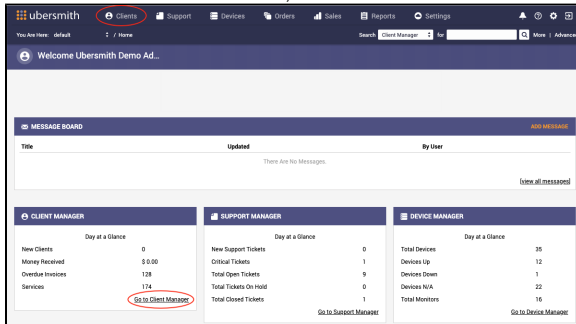


Managing Services

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

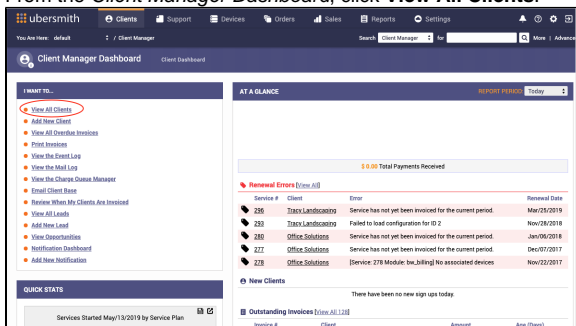
Access the Service Details Page

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



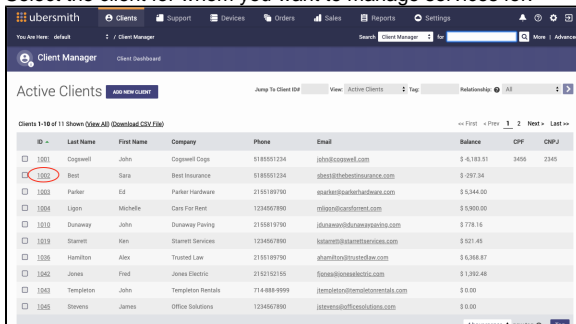
The *Client Manager Dashboard* appears.

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



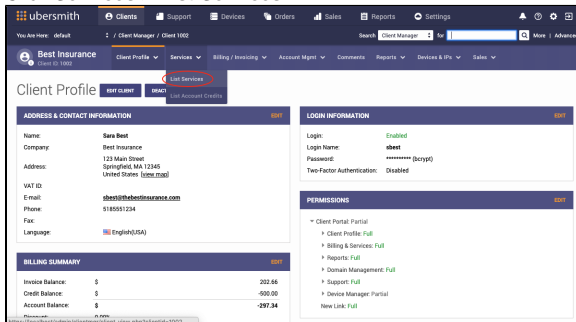
The *Active Clients* page appears.

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



The *Client Profile* page appears.

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



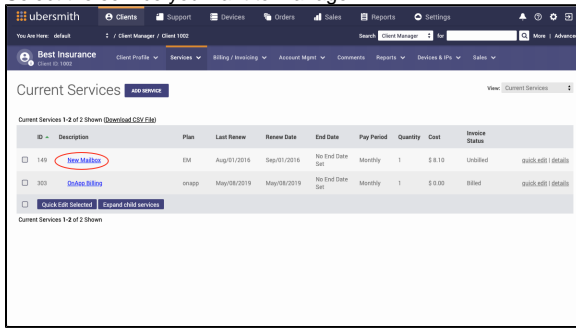
The *Current Services* page appears.

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](#)

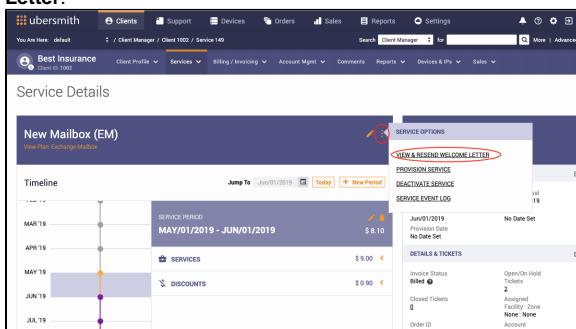
5. Select the service you want to manage.



The *Service Details* page appears.

