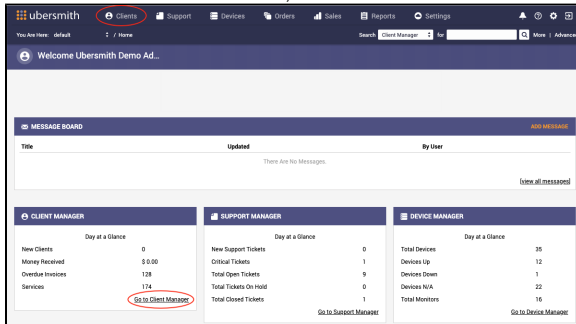


Managing Services

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

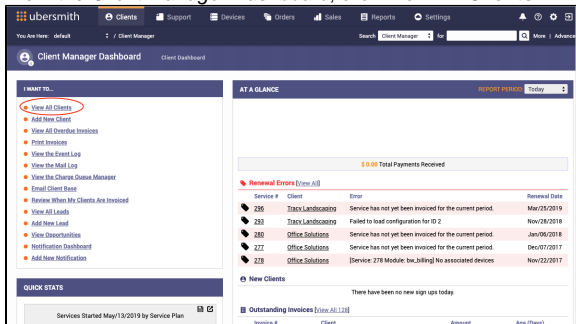
Access the Service Details Page

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



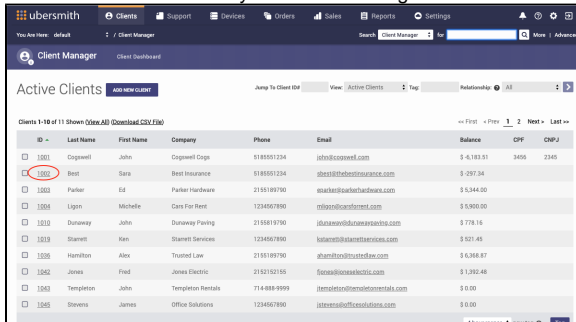
The *Client Manager Dashboard* appears.

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



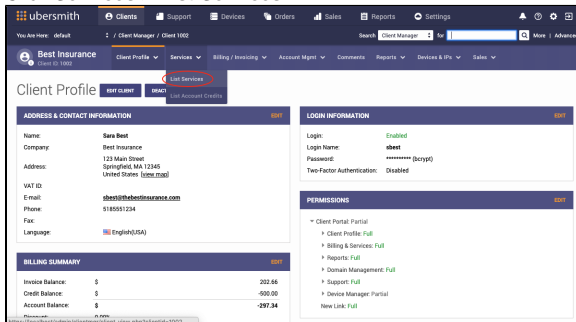
The *Active Clients* page appears.

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



The *Client Profile* page appears.

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



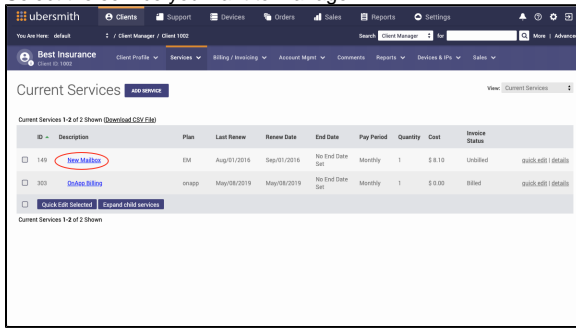
The *Current Services* page appears.

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](#)

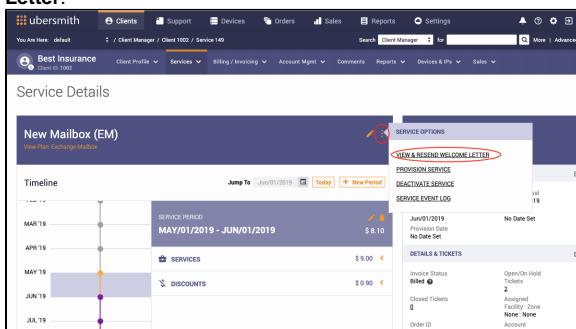
5. Select the service you want to manage.



The *Service Details* page appears.

