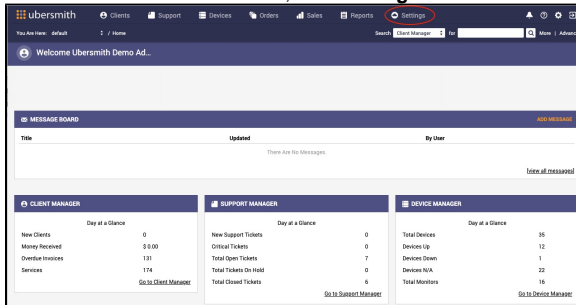


Managing Rate Plans

Once you have [created a rate plan](#), you can perform various actions on them.

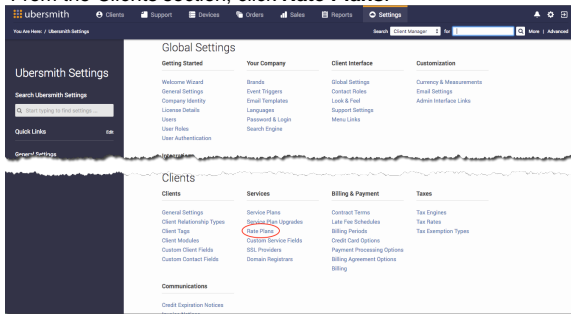
Accessing the Rate Plan Details Page

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



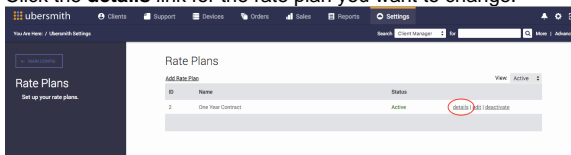
The *Ubersmith Settings* page appears.

2. From the *Clients* section, click **Rate Plans**.



The *Rate Plans* page appears.

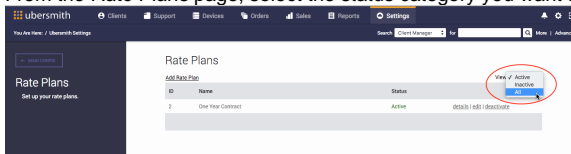
3. Click the **details** link for the rate plan you want to change.



The *Rate Plan Details* page appears.

Viewing Rate Plans

- From the *Rate Plans* page, select the status category you want to see in the **View** field.



The *Rate Plans* page displays the rate plans you have selected to view.

Editing Rate Plans

On this page:

On this page:

- [Accessing the Rate Plan Details Page](#)
- [Viewing Rate Plans](#)
- [Editing Rate Plans](#)
- [Adding a Rate Plan to a Service Plan](#)
- [Adding a Rate Plan to a Service Plan Upgrade Option](#)
- [Related Topics](#)

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

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

2. Make any necessary updates you need.
3. Click **Update**.

Adding a Rate Plan to a Service Plan

1. From the *Rate Plan Details* page, click **add service plan**.

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

2. From the **Service Plan** field, select the service plan you need.
 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 (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.

4. Click **Add**.



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.

Adding a Rate Plan to a Service Plan Upgrade Option

1. From the *Rate Plan Details* page, click **add option**.

The *Add Rate Plan Option* page appears.

- From the **Upgrade** field, select the service plan upgrade you need.
- From the **Option** field, select the service plan upgrade option you need.
- Enter the price for the service plan upgrade option.

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 (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

- Click **Save**.



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.



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

Related Topics

[Adding Rate Plans](#)

[Adding Service Plans](#)

[Managing Service Plans](#)

[Adding Service Plan Upgrades](#)

[Managing Service Plan Upgrades](#)

[Adding Contract Terms](#)

[Managing Contract Terms](#)