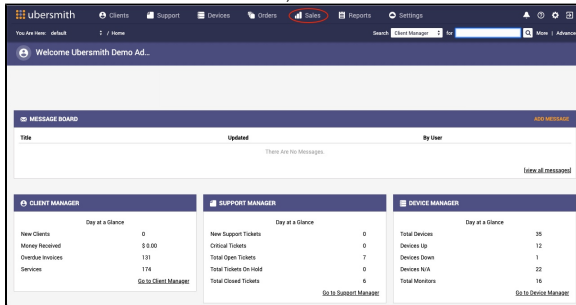


Managing Quotes

Once you have [added a quote](#), you can perform various actions.

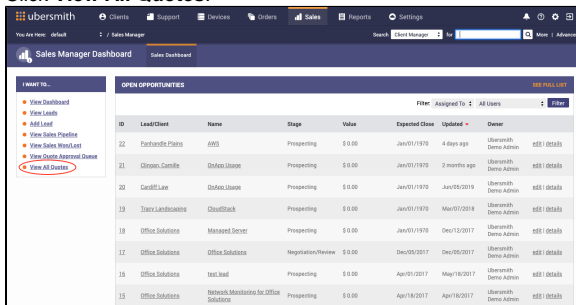
Accessing the View Quote Page

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



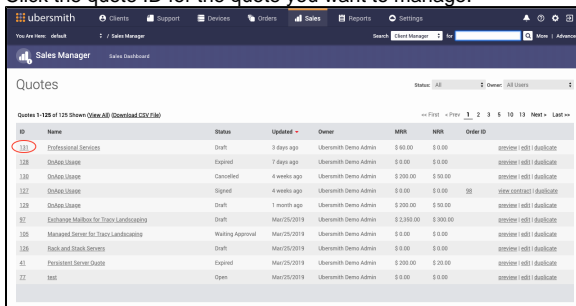
The *Sales Manager Dashboard* appears.

2. Click **View All Quotes**.



The *Quotes* page appears.

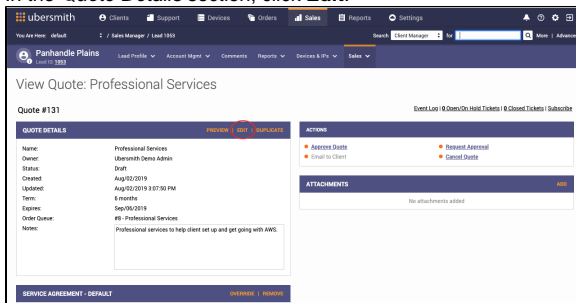
3. Click the quote ID for the quote you want to manage.



The *View Quote* page appears.

Editing Quote Details

1. Access the *View Quote* page.
2. In the *Quote Details* section, click **Edit**.



The *Edit Quote* page appears.

3. Make any necessary updates.

On this page:

On this page:

- [Accessing the View Quote Page](#)
- [Editing Quote Details](#)
- [Duplicating a Quote](#)
- [Previewing a Quote](#)
- [Overriding a Service Agreement](#)
- [Removing a Service Agreement](#)
- [Using the Global Default Service Agreement](#)
- [Adding Attachments](#)
- [Viewing Attachments](#)
- [Removing Attachments](#)
- [Adding Services](#)
- [Editing Services](#)
- [Duplicating Services](#)
- [Removing Services](#)
- [Adding Comments](#)
- [Deleting Comments](#)
- [Viewing Contract Details](#)
- [Related Topics](#)

4. Click **Save**.

Duplicating a Quote

You can create the same quote for another existing client, with an opportunity to update any of the quote details, if necessary.

1. [Access the View Quote page.](#)
2. In the *Quote Details* section, click **Duplicate**.

The *Duplicate Quote* page appears.

3. Update any information on the *Quote Details* tab, if necessary. See [Completing the Add Quotes page](#) for more information.

4. Click the *Ownership Info* tab.
5. In the **Search** field, select the information you want to search for, such as client ID # or client name.
6. In the **For** field, enter the corresponding information for the **Search** field.
7. Click **Search**. The *Search Results* section is populated based on your search criteria.
8. Select the appropriate result.

- Click **Save**.

A duplicated quote is created and displays.

