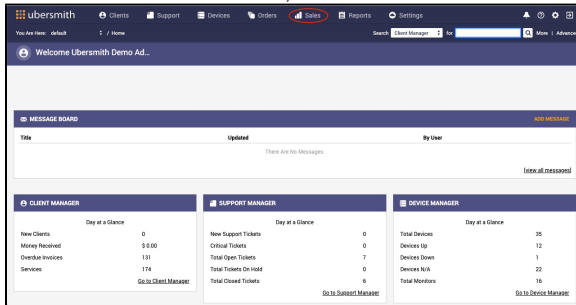


Managing Quotes

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

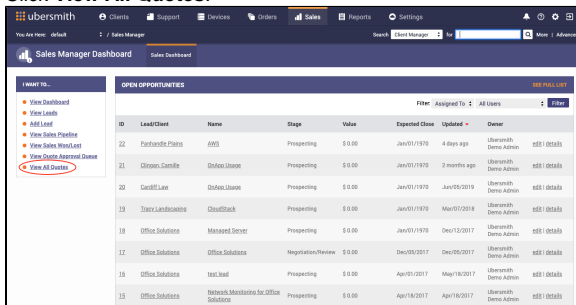
Accessing the View Quote Page

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



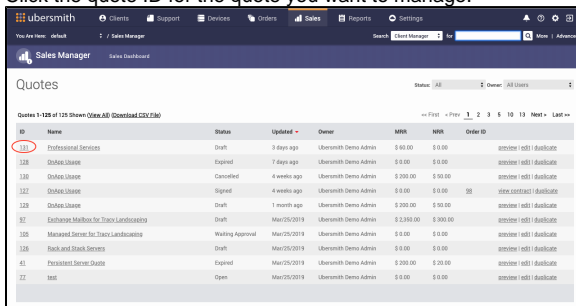
The *Sales Manager Dashboard* appears.

2. Click **View All Quotes**.



The *Quotes* page appears.

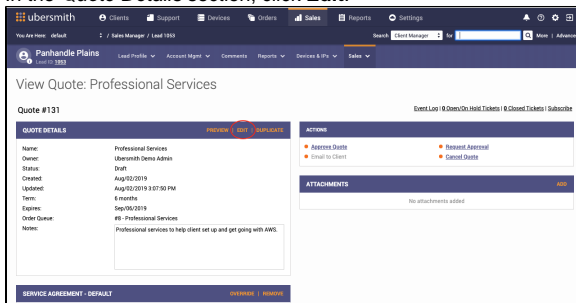
3. Click the quote ID for the quote you want to manage.



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**.

ubersmith

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: 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.

ubersmith

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

For

Search

Search Results

ID	Client Name	Company Name	Address
1053	(Current Client)	Client Name: Bob Smith Company: Panhandle Plains	
1050	Cardiff Law	Company Name: Cardiff Law Client Name: James Cardiff	11234 Fairwood Avenue Trg NY 12345 United States
1036	Trusted Law	Company Name: Trusted Law Client Name: Alex Hamilton	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**.

ubersmith

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
UPDATED Aug/02/2019 3:07:50 PM
TERMS 6 months
EXPIRES Sep/06/2019
ORDER DATE #0 - 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**

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

Master Service Agreement Default MSA
PDF MSA_Legal_2014_03_HD
Term 1 year
Auto Renew 6 months
Expires after service cancellation 90 days

Services

Description	Service Plan	Opportunity	Qty	Price	Discount	Total	Setup Price	Setup Discount	Setup Total	Code	Tax
0 Professional Services	Professional Services	AW0	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

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**.

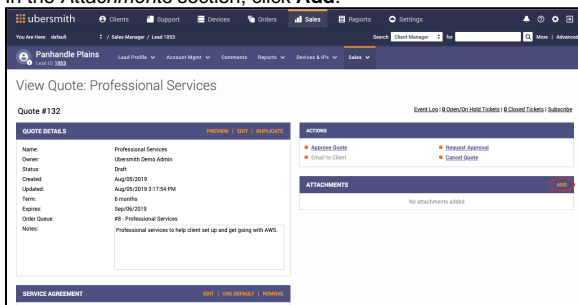
A confirmation message appears.