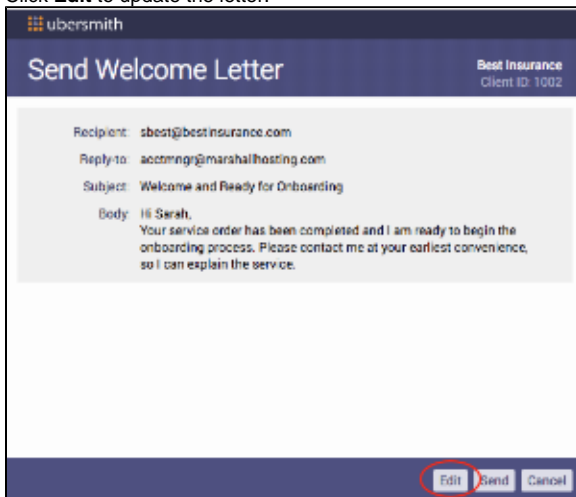
Viewing and Resending the Welcome Letter

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

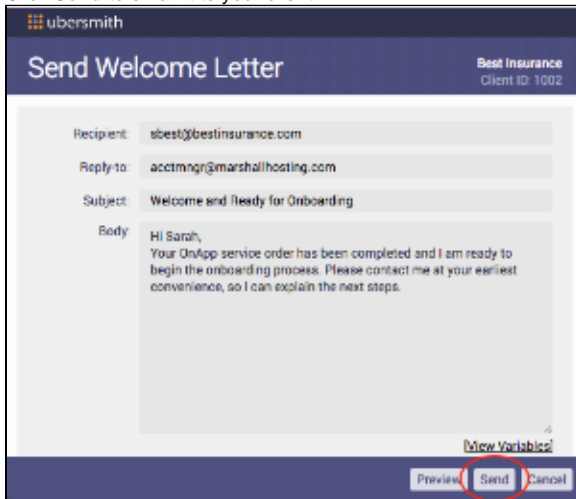


The *Send Welcome Letter* page appears.

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



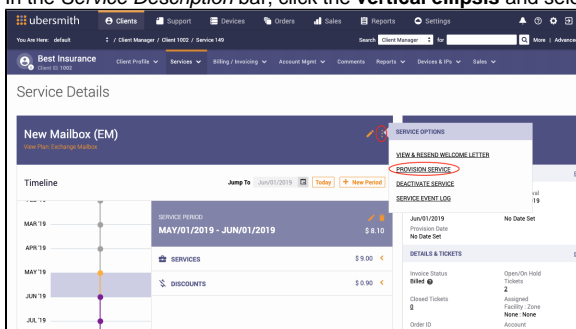
- Click **Send** to email it to your client.



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**.



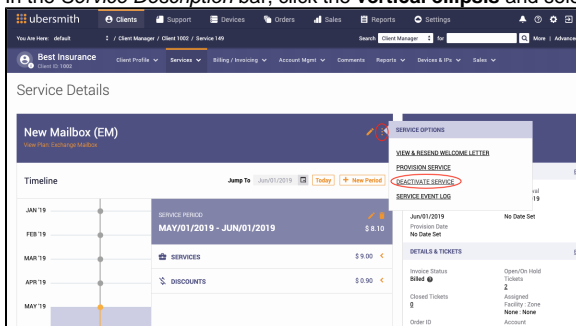
A confirmation message appears.

- Click **Yes**.

Deactivating the Service

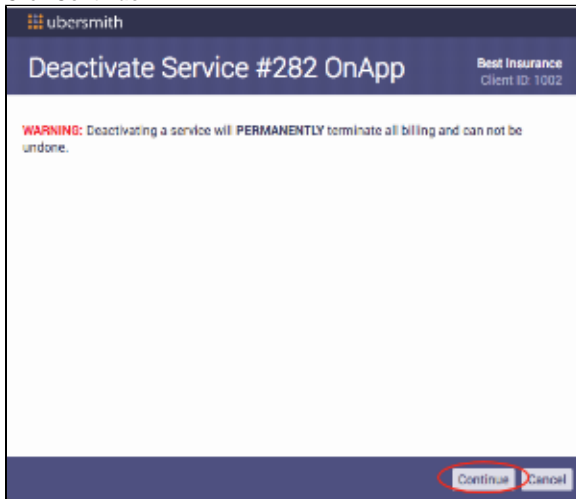
Deactivating a service permanently terminates all billing and cannot be undone. Any outstanding balances are automatically credited immediately.