Previewing a Quote

You can preview the quote to ensure what is sent to your lead or client is correct. You can review the quote and make any necessary changes before submitting the quote for internal approval.

- Access the [View Quote page](#)
- In the *Quote Details* section, click **Preview**.

The quote as seen by the lead or client appears.

- Review and close the quote.

Overriding a Service Agreement

New quotes automatically include your global default master service agreement (MSA). You can choose a different MSA PDF for the current quote.

- Access the [View Quote page](#).
- In the *Service Agreement – Default* section, click **Override**.

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	MSA	1	\$ 60.00		\$ 60.00	\$ 0.00		\$ 0.00		
Service Total:						\$ 60.00	Setup Total:	\$ 0.00	Tax Total:	\$ 0.00	
Grand Total:						\$ 60.00					

The *Service Agreement* page appears.

- In the **Client MSA** field, ensure **New MSA** is selected.
- In the **MSA** field, select **Custom MSA**.
- In the **Name** field, enter the name of the MSA to be used.
- In the **Term** field, enter the time frame for the agreement to be active, then select **Months** or **Years**.

- In the **Auto Renew** field, select **Yes** if you want the agreement to automatically renew once the term has been reached.
- In the **Renewal Term** field, enter the time frame for the renewal to be active, then select **Months** or **Years**.
- In the **Expires after service cancellation** field, enter the time frame for the agreement to expire after the related service has been cancelled, then select **Days**, **Months** or **Years**.
- In the **PDF** field, click **Choose File** and navigate to the location of your MSA PDF to upload.
- Click **Save**.

Removing a Service Agreement

You can remove an attached service agreement from the quote.

- Access the [View Quote](#) page.
- In the **Service Agreement – Default** section, click **Remove**.

A confirmation message appears.

- Click **Yes**.

Using the Global Default Service Agreement

You can add your global default master service agreement to the quote.

- Access the [View Quote](#) page.
- In the **Service Agreement – Default** section, click **Use Default**.

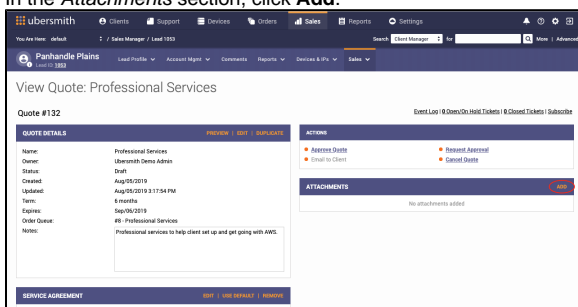
A confirmation message appears.

- Click **Yes**.

Adding Attachments

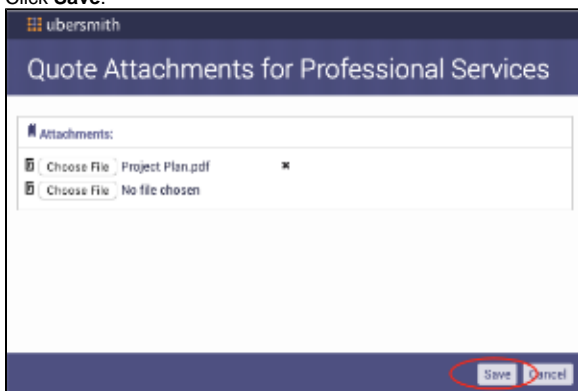
Additional PDF files can be included in the quote's contract, before the MSA, by adding attachments to the quote itself.

1. [Access the View Quote page.](#)
2. In the **Attachments** section, click **Add**.



The **Quote Attachments** page appears.

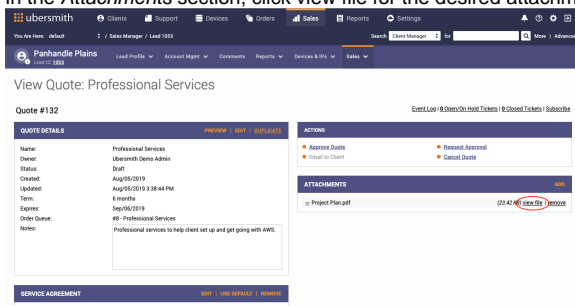
3. In the **Attachments** field, click **Choose File** and navigate to the location of your PDF to upload.
4. Click **Save**.



