My Site Services User Guide





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



e Valued

E-mail ID*

Phone Number

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.

ZTERS WASTE VALUE ACT-00068005		ن Eavy Pay المركز Users المركز Valued م	Read Only	Cancel
] Home Quotes Quotes Users Q NAME ROLE	MODULE(S) STATUS	+ Add User		
) Orders	Items po	rr page: 10 • 0 of 0 < >	ZTERS WASTE VALUE ACT-00068005	😝 Value
Easy Pay		门 Home 回 Quotes	Add User First Name* Phone Number* E-mail	IID*
Dy Users		III Quores	Standard User	
		्री Billing र Easy Pay	Assign Module(s) All Quotes Orders Ø Billing Ø Easy Pay	
		Diff. Users		Cancel

United

🔓 Home

Duotes

🖉 Orders

💲 Billing

ZTERS WASTE VALUE | ACT-00068005

First Name

Account Admin

Last Name'

Add User



Billing

🏠 Home	Don't see what you need he Ask about Trailers, Fence, Roll Of	ere?		Call us 1-888-320-1861
Quotes	Quotes	Orders 📀	New Order	
Orders Billing	3 In-Process Quotes	155 Active Orders		
🕃 Easy Pay	Easy Pay		Billing	
O Users	Manage automatic payment settings multiple orders.	on single or	View current and past invoices, ma payments, and open billing inquirie	
	What We Offer	Find a Branch Near You	Customer Support	About Us

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**.

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Jotes	MENU Co	HOME C	🎝 User Administra	ation Overview Transactions Payments Customer Inquiry User Manageme	ent for Customers
10165	Transactions		Grganizations	Transactions and Filters	
rders	User Administration	Overview Transactions Payments Customer Inquiry User Management for Customers	PHIP Video	The transactions menu will give you an overview of all invoices issued by United Site Se	
200	Grganizations	Welcome on United rvices Portal!		By default, the page will display all open invoices issued within the last 365 days, you w hand of the portal will help you to quickly find the invoices you are looking for:	III be able to dynamically filter. The filters on the
Billing	Help Video	Sign up to use EasyPate tomatic payments. Go to the main menu and select EasyPay to manage orders and payment method	ds.	 Document date: This filter allows you to filter for the invoice date, either on a spe Document type: filter for all documents, only invoices or only credit notes 	-
sy Pay		This Portal allows you to: • View all transactions		 Transaction number: search by invoice number; if you would like to search for in asterisks; ex INV-91* 	
iers		Pay your invoices Make an inquiry		 Status: this filter allows you to filter for invoices in a specific status, example: ope Purchase Order Number: search for an invoice or credit note linked to a specific 	
er 5				 Shipping Address In the table with the list of your invoices in the lower half of the portal, you will find spe 	
				permit you to download all of your invoices to Excel for further processing or analysis b Three different functionalities are available for you:	y clicking on the button "Export to Excel".
		Unit		"PDF" button will allow you to download a copy of your PDF invoice.	
		SITE SER	VICES	 The "Pay" button will allow you to pay your invoice. Please see further instruction The "Inquiry" button will allow you to open a communication channel with USS to instructions in the "Inquiry" tab on this FAQ. 	

BILLING

United

🔓 Home

Duotes

Ø Orders

S Billing

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O Users



> Customer Inquiry - Already paid Customer Inquiry - Customer Inquiry - Pricing Customer Inquiry - Missed services Customer Inquiry - Not valid order/wrong account

Customer Inquiry - Other Customer Inquiry - Sales Tax Customer Inquiry - Wrong/Inactive site address Customer Inquiry - Wrong PO