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

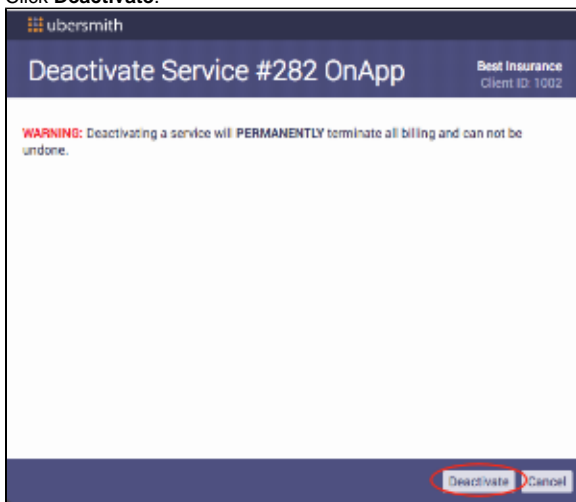


The *Deactivate Service* page appears.

3. Click **Continue**.



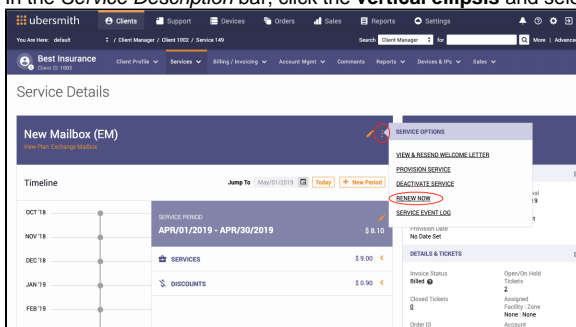
4. Click **Deactivate**.



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**.

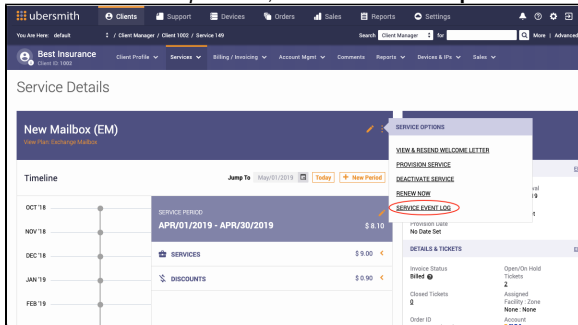


Manually Renewing

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.

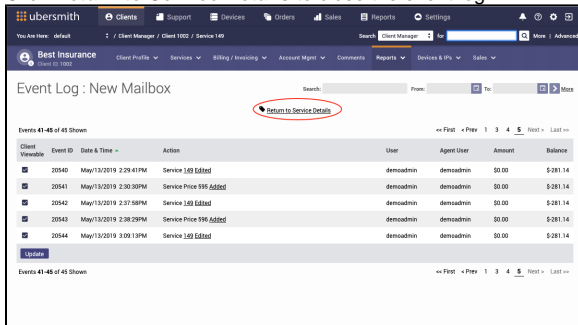
Viewing the Service Event Log

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



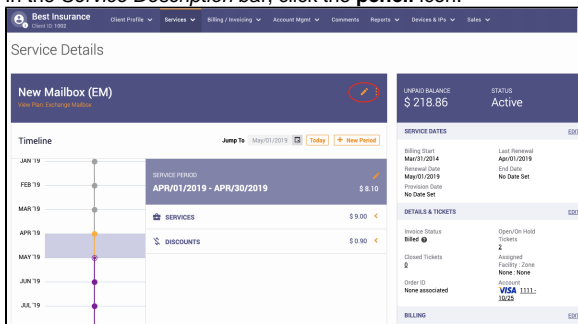
The *Event Log* page appears.

