

# My Site Services User Guide

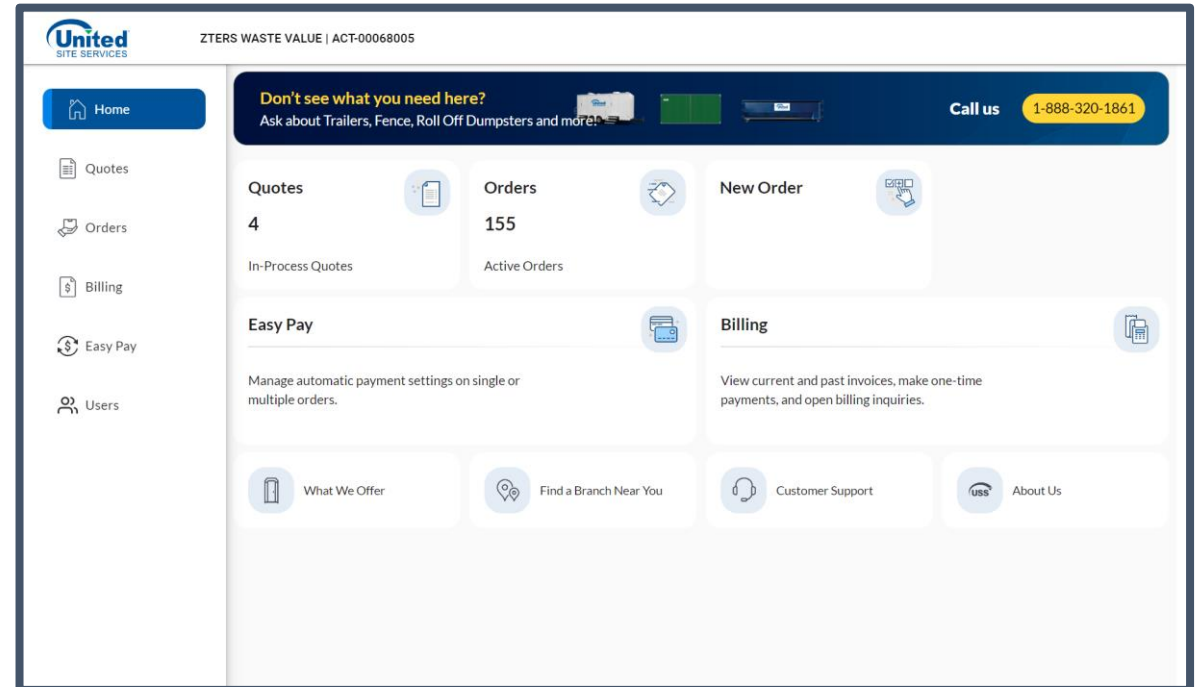
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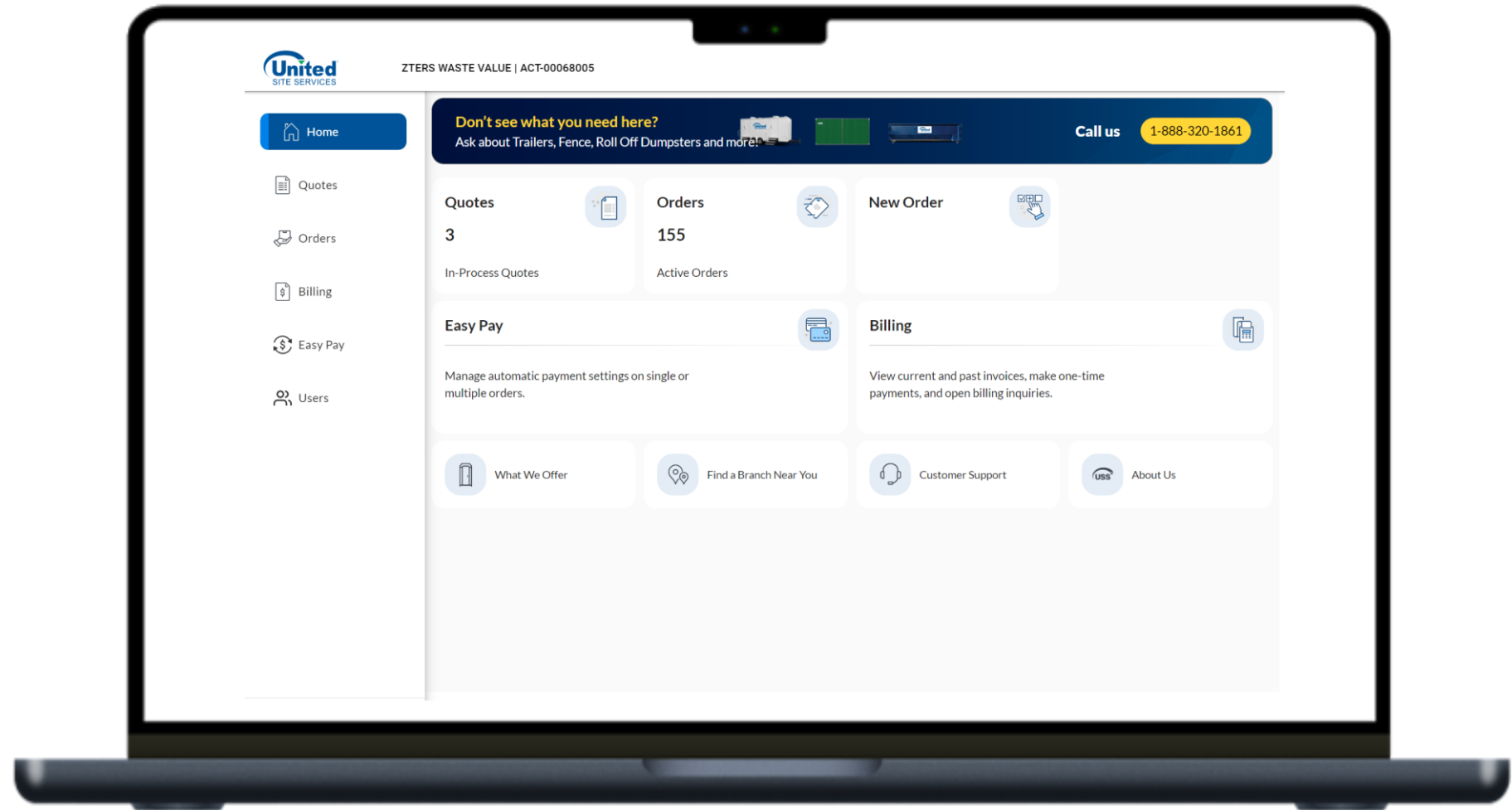
# My Site Services

My Site Services is a comprehensive online platform that enables management of all site service needs in one place.

From billing and invoicing to order tracking and service updates, it's all available in My Site Services.



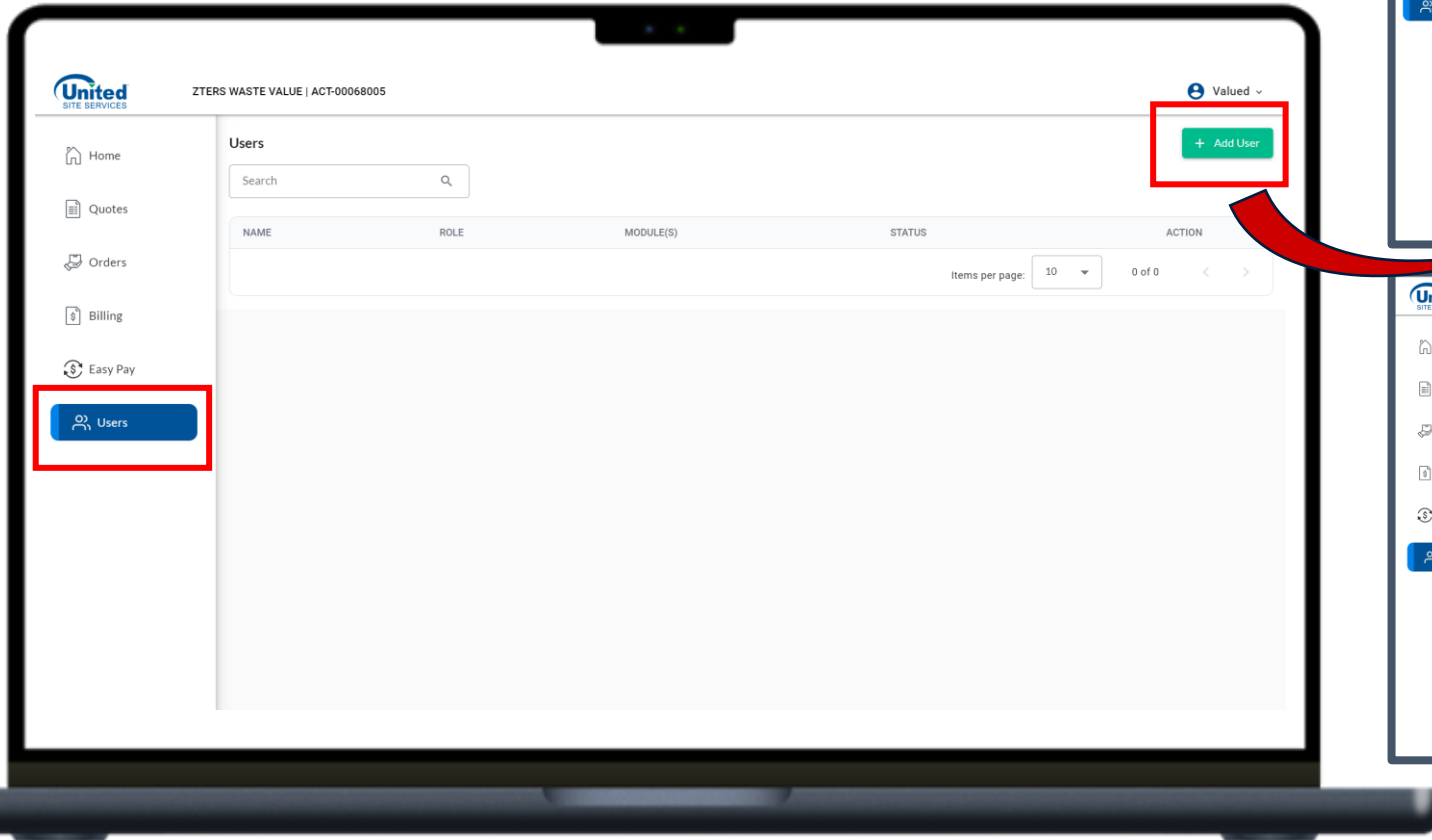
# Users



# USERS

Customers can give different levels of access to users.

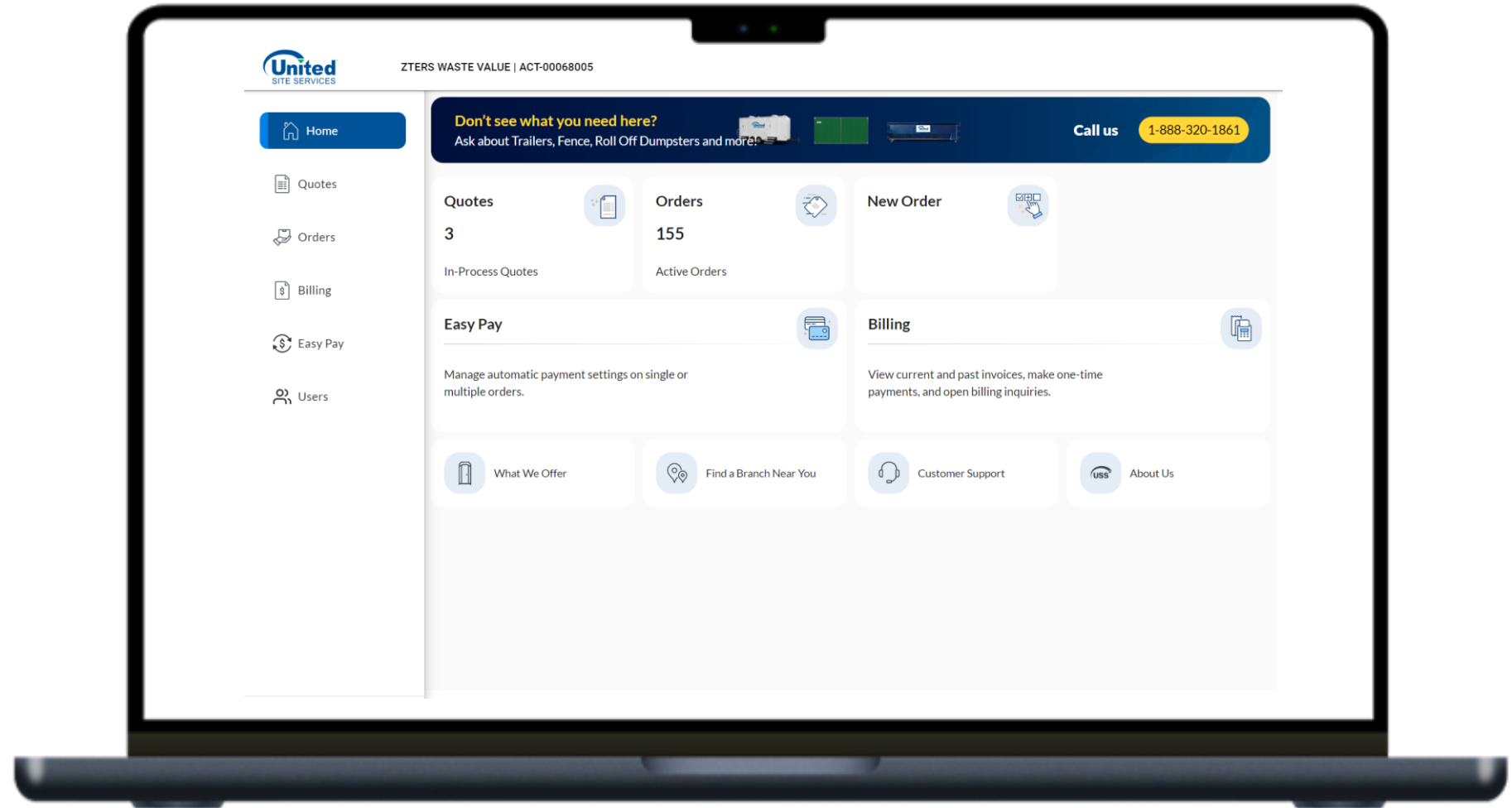
Select **Users** from the menu. You can search for the name of the user or select the green button to **Add User**. You can then select which role and access each user should have.



The 'Add User' form includes fields for First Name, Last Name, Phone Number, and E-mail ID. The 'Assign Role' dropdown menu is highlighted with a red box, showing options: Account Admin, Standard User, and Read Only. A red arrow points from the 'Add User' button in the main screenshot to this form.

The 'Add User' form includes fields for First Name, Last Name, Phone Number, and E-mail ID. The 'Assign Role' dropdown menu is set to 'Standard User'. The 'Assign Module(s)' section is highlighted with a red box, showing checkboxes for All, Quotes, Orders, Billing, and Easy Pay. The 'Billing' and 'Easy Pay' checkboxes are checked.

