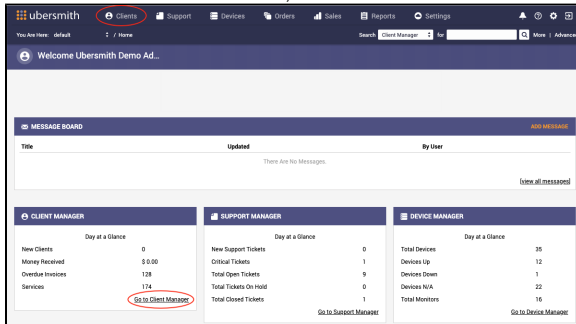


# Managing Services

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

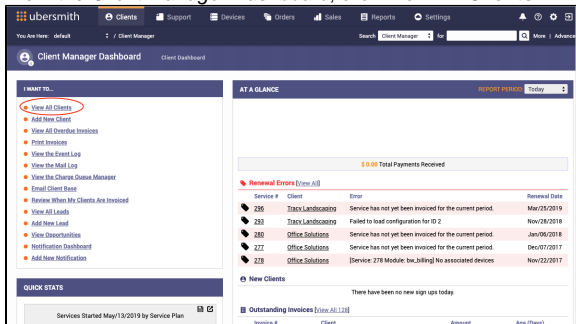
## Access the Service Details Page

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



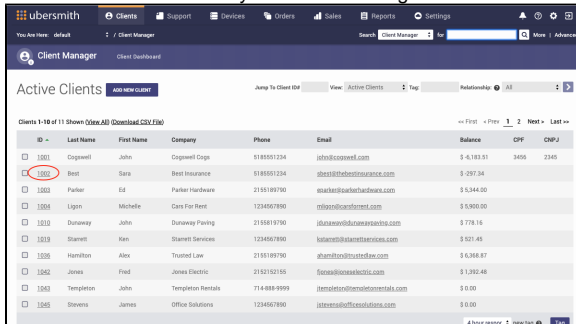
The *Client Manager Dashboard* appears.

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



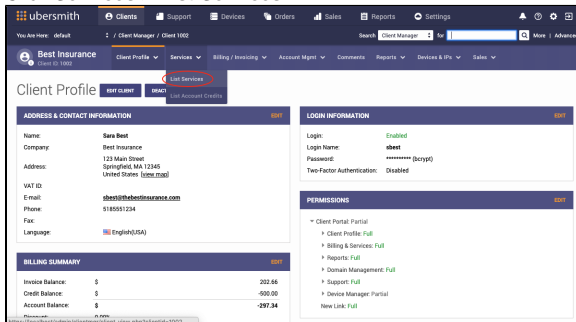
The *Active Clients* page appears.

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



The *Client Profile* page appears.

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



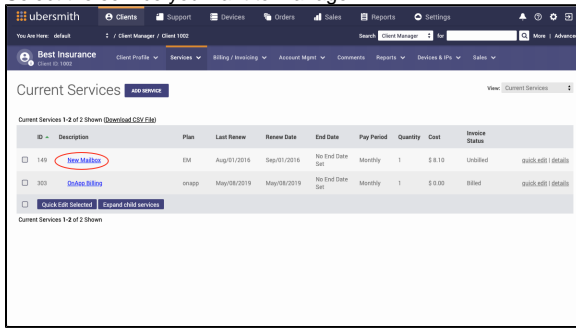
The *Current Services* page appears.

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](#)

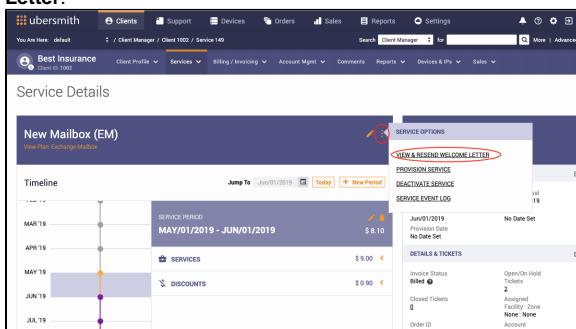
5. Select the service you want to manage.



The *Service Details* page appears.

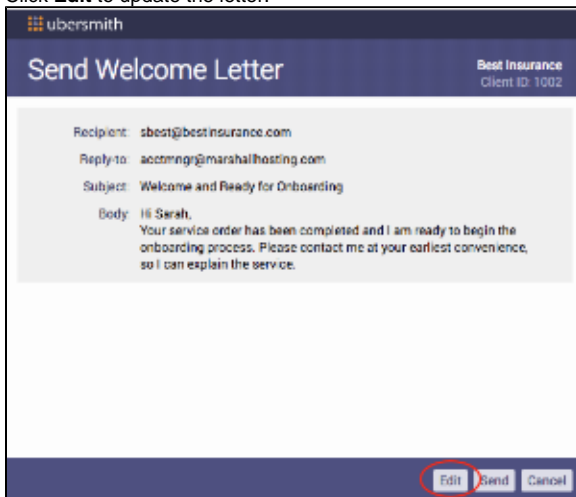
## Viewing and Resending the Welcome Letter