342.59

176 0.0

Original Invoice Amount Remaining Balance

342.59

175 00

0-676405

Open

ZTERS WASTE VALUE ACT-00	68005				e Valued		rom th earch f			•				
SIDETR MENU ♂ Home Transactions User Administrat Organizations Help Video	TRANSACTIONS (0) Document Date - From 2023-06-13 ×	No application selected Document Date - To 2024-06-12 Document Number Shipping Address	Payment Date - From x Account Number Shipping ZIP	Payment Date - To Status Open X Shipping City	×	P	Select E nd/or p	iber, o Export	r ac : to	count Excel	num to d	ber.		us,
	View by 50 • Sort by Document Date TRANSACTIONS (0) C C Display mode: • • Actions ↓ Document I No data found		ipe - Pay Inquiry	Document Type	Export to Excel TRANSACTION: Document Date 2022-09-18 Document Typ PO Number	e - From	Document Date - To 2023-09-18 Document Number Shipping Address		Acce	ment Date - From ount Number oping ZIP			ier Inquiry - Already pa	
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2023-09-14 00:00:00 CDT INV-01866516

Q

ACT-00187196

Invoice

BILLING



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

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2022-09-18	×	2023-09-18		×			×		×			· 4 2000	Payment Details					21.0	
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Actions	L Document Date Document #	Document Type	Account Number	PO Number	Order Number	Status	Message	Original Invoice Amount	Remaining Balance	
Q	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	,
Q	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	
Q	2023-09-13 00:00:00 CDT 114-13577121	Invoice	ACT-00200391	e	0-1618153	Paid In Full	Invoice paid via Stripe	202.88	0.00	ł
Q	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	
Q	2023-08-29 00:00:00 CDT INV-01835183	Invoice	ACT-00099423	ж. Т	0-710418	Paid In Full	Invoice paid via Stripe	384.37	0.00	Pa
Ð,	2023-08-24 00:00:00 CDT INV-3496321	Invoice	ACT-00200391	1	0-396902	Paid In Full	Invoice paid via Stripe	277.51	0.00	Pa
Q	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	Pa
Q	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	Pa
Q	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	Pa
Q	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	Pa
Đ	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.
Đ,	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	Pa
Q	2023-04-27 00:00:00 CDT INV-3401190	Invoice	ACT-01692592	O-717880		Paid In Full	Payment has been con	1254.36	0.00	Cr

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.



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.

Home	Add Payment Method	2 Select Order to Apply -	3 Confirm					
III Quotes	Select Orders Selected Payment Method: *********	* **** 6789						
Orders	ORDER ID 🕹	CURRENT EASY PAY STATUS	PAYMENT METHOD	RECURRING AMOUNT*	NEXT INVOICE DATE			
\$ Billing	0-926846	Active	1 **** 6789	\$646.85	07/15/2024			
S Easy Pay	0-923846	Active	1 **** 6789	\$665.19	06/25/2024			
Users	0-916481	Active	VISA **** 4242	\$329.77	05/15/2024			
	0-916473	Active	1 **** 6789	\$952.52	07/03/2024			
	*Recurring amount listed here may diff	er from Invoices due to taxes, order	Add Payment Method adju Confirm Easy Pay Review and confirm the below orders I Selected Payment Method:	r Easy Pay.		Confirm		Search
			ORDER ID 🕹	UPDATED EASY PAY	TATUS UPDATED PAYMENT METHOD	RECURRING AMOUNT*	NEXT INVOICE DATE	SITE ADDRESS



Orders

ົ່ງ Home	Don't see what you need Ask about Trailers, Fence, Roll	here? Off Dumpsters and more?		Call us 1-888-320-1861
Quotes Orders Billing	Quotes 3 In-Process Quotes	Orders 155 Active Orders	New Order	
Easy Pay	Easy Pay		Billing	
Users	Manage automatic payment settin multiple orders.	gs on single or	View current and past invoices, make payments, and open billing inquiries.	one-time
	What We Offer	Find a Branch Near You	Customer Support	About Us



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.