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



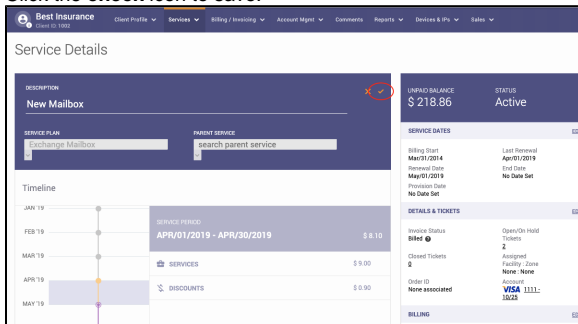
Changing the Service Plan and Parent Service

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 screenshot shows the 'Service Details' page for 'New Mailbox (EM)'. The 'Service Timeline' section displays a calendar view from January 2019 to July 2019. A red circle highlights the 'New Period' button in the timeline. The 'Service Period' is set to 'APR/01/2019 - APR/30/2019' with a price of '\$ 8.10'. The 'Services' section shows a price of '\$ 9.00' and 'Discounts' of '\$ 0.90'. The 'Details & Tickets' section shows 'Service Status' as 'Billed', 'Open On Hold Tickets' as '2', 'Assigned Facility - Zone' as 'None - None', and 'Order ID' as 'None associated'.

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.

The screenshot shows the 'Service Details' page for 'New Mailbox (EM)'. The 'Service Timeline' section displays a calendar view from January 2019 to July 2019. A red circle highlights the check icon in the timeline. The 'Service Period' is set to 'APR/01/2019' with a 'STARTING DATE' of 'Apr/01/2019' and a 'DURATION' of '1 month'. The 'Services' section shows a price of '\$ 9.00' and 'Discounts' of '\$ 0.90'. The 'Details & Tickets' section shows 'Service Status' as 'Billed', 'Open On Hold Tickets' as '2', 'Assigned Facility - Zone' as 'None - None', and 'Order ID' as 'None associated'.

Viewing Service Periods

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

The screenshot shows the 'Service Details' page for 'OnApp (onapp)'. The 'Service Timeline' section displays a calendar view from January 2018 to May 2018. A red circle highlights the selected month 'JAN/14/2018'. The 'Service Period' is set to 'JAN/14/2018' with a 'STARTING DATE' of 'Jan/14/2018' and a 'DURATION' of '1 month'. The 'Services' section shows a price of '\$ 9.00' and 'Discounts' of '\$ 0.90'. The 'Details & Tickets' section shows 'Service Status' as 'Billed', 'Open On Hold Tickets' as '2', 'Assigned Facility - Zone' as 'None - None', and 'Order ID' as 'None associated'.

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.

The screenshot shows the 'Service Details' page for 'New Mailbox (EM)'. The 'Service Timeline' section displays a calendar view from January 2019 to July 2019. A red circle highlights the 'Services' arrow in the timeline. The 'Service Period' is set to 'APR/01/2019 - APR/30/2019' with a price of '\$ 8.10'. The 'Services' section shows a price of '\$ 9.00' and 'Discounts' of '\$ 0.90'. The 'Details & Tickets' section shows 'Service Status' as 'Billed', 'Open On Hold Tickets' as '2', 'Assigned Facility - Zone' as 'None - None', and 'Order ID' as 'None associated'.

Editing Service Dates

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

- In the *Service Dates* section, click **edit**.

The screenshot shows the 'Service Details' page for a client named 'Best Insurance' (Client ID: 1002). The page has a top navigation bar with links like 'Client Profile', 'Services', 'Billing/Invoicing', etc. The main content area is titled 'Service Details' and includes a 'New Mailbox (EM)' header. Below this is a 'Timeline' section showing a calendar view from February to July 2019. The 'Service Dates' section is highlighted, showing a service period from 'APR/01/2019 - MAY/01/2019' with a price of '\$ 8.10'. To the right of the timeline, there are sections for 'UNPAID BALANCE' (\$ 218.86), 'STATUS' (Active), 'SERVICE DATES', 'DETAILS & TICKETS', and 'BILLING'. The 'SERVICE DATES' section includes fields for 'Billing Start', 'Last Renewal', 'Renewal Date', 'End Date', and 'Promotion Date'. The 'DETAILS & TICKETS' section includes 'Invoice Status', 'Assigned Facility', 'Assigned Zone', and 'Assigned Name'. The 'BILLING' section includes 'Order ID' and 'Home associated'. The 'EDIT' button in the 'SERVICE DATES' section is circled in red.

The *Edit Service* page appears.

- Make any necessary changes. Refer to [Adding Services](#) and [Adding Price Scheduling and Prorating Services](#) for more information.
- Click **Save**.

