE' section with a text area containing the placeholder text 'Name *'. Below the text area is a 'Save' button. At the bottom of the form is a dark blue bar with five buttons: 'Back', 'Save', 'Save & New', and 'Cancel'. The 'Save' button is highlighted with a red box.

Related Topics

- [Managing Services](#)
- [Adding Service Plans](#)
- [Managing Service Plans](#)
- [Adding Rate Plans](#)
- [Managing Rate Plans](#)
- [Adding Contract Terms](#)
- [Managing Contract Terms](#)
- [Adding Service Plan Upgrades](#)
- [Managing Service Plan Upgrades](#)
- [Adding Locations](#)
- [Tax Rates](#)