Home	Orders				🖨 🛛 Мар	View + Create Order
Quotes	Active	Inactive				
🚽 Orders	search	۹	Filter Y All			
Billing	order id ↓	SITE ADDRESS		PAYMENT METHOD	STATUS	ACTION
	0-98619	46433 Southeas	t 174th Street, North Bend, WA, 98045	Manual	Pending Delivery	0
Easy Pay	0-95404	731 West 3600 \$	South, Bountiful, UT, 84010	Manual	Pending Delivery	0
Users	0-93733	29180 South Div	ie Highway, Homestead, FL, 33033	Manual	Pending Delivery	0
	0-90006	11720 Southwe	st 20th Street, Davie, FL, 33325	Manual	Activated	0
	0-89930	16122 Construc	tion Circle East, Irvine, CA, 92618	Manual	Activated	0
	0-89725	17703 Jungman	Road, Damon, TX, 77430	Manual	Pending Delivery	0
	0-896703	2391 Parkwood	Road, Snellville, GA, 30039	Manual	Activated	0
	0-895098	1156 East Shore	Drive, Madison, NH, 03875	Manual	Activated	0
	0-894382	237 Cox Creek F	arkway, Florence, AL, 35630	Manual	Activated	0



Home	Order ID #O-520265 Activated	14216 NW Lakeshore Ct, Portland, OR, U		vironment - Development	
G Orders	Order Summary	Service Details			
\$ Billing	Site Details	Scheduled Date	Туре	Status	Product info
💲 Easy Pay	Billing Details	07/17/2024	Pickup	New	Std Rest : 1
Cases	Service Details	07/12/2024	Delivery	Completed	2 Stn Hand Sink : 1, Std Rest : 1
Users	Related Cases	07/12/2024	Service	New	2 Stn Hand Sink : 1, Std Rest : 1
		07/11/2024	Pickup	Completed	2 Stn Hand Sink : 1
					Items per page: \$

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.



SERVICES	MyUSS Test CI 1 ACT-01640863		🕜 😁 Adam 🗸
Home	O-520265 > Edit Order > Change Quantity	Environment - Development	
Quotes Orders Billing	Change Quantity Note - Bundle cannot be increased and decreased at the Note - Check service details on order for change quanti		
Easy Pay	Quote Summary Total Quantity 	14216 NW Lakeshore Ct, Portland, OR, USA - 14216 NW Lakeshore Ct, Po - Portland - OR by the gazebo	
Cases Users	Restroom Bundle Standard Restroom 1 Service 2 Days per Week Add Ons	- 1 +	
		·	

The customer can change the number of products.



Cases Restroom Bundle Standard Restroom Common Comm		MyUSS Test Cl 1 ACT-01640863	Environ	nent - Develoament		😮 🔮., Adam v =
Charge Quantity Building Easry Pay Cases Restroom Bundle Standard Restroom Standard Restro		O-520264 > Edit Order > Change Quantity		Restroom Bundle		
Billing Cases Cases Cases Cases	🖓 Orders	Note - Bundle cannot be increased and decreased at the same tim		Brookline - MA put them all in the driveway		See Details 🗸 🗸
Standard Restroom 1 Service 1 Day per Week Add One 1 Service 1 Day per Week Add Order Quantity by 1 * Total Order Quantity 3 Effective Date 7/17/2024		Quote Summary	136 Pleasant Street, Brookline, MA, USA - 136 Pleasa			
Add Order Quantity by Add Order Quantity by Total Order Quantity Image: Control of the state of		Standard Restroom				
Effective Date T/17/2024		Add Ons 1				
Please call when you arrive 555-5555					Effective Date*	
Cancel Save						
						Cancel Save