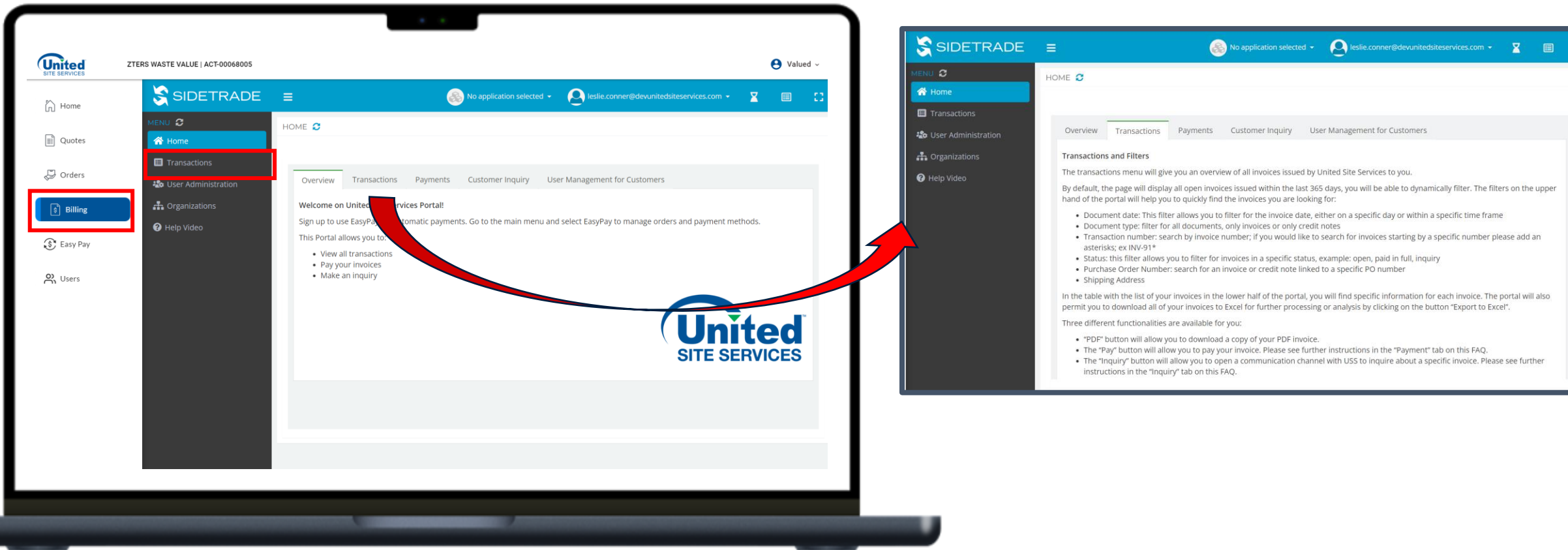
# Billing



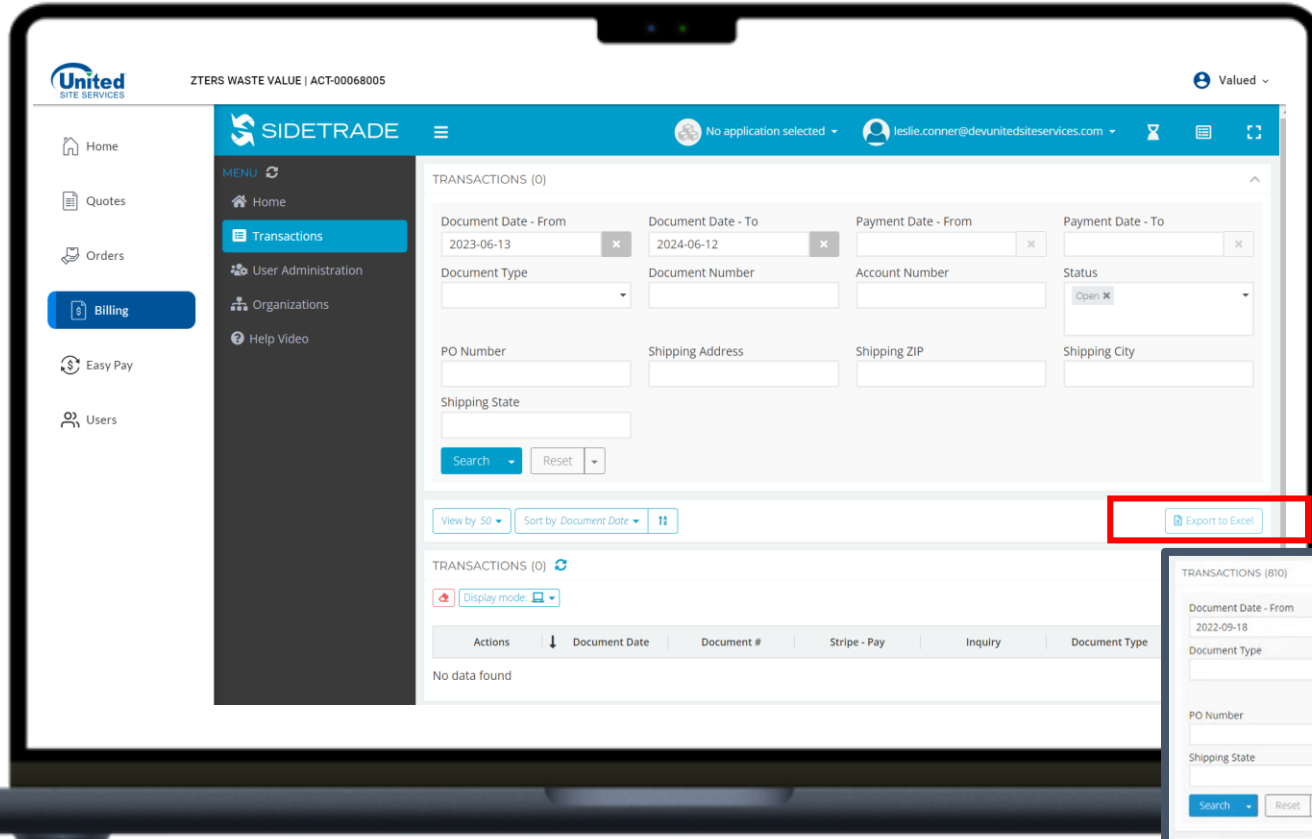
# BILLING

Customers can view, download, and pay invoices.

Select **Billing** from the menu. On the homepage, you will see tabs with helpful information regarding Transactions, Payments, and Customer Inquiries. Select **Transactions**.

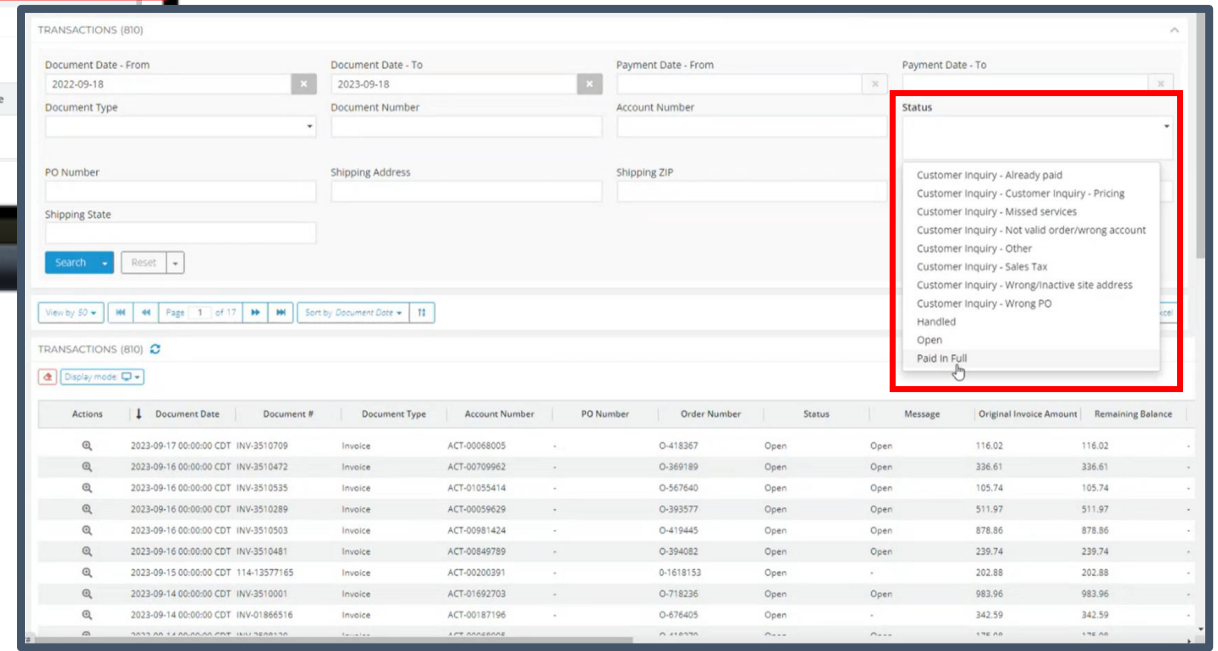


# BILLING



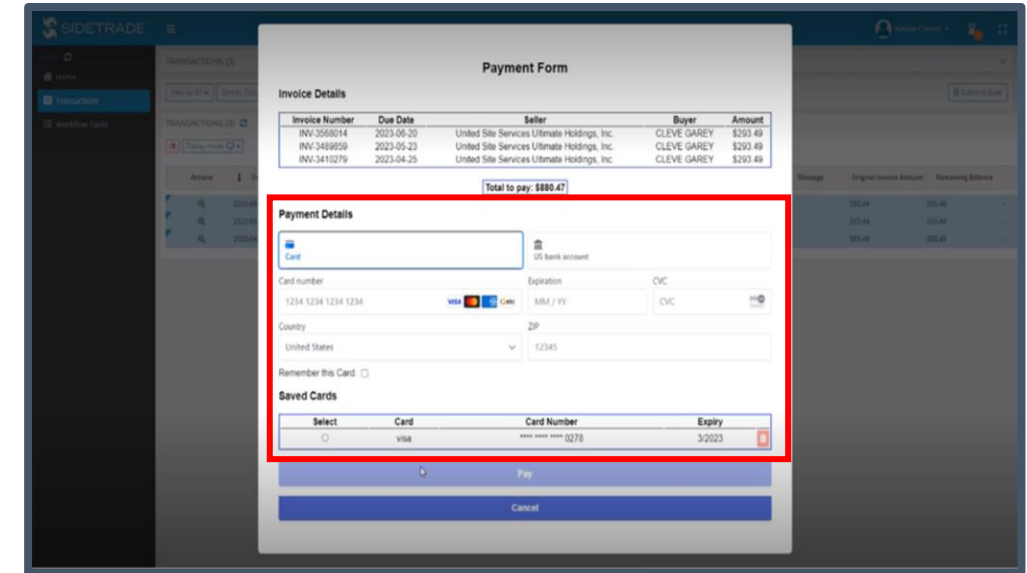
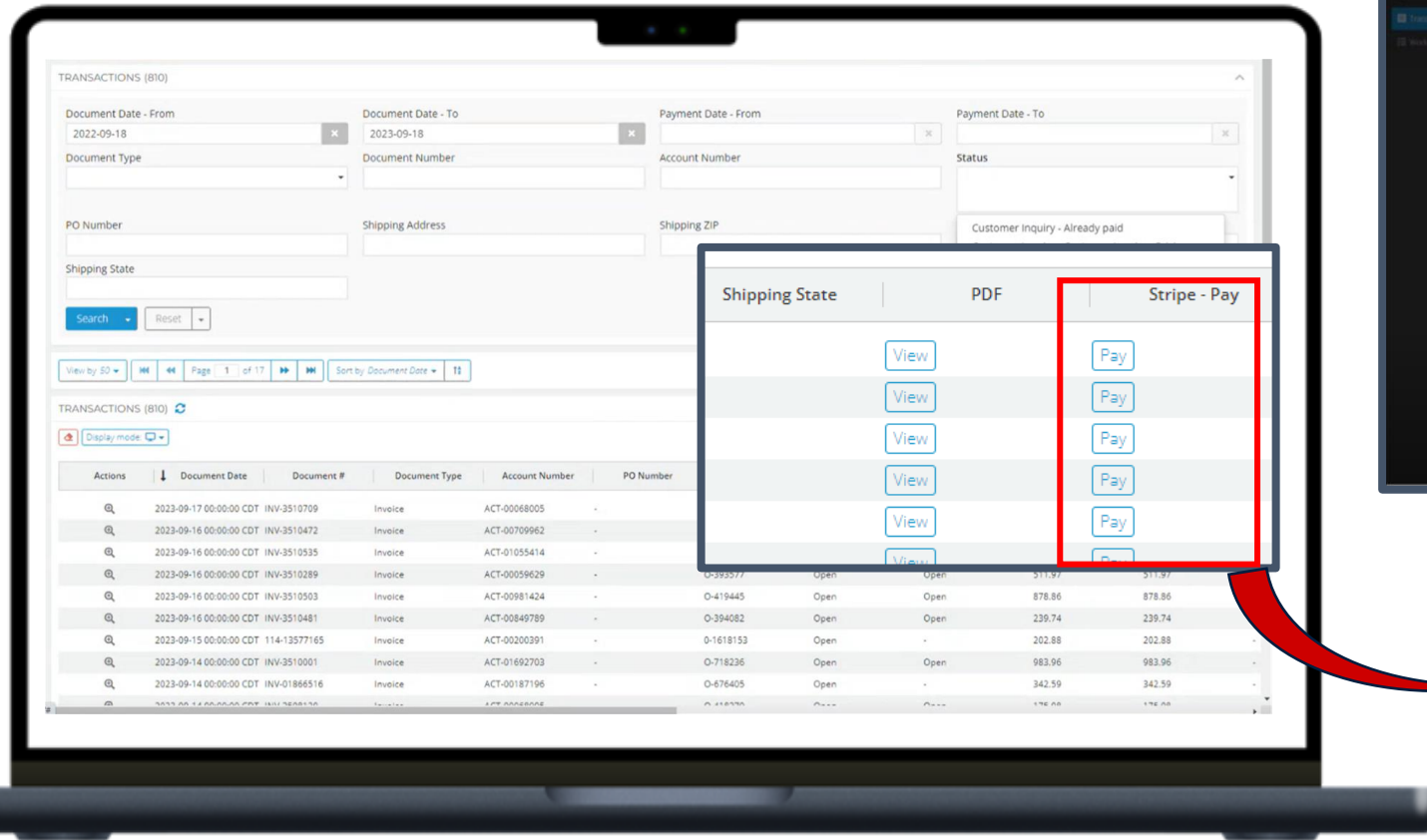
From the homepage, the customer can search for an invoice by the date, status, PO number, or account number.

Select **Export to Excel** to download and/or print the invoice.



# BILLING

To pay an invoice, select the **Pay** button. The customer can select the payment method.

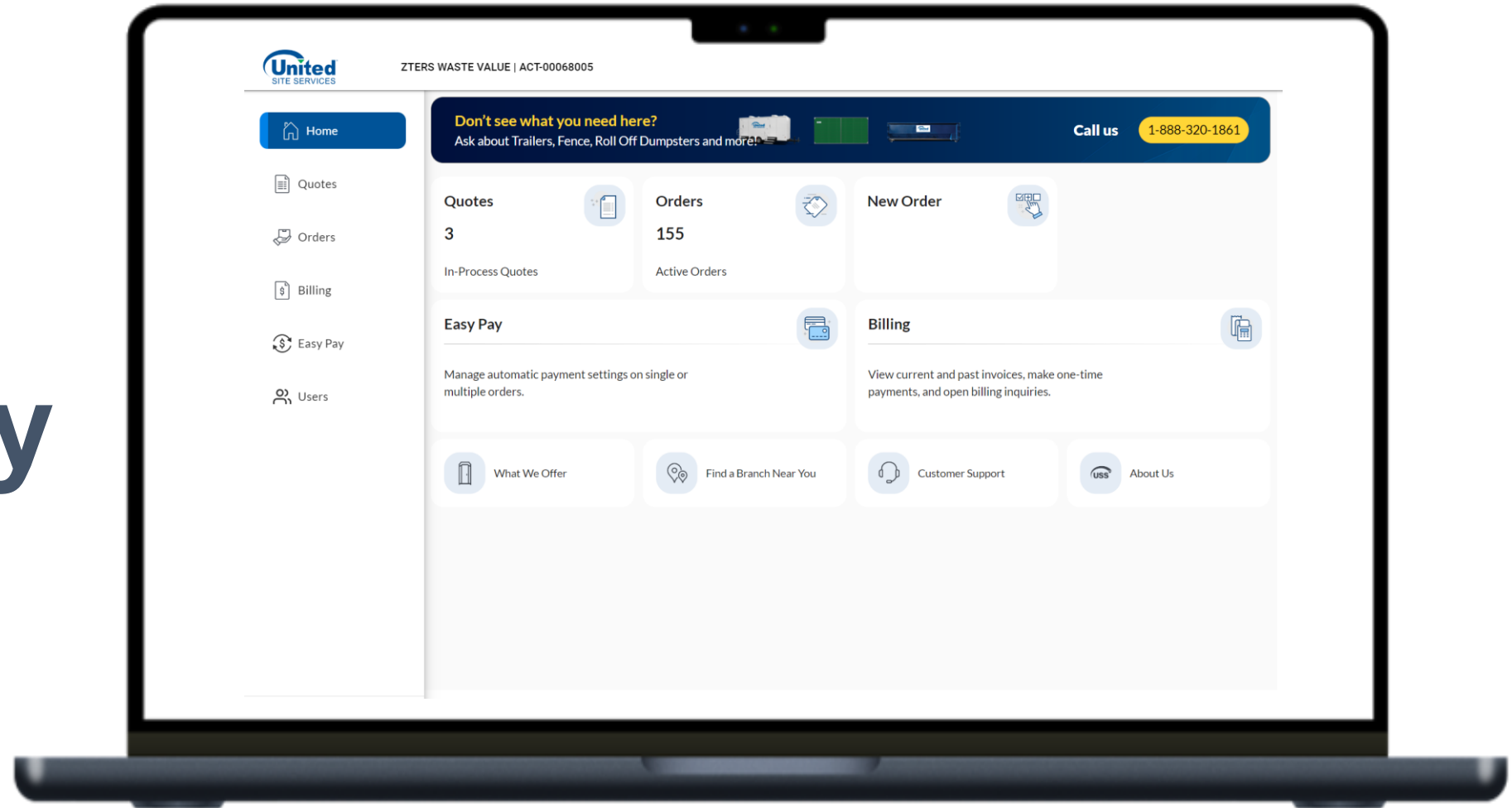


# BILLING

Actions	Document Date	Document #	Document Type	Account Number	PO Number	Order Number	Status	Message	Original Invoice Amount	Remaining Balance	
🔍	2023-09-15 00:00:00 CDT	114-13577166	Invoice	ACT-00099423	-	0-2081610	Paid In Full	Invoice paid via Stripe	385.52	0.00	-
🔍	2023-09-13 00:00:00 CDT	114-13577122	Invoice	ACT-00200391	-	0-1618153	Paid In Full	Invoice paid via Stripe	202.88	0.00	-
🔍	2023-09-13 00:00:00 CDT	114-13577121	Invoice	ACT-00200391	-	0-1618153	Paid In Full	Invoice paid via Stripe	202.88	0.00	-
🔍	2023-09-13 00:00:00 CDT	114-13577128	Invoice	ACT-00099423	-	0-2081610	Paid In Full	Invoice paid via Stripe	11951.17	0.00	-
🔍	2023-08-29 00:00:00 CDT	INV-01835183	Invoice	ACT-00099423	-	0-710418	Paid In Full	Invoice paid via Stripe	384.37	0.00	Paym
🔍	2023-08-24 00:00:00 CDT	INV-3496321	Invoice	ACT-00200391	-	0-396902	Paid In Full	Invoice paid via Stripe	277.51	0.00	Paym
🔍	2023-06-30 00:00:00 CDT	INV-01740876	Invoice	ACT-00099423	-	0-501270	Paid In Full	Invoice paid via Stripe	350.42	0.00	Paym
🔍	2023-05-31 00:00:00 CDT	INV-3440350	Invoice	ACT-00006654	-	0-623217	Paid In Full	Invoice paid via Stripe	233.97	0.00	Paym
🔍	2023-05-29 00:00:00 CDT	INV-3431301	Invoice	ACT-00067885	-	0-317481	Paid In Full	Invoice paid via Stripe	913.61	0.00	Paym
🔍	2023-05-29 00:00:00 CDT	INV-3440351	Invoice	ACT-00006654	-	0-414776	Paid In Full	Invoice paid via Stripe	566.60	0.00	Paym
🔍	2023-05-27 00:00:00 CDT	INV-3428690	Invoice	ACT-01055414	-	0-567640	Paid In Full	Invoice paid via Stripe	105.74	105.74	0.00
🔍	2023-05-24 00:00:00 CDT	INV-3424084	Invoice	ACT-00006654	-	0-698578	Paid In Full	Invoice paid via Stripe	233.97	0.00	Paym
🔍	2023-04-27 00:00:00 CDT	INV-3401190	Invoice	ACT-01692592	0-717880	-	Paid In Full	Payment has been con...	1254.36	0.00	Cred

The invoice will show as **Paid in Full** in the transactions list.