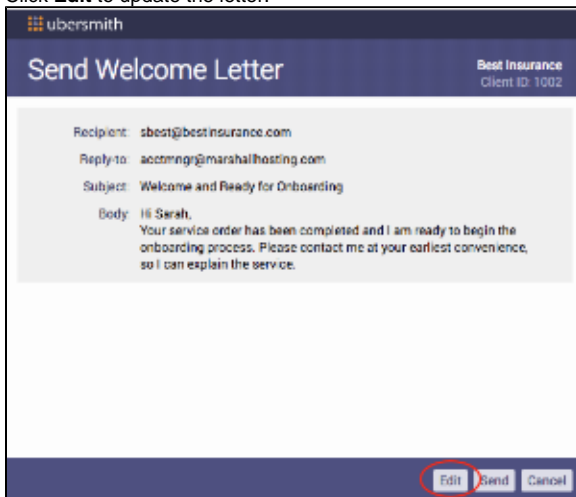
Viewing and Resending the Welcome Letter

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

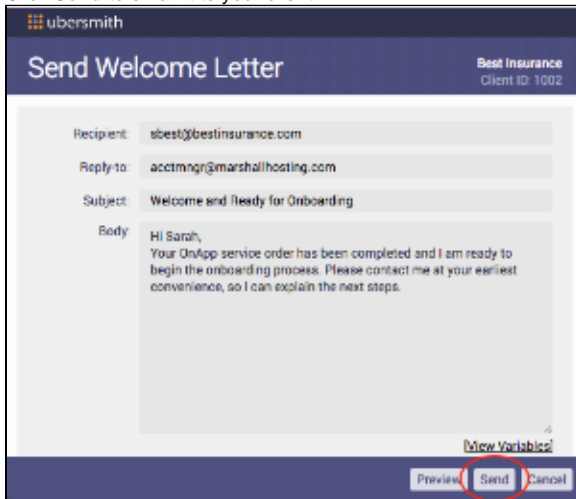


The *Send Welcome Letter* page appears.

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



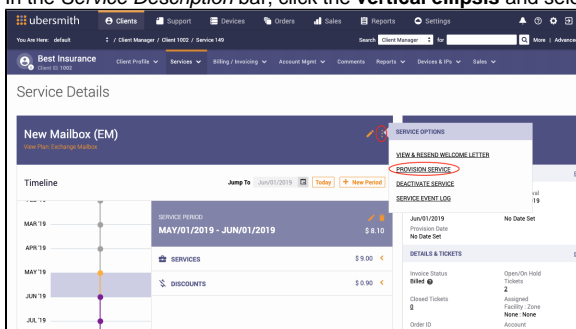
4. Click **Send** to email it to your client.



Provisioning the Service

Provision Service runs the onprovision() function for any enabled service modules on the service.

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



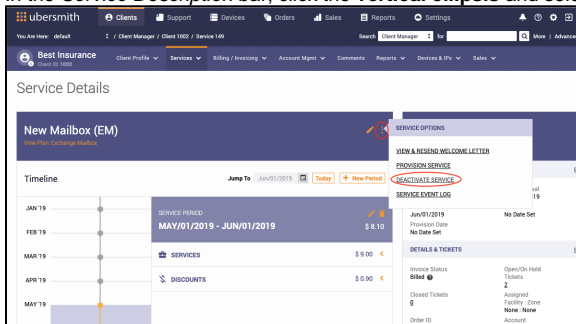
A confirmation message appears.

3. Click **Yes**.

Deactivating the Service

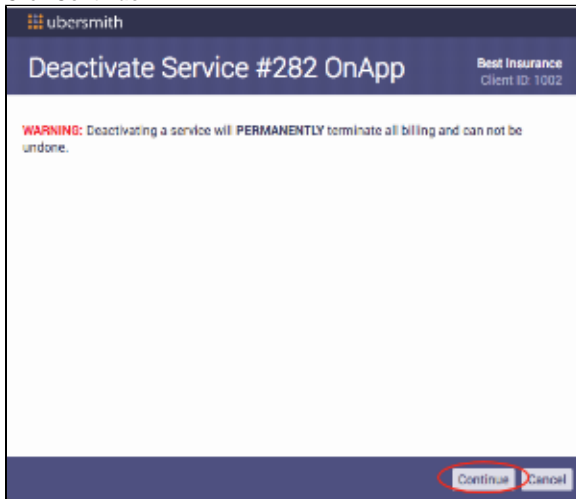
Deactivating a service permanently terminates all billing and cannot be undone. Any outstanding balances are automatically credited immediately.