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



Case Details Case List > 04647310 Opening date Order ID 0-520264 Case number: 0-520264 Case number: 0-520264 Order AT310 Provent Attached Files Case Description Comments Case Counce: A base Serial Numbers - Not provided Notes - Please call when you arrive 555-5555 Prodect Details Rase: Standard Restroon Increased Quantity Count: 1 Service Frequency: 1 Service 1 Day per Week No comments added to the case.	Opening date Order ID Case number: Status Order Information Oy10/2024 O-520264 O4647310 New Adam Studdard Customer: myusstest+ci1@gmail.com Status Order Information Adam Studdard Customer: myusstest+ci1@gmail.com 5415549030 136 Pleasant Street, Brookline, MA, USA, Brookline Case Description Case Request: Change Quantity Add Units Effective Date-07/17/2024 Placement Notes - Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-5555 Comments Head Comment Product Details Asset-Standard Restroom Increased Quantity Court-1 Net case.		_	_	_	_	_	_	_	_	0 8	o settings
Opening date 07/10/2024 Order 10 0-520264 Clase number 0647310 Status New Adam Studdard Customer myusstest+ci1@gmail.com 6 View Attached Files Case Description Case Request- Change Quantity Add Units Effective Date- 07/17/2024 Placement Notes- Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-555-5555 Product Details Asset - Standard Restroom Increased Quantity Count-1 New	Opening case Order ID Case number Status 07/10/2024 O-S20264 04647310 New 4dam Studdard Customer myusstest+ci1@gmail.com 5415549030 136 Pleasant Street, Brookline, MA, USA, Brookline Case Description Comments Case Request- Change Quantity Add Units Ffective Date-07/17/2024 Placement Notes - Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-555-5555 Froduct Details Asset- Standard Restroom Increased Quantity Count-1								ප ප	ase Owner: A	dam Studda	rd Custom
Case Description Comments + Add comment Case Request- Change Quantity Add Units Effective Date- 07/17/2024 + Add comment Placement Notes- Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-555 + Add comment Product Details Asset - Standard Restroom	Case Description Comments Case Request- Change Quantity Add Units Effective Date-07/17/2024 Placement Notes- Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-5555 Product Details Asset- Standard Restroom Increased Quantity Count-1	rd Custon	lard Custome					ie, MA, USA,	, Brookline			
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Effective Date-07/17/2024 Placement Notes-Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-5555 Product Details Asset - Standard Restroom Increased Quantity Count-1 No comments added to the case.	Effective Date-07/17/2024 Placement Notes- Asset Serial Numbers - Not provided Notes - Please call when you arrive 555-5555 Product Details Asset- Standard Restroom Increased Quantity Count-1 No comments added to the case.									1	+ Add co	mment
						No	comments a	added to the	case.			
				_								

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





USS Order 00211313 ount Name	Status	USS Order Start D	ate USS Order		JSS Order Term (months)	Amend Order	Change Unit Quantity	Change End Date	Create Ad Hoc Quote	Schedule On Demar	nd Service 🔻
USS Test CI 1 ISS Order Details	Activated Activity	7/10/2024 Related Cases	12/31/204 Subscriptions		Maintenance Plans (FSL)	Work Order (FSL)	Billing Info A:	set Locations D	eposit Schedules	BIQ Records M	fore v
Case-Order Rela	tionships (1)									\$ *	C ^a New
item • Updated a few sec	conds ago er Relati ∨	Case 🗸 🗸	Case Subject			✓ Case \$	Status 🗸 Case Date/	Time Opened 🗸 Ca	se Record Ty 🗸 C	ase Owner	×
COR-0000	0283	040	MyUSS Test CI 1/P4-	ET/Sanitation/Amen		New All	7/10/2024 5	45 AM Ori	ler Support O	rder Support Queue	v

You can find the case number in Salesforce.