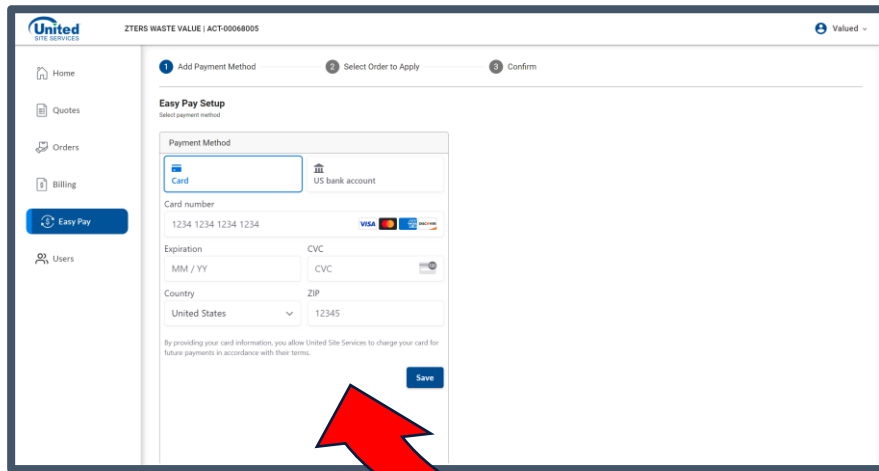
# Easy Pay



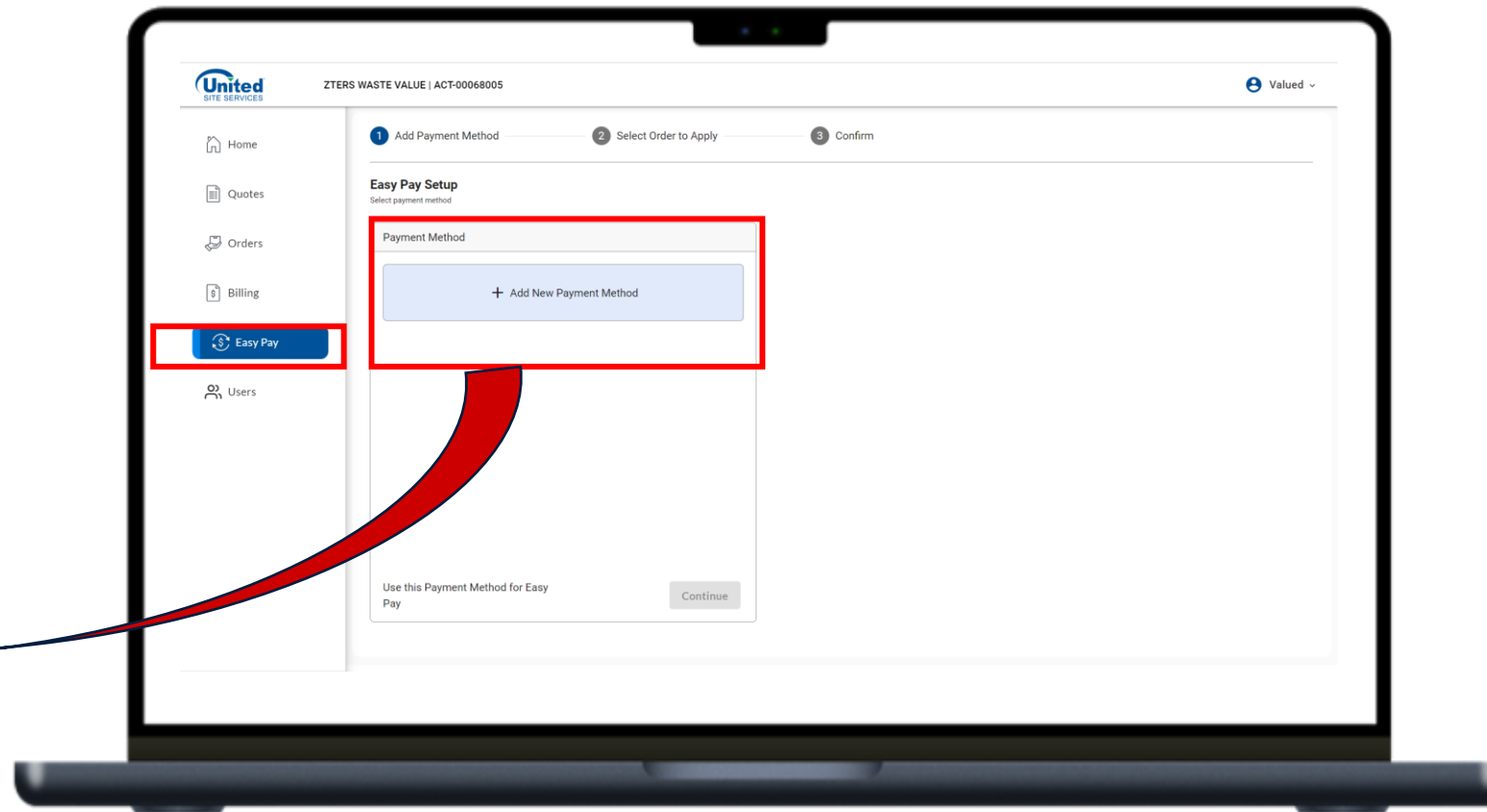
# EASY PAY

Customers can set up automatic payments.

Select **Easy Pay** from the menu. Then select **Add New Payment Method**. Enter the credit card or bank information that you would like to use for automatic payments.

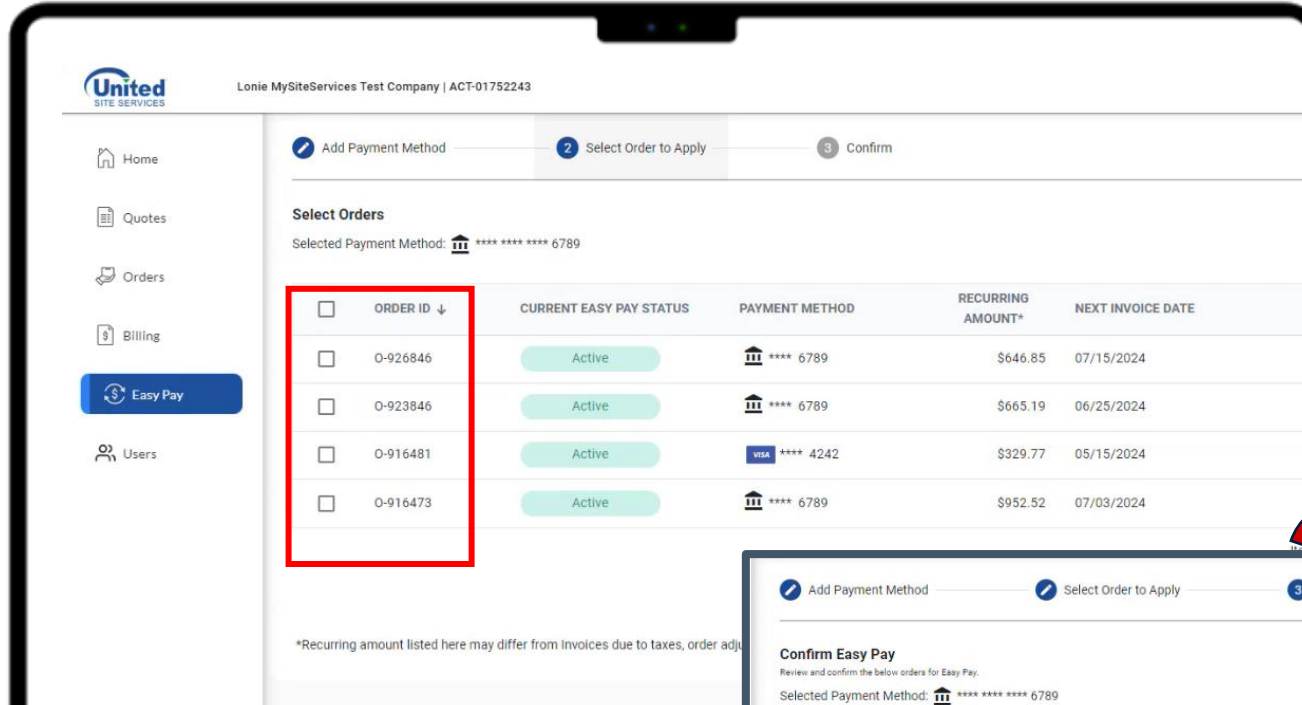


This screenshot shows the 'Easy Pay Setup' form in the United Site Services portal. The form is titled 'Easy Pay Setup' and includes a sub-header 'Select payment method'. It features a 'Payment Method' section with a dropdown menu currently set to 'Card'. Below this, there are input fields for 'Card number' (1234 1234 1234 1234), 'Expiration' (MM / YY), 'CVC', 'Country' (United States), and 'ZIP' (12345). A 'Save' button is located at the bottom right of the form. A red arrow points from the 'Easy Pay' button in the main menu of the laptop screen to this form.



# EASY PAY

After entering the payment information, you can select the order to apply the automatic payment. Then select **Confirm**. This means this order will be **AUTOMATICALLY** paid.



United SITE SERVICES

Lonie MySiteServices Test Company | ACT-01752243

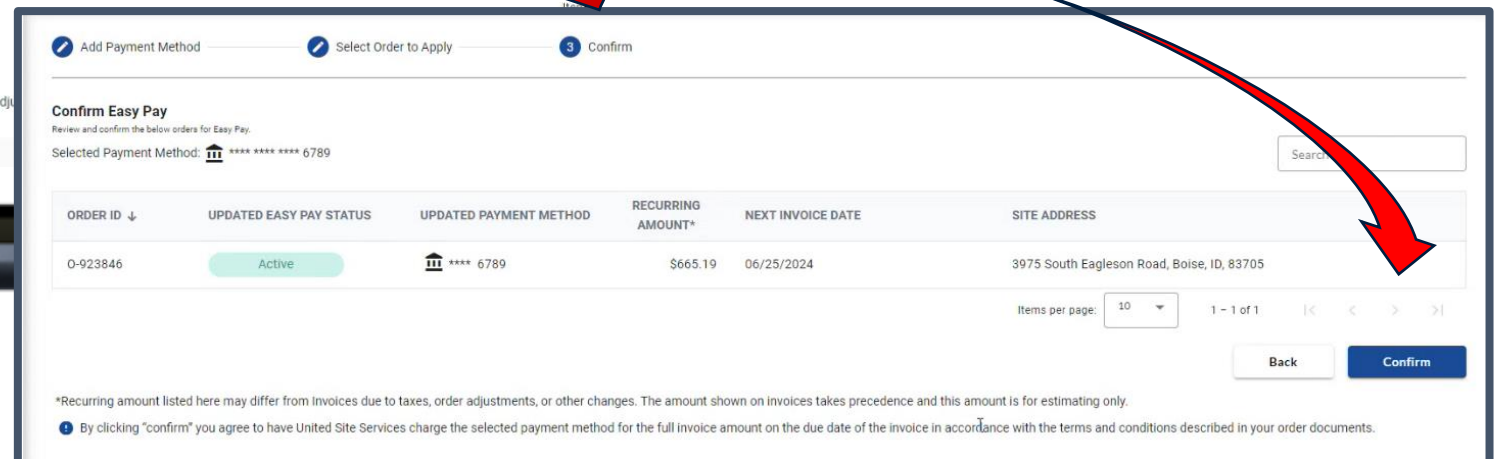
1 Add Payment Method 2 Select Order to Apply 3 Confirm

Select Orders

Selected Payment Method: \*\*\*\* \* 6789

<input type="checkbox"/> ORDER ID ↓	CURRENT EASY PAY STATUS	PAYMENT METHOD	RECURRING AMOUNT*	NEXT INVOICE DATE
<input type="checkbox"/> 0-926846	Active	**** * 6789	\$646.85	07/15/2024
<input type="checkbox"/> 0-923846	Active	**** * 6789	\$665.19	06/25/2024
<input type="checkbox"/> 0-916481	Active	**** * 4242	\$329.77	05/15/2024
<input type="checkbox"/> 0-916473	Active	**** * 6789	\$952.52	07/03/2024

\*Recurring amount listed here may differ from invoices due to taxes, order adjustments, or other changes.



United SITE SERVICES

1 Add Payment Method 2 Select Order to Apply 3 Confirm

Confirm Easy Pay

Review and confirm the below orders for Easy Pay.

Selected Payment Method: \*\*\*\* \* 6789

ORDER ID ↓	UPDATED EASY PAY STATUS	UPDATED PAYMENT METHOD	RECURRING AMOUNT*	NEXT INVOICE DATE	SITE ADDRESS
0-923846	Active	**** * 6789	\$665.19	06/25/2024	3975 South Eagleson Road, Boise, ID, 83705

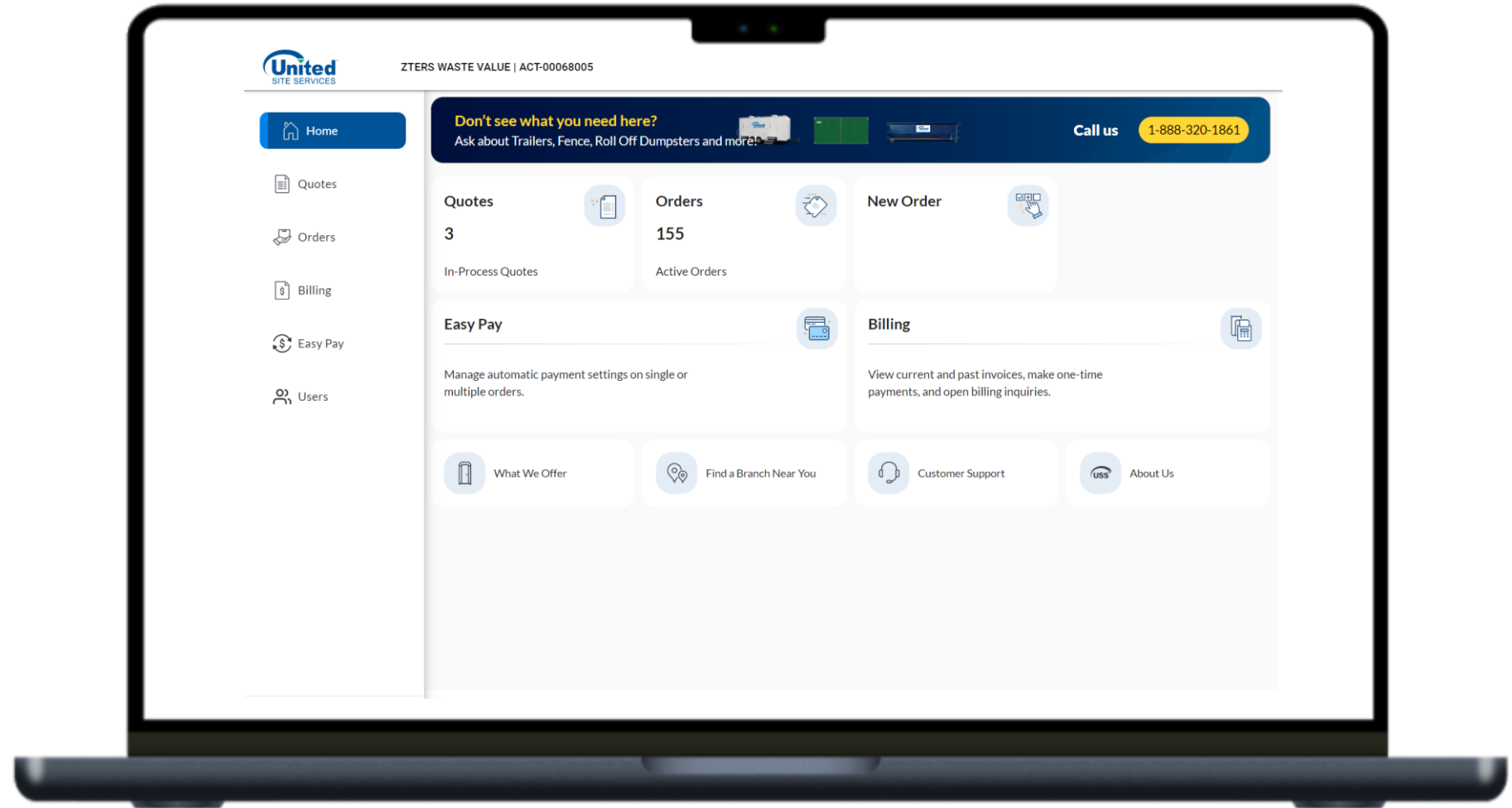
Items per page: 10 1 - 1 of 1

Back Confirm

\*Recurring amount listed here may differ from invoices due to taxes, order adjustments, or other changes. The amount shown on invoices takes precedence and this amount is for estimating only.

By clicking "confirm" you agree to have United Site Services charge the selected payment method for the full invoice amount on the due date of the invoice in accordance with the terms and conditions described in your order documents.