The screenshot shows the 'Edit Service 282' page for 'Best Insurance' (Client ID: 1002). The page has a top navigation bar with links like 'Client Profile', 'Services', 'Billing/Invoicing', etc. The main content area is titled 'Edit Service 282'. Below this is a 'Status' dropdown menu set to 'Active'. There are several date fields: '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', and 'End Date'. There are also radio button options for 'Post Renew' (Yes/No), 'Bill In Advance' (Yes/No), and 'Auto Charge' (Yes/No). The 'Automatic Payment Method' is set to 'No Accounts on File'. The 'Invoice Status' is set to 'Un-billed', 'Billed', or 'Pre-Billed'. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

Editing Details and Tickets

- Access the *Service Details* page.
- In the *Details & Tickets* section, click **edit**.

This screenshot is identical to the one above, showing the 'Service Details' page for 'New Mailbox (EM)'. It highlights the 'Details & Tickets' section, which includes fields for 'Invoice Status', 'Assigned Facility', 'Assigned Zone', and 'Assigned Name'. The 'EDIT' button in this section is circled in red.

The *Edit Service* page appears.

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

4. Click **Save**.

ubersmith

Edit Service 282 Best Insurance Client ID: 1002

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

Service Details Best Insurance Client ID: 1002

BILLING **edit**

Next Renew: No ☒ Bill In Advance: No ☒
 Auto Charge: No ☒ Auto Suspend: No ☒
 Auto Cancel: No ☒

APPLICABLE TAXES **edit**

There Are No Taxes Assigned To This Service

OUTSTANDING INVOICES

Invoice #	Date Due	Outstanding
1002-210	May/01/2014	\$ 0.46
1002-207	Jul/01/2014	\$ 16.30
1002-202	Aug/01/2014	\$ 8.15
1002-201	Oct/01/2014	\$ 16.30
1002-205	Dec/01/2014	\$ 16.30
1002-203	Jan/01/2015	\$ 8.15
1002-200	Mar/01/2015	\$ 16.30
1002-202	May/01/2015	\$ 16.30

The *Edit Service* page appears.

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

ubersmith

Edit Service 282 Best Insurance Client ID: 1002

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**.

The screenshot shows the 'Service Details' page for 'Tracy Landscaping' (Client ID: 1045). The 'Applicable Taxes' section is highlighted with a red box and the word 'edit' next to it. Below this section, there is a table of 'Outstanding Invoices'.

Invoice #	Date Due	Outstanding
1002-210	May/01/2014	\$ 6.45
1002-207	Jul/01/2014	\$ 16.20
1002-267	Aug/01/2014	\$ 8.10
1002-281	Oct/01/2014	\$ 16.20
1002-308	Dec/01/2014	\$ 16.20
1002-335	Jan/01/2015	\$ 8.10
1002-350	Mar/01/2015	\$ 16.20
1002-383	May/01/2015	\$ 16.20

The *Edit Service* page appears.

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

The screenshot shows the 'Edit Service' page for 'Tracy Landscaping' (Client ID: 1045). The 'Tax Engine' section is highlighted with a red box. Below this section, there are fields for 'Situs Rule (US/Canada)', 'Situs Rule (Non US/Canada)', 'Transaction Type Code', 'Tax Zip Code', and 'Tax Point to Point Zip Code'. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

Viewing Outstanding Invoices

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

The screenshot shows the 'Service Details' page for 'Tracy Landscaping' (Client ID: 1045). The 'Outstanding Invoices' section is highlighted with a red box. Below this section, there is a table of 'Outstanding Invoices'.

Invoice #	Date Due	Outstanding
1002-210	May/01/2014	\$ 6.45
1002-207	Jul/01/2014	\$ 16.20
1002-267	Aug/01/2014	\$ 8.10
1002-281	Oct/01/2014	\$ 16.20
1002-308	Dec/01/2014	\$ 16.20
1002-335	Jan/01/2015	\$ 8.10
1002-350	Mar/01/2015	\$ 16.20
1002-383	May/01/2015	\$ 16.20

The *Invoice* page appears.

3. You can review the invoice or mark a payment. See [Marking Payments](#) for more information.

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

This invoice has been sent manually without automatically processing a payment. Please contact us if you wish to arrange an alternate method of payment.