Viewing Attachments

You can view any attachments for the quote.

1. [Access the View Quote page.](#)
2. In the **Attachments** section, click view file for the desired attachment.



The attachment downloads in your Internet browser.

Removing Attachments

You can remove an attached PDFs from the quote.

1. [Access the View Quote page.](#)

2. In the **Attachments** section, click remove for the desired attachment.

The screenshot shows the 'View Quote: Professional Services' page for Quote #132. The 'ATTACHMENTS' section on the right lists 'Project Plan.pdf' with a 'REMOVE' button circled in red. The left sidebar contains tabs for 'QUOTE DETAILS', 'SERVICE AGREEMENT', 'ACTIVITY', and 'COMMENTS'. The 'QUOTE DETAILS' tab is active, showing quote information like Name, Status, Created, Updated, Term, Expires, Order Queue, and Notes.

A confirmation message appears.

3. Click **Yes**.

Adding Services

Once a quote is created any number of services can be added to it.

1. [Access the View Quote page.](#)
2. In the **Services** section, click **add service**.

The screenshot shows the 'View Quote: Professional Services' page. The 'Services' section at the bottom contains a table with one service: 'Professional Services' with a quantity of 1 and a price of \$60.00. An 'add service' button is circled in red. The left sidebar shows the 'SERVICE AGREEMENT' tab, and the right sidebar shows the 'ATTACHMENTS' section with 'Project Plan.pdf'.

The **Add Service** page appears.

3. Complete the **Service Info**, **Taxes**, **Notes** and **Custom Fields** tabs. See [Completing the Add Services Page](#).
4. Click **Save** or **Save & New**.

Editing Services

1. [Access the View Quote page.](#)
2. In the **Services** section, click **edit** for the service.

The screenshot shows the 'View Quote: Professional Services' page. The 'Services' section at the bottom contains a table with two services: 'Professional Services' and 'Add Service Editing'. The 'edit' button for the second service is circled in red. The left sidebar shows the 'SERVICE AGREEMENT' tab, and the right sidebar shows the 'ATTACHMENTS' section with 'Project Plan.pdf'.

The **Add Service** page appears.

3. Make any necessary changes. See [Completing the Add Services Page](#).
4. Click **Save**.

Duplicating Services

You can add multiple copies of the same service to a quote.

1. [Access the View Quote page.](#)

- In the **Services** section, click **duplicate** for the service.

Term: 6 months
Expires: Sep/06/2019
Order Queue: #8 - Professional Services
Notes: Professional services to help client set up and get going with AMS.

SERVICE AGREEMENT [EDIT](#) [VIEW HISTORY](#) [REMOVE](#)

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.93 KB)
Term: 1 year
Auto Renewal: 6 months
Expires after service cancellation: 30 days

Services [add service](#)

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax	
Professional Services	Professional Services	AMS	1	\$ 90.00	-	\$ 90.00	\$ 0.00	-	\$ 0.00			edit remove duplicate
AMS Reseller Billing	AMS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00			edit remove duplicate
Service Total:						\$ 190.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 190.00						

Comments [View all comments](#) [Add Comment](#)

A confirmation message appears.

- Click **Yes**.

Removing Services

- Access the [View Quote](#) page.
- In the **Services** section, click **remove** for the service.

Term: 6 months
Expires: Sep/06/2019
Order Queue: #8 - Professional Services
Notes: Professional services to help client set up and get going with AMS.

SERVICE AGREEMENT [EDIT](#) [VIEW HISTORY](#) [REMOVE](#)

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.93 KB)
Term: 1 year
Auto Renewal: 6 months
Expires after service cancellation: 30 days

Services [add service](#)

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax	
Professional Services	Professional Services	AMS	1	\$ 90.00	-	\$ 90.00	\$ 0.00	-	\$ 0.00			edit remove duplicate
AMS Reseller Billing	AMS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00			edit remove duplicate
Service Total:						\$ 190.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 190.00						

Comments [View all comments](#) [Add Comment](#)

A confirmation message appears.

- Click **Yes**.

Adding Comments

You can add a comment to the quote that is either internal or seen by the client.

- Access the [View Quote](#) page
- In the **Comments** section, click **Add Comment**.

