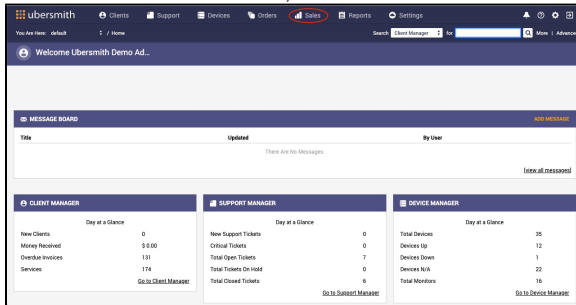


# Managing Quotes

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

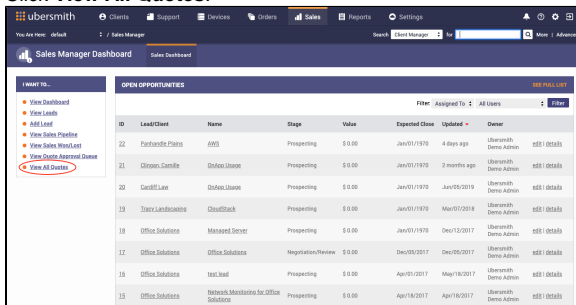
## Accessing the View Quote Page

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



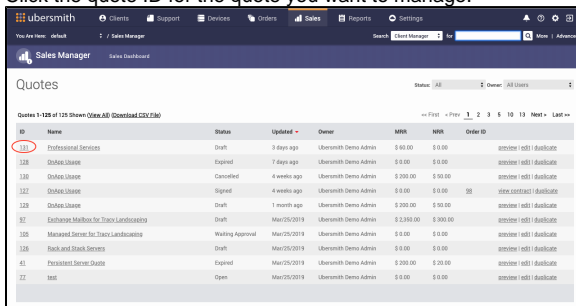
The *Sales Manager Dashboard* appears.

2. Click **View All Quotes**.



The *Quotes* page appears.

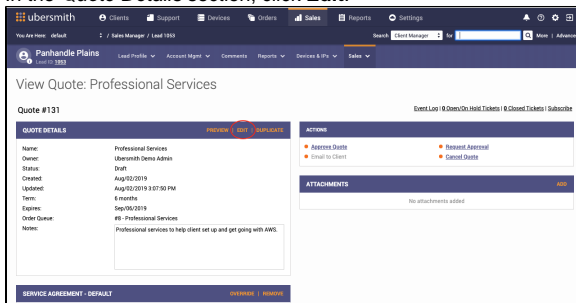
3. Click the quote ID for the quote you want to manage.



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**.

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### Edit Quote

Name: Professional Services

Assigned to: Ubersmith Demo Admin

Status: Draft

Term: 6 Months

Expires on: Sep/06/2019

Order Queue: Professional Services

Notes: Professional services to help client set up and get going with AWS.

Save Cancel

## 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**.

ubersmith

You are here: default / Sales Manager / Lead 1553

Plan/Handle Plans

View Quote: Professional Services

Quote #131

Quote Details

Name: Professional Services

Owner: Ubersmith Demo Admin

Status: Draft

Created: Aug/02/2019

Updated: Aug/02/2019 3:07:00 PM

Term: 6 months

Expires: Sep/06/2019

Order Queue: #15 - Professional Services

Notes: Professional services to help client set up and get going with AWS.

Service Agreement: DEFAULT

Actions: 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.

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### Duplicate Quote

Quote Details Ownership Info

Name: Professional Services

Assigned to: Ubersmith Demo Admin

Status: Draft

Order Queue: Professional Services

Term: 6 Months

Expires on: Sep/06/2019

Notes: Professional services to help client set up and get going with AWS.

Save Cancel

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**.

**ubersmith**

## Duplicate Quote

Quote Details **Ownership Info**

Select a client to associate this quote with.

**Find a Client**

Search Client

For: cardiff law

**Search**

**Search Results**

ID	Client Name	Company Name	Address
1053	(Current Client)	Bob Smith	Panhandle Plains
1050	<b>Cardiff Law</b>	Company Name: <b>Cardiff Law</b>	11234 Fairwood Avenue Troy, NY 12345 United States
1036	<b>Trusted Law</b>	Company Name: <b>Trusted Law</b>	1234 Broadway Street Setting Sun, PA 91000 United States

**Save** **Cancel**

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**.