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

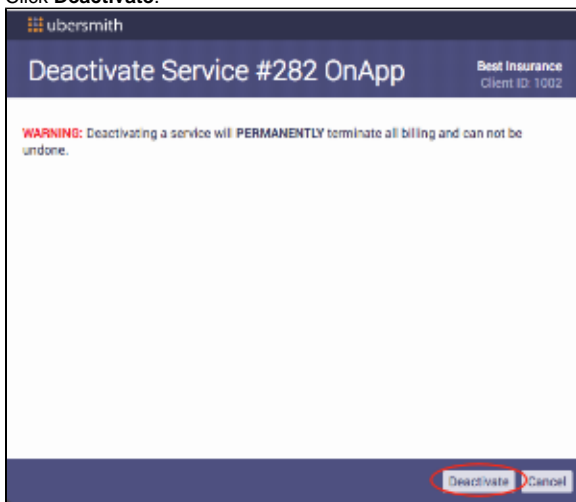


The *Deactivate Service* page appears.

3. Click **Continue**.



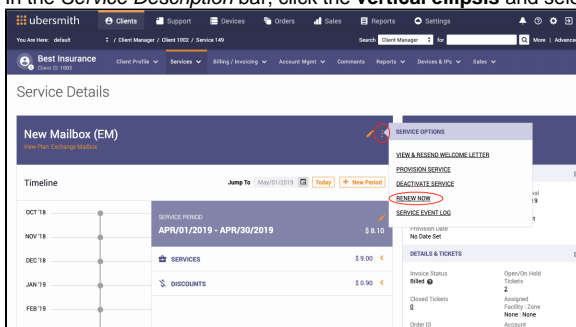
4. Click **Deactivate**.



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**.

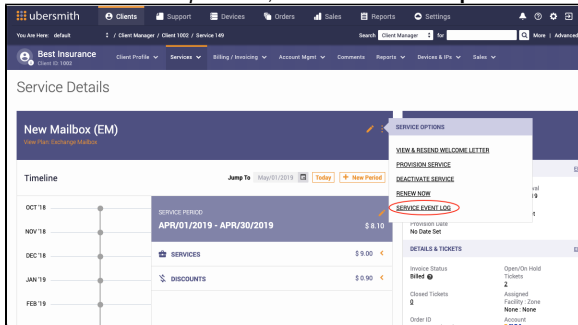


Manually Renewing

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.

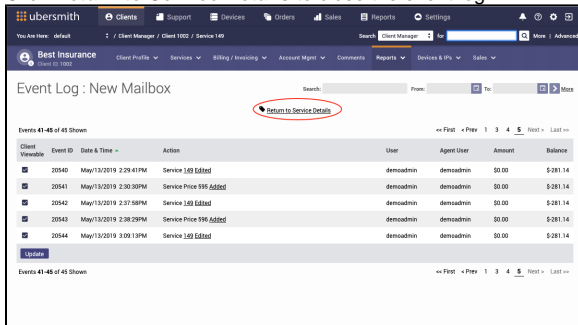
Viewing the Service Event Log

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



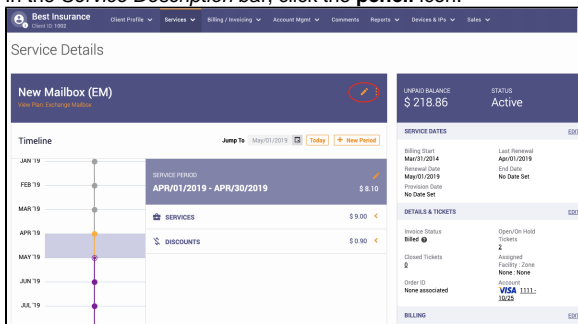
The *Event Log* page appears.

