

Adding Service Plans

The *Add Service Plan* page is a two-step wizard that guides you through configuring service plans that serve as the foundation for billing your clients. Once your service plans are configured, you can begin setting up services for your clients' accounts. Each service plan contains defaults and starting service configurations that carries through to the individual services created to bill your clients.

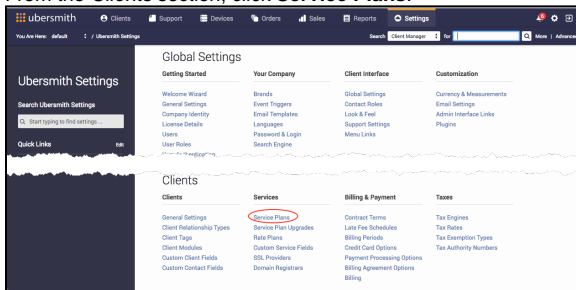
Access the Add Service Plan Page

1. From the *Ubersmith Dashboard*, click **Settings**.



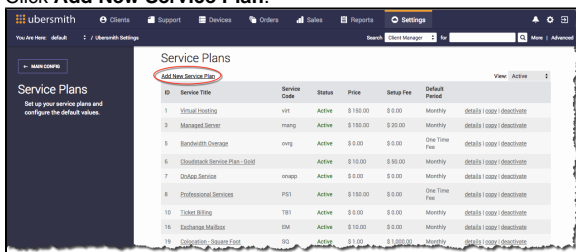
The *Ubersmith Settings* page appears.

2. From the *Clients* section, click **Service Plans**.



The *Service Plans* page appears.

3. Click **Add New Service Plan**.



The *Add Service Plan* page appears.

On this page:

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- [Access the Add Service Plan Page](#)
- [Complete the Details tab](#)
- [Complete the Pricing Page](#)
- [Related Topics](#)

Complete the Details tab

1. In the **Service Title** field, enter the title of the service. This field populates the *Add Service* page.
2. In the **Service Category** field, enter a category for the service plan to belong to. Categories organize service plans for use with the *Ubersmith API*.
3. In the **Service Code** field, enter an alternative abbreviated name or number to represent the service plan. This code will display on your customers' invoices.
4. In the **Accessible by API** field, select either **Yes** or **No** to make this service plan available to the *Ubersmith API*.
5. In the **Allow Quoting** field, select either **Yes** or **No** to make this service plan available to the *Sales Quoting* functionality, so you can make the service plan available to quote.
6. In the **Bill In Advance** field, select either **Yes** or **No** to set this service to bill before the invoice is due.
7. In the **Invoice when cost is \$0.00** field, select either **Yes** or **No** to send an invoice even when the total due is zero dollars.

8. Click **Next**.



The *Pricing* page appears.



The **Data** tab provides a means for you to define a variable name and a value to store with the service plan. This data can be used with the *Ubersmith API* to generate more in depth reports and order forms.

Complete the Pricing Page

1. In the **Default Prices and Setup Fee** fields, enter the price for the service plan. These fields contain a range of pricing options you can charge for the service. The columns represent selectable renewal periods and the rows are the service plan's price and setup fee. For example, this product is \$50 a month with a \$100 setup fee.



Careful attention should be paid to configuring the pricing options. For a monthly fee with an associated one-time setup fee, the price for both should go in the monthly row, since the upgrade option is based on a monthly price. If there was a one-time fee along with a one-time setup fee, both prices should be set in the One-Time fee row.

2. Select the **Setup Fee Quantity Sensitive** field to multiply the service's price by the quantity when it is added to a client's account.
3. In the **Default Period** field, select the default billing period to be used for this service.
4. In the **Default Quantity** field, enter the default starting quantity for services based on this service plan.
5. In the **Default Billing Type** field, select the default billing type.
By Month multiplies the base price of the service by the number of months in its renewal period.
By Period takes the base price as representative of the full cost for the service's renewal period.
6. In the **Automatically Charge** field, select **Yes** or **No** to allow this service to automatically charge your client's credit card or bank account upon being invoiced.
7. In the **Post Renew** field, select **Yes** or **No** to allow this service to be billed in arrears.
8. In the **Auto Prorate** field, select **Yes** or **No** to allow this service to have prorated billing once it is added as a service for your clients.
9. In the **Auto Suspend** field, select **After** and enter the number of days to have the service automatically suspended after that number of days of nonpayment.
10. In the **Auto Cancel** field, select **After** and enter the number of days to have the service automatically cancelled after that number of days of nonpayment.

11. Click **Save** or **Save & New**.

ubersmith

Add Service Plan

	Default Prices	Setup Fee
One Time Fee:		
Monthly:	50.00	100.00
Quarterly:		
Semi-Annually:		
Annually:		
Two Years:		

Setup Fee Quantity Sensitive: ☒

Default Period: Monthly ▾

Default Quantity: 1

Default Billing Type: By Month ▾

Automatically Charge: ☐ Yes ☒ No

Post Renew: ☐ Yes ☒ No ?

Auto Prorate: ☒ Yes ☐ No ?

Back Save Save & New Cancel

Related Topics

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