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

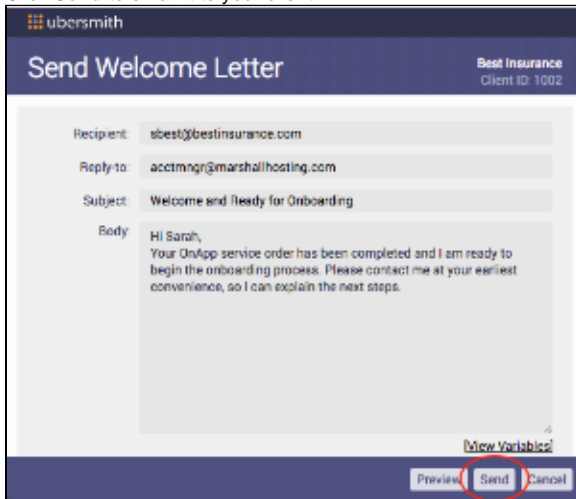


The *Send Welcome Letter* page appears.

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



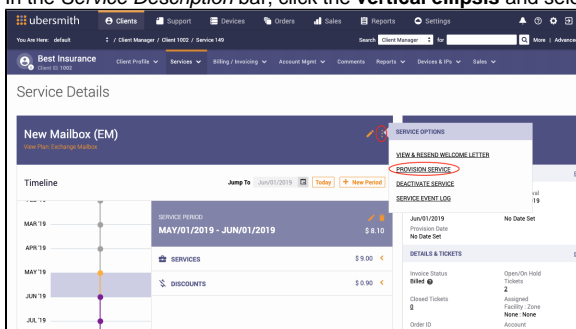
4. Click **Send** to email it to your client.



## 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**.



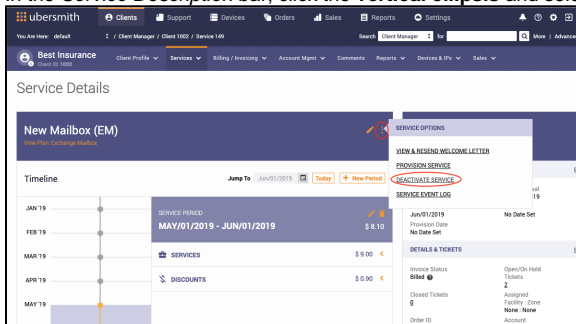
A confirmation message appears.

3. Click **Yes**.

## Deactivating the Service

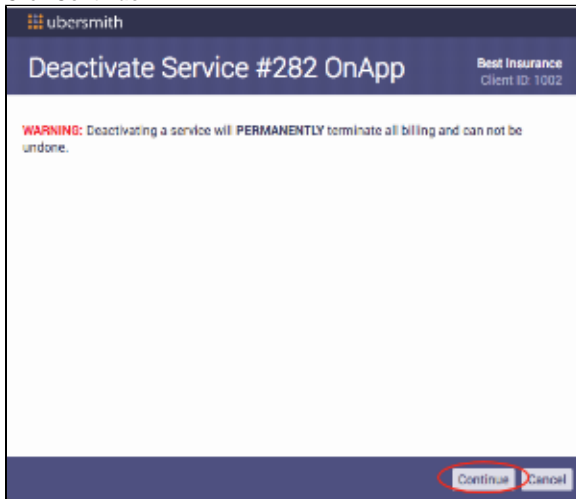
Deactivating a service permanently terminates all billing and cannot be undone. Any outstanding balances are automatically credited immediately.

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

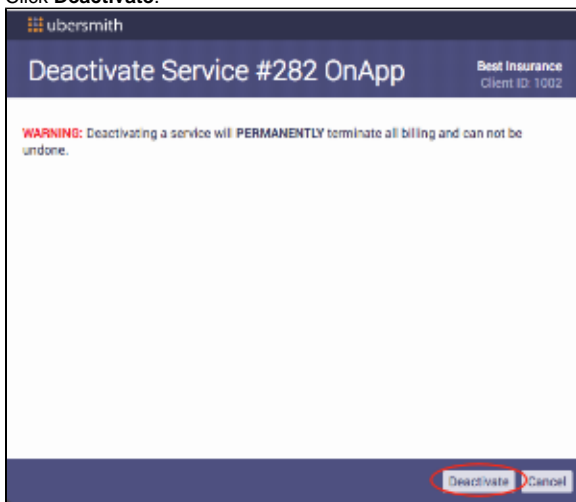


The *Deactivate Service* page appears.

3. Click **Continue**.



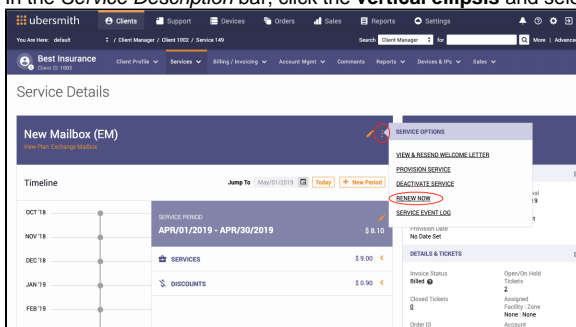
4. Click **Deactivate**.



