

# Managing Service Plans

Once you have [created a service plan](#), you can perform various actions on it. Ubersmith also allows you to plug in your own service modules. Examples are available at [Example Service Modules](#).

## Accessing the Service Plan Details 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 the service plan you want to change.



The *Service Plans Detail* page appears.

## Editing Service Plans

1. From the *Service Plan Details* page, click on **edit** in any section.



The *Edit Service Plan* page appears, with that section's information displayed.

2. Make any necessary updates you need.

On this page:

On this page:

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- [Adding Usage Plans](#)
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- [Managing Custom Welcome Letters](#)
- [Adding Service Modules](#)
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3. Click **Update**.

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## Edit Service Plan

English(USA) Data

Service Title: Managed Server

Service Category:

Service Code: mang

Status: Active

Accessible by API: ☒ Yes ☐ No

Allow Quoting: ☒ Yes ☐ No

Update Cancel

## Adding a Rate Plan

1. From the *Service Plan Details* page, click **add rate plan**.

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Service Plan Details

**RATE PLANS**

	One-Time Fee	Monthly	Quarterly	Semi-Annually	Annually
One Year Contract (Default) (discount)					
Period Price	0.00	10.00	15.00	20.00	30.00
Setup Fee	0.00	0.00	0.00	0.00	0.00
Cost	0.00	0.00	0.00	0.00	0.00
Setup Fee Cost	0.00	0.00	0.00	0.00	0.00
Upgrade Price		+10.00%	+10.00%	+10.00%	+10.00%
Upgrades	No Upgrades Found				

**USAGE PLAN**

Usage Plan Name: Status: Active

**SERVICE NOTES**

There are no notes for this service plan.

**WELCOME LETTER**

Welcome Letter Template: Default

**CUSTOM FIELD DEFAULTS**

**SERVICE MODULES**

The *Add Rate Plan Service Plan Pricing* page appears.

2. From the **Rate Plan** field, select the rate plan you need or click **Add Rate Plan** to create a new rate.
3. Enter the price for the service plan.  
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 each price, use the following setting to refine your rate:  
= does not affect the existing default price.  
\$ sets a specific price override (an example is always \$10 instead of the existing default).  
+/- is a number of dollars more or less than the base default.  
% is a percentage higher or lower than the existing default.



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.

- Click **Add**.

Warning: Modifiers in detail!

- + Service price will not be modified.
- \$ Service price will be set to this amount.
- % This amount will be added or subtracted to service price.
- % This percent age amount will be added or subtracted to service price.

	Price	Setup Fee	Cost	Setup Fee Cost	Usage Price
One Year Contract	0.00	0.00	0.00	0.00	
Monthly	0.00	0.00	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	

Add Cancel

## Adding Usage Plans

Usage plans calculate and bill for the volume of resources consumed through a configured plugin data source. Some examples include OnApp and CloudStack usage. See [Plugins](#) for more information. Usage plans rely on existing plugins to provide a data source. Once you have a plugin configured and active, you can configure a service plan to track usage information. The data source in the service plan is configured to provide the necessary resources to track, and the appropriate units for those resources.

- From the *Service Plan Details* page, in the *Usage Plan* section, click **add usage plan**.

RATE PLANS

	One-Time Fee	Monthly	Quarterly	Semi-Annually	Annually
One Year Contract (Details) (Add) (Description)	0.00	10.00	10.00	20.00	20.00
Fixed Fee	0.00	0.00	0.00	0.00	0.00
Setup Fee	0.00	0.00	0.00	0.00	0.00
Cost	0.00	0.00	0.00	0.00	0.00
Setup Fee Cost	0.00	0.00	0.00	0.00	0.00
Usage Price	-	+ 10.00%	+ 10.00%	+ 10.00%	+ 10.00%
Updates					

No Updates Found

USAGE PLAN

Usage Plan Name:

Data Source:

Add Usage Plan Cancel

The *Add Usage Plan* page appears.

