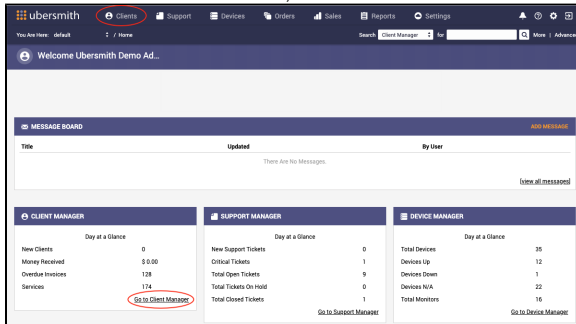


# Managing Services

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

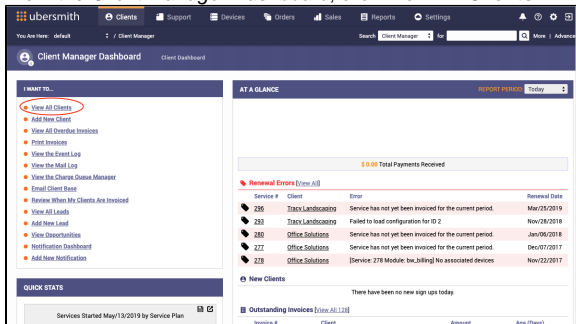
## Access the Service Details Page

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



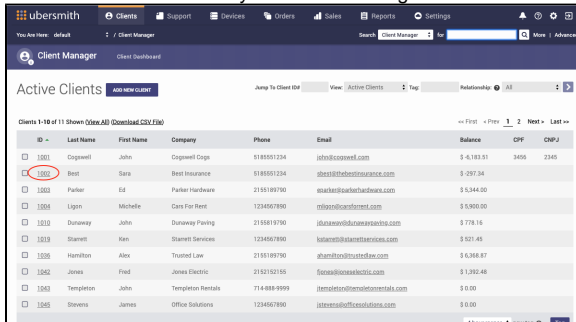
The *Client Manager Dashboard* appears.

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



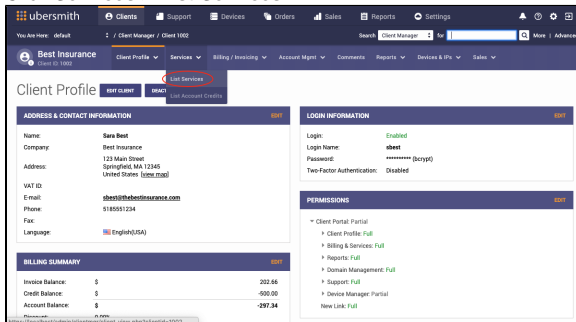
The *Active Clients* page appears.

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



The *Client Profile* page appears.

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



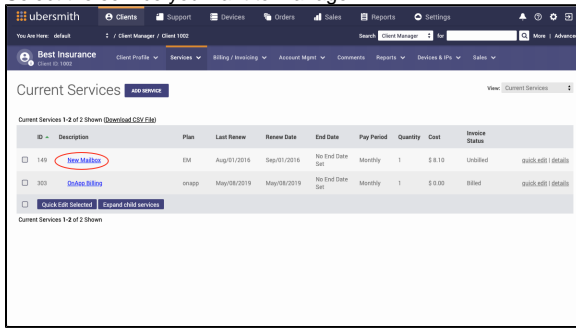
The *Current Services* page appears.

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](#)

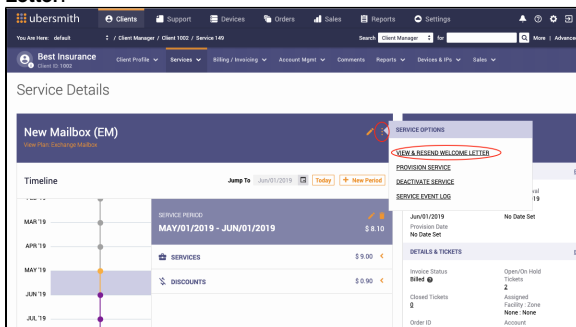
5. Select the service you want to manage.