	Q Search				*• 🗄 🚓 🕯	? \$ 🖡 🔘
USS CPQ App Accounts 🗸 📰	MyUSS Test CI 1 A 🗸 🗙					
fyUSS Test Cl 1 🖺 00211313 ∨ × 🍏 COR-000) ∨ ×					
ACTU II ALLAND MARCEN	Details Activity Submitter History	Archive	d Email Messages Related USS Order		1 Int I specific the	115 211 0
Case History			-		Service Appointment	•
	✓ MyUSS Information					
	Case Comment Status Type	1	Last comment	/ 0	Link a related record.	
	Most recent What's the status of this? comment	1		Sea	arch Scheduled Visits	٩
	✓ Description				Emails (0)	
	From Address			/		
	Description			_/ 🛛 😰	MyUSS Case Comments	
	Subject MyUSS Test CI 1/P4-ET/Sat	itation/Amend	ment/520264			
	Systems to Update Salesforce		•			
	Parent Case					
	Tableau Report URL Open Orders Tableau Repo	rt				
Child Cases	Account Number					
	Applicable Geography					
	Case Owner Order Support Queue	£	Status New	/ -		
	Service Group East Order Support		On Hold Reason 🚯	/		
	Case Record Order Support Type	£7	Case Type Amendment			
	Priority P4-ET		Case Sub-type Quantity/Frequency Change	/		
	Account Name MyUSS Test Cl 1	/	If 'Other', pro-	/		
	Account Id		Case Origin Web	/		

All the details entered by the customer will appear.



	SS Order	2111. 1		(some and	-011/-	(X + (X))	ATTENNA N						
= 0	0211313							Amer	nd Order Ch	ange Unit Quantity Chang	e End Date Create Ad H	oc Quote Schedule On Demand Se	ervice V
Iccount N		Status Activated	USS Order 5 7/10/2024		S Order End Date /31/2049	USS Order Ten 306	m (months)						
									_				
USS O	Order Details	Activity Re	elated Case	es Subscription	ns FSL Orders	Maintenand	ce Plans (FSL)	Work Ord	er (FSL)	Billing Info Asset Loca	tions Deposit Scheo	dules BIQ Records More	• •
N	Work Orders (5)												
-		ate • Updated a few	one shanas									\$\$* C	New
o itemio	Work Orde V		-	Site Address		✓ Service ✓	Origin 🗸	Status	✓ Subject	✓ Start Date ↓	End Date	Product Information	~
1	17624068			136 Pleasant Street, B		FOX-B	New	New	Pickup	12/31/2049 12:01 AM	12/31/2049 11:59 PM	Std Rest : 2, Hand Sani Refill : 2	v
2	17624076			136 Pleasant Street, B		FOX-B	Quantity Ch		Pickup	12/30/2049 12:01 AM	12/30/2049 11:59 PM	Hand Sani Refill : 1, Std Rest : 1	
3	17624075			136 Pleasant Street, B		FOX-B	Quantity Ch		Delivery	7/17/2024 12:01 AM	7/17/2024 11:59 PM	Hand Sani Refill : 1, Std Rest : 1	
4	17624067	136 Pleasant St	eet, Bro	136 Pleasant Street, B	Iroo - Brookline - MA	FOX-B	New	Completed	Delivery	7/12/2024 12:01 AM	7/12/2024 11:59 PM	Std Rest : 4, Hand Sani Refill : 4	
5	17624069	136 Pleasant St	reet, Bro	136 Pleasant Street, B	Broo - Brookline - MA	FOX-B	Quantity Ch	Completed	Pickup	7/10/2024 12:01 AM	7/10/2024 11:59 PM	Hand Sani Refill : 2, Std Rest : 2	V
								A.I.					
							V	iew All					

A work order for this request is also created.



Quotes	O-520265 > Edit Order > Change Service Frequency Change Service Frequency		Select all units
Ørders			
Billing	14216 NW Lakeshore Ct, Portland, OR, USA - 14216 NW Lakeshore Ct, Po - Portland - OR by the gazebo		
Easy Pay	Unit Number: 98765432		
Cases	Asset Standard Restroom	h	
Users	Frequency 1 Service 2 Days per Week Additional Services -		
	Change Frequency 👻		
			Next

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





) Home	O-520265 > Edit Order > Change Service Frequency	Order ID #O-520265 14216 NW Lakeshore Ct, Portland, OR, USA, Portland, OR, 97229
Quotes	Change Service Frequency	Enter Details
Orders	14216 NW Lakeshore Ct, Portland, OR, USA - 14216 NW Lakeshore Ct, Po - Portland - OR	Change Service Frequency
Billing	by the gazebo	1 Service 3 Days per Week
Easy Pay	Unit Number: 98765432	Effective Date
Cases	Asset Standard Restroom	7/15/2024
	Frequency 1 Service 2 Days per Week	Unit Number
Users	Additional Services -	Ukit 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**.