- In the **Usage Plan Name** field, enter the name for your usage plan.
- In the **Data Source** field, select the appropriate data source.
- Click **Save** or **Save & Add Resources**.
- If you clicked **Save & Add Resources**, see [Adding Resources](#).

Add Usage Plan

Usage Plan Name:

Data Source:

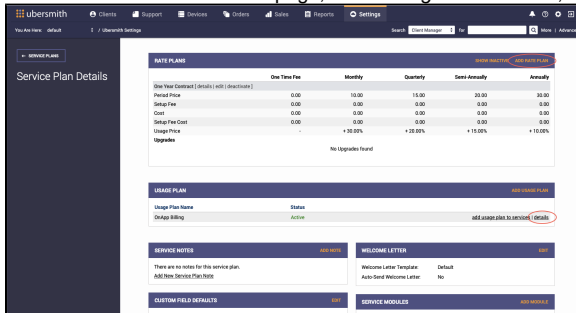
Save Save & Add Resources Cancel

## Managing Usage Plans

If you have services using a usage plan, you can add new resources, but existing resources cannot be deleted.

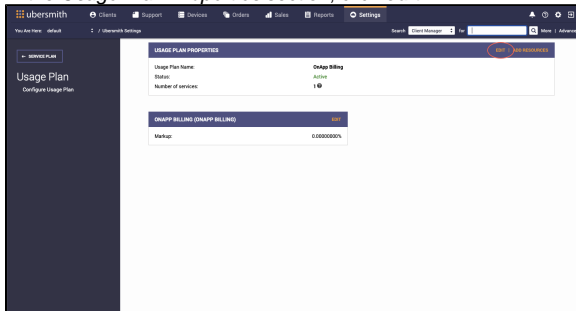
## Editing Usage Plans

1. From the *Service Plan Details* page, in the *Usage Plan* section, click **details**.



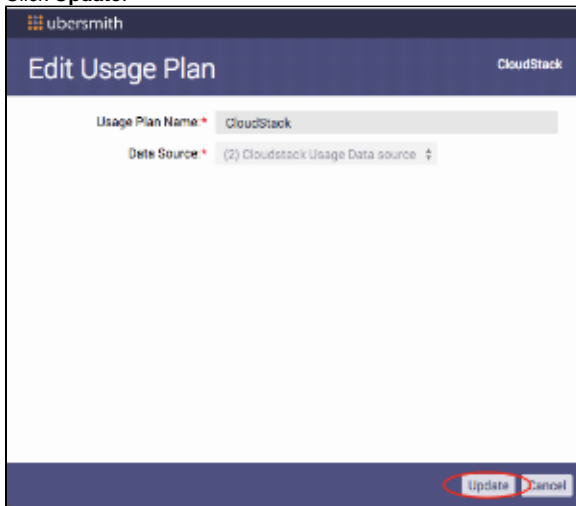
The *Configure Usage Plan* page appears.

2. In the *Usage Plan Properties* section, click **edit**.



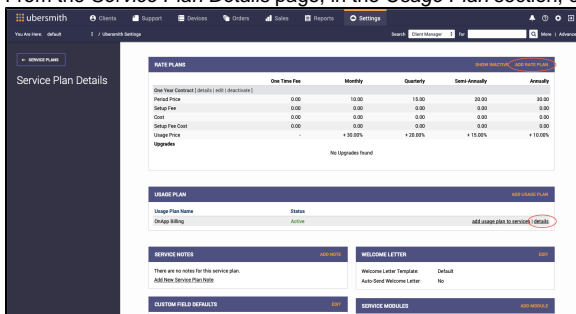
The *Edit Usage Plan* page appears.

3. Make any necessary updates.
4. Click **Update**.



## Adding Resources

1. From the *Service Plan Details* page, in the *Usage Plan* section, click **details**.



The *Configure Usage Plan* page appears.