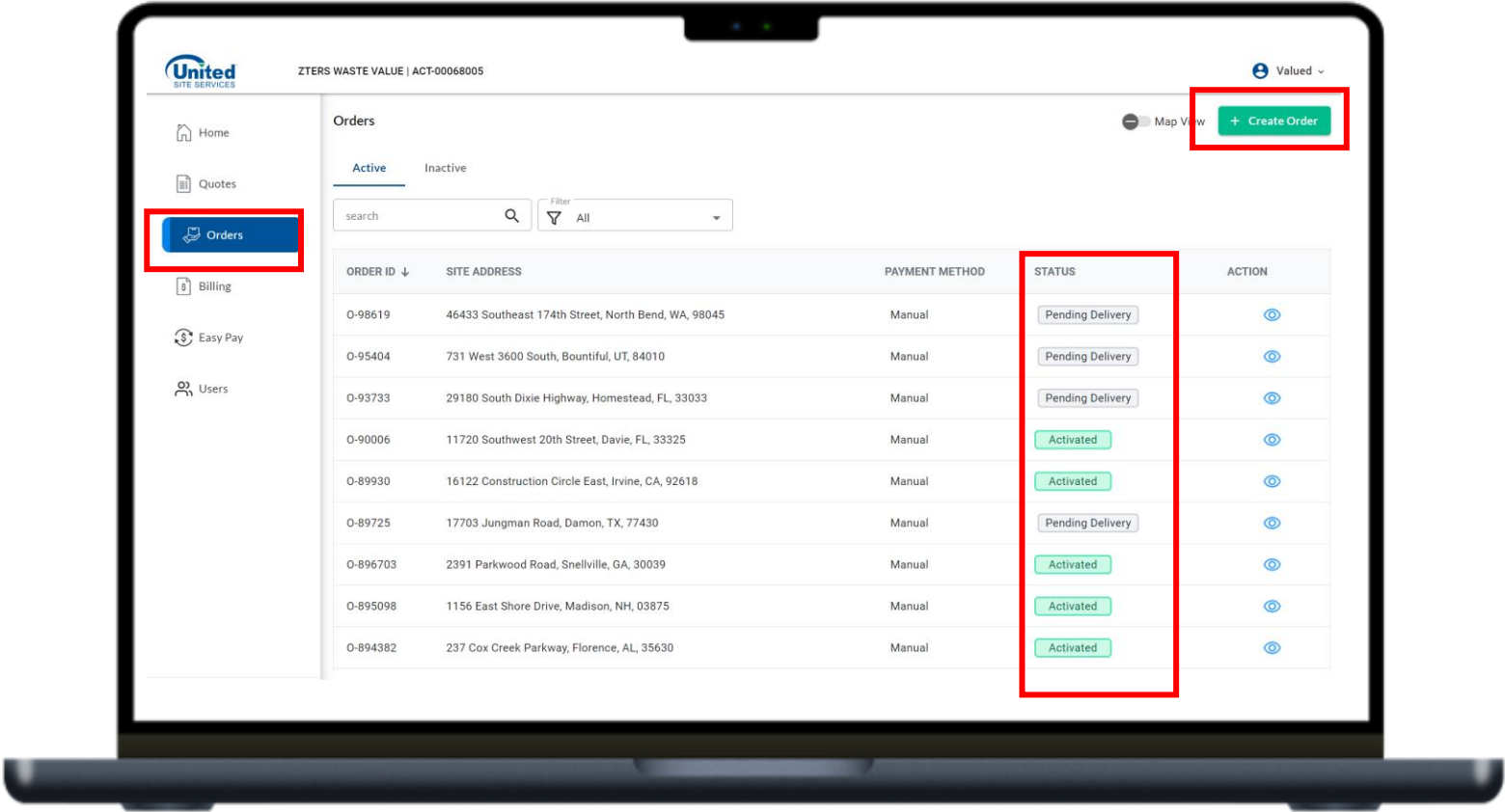
# Orders

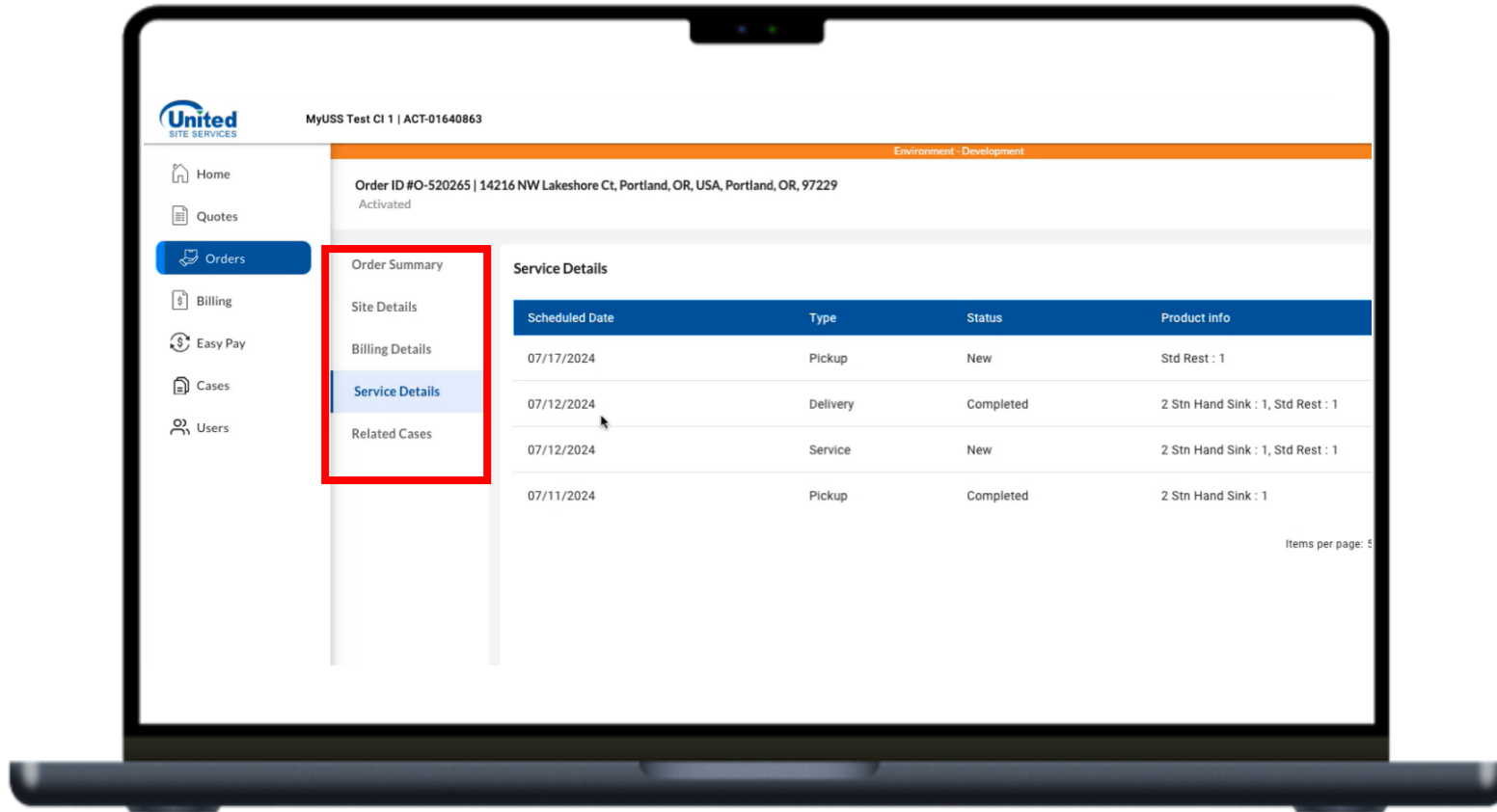


# ORDERS

Customers can check on the status of an order or create an order.

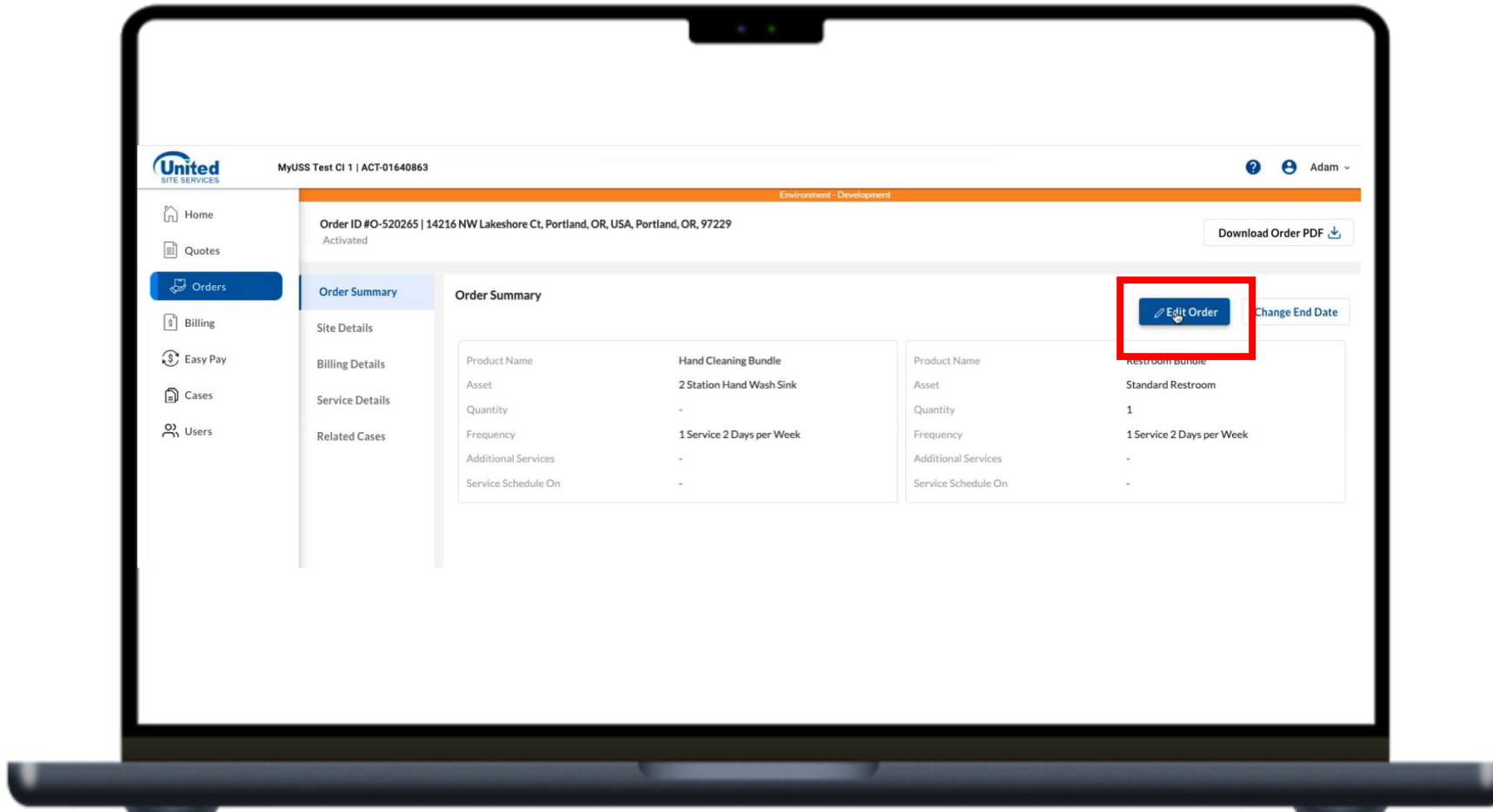
Select **Orders** to see the list of orders and their status. Or **Create Order**.



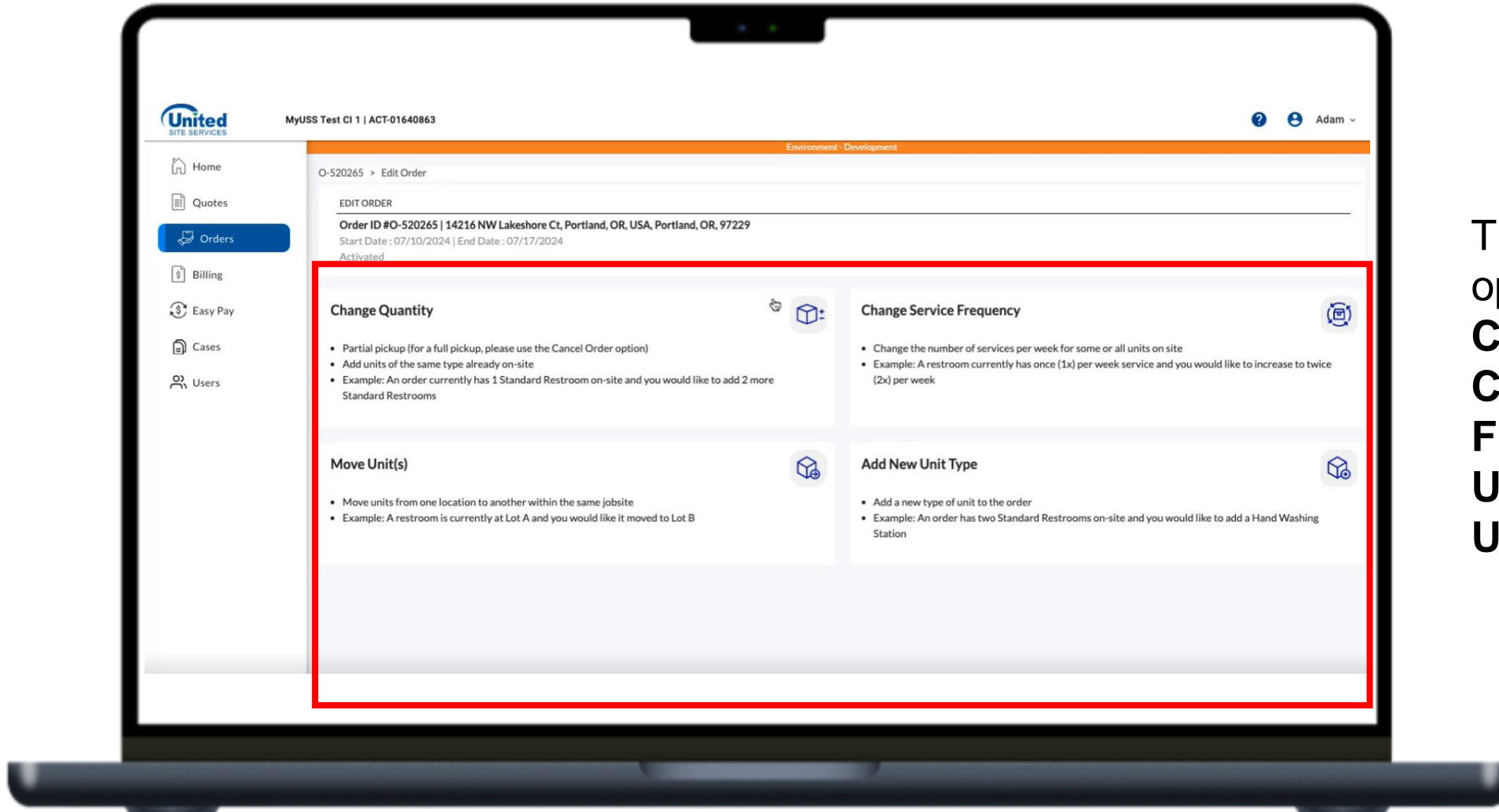


From the homepage, the customer is able to view all information regarding their orders:

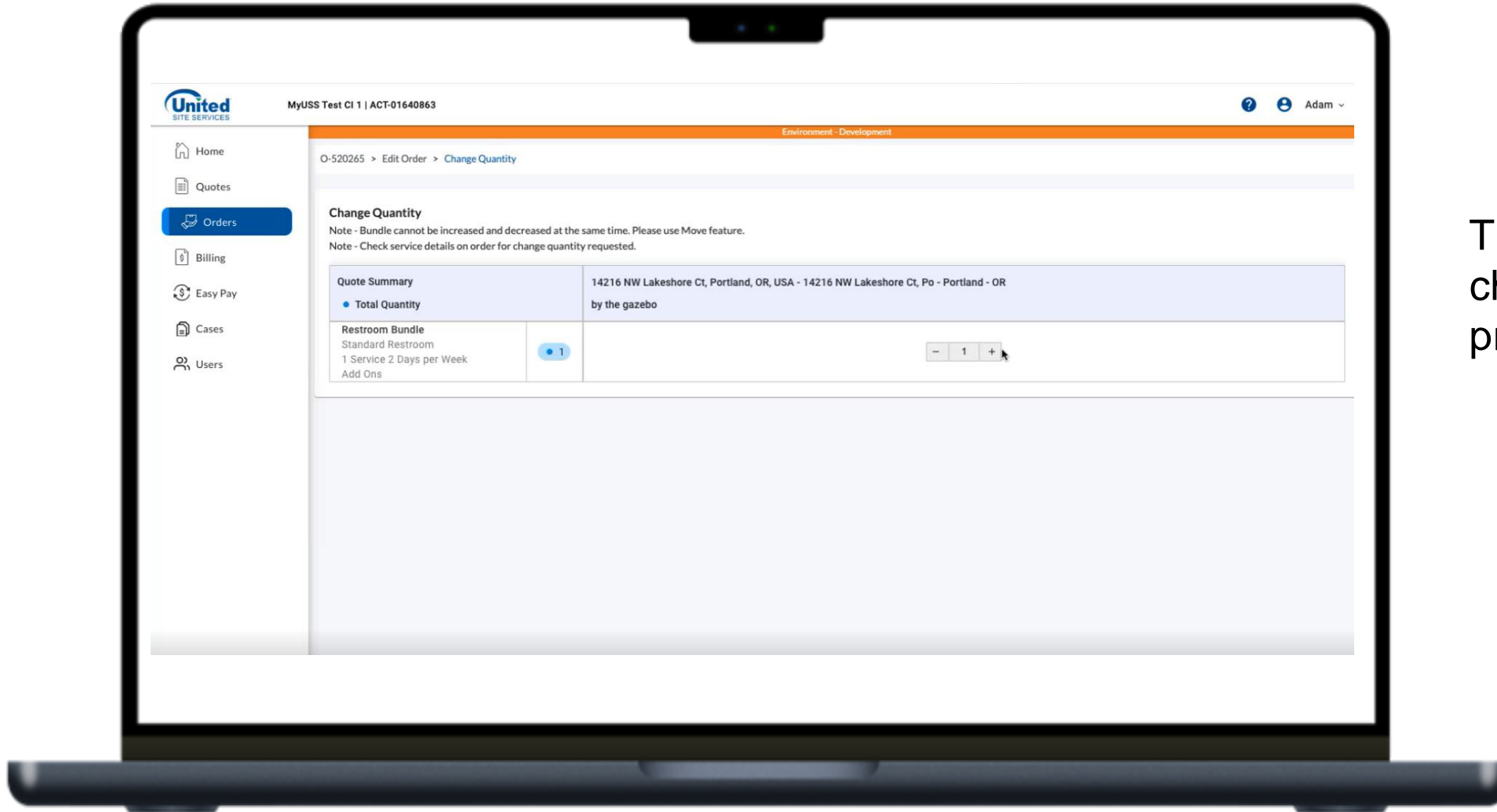
**Site Details, Billing Details, Service Details, and Related Cases.**



Customers can also manage their orders by selecting **Edit Order**.