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



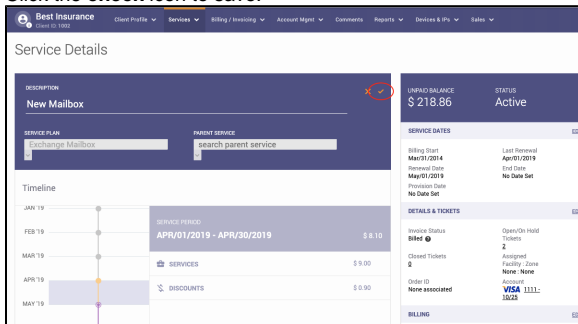
Changing the Service Plan and Parent Service

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 timeline 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 timeline 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 timeline 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 timeline 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 '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. The 'EDIT' button in the top right corner of 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. 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). The 'Save' button at the bottom right is circled in red.

Editing Details and Tickets

- Access the *Service Details* page.
- 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. The 'EDIT' button in the top right corner of the 'Details & Tickets' 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	\$ 8.19
1002-201	Oct/01/2014	\$ 16.30
1002-205	Dec/01/2014	\$ 16.30
1002-203	Jan/01/2015	\$ 8.19
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' (Item ID: 1046). The 'Applicable Taxes' section is highlighted with a red box and the word 'edit' next to it. Below this section is the 'Outstanding Invoices' table.

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' (Item ID: 1046). The 'Tax Engine' section is highlighted with a red box. Below this section 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'. The 'Save' button is 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' (Item ID: 1046). The 'Outstanding Invoices' section is highlighted with a red box. The 'Invoice #' column is circled in red, and the invoice number '1002-210' is highlighted in red.

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.

[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
Invoice Total	\$ 16.46

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
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: None

POWER CIRCUIT BILLING

Billing Method: Not Billed

PROFESSIONAL SERVICES

Existing Client: Unchecked

QUICKBOOKS

Quickbooks Class: Not Classified

BACKUP BILLING

Billing Method: Not Billed

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 [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

APPLICABLE TAXES [EDIT](#)

There Are No Taxes Assigned To This Service

OUTSTANDING INVOICES

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

USAGE PLAN RATE PROPERTIES [EDIT](#) [DOWNLOAD PROPERTIES](#)

Usage Plan Rate Name: **OutApp Billing**

ONAPP BILLING (ONAPP BILLING) [EDIT](#)

Markup: 0.00000000%

CUSTOM FIELDS [EDIT](#)

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

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**.

Service details page for 'OutApp Billing'. The 'COMMENTS' tab is selected. The 'ADD COMMENT' button is visible at the bottom right of the comments section.

- Click **Add Comment**.

The 'ADD COMMENT' button is highlighted with a red circle in the 'COMMENTS' section.

The *Add Service Comment* page appears.

- Complete the comment fields. Refer to [Adding Services](#) for more information.
- Click **Save** or **Save & New**.

The 'Add Service Comment' page shows a comment being added. The 'Save' and 'Save & New' buttons are highlighted with a red circle at the bottom.

Editing Comments

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

Service details page for 'OutApp Billing'. The 'COMMENTS' tab is selected. A comment is visible with an 'EDIT' button next to it.

- 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

USAGE PLAN RATE PROPERTIESDETAILS

Usage Plan Rate Name:Outage Billing

CHILD SERVICESADD CHILD SERVICE

CUSTOM FIELDSNOT

BANDWIDTH BILLING

Billing Method:Not Billed

CLOUD BILLING

Credit Limit:0

Usage Status:Account

TICKET BILLING

Billing Method:Not Billed

Send Overage Notification:Yes

BANDWIDTH NOTIFICATION

Bandwidth Notification:None

QUICKBOOKS

Quickbooks Class:Not Classified

POWER CIRCUIT BILLING

Billing Method:Not Billed

BACKUP BILLING

Billing Method:Not Billed

PROFESSIONAL SERVICES

Existing Client:Unchecked

SERVER DETAILSNOT

User ID:
Password:
Domain Name:
IP Address:

COMMENTSNOTESNOT

There are no Notes for This Service

Related Topics

[Adding Services](#)