2. In the *Usage Plan Properties* section, click **add resources**.



The *Add Resources* page appears.

## Complete the Add Resources Page

The fields in this section differ, based on the type of [plugin](#) you are using.

### For markup resources:

1. In the **Resource Name** field, enter or select the name of the resource.
2. In the **Resource** field, select the type of resource.
3. In the **Markup** field, enter either the fixed price or the percentage you want to mark up your resource, and select either the percent or dollar sign.
4. In the **Update existing services** field, select **Yes** if you want to update any existing services to being using this resource.
5. Click **Save** or **Save & New**.



### For tiered resources:

1. In the **Resource Name** field, enter or select the name of the resource.
2. In the **Resource** field, select the type of resource.
3. In the **Resource Unit**, select the appropriate unit based on the resource.
4. In the **Base Price** field, enter the monetary cost of the resource unit.

5. In the **Update existing services** field, select **Yes** if you want to update any existing services to being using this resource.

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### Add Resources

English(USA) Français canadien Português (Portugal) **Tiers**

Resource Name: CloudStack

Resource: Small Instance

Resource Unit: (hr) 1 CPU @ 500 Mhz + 512 MB RAM

Base Price: \$ 25.00000000

Save Save & New Cancel

6. Click the **Tiers** tab, which only displays if you are using a [plugin](#) with tiered billing amounts.

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### Add Resources

English(USA) Français canadien Português (Portugal) **Tiers**

Resource Name: CloudStack

Resource: Small Instance

Resource Unit: (hr) 1 CPU @ 500 Mhz + 512 MB RAM

Base Price: \$ 25.00000000

Save Save & New Cancel

7. In the **Included** row, enter the cut off range for the included amount. The monetary value is set to zero.
8. In the **Rate Tier [number]** field, enter the monetary value for that tier.
9. In the **Up to Tier** field, enter the cut off range for the tier.
10. Click the **+** sign to add additional tier fields.
11. Click **delete** to remove tier fields.
12. In the **Remaining** field, enter the monetary value for the usage past the last tier.
13. Click **Save** or **Save & New**.

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### Add Resources

English(USA) **Tiers**

	Rate / (hr) 1 CPU @ 500 Mhz + 512 MB RAM	Up to (hr) 1 CPU @ 500 Mhz + 512 MB RAM
Included	\$ 0.00	60
Tier 1	\$ 0.75000000	100
Remaining	\$ 1.00000000	Unlimited

Save Save & New Cancel

## Editing Resources

1. From the *Service Plan Details* page, in the *Usage Plan* section, click **details**.



The *Configure Usage Plan* page appears.

2. In the appropriate resource section, click **edit**.



The *Edit Usage Plan* page appears.

3. Make any necessary updates.
4. Click **Update**.



## Deleting Resources

You can only delete resources not in use.

1. From the *Service Plan Details* page, in the *Usage Plan* section, click **details**.



The *Configure Usage Plan* page appears.

- In the appropriate resource section, click **delete**.



A confirmation message appears.

- Click **Yes**.

## Adding Service Plan Notes

Service plan notes are included on your client's invoices when the associated service is billed.

- From the *Service Plan Details* page, click **add note**.



The *Add Service Plan Note* page appears.

- In the *Note* section, enter the note you want to display on your client's invoice.
- Click **Save** or **Save & New**.



## Managing Service Notes

Text entered as a service note displays on your client's invoices under each service, unless the service notes are individually overridden at the service level.

- From the *Service Plan Details* page, in the *Service Notes* section, click **edit** or **delete**.