The customer has the option to **Change Quantity, Change Service Frequency, Move Units, or Add New Unit Type.**



The customer can change the number of products.

The screenshot shows the 'Change Quantity' interface for a 'Restroom Bundle' in the United Site Services system. The interface is displayed on a laptop screen. A red box highlights the 'Restroom Bundle' details panel on the right side of the screen.

**Restroom Bundle**

136 Pleasant Street, Brookline, MA, USA - 136 Pleasant Street, Brookline - MA | put them all in the driveway [See Details](#)

**What you want to do?**

[Add more units](#) [Reduce units](#)

Current Order Quantity: 2

Add Order Quantity by: 1

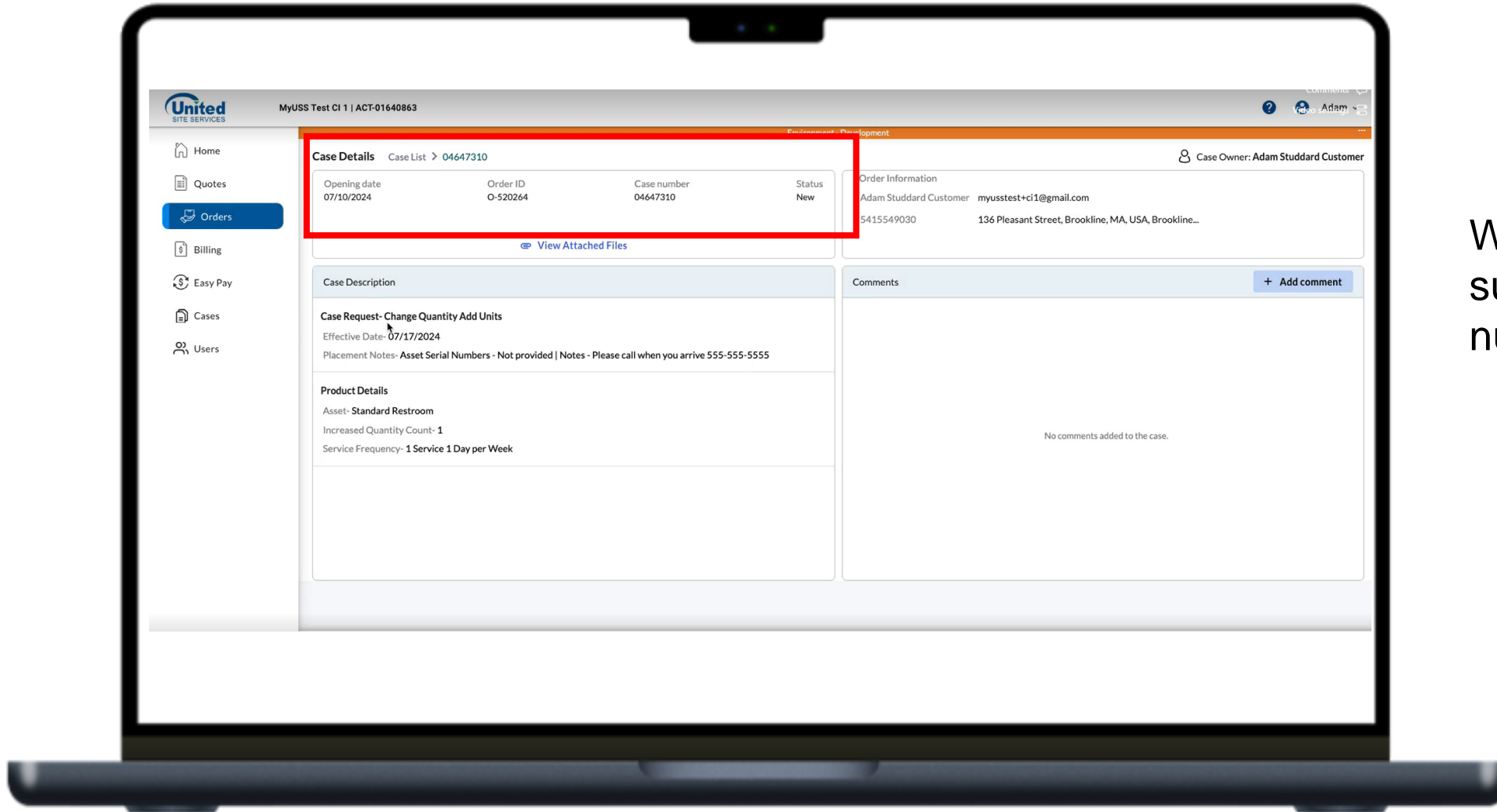
Total Order Quantity: 3

Effective Date: 7/17/2024

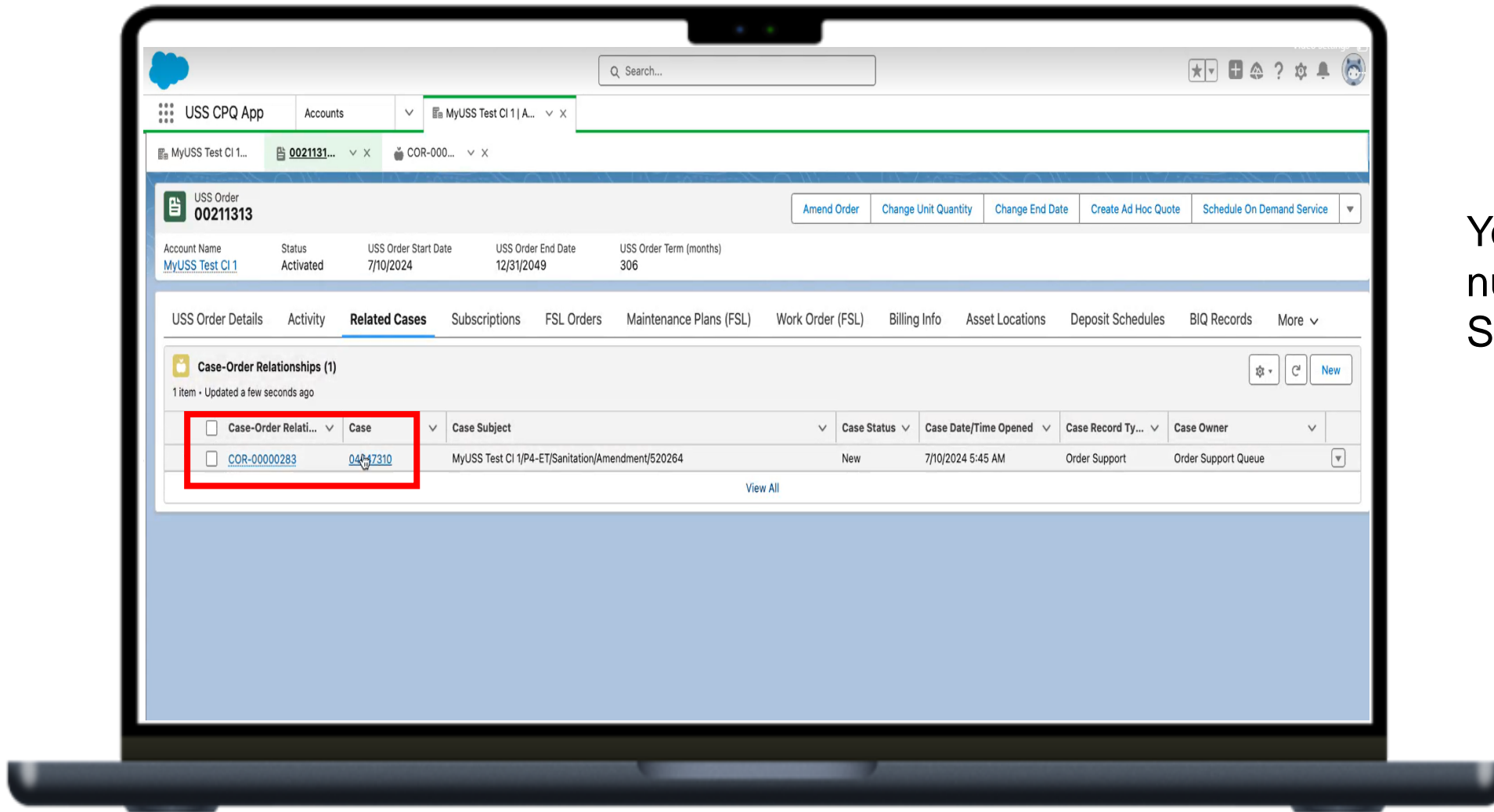
Notes: Please call when you arrive 555-555-5555

[Cancel](#) [Save](#)

The customer will then fill out the quantity requested, the date, and any notes. Then select Save.

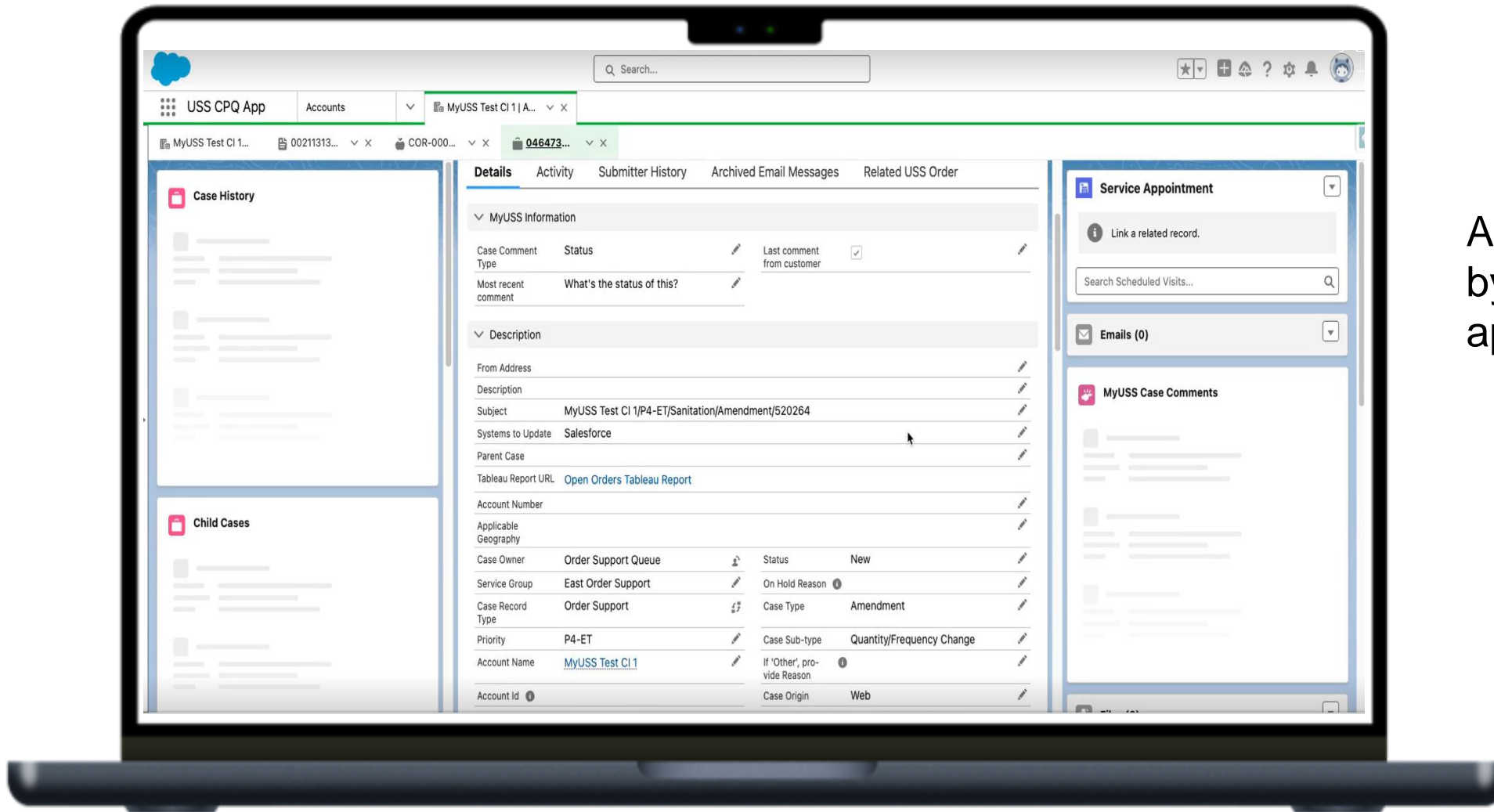


When the request is submitted, a case number is created.

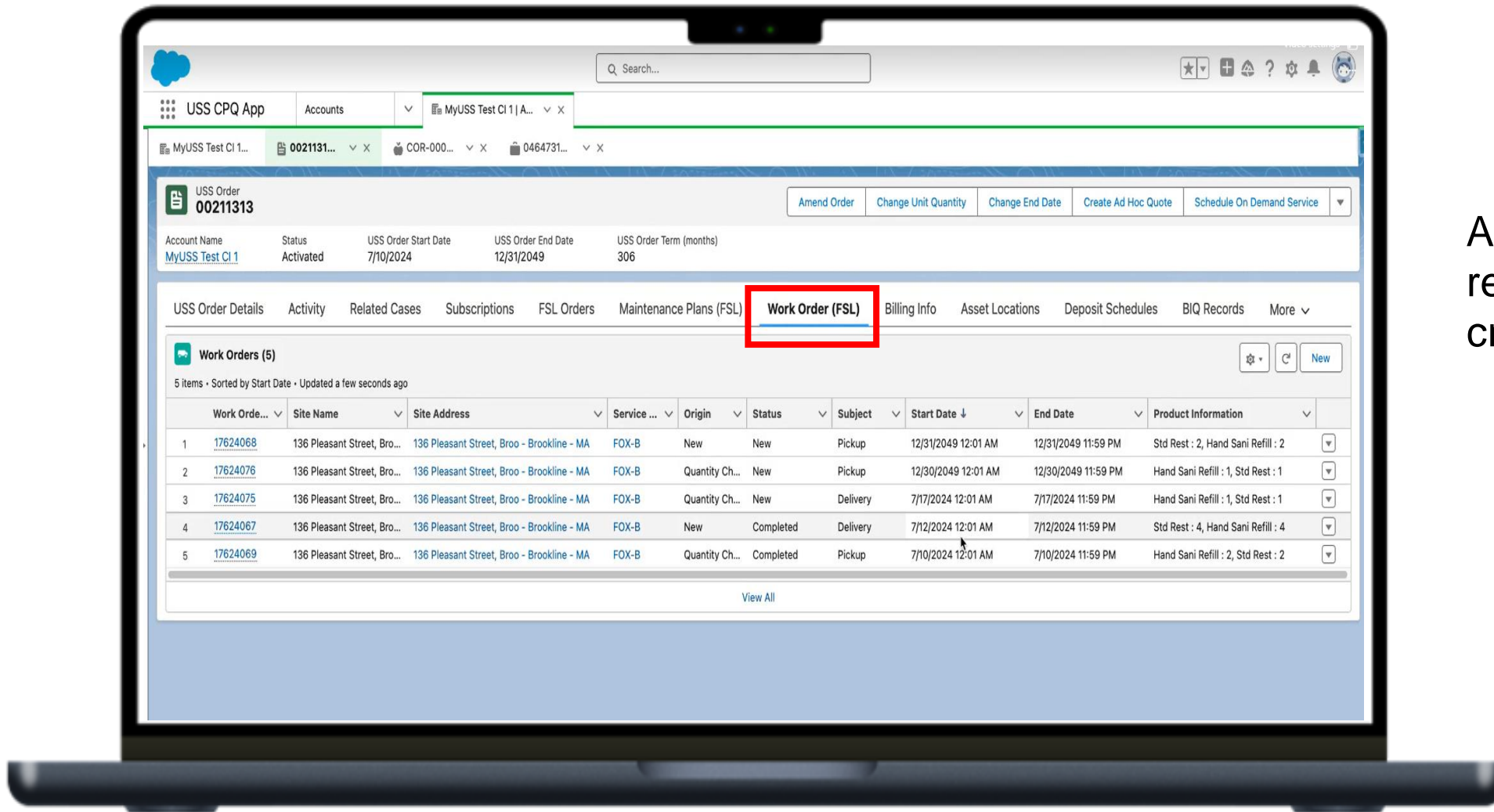


You can find the case number in Salesforce.