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You are here: default / Sales Manager / Lead 1933

**Panhandle Plains** Lead 1933

View Quote: Professional Services

Quote #131

**QUOTE DETAILS** **Preview** **Print** **Share**

**NAME** Professional Services  
**OWNER** Ubersmith Demo Address  
**STATUS** Draft  
**CREATED** Aug/02/2019  
**TERMS** 6 months  
**EXPIRES** Sep/06/2019  
**ORDER DATE** Professional Services  
**NOTES** Professional services to help client set up and get going with AWS.

**ACTIONS**  
 Approve Quote | Renewal Approval  
 Email to Client | Cancel Quote

**ATTACHMENTS**  
 No attachments added

**SERVICE AGREEMENT - DEFAULT** **Override** **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**.

**QUOTE DETAILS** **Preview** **Print** **Share**

**NAME** Professional Services  
**OWNER** Ubersmith Demo Address  
**STATUS** Draft  
**CREATED** Aug/02/2019  
**TERMS** 6 months  
**EXPIRES** Sep/06/2019  
**ORDER DATE** Professional Services  
**NOTES** Professional services to help client set up and get going with AWS.

**SERVICE AGREEMENT - DEFAULT** **Override** **Preview**

**Master Service Agreement** Default MSA  
**PDF** MSA\_Latest (114.03 KB)  
**Terms** 1 year  
**Auto Renew** 6 months  
**Expires after service cancellation** 90 days

**Services**

Description	Service Plan	Quantity	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	1	\$ 60.00		\$ 60.00	\$ 0.00		\$ 0.00		
<b>Service Total:</b>			\$ 60.00		\$ 60.00			\$ 0.00		\$ 0.00
<b>Grand Total:</b>					\$ 60.00					\$ 0.00

**Comments**  
 There are no comments. **Add Comment**

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**.

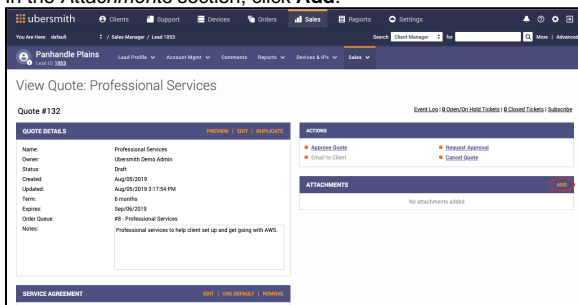
A confirmation message appears.

- Click **Yes**.

## Adding Attachments

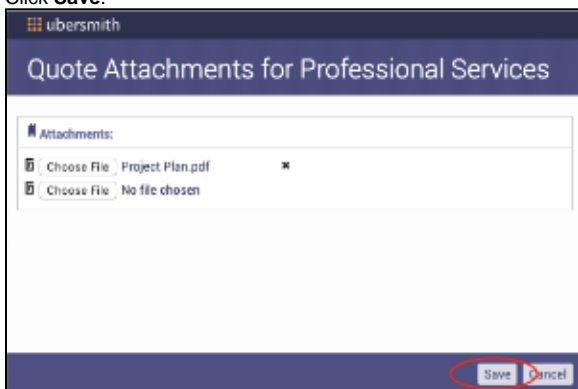
Additional PDF files can be included in the quote's contract, before the MSA, by adding attachments to the quote itself.

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



The **Quote Attachments** page appears.

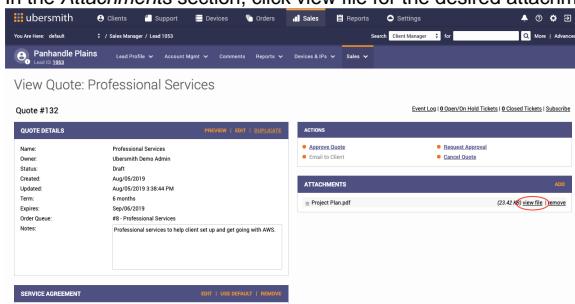
3. In the **Attachments** field, click **Choose File** and navigate to the location of your PDF to upload.
4. Click **Save**.



