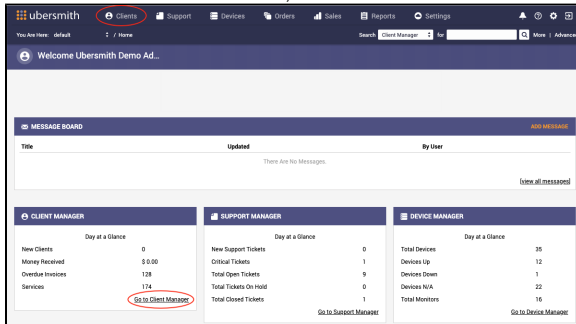


# Managing Services

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

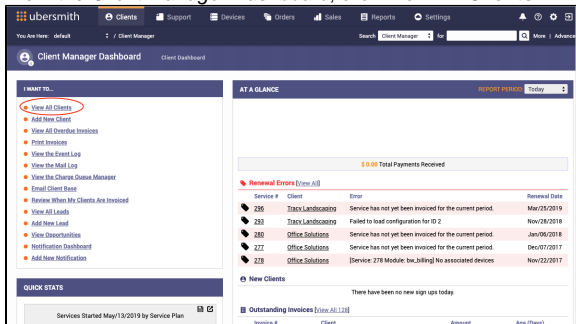
## Access the Service Details Page

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



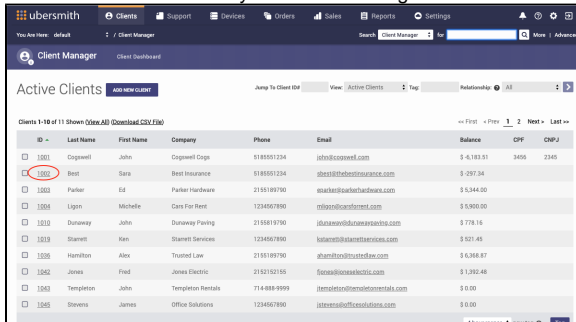
The *Client Manager Dashboard* appears.

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



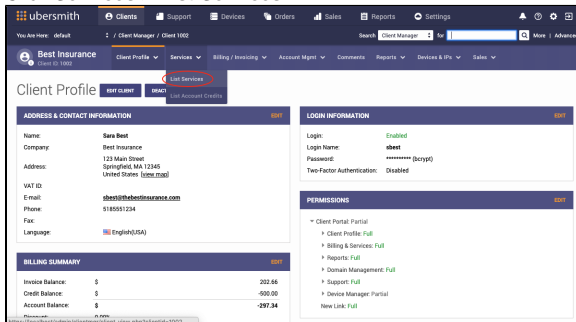
The *Active Clients* page appears.

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



The *Client Profile* page appears.

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



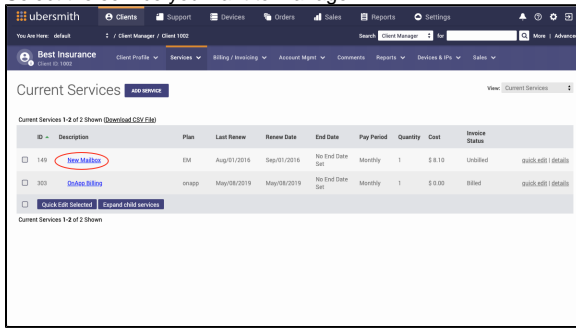
The *Current Services* page appears.

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](#)

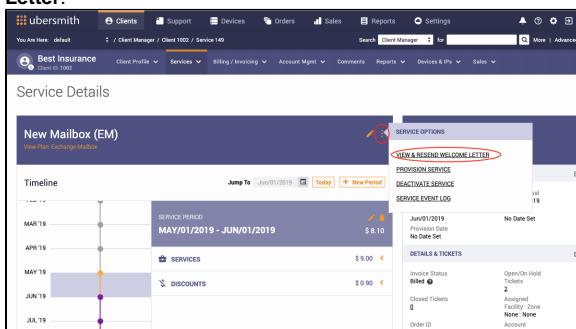
5. Select the service you want to manage.



The *Service Details* page appears.