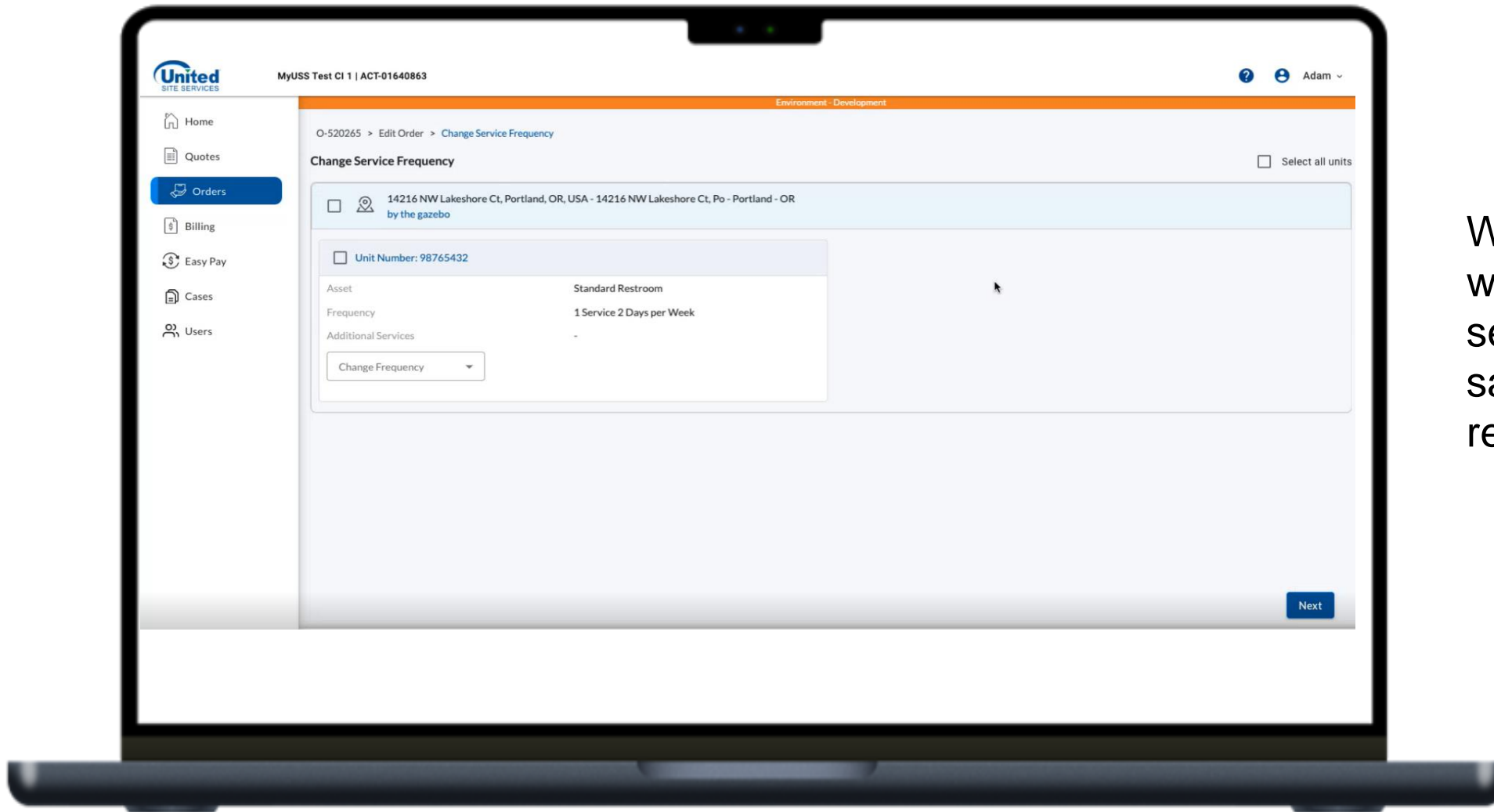
# ORDERS



All the details entered by the customer will appear.



A work order for this request is also created.



When the customer wants to change the service frequency, the same steps are required.

United SITE SERVICES

MyUSS Test CI 1 | ACT-01640863

Environment - Development

Order ID #O-520265 | 14216 NW Lakeshore Ct, Portland, OR, USA, Portland, OR, 97229

Home

Quotes

Orders

Billing

Easy Pay

Cases

Users

O-520265 > Edit Order > Change Service Frequency

Change Service Frequency

14216 NW Lakeshore Ct, Portland, OR, USA - 14216 NW Lakeshore Ct, Po - Portland - OR  
by the gazebo

Unit Number: 98765432

Asset	Standard Restroom
Frequency	1 Service 2 Days per Week
Additional Services	-

Enter Details

Change Service Frequency

Change Service Frequency\*

1 Service 3 Days per Week

Effective Date

Effective Date\*

7/15/2024

Unit Number

Unit Number

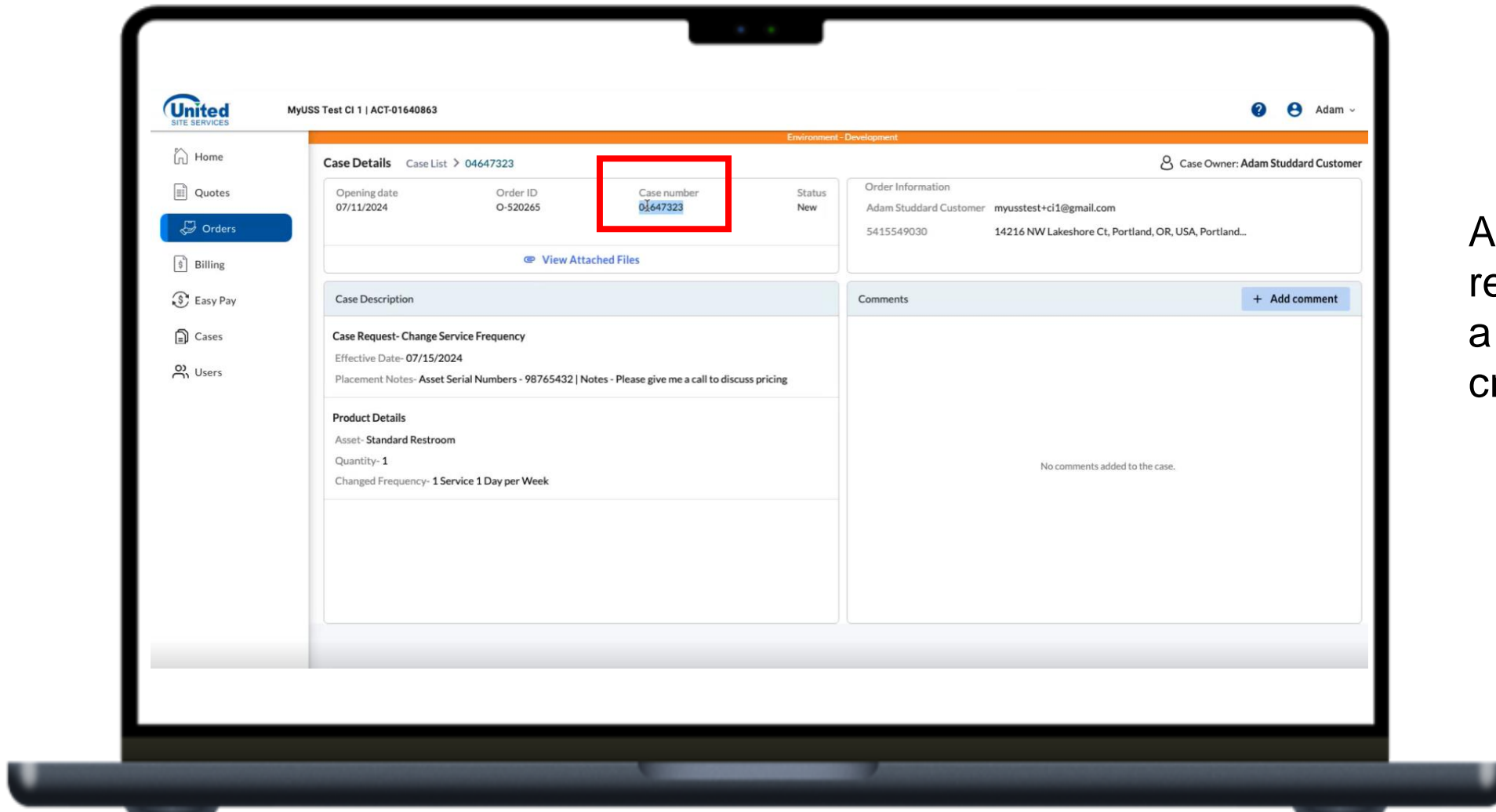
98765432

Additional Instructions

Please give me a call to discuss pricing

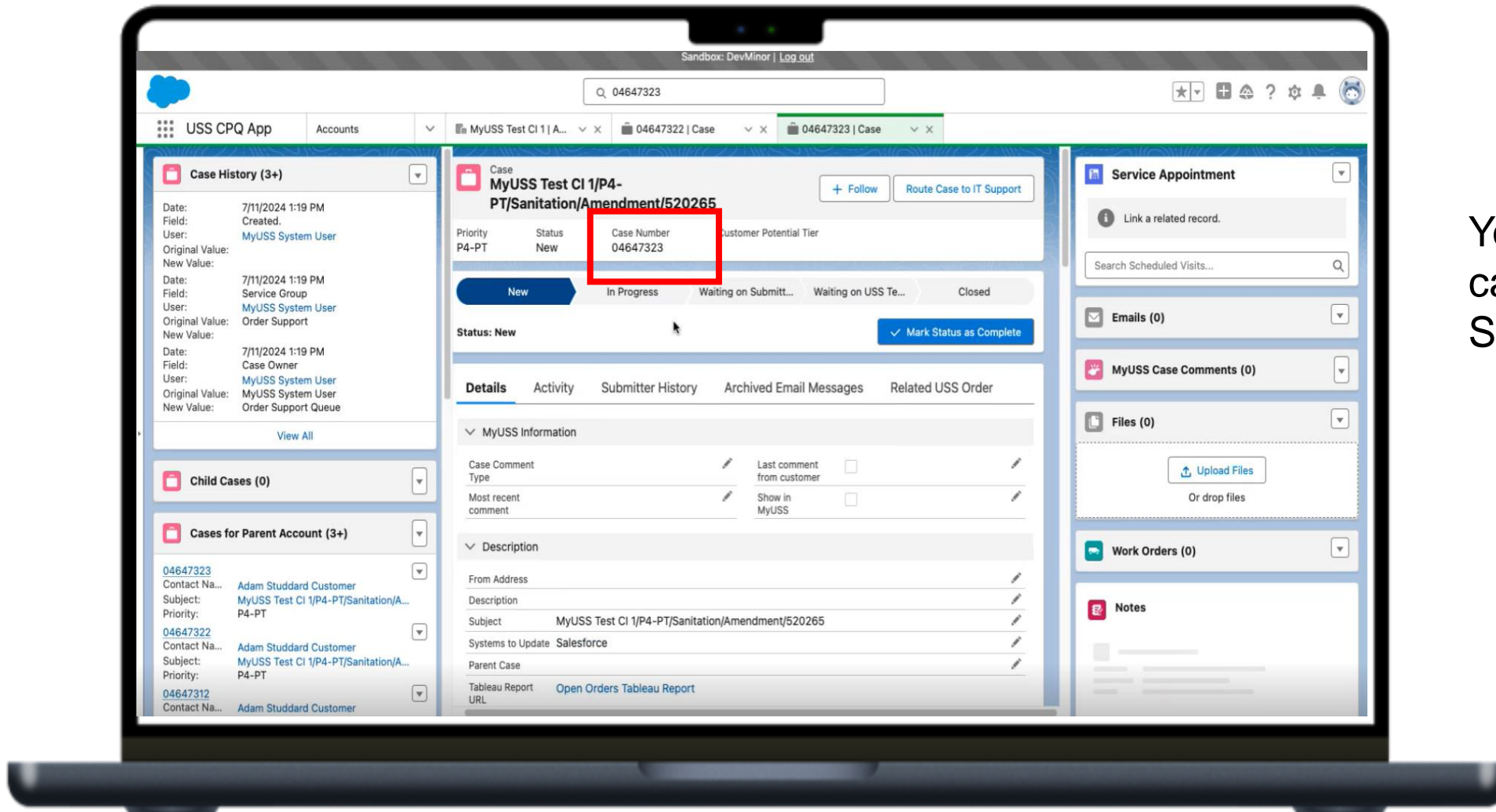
Cancel Next

The customer will enter the frequency, the date, and any notes. Then select **Next**.

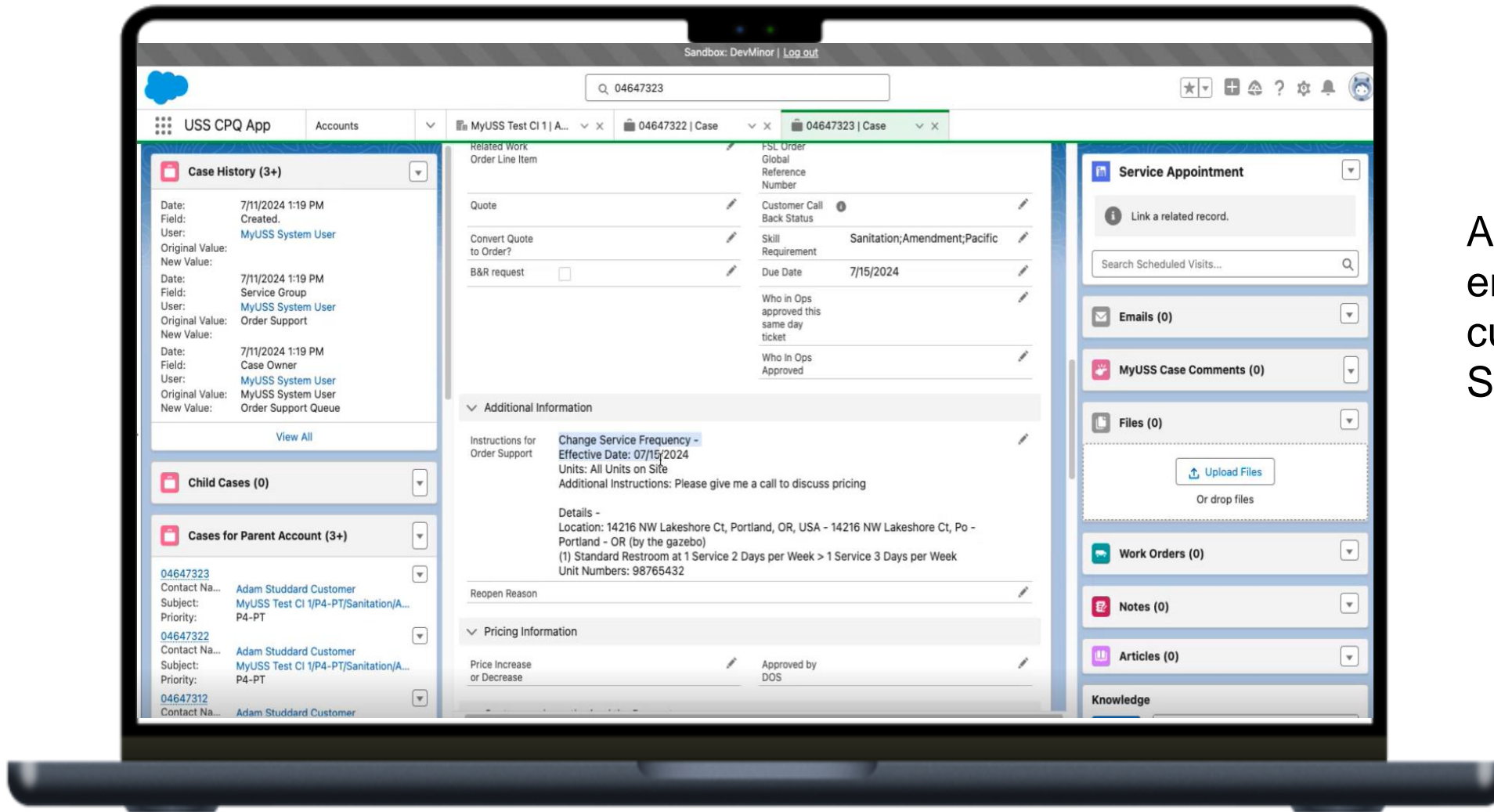


As soon as the request is submitted, a case number is created.