## 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 'QUOTE DETAILS' and 'SERVICE AGREEMENT' sections.

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 with the 'Services' section expanded. The 'add service' button is circled in red. The table below shows the current service plan.

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	6000	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 **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 with the 'Services' section expanded. The 'edit' button is circled in red. The table below shows the current service plan.

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	6000	1	\$ 60.00	-	\$ 60.00	\$ 0.00	-	\$ 0.00		
Additional Service	Additional Service	6000	1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00		
Service Total:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00	
Grand Total:						\$ 160.00					

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			<a href="#">edit</a> <a href="#">remove</a> <a href="#">duplicate</a>
AMS Reseller Billing	AMS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00			<a href="#">edit</a> <a href="#">remove</a> <a href="#">duplicate</a>
Service Total:						\$ 190.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 190.00						

**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			<a href="#">edit</a> <a href="#">remove</a> <a href="#">duplicate</a>
AMS Reseller Billing	AMS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00			<a href="#">edit</a> <a href="#">remove</a> <a href="#">duplicate</a>
Service Total:						\$ 190.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 190.00						

**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			<a href="#">edit</a> <a href="#">remove</a> <a href="#">duplicate</a>
AMS Reseller Billing	AMS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00			<a href="#">edit</a> <a href="#">remove</a> <a href="#">duplicate</a>
Service Total:						\$ 190.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 190.00						

**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**.

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## 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** [add service](#)

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	AW5	1	\$ 60.00	-	\$ 60.00	\$ 0.00	-	\$ 0.00	add1 comment (duplicate)	
AWS Reseller Billing	AWS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00	add1 comment (duplicate)	
Service Total:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00	
Grand Total:						\$ 185.00					

**Comments** [Add Comment](#)

Date Posted	Comment	
Created: Aug/26/2019 4:01:24 PM Aug/26/2019 4:01:24 PM Deleted: Done By Admin PRIVATE	We will be installing servers, connecting with AWS, and training.	<a href="#">edit</a> <a href="#">delete</a>

[Add Comment](#)

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** [add service](#)

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
Professional Services	Professional Services	AW5	1	\$ 60.00	-	\$ 60.00	\$ 0.00	-	\$ 0.00	add1 comment (duplicate)	
AWS Reseller Billing	AWS Reseller Billing		1	\$ 100.00	-	\$ 100.00	\$ 25.00	-	\$ 25.00	add1 comment (duplicate)	
Service Total:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00	
Grand Total:						\$ 185.00					

**Comments** [Add Comment](#)

Date Posted	Comment	
Created: Aug/26/2019 4:01:24 PM Aug/26/2019 4:01:24 PM Deleted: Done By Admin PRIVATE	We will be installing servers, connecting with AWS, and training.	<a href="#">edit</a> <a href="#">delete</a>

[Add Comment](#)

A confirmation message appears.

- Click **Yes**.

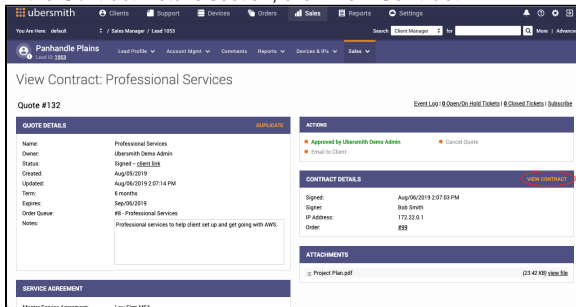
## Viewing Contract Details

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](#).

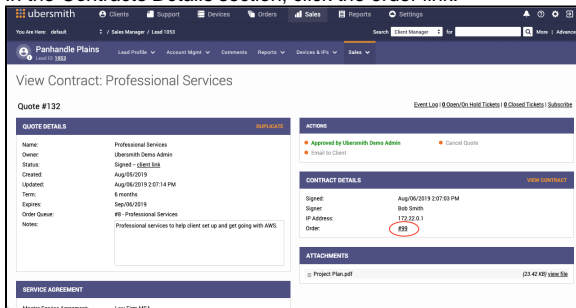


2. In the *Contract Details* section, click **View Contract**.



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](#)