

# Adding Service Plan Upgrades

Service plan upgrades are initially defined separately from service plans in order to configure multiple upgrades at once. Once you have finished configuring your upgrades, you can then assign them to one or more service plans.

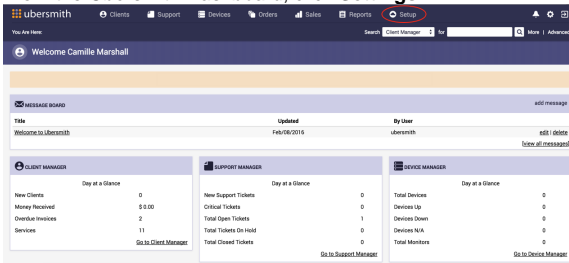
For example, if you sell five different types of dedicated servers, you can define a hard drive that every server can be upgraded to once, instead of adding each hard drive upgrade five separate times. You define it once and then assign it to the appropriate service plans.

Service plan upgrades can be grouped into organized sets of categories. Two levels of groupings, a high level upgrade group, and a more specific level option group, keep your upgrades flexible and organized.

An upgrade group contains higher level service plan upgrades, such as all types of hardware for a server. This upgrade group is then broken down into more specific upgrade option groups, such as hard drives. The upgrade option groups then contain the types of hard drives available.

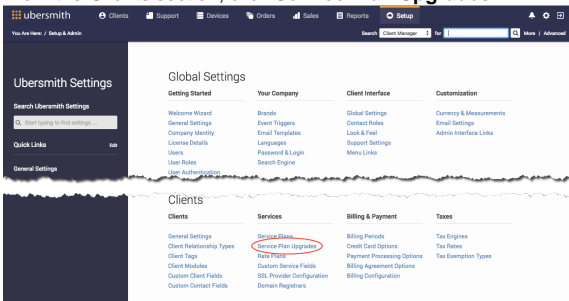
## Access the Service Plan Upgrades page

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



The *Ubersmith Settings* page appears.

2. From the *Clients* section, click **Service Plan Upgrades**.

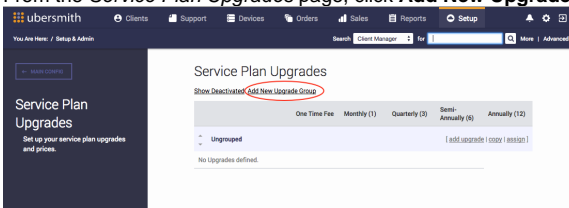


The *Service Plan Upgrades* page appears.

## Creating Service Plan Upgrades

### Adding an Upgrade Group

1. From the *Service Plan Upgrades* page, click **Add New Upgrade Group**.



The *Add New Upgrade Group* page appears.

2. In the **Name** field, enter a name for your upgrade group.
3. In the **Description** field, enter some information that describes your upgrade group.

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- Click **Save** or **Save & New**.

The screenshot shows the 'Add New Upgrade Group' form. The 'Name' field contains 'Hardware' and the 'Description' field contains 'Different options for managed servers'. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save & New' button is circled in red.



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

## Adding a Service Plan Upgrade to an Upgrade Group

- From the *Service Plan Upgrades* page, click **Add Upgrade** from your desired upgrade group.

The screenshot shows the 'Service Plan Upgrades' page. It features a table with columns for different upgrade frequencies: 'One Time Fee', 'Monthly (1)', 'Quarterly (3)', 'Semi-Annually (6)', and 'Annually (12)'. Under the 'Quarterly (3)' column, there is a button labeled 'Add Upgrade' which is circled in red.

The *Add Service Plan Upgrade* page appears.

- In the **Upgrade** field, enter the name of the upgrade.
- In the **API Variable** field, click **edit** to enable the field, and then update the API variable's name, if necessary.
- In the **Group** field, select the upgrade group to add this specific upgrade to.
- In the **Client Visibility** field, select one of the following:
  - Visible to Client** – this option is selected by default and allows your clients to view this option.
  - Hidden from Client** - this option hides this upgrade from your clients.
  - Hidden when \$0.00** – this option hides this upgrade when there is no dollar value associated to it.
- In the **Description** field, enter text to further describe the service plan upgrade.

- Click **Save** or **Save & New**.

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

## Adding an Option Group to a Service Plan Upgrade

- From the *Service Plan Upgrades* page, click **add option group**.

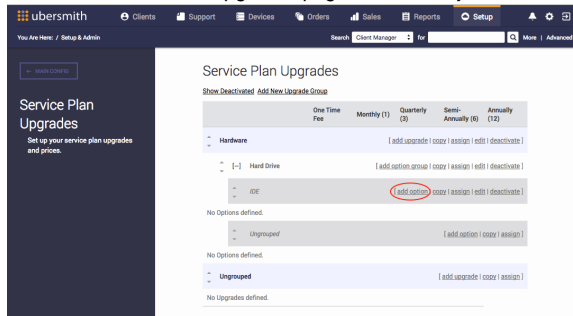
The *Add New Service Plan Option Group* page appears.

- In the **Name** field, enter the name of the option group.
- In the **Description** field, enter text to further describe the service plan option group.
- Click **Save** or **Save & New**.

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

## Adding New Upgrade Options to an Option Group

1. From the *Service Plan Upgrades* page, click **add option**.



The *Add New Upgrade Option* page appears.

2. In the **Name** field, enter the name of the option. The option name displays in client invoices for any services where the option is selected.
3. In the **Option Group** field, select the option group this option should belong to.
4. In the **Description** field, enter text to further describe the option.
5. Click **Pricing**.

6. Complete the **Price**, **Setup Fee**, **Cost**, and **Setup Fee Cost** fields.

These fields contain a range of pricing options you can charge for the service upgrade. The rows represent selectable renewal periods and the columns are the service plan upgrade's price and corresponding setup fee along with your cost and corresponding upgrade fee for the upgrade. For example, the 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.

7. Click **Save** or **Save & New**.

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## Add New Upgrade Option

Hard Drive

English(USA) Pricing Data

	Default (\$)			
	Price	Setup Fee	Cost	Setup Fee Cost
One Time Fee	0.00	0.00	0.00	0.00
Monthly	50.00	100.00	0.00	0.00
Quarterly	0.00	0.00	0.00	0.00
Semi-Annually	0.00	0.00	0.00	0.00
Annually	0.00	0.00	0.00	0.00
Two Years:	0.00	0.00	0.00	0.00

Save Save & New Cancel



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

## Related Topics

[Managing Service Plan Upgrades](#)

[Adding Service Plans](#)

[Managing Service Plans](#)

[Adding Services](#)

[Managing Services](#)

[Using the Ubersmith API](#)