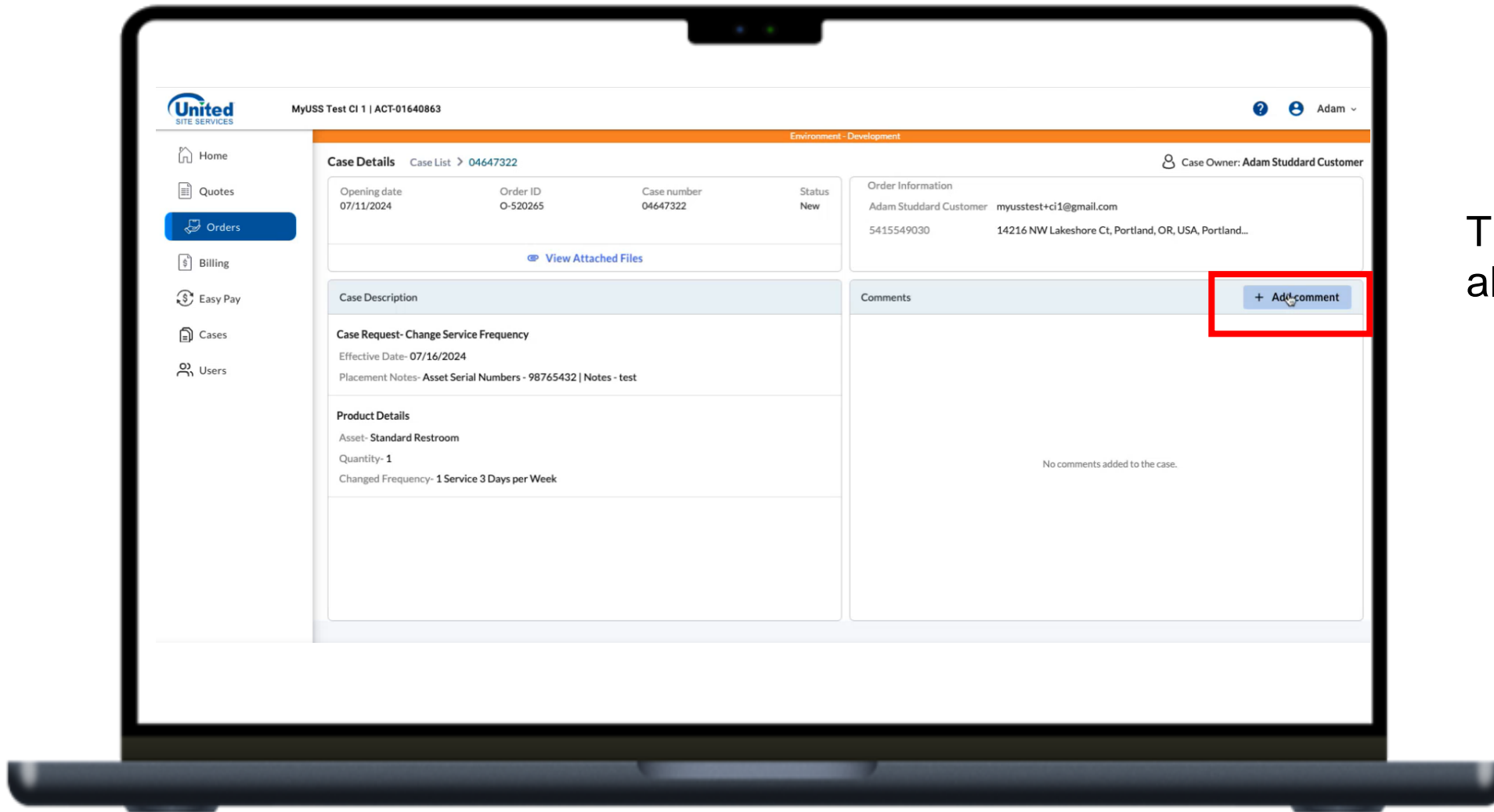
# ORDERS



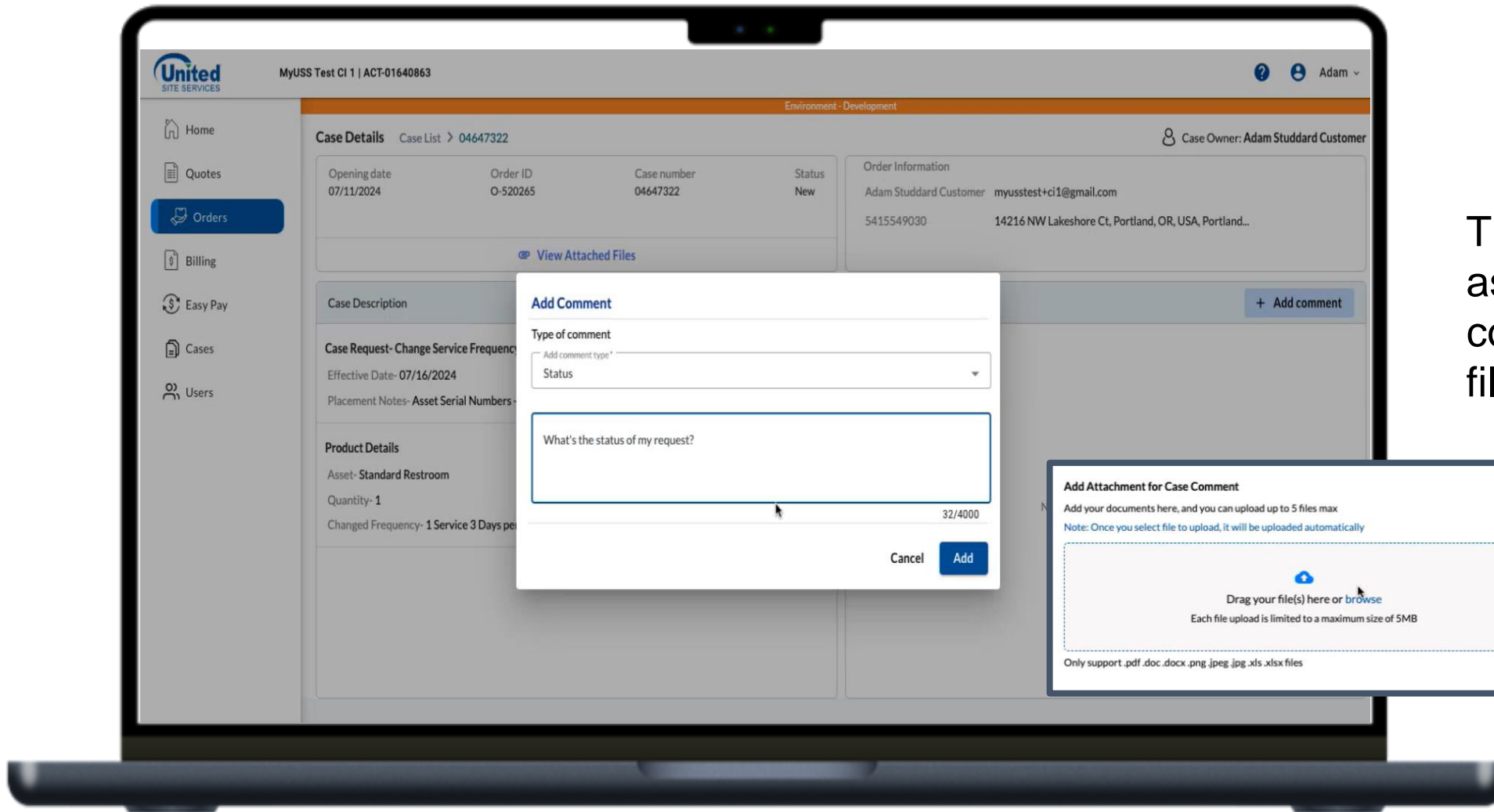
You can then find this case number in Salesforce.



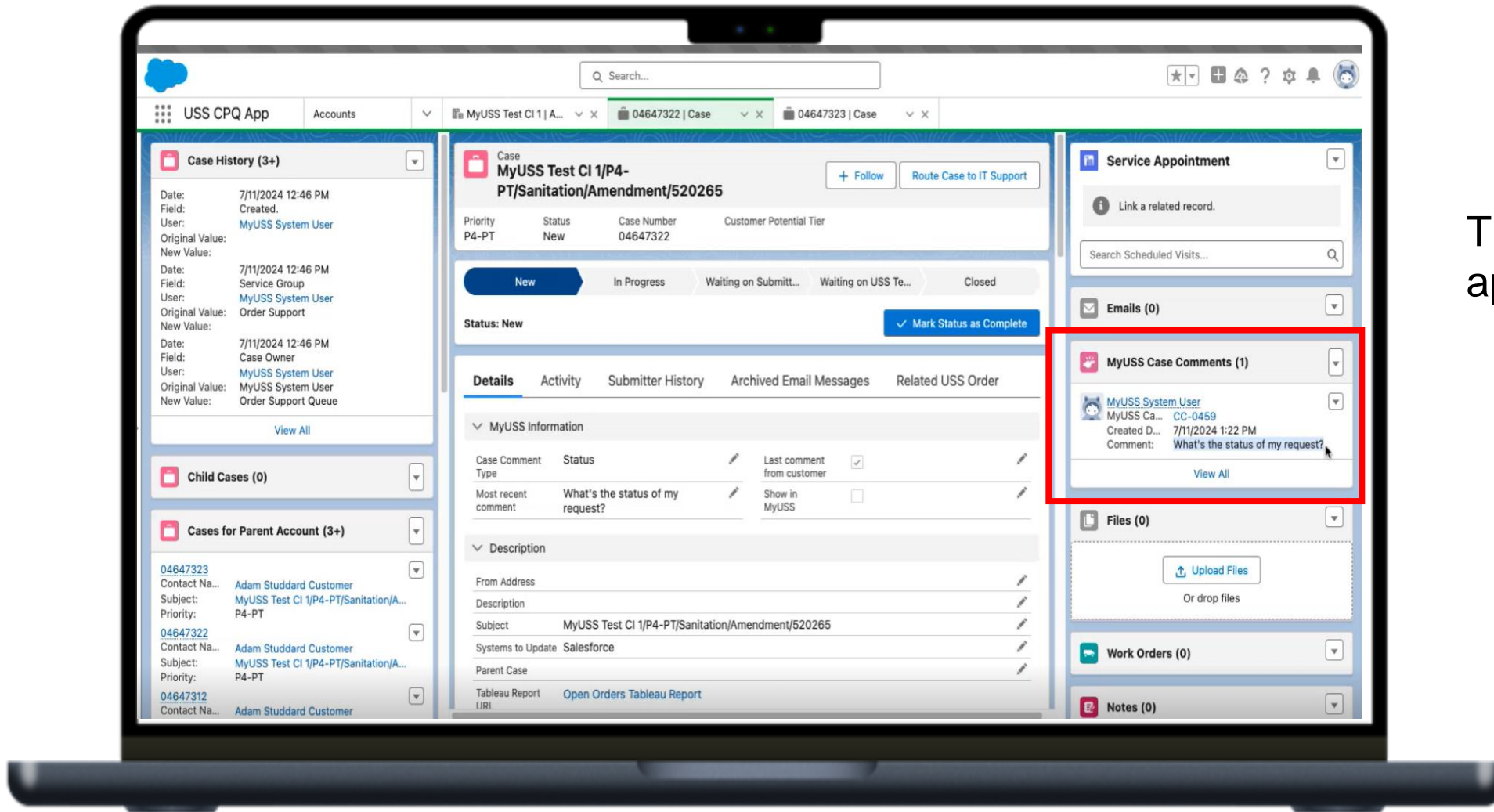
All the information entered by the customer appears in Salesforce.



The customer can also add a comment.



The customer can ask a question, add a comment, or add a file/picture.



That message will appear in Salesforce.

# ORDERS

USS CPQ App Accounts MyUSS Test CI 1 | A... 04647322 | Case 04647323 | Case

04647322 | Case New My...

### New MyUSS Case Comment

\* = Required Information

Information

MyUSS Case Comment Name  
Comment

Case 04647322

Comment Type --None--

Commented By Search Contacts...

Commented By MyUSS User ☐

Case Authorized By Search Contacts...

Case Owner Search People...

Owner Adam Studdard

Cancel Save & New Save

You can respond to the questions or comments from the customer.

Development

Case Owner: Adam Studdard Customer

Order Information

Adam Studdard Customer myusstest+ci1@gmail.com

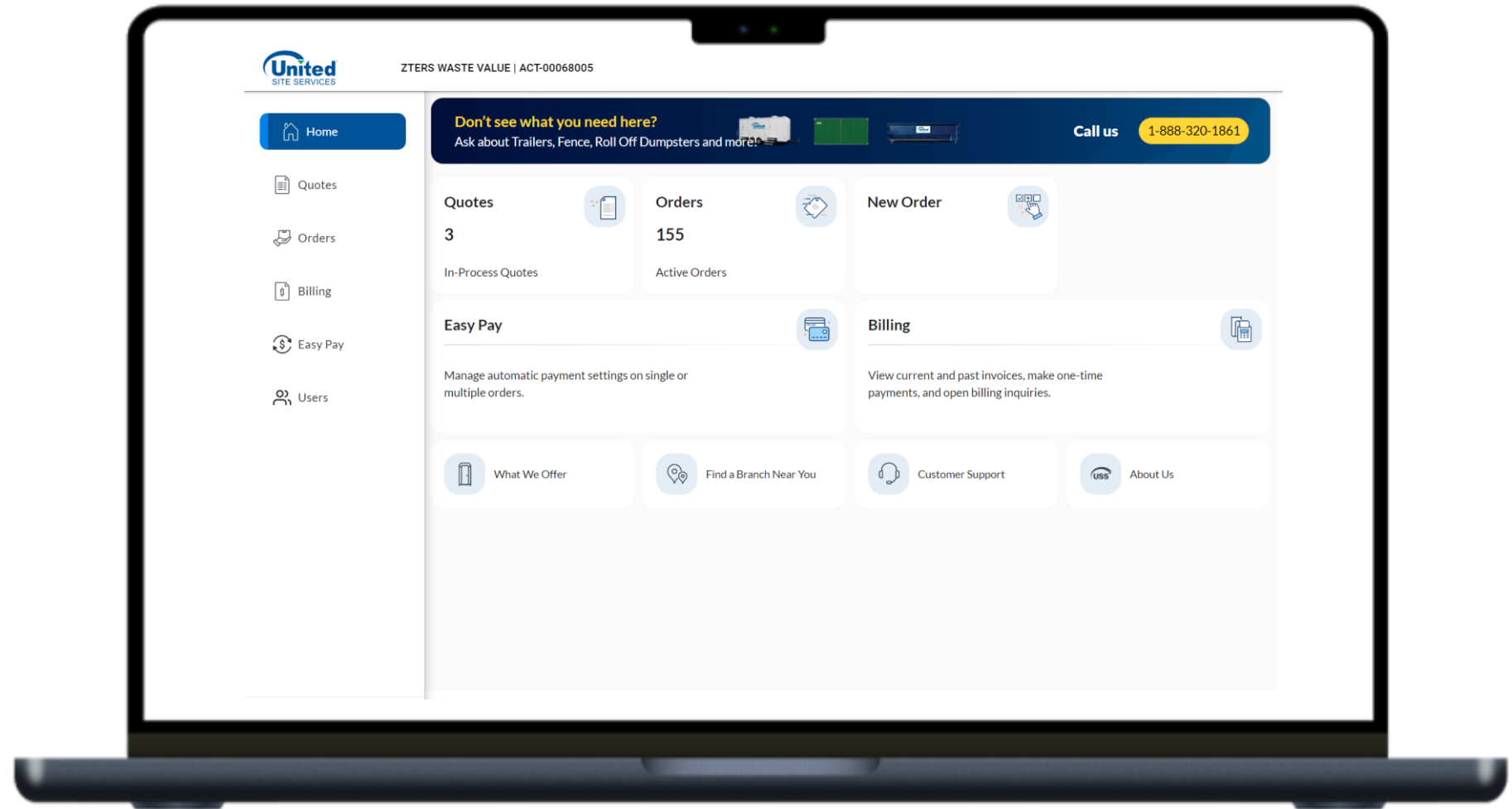
5415549030 14216 NW Lakeshore Ct, Portland, OR, USA, Portland...

Comments + Add comment

Adam Studdard 07/11/2024 • 1:22 PM  
I'm working on it!

Adam Studdard Customer Status 07/11/2024 • 1:22 PM  
What's the status of my request?