The *Service Details* page appears.

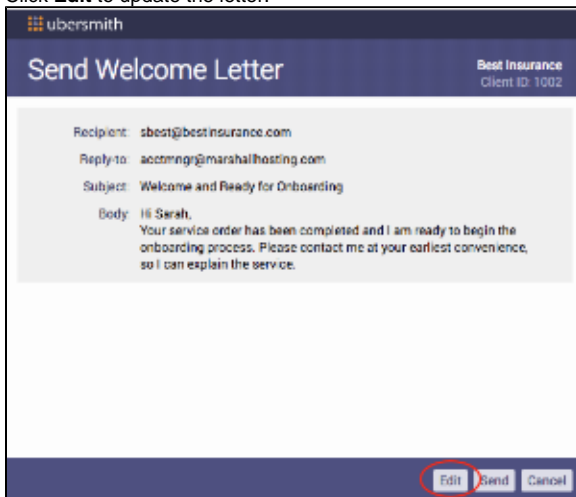
## Viewing and Resending the Welcome Letter

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

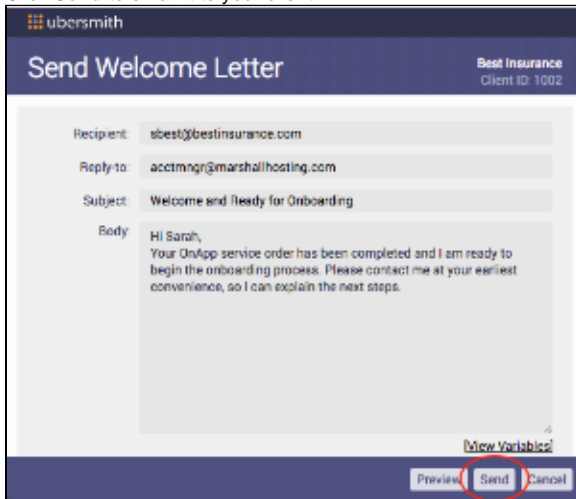


The *Send Welcome Letter* page appears.

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



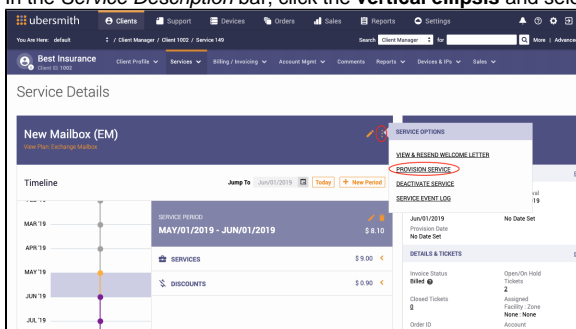
- Click **Send** to email it to your client.



## 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**.



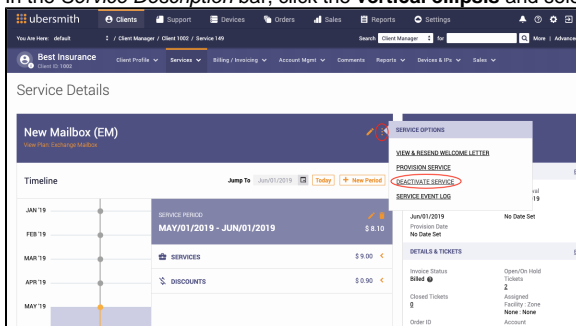
A confirmation message appears.

- Click **Yes**.