- Click **Yes**.

Adding Attachments

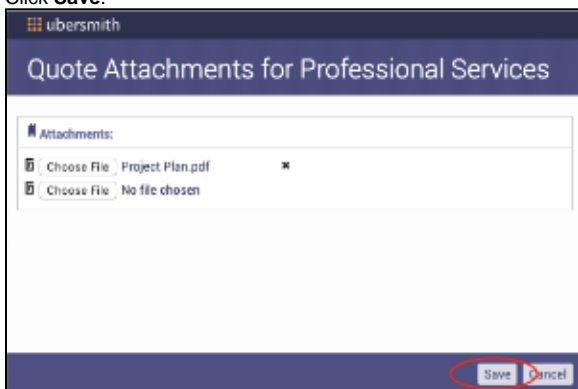
Additional PDF files can be included in the quote's contract, before the MSA, by adding attachments to the quote itself.

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



The **Quote Attachments** page appears.

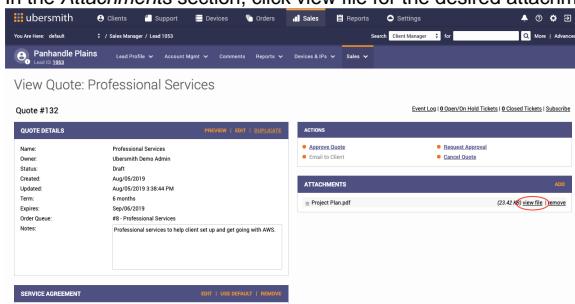
3. In the **Attachments** field, click **Choose File** and navigate to the location of your PDF to upload.
4. Click **Save**.



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 tabs for 'QUOTE DETAILS', 'SERVICE AGREEMENT', 'ACTIVITY', and 'COMMENTS'.

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 in the top right corner of the Services section.

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 Billing'. The 'edit' button for the second service is circled in red.

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.

Project Plan.pdf (23-42 KB) [view file](#) | [download](#)

SERVICE AGREEMENT [edit](#) | [view history](#) | [renew](#)

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.63 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	\$ 60.00	-	\$ 60.00	\$ 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:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 185.00						

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.

Project Plan.pdf (23-42 KB) [view file](#) | [download](#)

SERVICE AGREEMENT [edit](#) | [view history](#) | [renew](#)

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.63 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	\$ 60.00	-	\$ 60.00	\$ 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:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 185.00						

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.

Project Plan.pdf (23-42 KB) [view file](#) | [download](#)

SERVICE AGREEMENT [edit](#) | [view history](#) | [renew](#)

Master Service Agreement: Law Firm MSA
PDF: MSLA.pdf (114.63 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	\$ 60.00	-	\$ 60.00	\$ 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:						\$ 160.00	Setup Total:	\$ 25.00	Tax Total:	\$ 0.00		
Grand Total:						\$ 185.00						

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**.

Editing Comments

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

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		
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		

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.

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		
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		

A confirmation message appears.

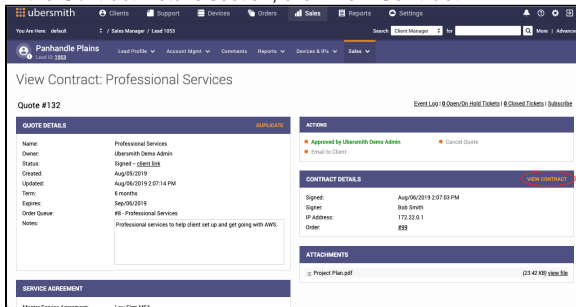
- Click **Yes**.

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.

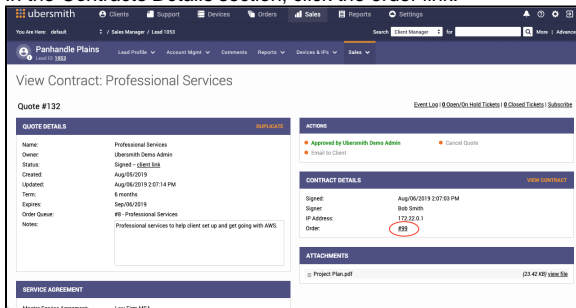
- Access the [View Quote page](#).

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](#)