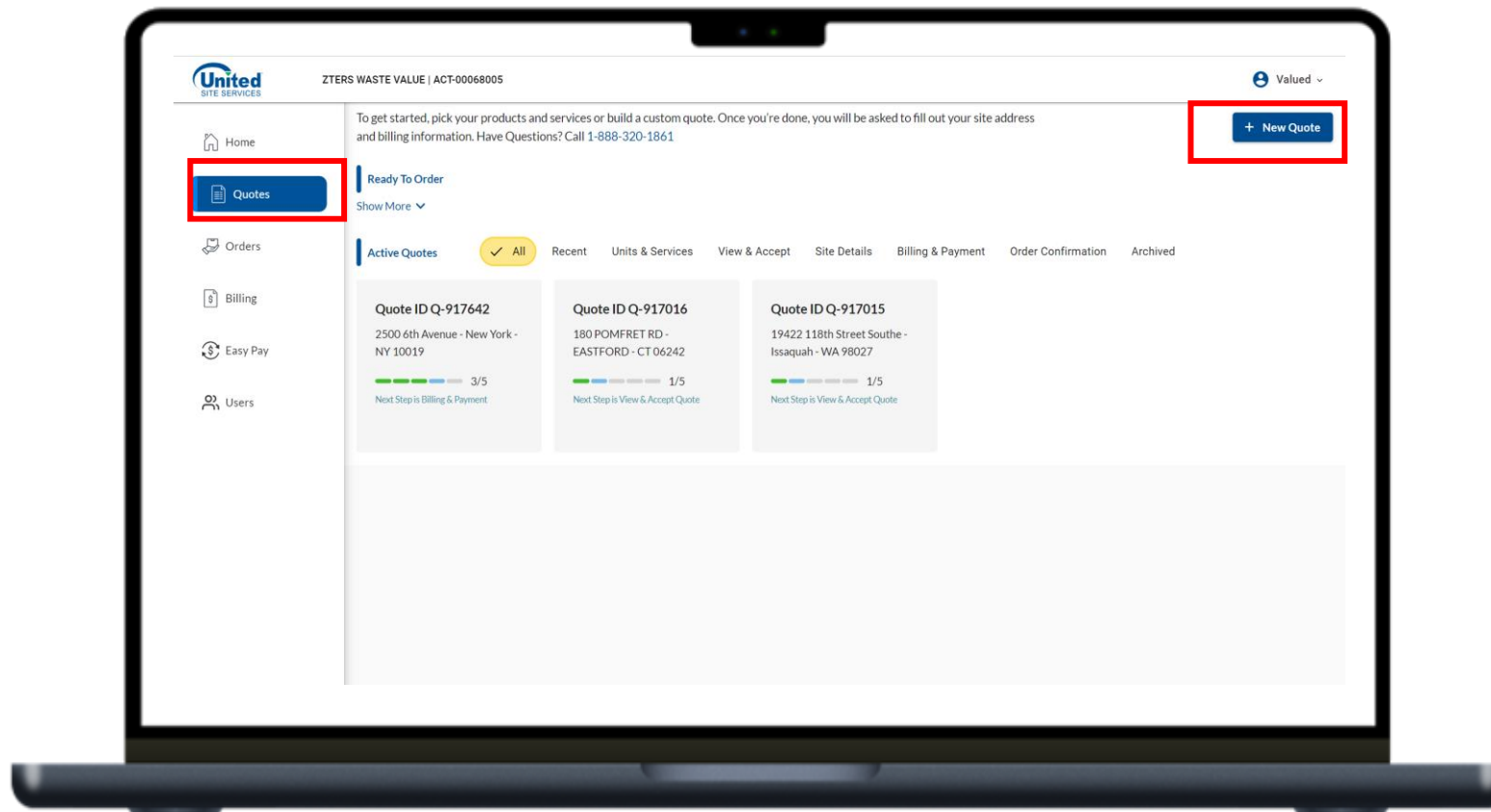
# Quotes



# QUOTES

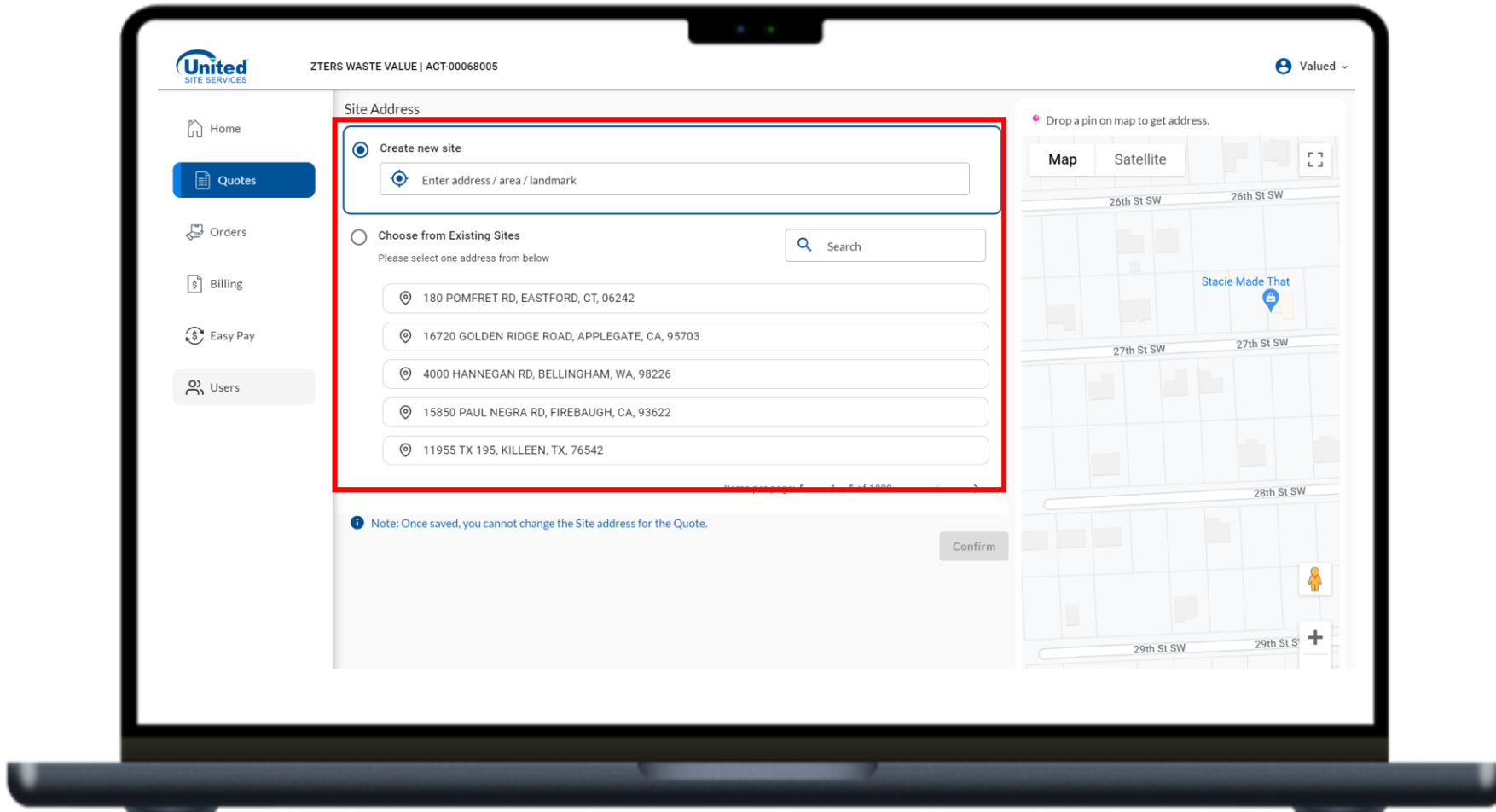
Customers can create new quotes.

Select **Quotes** from the menu. You can see all active quotes on the homepage. Then select **New Quote**.



# QUOTES

Select **Create a new site** or choose from an existing site.



The screenshot displays the United Site Services web application interface. The top navigation bar includes the United Site Services logo, the text "ZTERS WASTE VALUE | ACT-00068005", and a "Valued" dropdown menu. The left sidebar contains navigation links for Home, Quotes (highlighted in blue), Orders, Billing, Easy Pay, and Users. The main content area is titled "Site Address" and features two options: "Create new site" (selected with a radio button) and "Choose from Existing Sites" (unselected). The "Create new site" option is highlighted with a red rectangular box. Below it, there is a text input field labeled "Enter address / area / landmark". The "Choose from Existing Sites" option includes a search bar and a list of five existing sites, each with a location pin icon and an address: "180 POMFRET RD, EASTFORD, CT, 06242", "16720 GOLDEN RIDGE ROAD, APPELATE, CA, 95703", "4000 HANNEGAN RD, BELLINGHAM, WA, 98226", "15850 PAUL NEGRA RD, FIREBAUGH, CA, 93622", and "11955 TX 195, KILLEEN, TX, 76542". A note at the bottom states: "Note: Once saved, you cannot change the Site address for the Quote." A "Confirm" button is located at the bottom right of the form. On the right side of the screen, there is a map section with a "Drop a pin on map to get address." instruction, "Map" and "Satellite" tabs, and a map showing a street grid with a pin labeled "Stacie Made That".

# QUOTES

Choose the start and end date. Then choose the product. Then select **Get Quote**.

United SITE SERVICES

ZTERS WASTE VALUE | ACT-00068005

Valued

1 Units & Services 2 View & Accept Quote 3 Site Details 4 Billing & Payment 5 Order Confirmation

Quote: Q-926942

Custom Quote

End Date Type: ☒ Estimated ☐ Fixed

Start Date\* 6/20/2024 End Date\* 8/10/2024

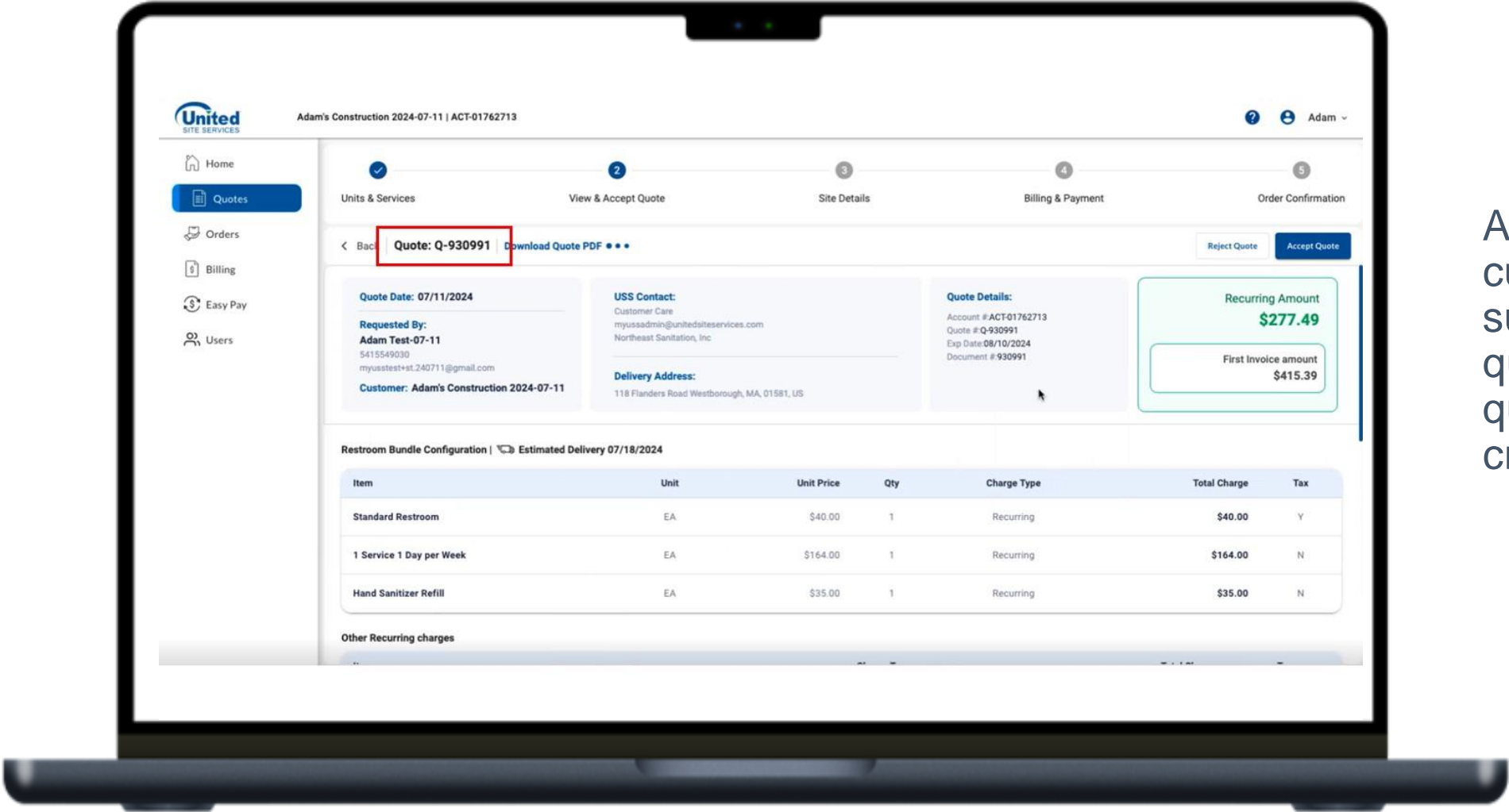
Add New Product Add

Restroom Bundle

Select Asset\* Standard Restro... Select Frequency\* 1 Service 1 Day ... Additional Services Qty 1

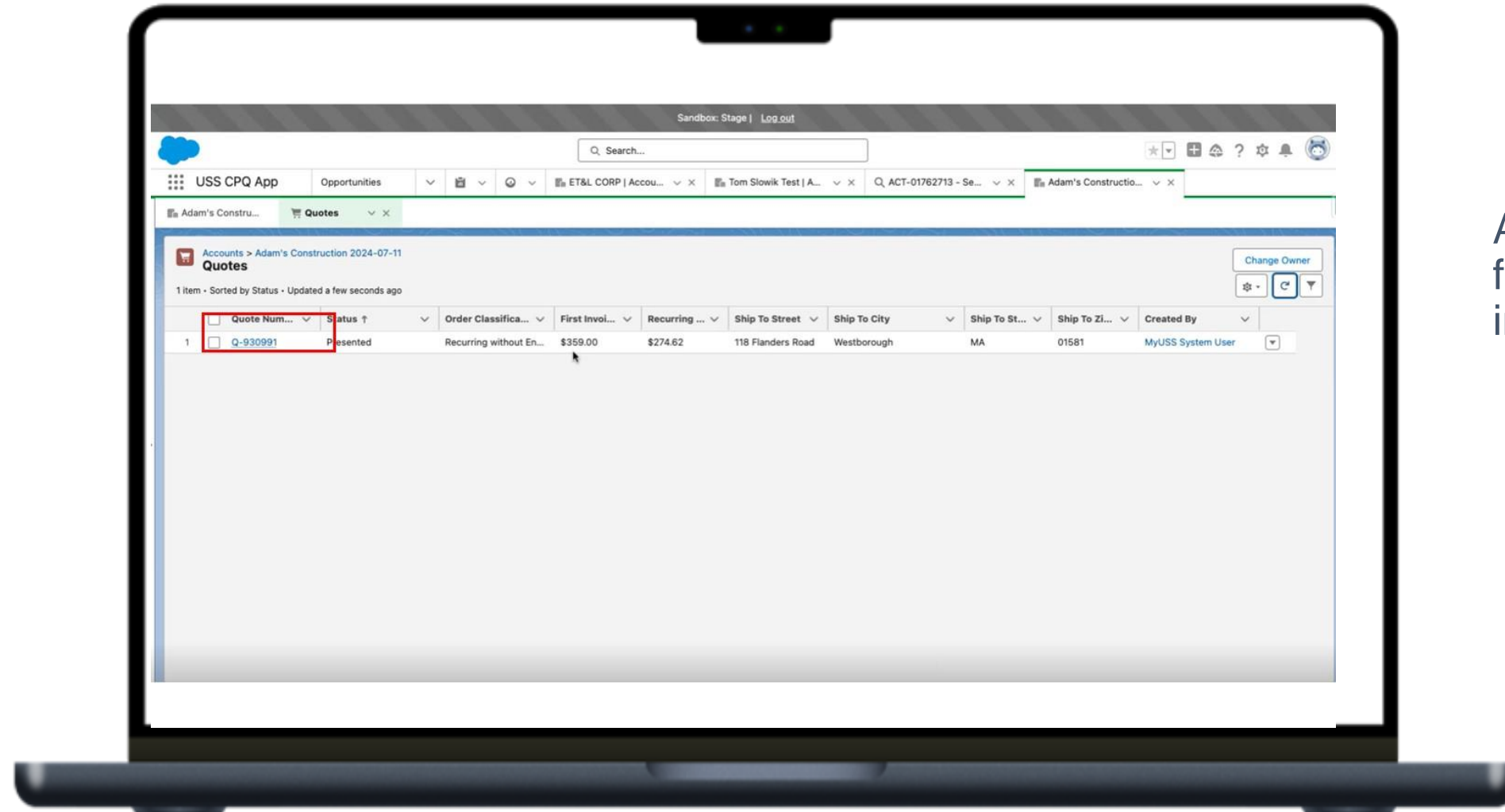
Save Draft

Get Quote



After the customer submits the quote request, a quote number is created.

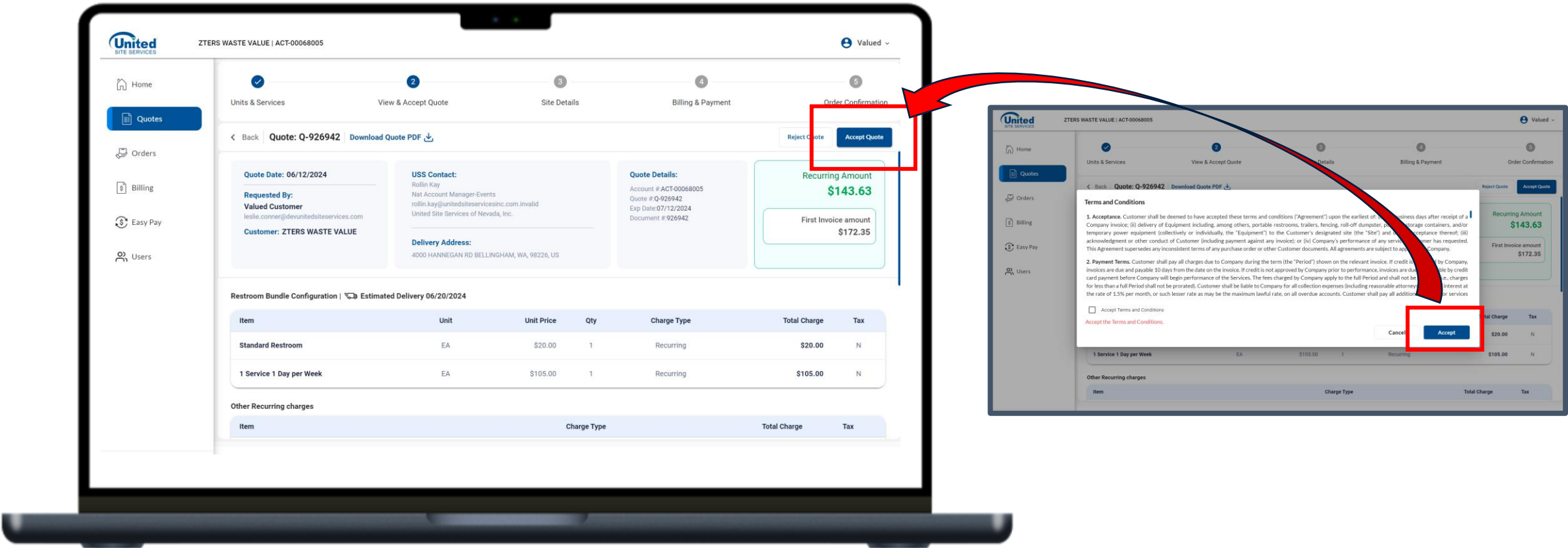
# QUOTES



And you can  
find this quote  
in Salesforce.

# QUOTES

Then the customer can accept the quote.



# QUOTES

Fill in the **Site Details**. Then enter billing and payment information and confirm the order.

The screenshot shows the 'Site Details' form for Quote Q-927037. The form is highlighted with a red border. It includes fields for Site Contact (First Name, Last Name, Email ID, Phone Number) and Site Address (Address, City, State, Zipcode, Latitude, Longitude). A map of Bellingham Truck Wash is visible on the right.

United SITE SERVICES

ZTERS WASTE VALUE | ACT-00068005

Valued

Units & Services View & Accept Quote Site Details Billing & Payment Order Confirmation

< Back Quote: Q-927037

Site Details

Site Contact

First Name\* Last Name\* Choose from saved contacts

Email ID\* Phone Number

Site Address

Address 4000 HANNEGAN RD

City BELLINGHAM

State WA

Zipcode 98226

Latitude 48.78439 Longitude -122.44072

Site Information

Map Satellite

Bellingham Truck Wash

Google

The screenshot shows the 'Billing & Payment' form for Quote Q-926942. The form is highlighted with a red border. It includes fields for Purchase Order Details (PO Number), Billing Contact (First Name, Last Name, Email ID, Phone Number), Secondary Bill Contact (First Name, Last Name, Email ID, Phone Number), and Billing Address. A 'Payment Method' section is also visible on the right.

United SITE SERVICES

ZTERS WASTE VALUE | ACT-00068005

Valued

Units & Services View & Accept Quote Site Details Billing & Payment Order Confirmation

< Back Quote: Q-926942

Purchase Order Details

PO Number

Billing Contact

First Name\* Valued Last Name\* Customer

Email ID\* leslie.conner@devunitedsiteservices.com Phone Number\*

Secondary Bill Contact

First Name Last Name Choose from saved contacts

Email ID Phone Number

Billing Address

To change the account's billing address, please contact 1-888-320-1861.

Address\* 13727 OFFICE PARK DR

Payment Method

☒ Autopay ☐ Manual Payment

+ Add New Payment Method

Save & Continue