## Deactivating the Service

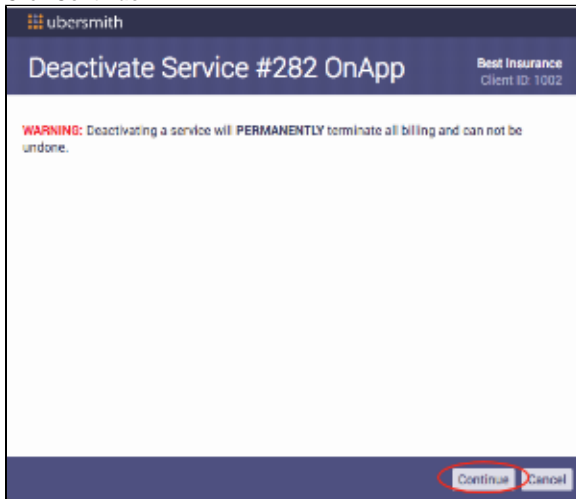
Deactivating a service permanently terminates all billing and cannot be undone. Any outstanding balances are automatically credited immediately.

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

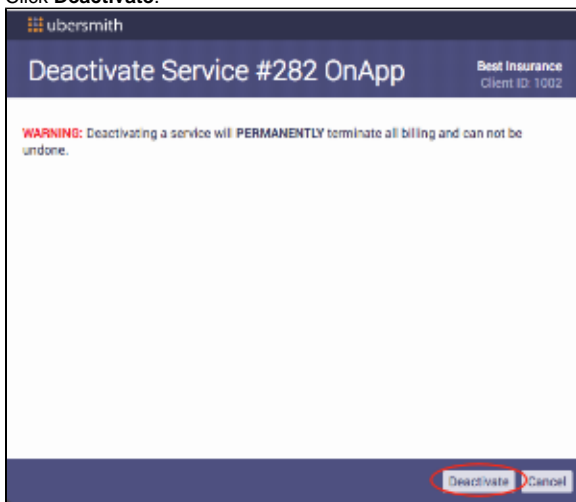


The *Deactivate Service* page appears.

3. Click **Continue**.



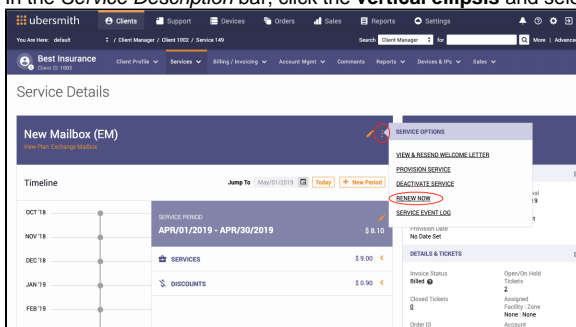
4. Click **Deactivate**.



## 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**.

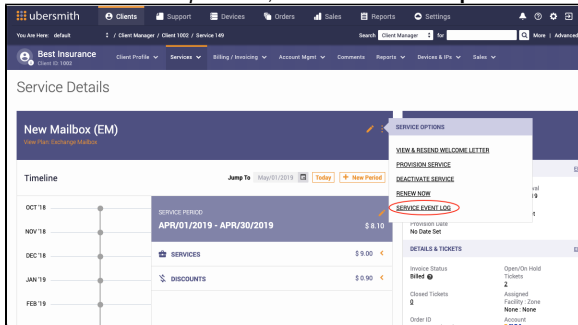


### Manually Renewing

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.