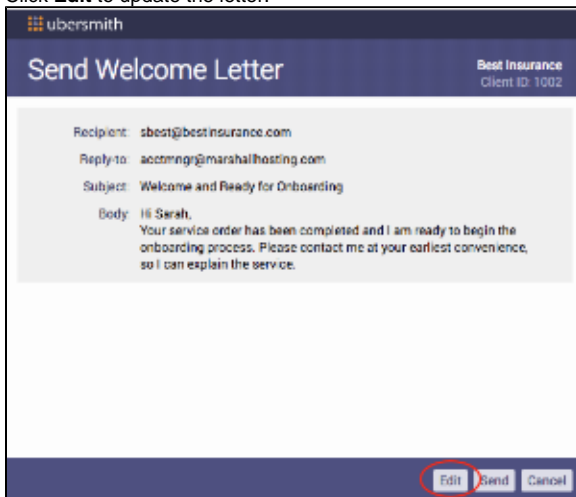
## Viewing and Resending the Welcome Letter

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

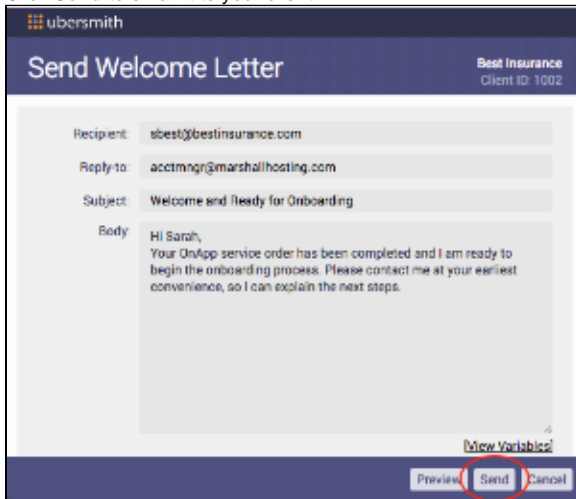


The *Send Welcome Letter* page appears.

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



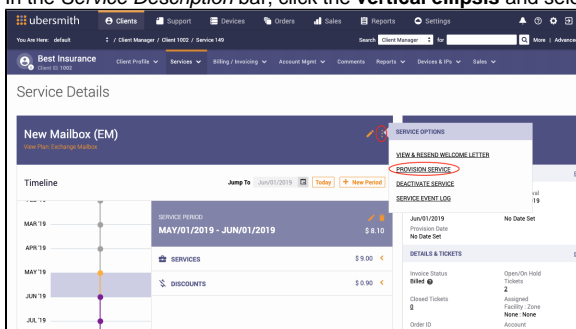
- Click **Send** to email it to your client.



## 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**.



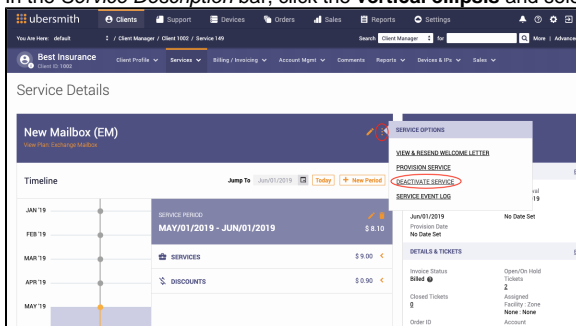
A confirmation message appears.

- Click **Yes**.

## Deactivating the Service

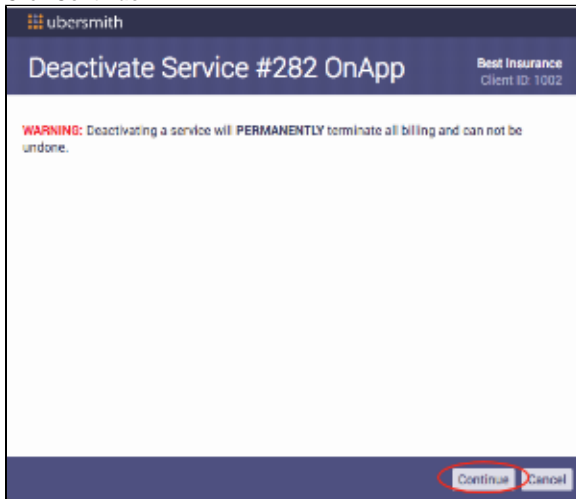
Deactivating a service permanently terminates all billing and cannot be undone. Any outstanding balances are automatically credited immediately.

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

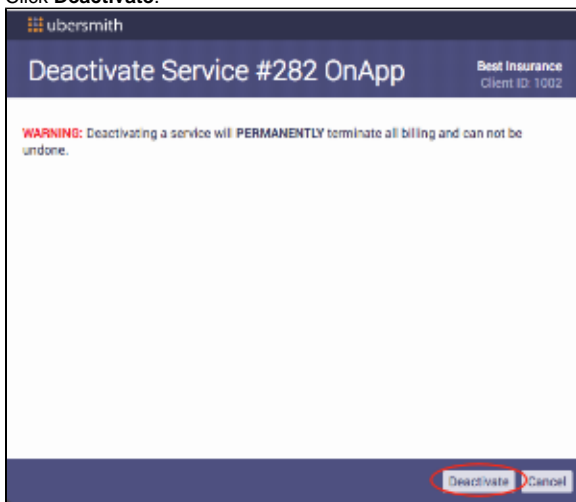


The *Deactivate Service* page appears.