## 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**.

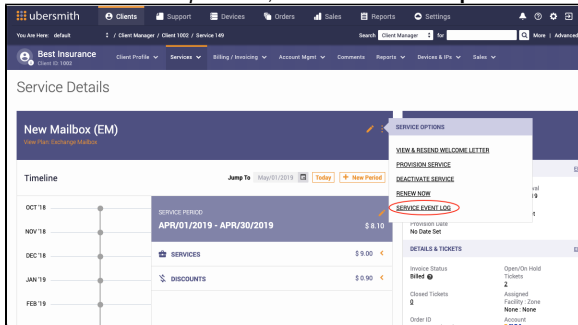


### Manually Renewing

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.

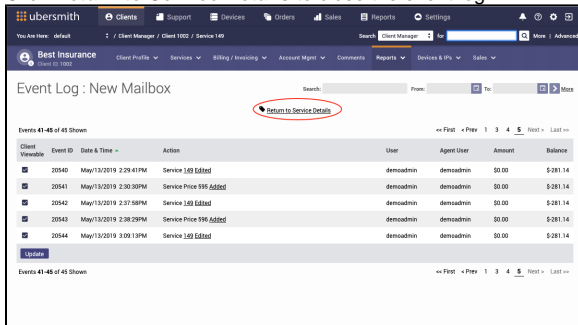
## Viewing the Service Event Log

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



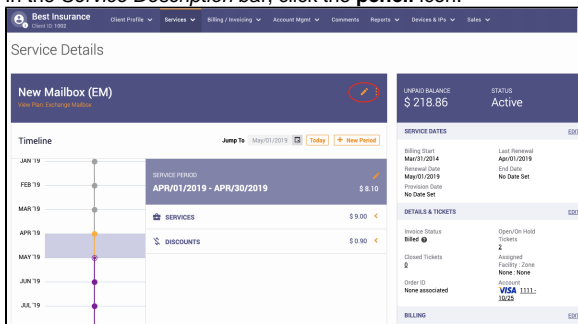
The *Event Log* page appears.

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



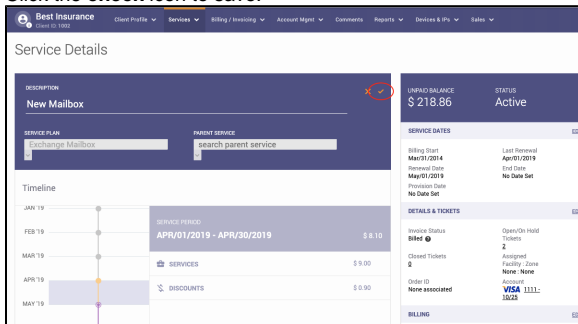
## Changing the Service Plan and Parent Service

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 *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 'Best Insurance' (Client ID: 1002). The page has a top navigation bar with links like 'Client Profile', 'Services', 'Billing/Invoicing', 'Account Mgmt', 'Comments', 'Reports', 'Devices & Pts', and 'Sales'. 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 2019 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', 'Promotion Start', and 'No Date Set'. The 'DETAILS & TICKETS' section includes fields for 'Invoice Status', 'Assigned Facility', 'Zone', 'Name', 'Home', 'Order ID', 'Home associated', 'Assigned', 'VISA 1111', and '1028'. The 'BILLING' section includes an 'EDIT' button. 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', 'Account Mgmt', 'Comments', 'Reports', 'Devices & Pts', and 'Sales'. 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), 'Auto Charge' (Yes/No), 'Automatic Payment Method' (No Accounts on File), and 'Invoice Status' (Un-billed/Billed/Pre-Billed). The 'Save' button 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 'Best Insurance' (Client ID: 1002). The page has a top navigation bar with links like 'Client Profile', 'Services', 'Billing/Invoicing', 'Account Mgmt', 'Comments', 'Reports', 'Devices & Pts', and 'Sales'. 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 2019 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', 'Promotion Start', and 'No Date Set'. The 'DETAILS & TICKETS' section includes fields for 'Invoice Status', 'Assigned Facility', 'Zone', 'Name', 'Home', 'Order ID', 'Home associated', 'Assigned', 'VISA 1111', and '1028'. The 'BILLING' section includes an 'EDIT' button. The 'EDIT' button in 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**.

**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

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	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 showing various billing and service options. The 'COMMENTS' tab is highlighted with a red circle, and the 'ADD COMMENT' button is also highlighted with a red circle.

- 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 highlighted with a red circle, and the 'ADD COMMENT' button is also highlighted with a red circle.

- 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:

Default Name:

IP Address:

COMMENTSNOTESNOT

There are no Notes for This Service

Related Topics

[Adding Services](#)