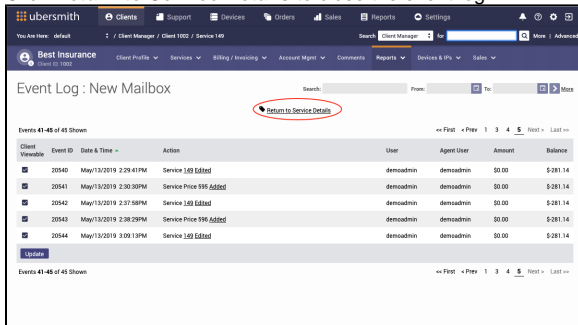
## Viewing the Service Event Log

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



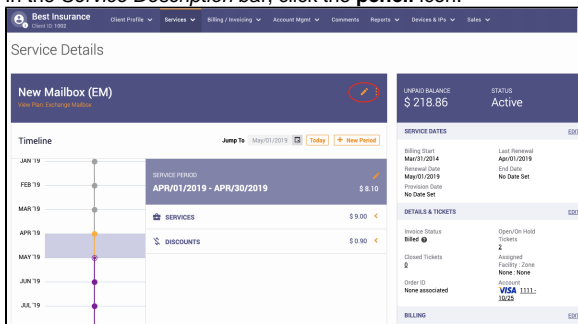
The *Event Log* page appears.

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



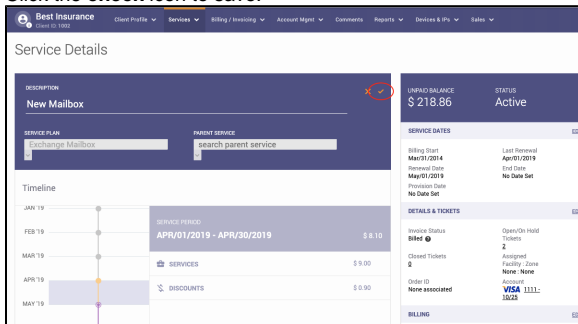
## Changing the Service Plan and Parent Service

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 *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.

## Viewing Service Periods

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

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.

## Editing Service Dates

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

2. 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. An 'edit' link is circled in red in the top right corner of the 'Service Dates' section.

The *Edit Service* page appears.

3. Make any necessary changes. Refer to [Adding Services](#) and [Adding Price Scheduling and Prorating Services](#) for more information.
4. 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). A 'Save' button is circled in red at the bottom right of the page.

## Editing Details and Tickets

1. [Access the Service Details page.](#)
2. 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. An 'edit' link is circled in red in the top right corner of the 'Details & Tickets' section.

The *Edit Service* page appears.

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

4. Click **Save**.

**ubersmith** Best Insurance  
Client ID: 1002

## Edit Service 282

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**.

**ubersmith** Best Insurance  
Client ID: 1002

## Edit Service 282

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

The *Edit Service* page appears.

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

**ubersmith** Best Insurance  
Client ID: 1002

## Edit Service 282

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**.

**ubersmith**

### Edit Service 296

Tracy Landscaping  
Client ID: 1045

**TAX ENGINE**

Tax Engine: SureTax

Situs Rule (US/Canada): Plan Default ()

Situs Rule (Non US/Canada): Plan Default ()

Transaction Type Code: Plan Default ()

Tax Zip Code:

Tax Point to Point Zip Code:

**Save** **Cancel**

The *Edit Service* page appears.

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

## Viewing Outstanding Invoices

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

**ubersmith**

### Edit Service 296

Tracy Landscaping  
Client ID: 1045

**TAX ENGINE**

Tax Engine: SureTax

Situs Rule (US/Canada): Plan Default ()

Situs Rule (Non US/Canada): Plan Default ()

Transaction Type Code: Plan Default ()

Tax Zip Code:


Tax Point to Point Zip Code:

**Save** **Cancel**

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
<b>Invoice Total</b>	<b>\$ 16.46</b>

**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
<b>Invoice Total:</b>						<b>\$ 16.46</b>

## 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

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

Usage Plan Rate Name: **OutApp Billing**

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

Markup: 0.00000000%

**CUSTOM FIELDS** [edit](#)

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

**APPLICABLE TAXES** [edit](#)

There Are No Taxes Assigned To This Service

**OUTSTANDING INVOICES** [edit](#)

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

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**.

ubersmith

## Edit Usage Plan Rate

OnApp Billing

English (USA) Français (Canada) Português (Portugal)