3. Click **Continue**.



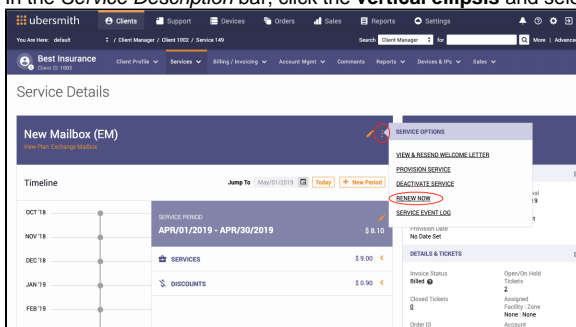
4. Click **Deactivate**.



## 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**.

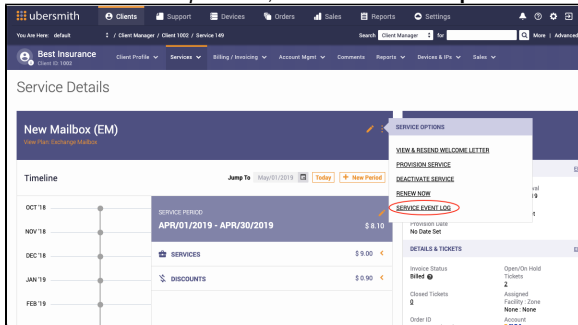


### Manually Renewing

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.

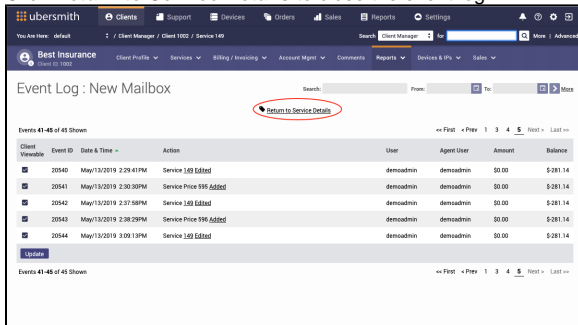
## Viewing the Service Event Log

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



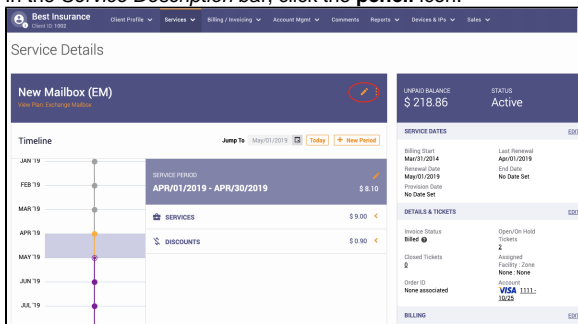
The *Event Log* page appears.

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



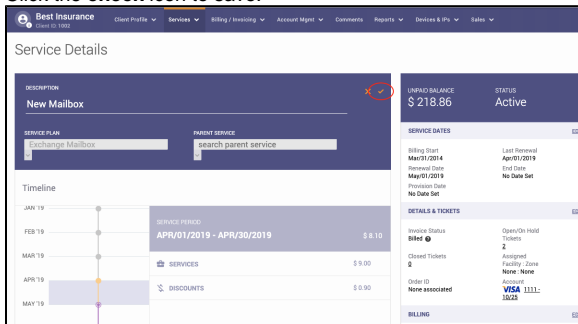
## Changing the Service Plan and Parent Service

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.](#)

- 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 right-hand panel with sections for 'Service Dates', 'Details & Tickets', and 'Billing'. The 'Service Dates' section is highlighted, and the 'edit' link next to it is circled in red. The 'Service Dates' section displays the following information:

Service Dates
Billing Start: Mar/1/2014
Last Renewal: Apr/01/2019
Renewal Date: May/01/2019
End Date: No Date Set
Prepayment Date: No Date Set

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 contains various configuration options for the service, 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.
- 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 right-hand panel with sections for 'Service Dates', 'Details & Tickets', and 'Billing'. The 'Details & Tickets' section is highlighted, and the 'edit' link next to it is circled in red. The 'Details & Tickets' section displays the following information:

Details & Tickets
Invoice Status: Billed
Open/On Hold Tickets: 2
Closed Tickets: 0
Assigned Facility: Zone
Name: None
Order ID: None associated
Approved: VISA 1111 1111 1111 1111

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' (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'. 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' (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.

[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

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/EDIT 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](#)

<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	Credit Limit: 0
OnApp Billing Method: User ID - VM resource only	Billing Method: Send Overage Notification
<b>BANDWIDTH NOTIFICATION</b>	<b>QUICKBOOKS</b>
Bandwidth Notification: None	Quickbooks Class: Not Classified

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**.

NAME VALUE ACTION

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**.

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 'EDIT' 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

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](#)