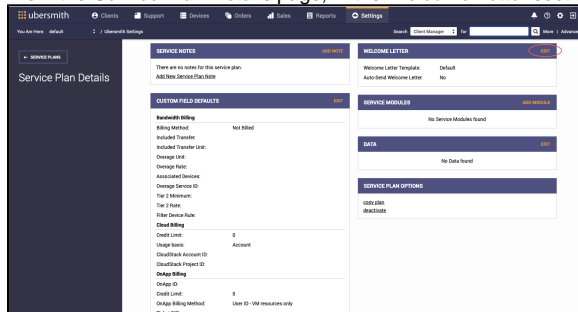




## Managing Custom Welcome Letters

You can send clients a customized welcome letter for the associated service plan. This welcome letter will be specifically for the service plan you add it to. If a custom template is not set up for a service plan, the default, brand-specific template located in the Client Communications menu in the Clients settings is used.

1. From the *Service Plan Details* page, in the *Welcome Letter* section, click **edit**.



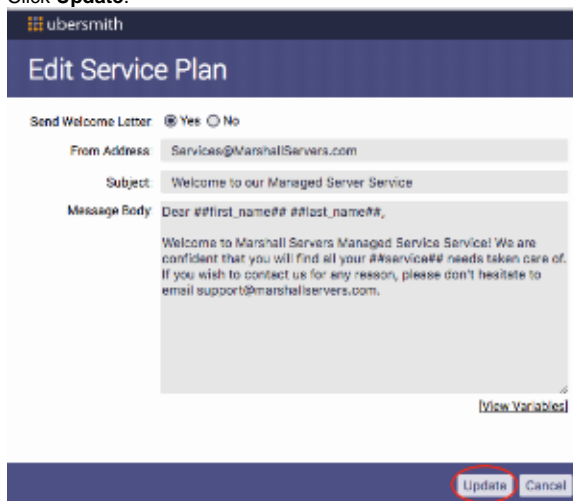
The *Edit Service Plan* page appears.

2. In the **Send Welcome Letter** field, select **Yes** if you want to automatically send a welcome letter to your clients when this service plan is added to their account.
3. In the **From Address** field, enter the address associated with the service plan.
4. In the **Message Body** field, enter the body of your welcome message.



Click the View Variables link to display the View Variables: Welcome Letters page that lists all the system variables you can use to customize your letters.

5. Click **Update**.



## Adding Service Modules

Service modules are custom php files that run specific code for particular service-related events. They carry out customized functions or integrate with third party systems. Ubersmith provides a number of service modules that only need to be enabled and properly configured. You can also create custom modules and uploaded them directly to your Ubersmith instance without any special code or intervention from the Ubersmith team.

[Custom Service Module Examples](#)

[Configuring Backup Billing](#)

[Configuring Bandwidth Usage Billing](#)

[Configuring Bandwidth Notification Billing](#)

[Configuring CloudStack Billing Service Module](#)

[Configuring Control Panel Account Notification Billing](#)

[Configuring Domain Management Billing](#)

[Configuring OnApp Billing](#)

[Configuring Power Circuit Billing](#)

[Configuring Power Management](#)

[Configuring SolusVM VServer Management Billing](#)

[Configuring Swift Usage Billing](#)

[Configuring Switch Management Billing](#)

[Configuring Ticket Billing](#)

[Configuring VM Management](#)

[Configuring vCloud and vCenter Chargeback Billing](#)

1. From the *Service Plan Details* page, click **add module**.



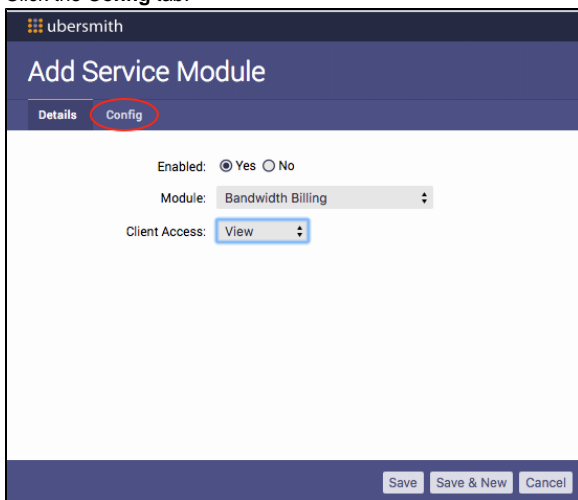
The *Add Service Module* page appears.