Case Details Case List > 04647323 Opening date Ordd 07/11/2024 O-52	Pr ID Case number 0265 02647323 Priew Attached Files	Status New	Order Information Adam Studdard Customer myusstest+ci1@gmail.com 5415549030 14216 NW Lakeshore Ct, Portland	8 Case Owner: Adam Studdard Custom
Case Description	C View Attaclieu Files		Comments	+ Add comment
Placement Notes- Asset Serial Numbers Product Details Asset-Standard Restroom Quantity- 1 Changed Frequency- 1 Service 1 Day per	- 98765432 Notes - Please give me a call to discuss p	ricing	No comments added to the	e case.

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





You can then find this case number in Salesforce.



	Q 04647323		*	? 🌣 🖡 👩
USS CPQ App Accounts ~		322 Case 🗸 🗴 🛍 04647323 Case 🗸 🗙		
Case History (3+)	Related Work Order Line Item	FSL Order Global Reference Number	Service Appointment	•
te: 7/11/2024 1:19 PM Id: Created.	Quote	Customer Call Back Status	Link a related record.	
ar: MyUSS System User ginal Value: w Value:	Convert Quote to Order?	Skill Sanitation;Amendmen Requirement	Search Scheduled Visits	٩
ie: 7/11/2024 1:19 PM d: Service Group ar: MyUSS System User ginal Value: Order Support	B&R request	Due Date 7/15/2024 Who in Ops approved this same day	Emails (0)	
w Value: te: 7/11/2024 1:19 PM td: Case Owner tr: MyUSS System User		ticket Who in Ops Approved	MyUSS Case Comments (0)	
ginal Value: MyUSS System User w Value: Order Support Queue	✓ Additional Information		Files (0)	
View All	Instructions for Change Service Freque Order Support Effective Date: 07/15/2			
Child Cases (0)	Units: All Units on Site		▲ Upload Files Or drop files	
Cases for Parent Account (3+)	Location: 14216 NW La Portland - OR (by the	at 1 Service 2 Days per Week > 1 Service 3 Days per Week	Work Orders (0)	
itact Na Adam Studdard Customer ject: MyUSS Test Cl 1/P4-PT/Sanitation/A prity: P4-PT	Reopen Reason		/ 😥 Notes (0)	
147322 itact Na Adam Studdard Customer	✓ Pricing Information			
oject: MyUSS Test CI 1/P4-PT/Sanitation/A ority: P4-PT	Price Increase or Decrease	Approved by DOS	/ Articles (0)	•
147312 Ttact Na Adam Studdard Customer			Knowledge	

All the information entered by the customer appears in Salesforce.



/USS Test Cl 1 ACT-01640863		? 😬 Adam ~
Case Details Case List > 04647322	Environment - Development	Scase Owner: Adam Studdard Customer
Opening date Order ID Case nu 07/11/2024 O-520265 046473	322 New Adam Studdard Customer m	
Case Description	Comments	+ Add_comment
Case Request- Change Service Frequency Effective Date- 07/16/2024 Placement Notes- Asset Serial Numbers - 98765432 Notes - test Product Details Asset- Standard Restroom Quantity- 1 Changed Frequency- 1 Service 3 Days per Week		No comments added to the case.

The customer can also add a comment.