Term: 6 months
Expires: Sep/06/2019
Order Queue: #8 - Professional Services
Notes: Professional services to help client set up and get going with AMS.

SERVICE AGREEMENT [EDIT](#) [VIEW HISTORY](#) [REMOVE](#)

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.93 KB)
Term: 1 year
Auto Renewal: 6 months
Expires after service cancellation: 30 days

Services [add service](#)

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax	
Professional Services	Professional Services	AMS	1	\$ 90.00	-	\$ 90.00	\$ 0.00	-	\$ 0.00			edit remove duplicate
AMS Reseller Billing	AMS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00			edit remove duplicate
Service Total:						\$ 190.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 190.00						

Comments [View all comments](#) [Add Comment](#)

The **Add Quote Comment** page appears.

- In the **Comment** field, enter your comment about the quote.
- Select **Client Viewable** if you want the comment to be seen by the client. Do not select it if you want it to be seen only internally.
- In the **Attachments** field, click **Choose File** and navigate to the location of your PDF to upload.

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

ubersmith

Add Quote Comment

From: Ubersmith Demo Admin

Comment: We will be installing servers, connecting with AWS, and training!

Client Viewable: ☐

Attachments: No file chosen

Editing Comments

- Access the [View Quote page](#).
- In the **Comments** section, click **edit** for the comment.

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.83 KB)
Term: 1 year
Auto Renew: 6 months
Expires after service cancellation: 30 days

Services

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	AWSS	1	\$ 60.00	-	\$ 60.00	\$ 0.00	-	\$ 0.00		
AWS Reseller Billing	AWS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00		
Service Total:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00	
Grand Total:						\$ 185.00					

Comments

Date Posted	Comment
Created: Aug/26/2019 4:01:24 PM Aug/26/2019 4:01:24 PM Deleted: Done By Admin	We will be installing servers, connecting with AWS, and training.

The *Edit Quote Comment* page appears.

- Make any necessary changes.
- Click **Update**.

Deleting Comments

- Access the [View Quote page](#).
- In the **Comments** section, click **delete** for the comment.

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.83 KB)
Term: 1 year
Auto Renew: 6 months
Expires after service cancellation: 30 days

Services

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	AWSS	1	\$ 60.00	-	\$ 60.00	\$ 0.00	-	\$ 0.00		
AWS Reseller Billing	AWS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00		
Service Total:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00	
Grand Total:						\$ 185.00					

Comments

Date Posted	Comment
Created: Aug/26/2019 4:01:24 PM Aug/26/2019 4:01:24 PM Deleted: Done By Admin	We will be installing servers, connecting with AWS, and training.

A confirmation message appears.

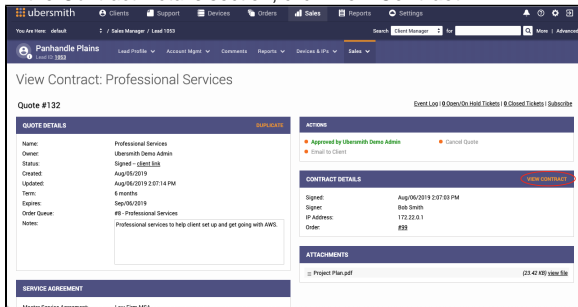
- Click **Yes**.

Viewing Contract Details

You can view a signed contract and the resulting Ubersmith order, once a quote has been signed by the client, and added to Ubersmith.

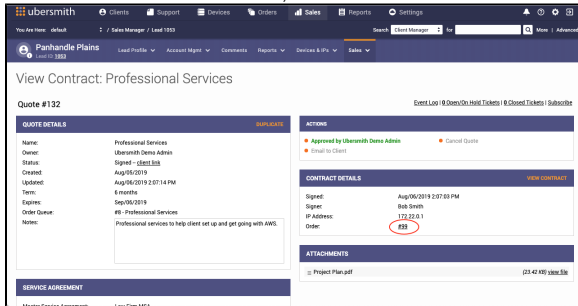
- Access the [View Quote page](#).

2. In the *Contract Details* section, click **View Contract**.



The signed contract appears in a new browser window.

3. In the *Contracts Details* section, click the order link.



The order opens in the *Order Manager* in a new browser window.

Related Topics

[Adding Quotes](#)

[Processing Quotes](#)

[Using the Order Manager](#)