## Complete the Details tab

1. In the **Enabled** field, select **Yes**.
2. In the **Module** field, select the service module you want to add to the service plan.
3. In the **Client Access** field, select either **No Access**, **View** or **Edit**.

 This setting does something different for each service module.

4. Click the **Config** tab.



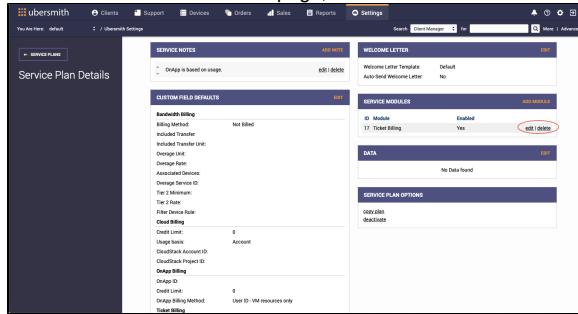
## Complete the Config tab

The fields and options in this step vary depending on the selected service module. See Adding Service Modules (above) for more information.

## Managing Service Modules

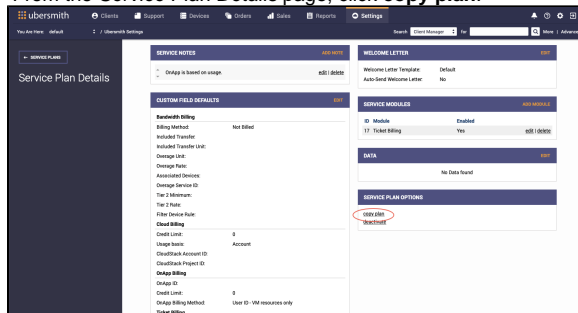
If a service module within an active service is disabled, the module will skip its process and the service will renew at the prescribed time. The service itself will be unaffected, only the service module code will stop and all functions written for it will be skipped.

1. From the *Service Plan Details* page, in the *Service Modules* section, click **edit** or **delete**.



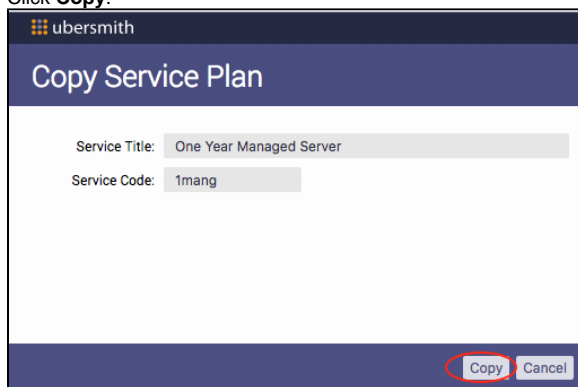
## Copying Service Plans

1. From the *Service Plan Details* page, click **copy plan**.



The *Copy Service Plan* page appears.

2. In the **Service Title** field, enter the name of the new service plan.
3. In the **Service Code** field, enter the new alternative abbreviated name or number to represent the service plan. This code will display on your customers' invoices.
4. Click **Copy**.



## Deactivating Service Plans

Deactivating a service plan does not deactivate any of its associated services. It does disable any service module. It is best practice to either also deactivate any active services or move them to a different, active service plan before deactivating the original service plan.

1. From the *Service Plan Details* page, click **deactivate**.



A warning message appears.

2. Click **Yes**.



## Related Topics

[Adding Service Plans](#)

[Adding Services](#)

[Managing Services](#)

[Using the Ubersmith API](#)

[Adding Service Plan Upgrades](#)

[Managing Service Plan Upgrades](#)

[Configuring Service Modules](#)

[Example Service Modules](#)