Usage Plan Rate Name: OnApp Billing

Usage Plan Datasource: OnApp Billing Datasource

Update Cancel

## Editing Usage Plan Data Sources

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

Usage Plan Rate Name: OnApp Billing

OnApp Billing (OnApp Billing) EDIT

Markup: 0.00000000%

**CUSTOM FIELDS** EDIT

<b>BANDWIDTH BILLING</b>	<b>CLOUD BILLING</b>
Billing Method: Not Billed	Credit Limit: 0 Account
<b>OnApp Billing</b>	<b>TICKET BILLING</b>
Credit Limit: 0	Billing Method: Not Billed
OnApp Billing Method: User ID: VM resources only	Send Coverage Notification: Yes
<b>BANDWIDTH NOTIFICATION</b>	<b>QUICKBOOKS</b>
Bandwidth Notification: None	Quickbooks Class: Not Classified
<b>POWER CREDIT BILLING</b>	<b>BACKUP BILLING</b>
Billing Method: Not Billed	Billing Method: Not Billed
<b>PROFESSIONAL SERVICES</b>	
Existing Client: Unchecked	

**OUTSTANDING INVOICES**

There are no Outstanding Invoices For This Service

**CHILD SERVICES** [ADD/REMOVE SERVICES](#)

OnApp Billing Status For OnApp Billing Status For (OnApp)

ACTIVE \$100.00 / One Time

**SERVER DETAILS** EDIT

User ID:  
Password:  
Domain Name:  
IP Address:

**COMMENTS** [ADD COMMENT](#)

There are no Comments

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**.

APR 20 TOTALS \$ 0.00

**Usage Plan Rate Properties** [DETAILS](#)

Usage Plan Rate Name: OnApp Billing

**CUSTOM FIELDS** [EDIT](#)

<b>BANDWIDTH BILLING</b>	<b>CLOUD BILLING</b>
Billing Method: Not Billed	Credit Limit: 0 Account
<b>TICKET BILLING</b>	<b>BANDWIDTH NOTIFICATION</b>
Billing Method: Not Billed	Bandwidth Notification: None
Send Coverage Notification: Yes	
<b>QUICKBOOKS</b>	<b>POWER CREDIT BILLING</b>
Quickbooks Class: Not Classified	Billing Method: Not Billed
<b>BACKUP BILLING</b>	<b>PROFESSIONAL SERVICES</b>
Billing Method: Not Billed	Existing Client: Unchecked

**OUTSTANDING INVOICES**

There are no Outstanding Invoices For This Service

**CHILD SERVICES** [ADD/REMOVE SERVICES](#)

This Service Does Not Have Any Child Services

**SERVER DETAILS** [EDIT](#)

User ID:  
Password:  
Domain Name:  
IP Address:

**COMMENTS** [ADD COMMENT](#)

There are no Comments

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 selected and highlighted with a red circle. The 'ADD COMMENT' button is also visible.

- 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 selected and highlighted with a red circle. The 'ADD COMMENT' button is also visible.

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

The *Edit Service Comment* page appears.

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

## Deleting Comments

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

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

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

There are no Outstanding Invoices for This Service

USAGE PLAN RATE PROPERTIESDETAILS

Usage Plan Rate NameOutage Billing

CHILD SERVICESADD CHILD SERVICE

This Service Does Not Have Any CHILD Services

CUSTOM FIELDSNOT

BANDWIDTH BILLING

Billing MethodNot Billed

CLOUD BILLING

Credit Limit0

Usage UnitsAccount

TICKET BILLING

Billing MethodNot Billed

Send Overage NotificationYes

BANDWIDTH NOTIFICATION

Bandwidth NotificationNone

QUICKBOOKS

Quickbooks ClassNot Classified

POWER CIRCUIT BILLING

Billing MethodNot Billed

BACKUP BILLING

Billing MethodNot Billed

PROFESSIONAL SERVICES

Existing ClientUnchecked

SERVER DETAILSNOT

User ID

Password

Domain Name

IP Address

COMMENTSNOTESNOT

There are no Notes for This Service

Related Topics

[Adding Services](#)