Client Ledger
Prior Balance \$ 1,172.00
Payments / Refunds \$ 0.00

Current Charges
Service Items \$ 16.46
Taxes \$ 0.00
Invoice Total \$ 16.46

Account Balance as of Apr/01/2014 **\$ 1,188.46**

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
Invoice Total:						\$ 16.46

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 Name
None

QUICKBOOKS
QuickBooks Class
Not Classified

POWER CIRCUIT BILLING
Billing Method
Not Billed

BACKUP BILLING
Billing Method
Not Billed

PROFESSIONAL SERVICES
Existing Client
Unchecked

1002-483	Aug/01/2015	\$ 8.10
1002-484	Dec/01/2015	\$ 16.20
1002-527	Dec/01/2015	\$ 16.20
1002-573	Jan/01/2016	\$ 8.10
1002-593	Mar/01/2016	\$ 16.20
1002-640	May/01/2016	\$ 16.00
1002-698	Jun/12/2016	\$ 16.20

CHILD SERVICES
This Service Does Not Have Any Child Services

SERVER DETAILS
User ID
Password
Domain Name
IP Address

COMMENTS / NOTES
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
Usage Plan Rate Name: OutApp Billing
ONAPP BILLING (ONAPP BILLING)
Markup: 0.00000000%

CUSTOM FIELDS
BANDWIDTH BILLING
Billing Method: Not Billed
ONAPP BILLING
Credit Limit: 0
ONAPP Billing Method: User ID - VM resource only
BANDWIDTH NOTIFICATION
Bandwidth Notification Name: None

CHILD SERVICES
This Service Does Not Have Any Child Services

SERVER DETAILS
User ID
Password
Domain Name
IP Address

COMMENTS / NOTES
There Are No Comments

APPLICABLE TAXES
There Are No Taxes Assigned To This Service

OUTSTANDING INVOICES
There Are No Outstanding Invoices For This Service

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**.

Editing Usage Plan Data Sources

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

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**.

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**.

Ubersmith service details page. The 'COMMENTS' tab is selected and highlighted with a red circle. The 'ADD COMMENT' button is also visible.

- Click **Add Comment**.

Ubersmith service details page. 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**.

Ubersmith service details page. 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 screenshot shows the Ubersmith dashboard for a client named 'Best Insurance' (Client ID: 1002). The 'Comments' section is active, displaying a comment by 'Ubersmith Demo Admin' dated May 14, 2019. The comment text is 'The OnApp service is set to begin at midnight.' and it has an 'edit' link next to it. The dashboard also shows various service details and billing information on the left and top.

The *Edit Service Comment* page appears.

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

The screenshot shows the 'Edit Service Comment' page. The comment text is 'The OnApp service is set to begin at midnight.' Below the comment, there is a 'Client Viewable' checkbox and an 'Attachments' section. At the bottom right, there are 'Update' and 'Cancel' buttons, with the 'Update' button highlighted by a red circle.

Deleting Comments

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

The screenshot shows the Ubersmith dashboard for a client named 'Best Insurance' (Client ID: 1002). The 'Comments' section is active, displaying a comment by 'Ubersmith Demo Admin' dated May 14, 2019. The comment text is 'The OnApp service is set to begin at midnight.' and it has a 'delete' link next to it. The dashboard also shows various service details and billing information on the left and top.

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

The screenshot shows the Ubersmith dashboard for a client named 'Best Insurance' (Client ID: 1002). The 'Comments' section is active, displaying a comment by 'Ubersmith Demo Admin' dated May 14, 2019. The comment text is 'The OnApp service is set to begin at midnight.' and it has a 'delete' link next to it. The dashboard also shows various service details and billing information on the left and top.

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

USAGE PLAN RATE PROPERTIESDETAILS

Usage Plan Rate Name:Outage Billing

CHILD SERVICESADD CHILD SERVICE

CUSTOM FIELDSNOT

BANDWIDTH BILLING

Billing Method:Not Billed

TICKET BILLING

Billing Method:Not Billed

QUICKBOOKS

Quickbooks Class:Not Classified

BACKUP BILLING

Billing Method:Not Billed

CLOUD BILLING

Credit Limit:0

BANDWIDTH NOTIFICATION

Bandwidth Notification:None

POWER CIRCUIT BILLING

Billing Method:Not Billed

PROFESSIONAL SERVICES

Existing Client:Unchecked

SERVER DETAILSNOT

User ID:
Password:
Domain Name:
IP Address:

COMMENTSNOTESNOT

There are no Outstanding Invoices for This Service

This Service Does Not Have Any Child Services

There are no Notes for This Service

Related Topics

[Adding Services](#)