Home	Case Details Case List > 046	647322			Case Owner: Adam Studdard Customer	
Quotes	Opening date 07/11/2024	Order ID Case number O-520265 04647322	Status New	Order Information Adam Studdard Customer my 5415549030 14	usstest+ci1@gmail.com 216 NW Lakeshore Ct, Portland, OR, USA, Portland	-
 Billing Easy Pay Cases Users 	Case Description Case Request- Change Service Fi Effective Date- 07/16/2024 Placement Notes- Asset Serial N	Status			+ Add comment	; (1
	Product Details	What's the status of my request?				
	Product Details Asset- Standard Restroom Quantity- 1 Changed Frequency- 1 Service 3		k	32/4000 Cancel Add	Add Attachment for Case Comment Add your documents here, and you can upload up to 5 files max Note: Once you select file to upload, it will be uploaded automatically Drag your file(s) here or browse Each file upload is limited to a maximum size of 5MB	

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





That message will appear in Salesforce.



Q Saarch the questions for comments from the second sec	
New MyUSS Case Concurs Information MyUSS Case Comment Name Image: Comment Varie	
MyUSS Case Comment Name Comment Owner ▲ dam Studdard Comment I Case 04647322 × Comment Type None Commented By Search Contacts Commented By	
Comment Type None Order Information Commented By Search Contacts Q Commented By Commented By 14216 NW Lakeshore Ct, Portland, OR, USA, Portland	e Adam
	Studdard Custo
Case Authorized By Search Contacts Q Comments +	Add comment
Case Owner Search People Q Adam Studdard 07/1 I'm working of it! 07/1	L/2024 • 1:22 PM
Cancel Save Save Adam Studdard Customer Status What's the status of my request?	l/2024 • 1:22 PM



Quotes

Home	Don't see what you need Ask about Trailers, Fence, Roll	here? Off Dumpsters and more!		Call us 1-888-320-1861			
Quotes Orders Billing	Quotes 3 In-Process Quotes	Orders 155 Active Orders	New Order				
Easy Pay	Easy Pay	,	Billing	Ĩ			
S Easy Pay	Manage automatic payment settin multiple orders.	gs on single or		View current and past invoices, make one-time payments, and open billing inquiries.			
	What We Offer	Rind a Branch Near You	Customer Support	About Us			



Customers can create new quotes.

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





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

 Home Create new site Enter address / area / landmark Orders Choose from Existing Sites Please select one address from below Billing 180 POMFRET RD, EASTFORD, CT, 06242 Easy Pay 16720 GOLDEN RIDGE ROAD, APPLEGATE, CA, 95703 27th St SW 4000 HANNEGAN RD, BELLINGHAM, WA, 98226 	26th St SW
Quotes Image: Choose from Existing Sites Please select one address from below Image: Billing Image: Choose from Existing Sites Image: Choose from Existing Sites Please select one address from below Image: Search <	26th St SW
 Orders Choose from Existing Sites Please select one address from below Billing 180 POMFRET RD, EASTFORD, CT, 06242 180 POMFRET RD, EASTFORD, CT, 06242 16720 GOLDEN RIDGE ROAD, APPLEGATE, CA, 95703 27th St SW 	
Image: Billing Image: Billing Image: Billing Image: Bil	
27th St 5W	
27th St 5W	
	27th St SW
W Users	
	28th St SW
Note: Once saved, you cannot change the Site address for the Quote. Confirm	
	29th St S
29th S	SW 29th St S



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

Home	1 Units & Services	2 View & Accept Quote	3 Site Details	Billir	4 ng & Payment	5 Order Confirmation
Quotes	Quote: Q-926942				Quote Summar	y
یک Orders Billing ک Easy Pay این Users	Custom Quote End Date Type: Custometer Start Date* 6/20/2024 Add New Product	Fixed T Fixed T Find Date Add				224 End Date 08/10/2024 Restroom Bundle Standard Restroom 1 1 Service 1 Day per Week -
	Restroom Bund Select Asset* Standard Restr	Select Frequency*	Additional Services	•		
						Get Quote





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





			C . Crurk		Stage <u>Log out</u>				*• • • • •	
USS CPQ App O)pportunities	× 8 × 0 ×	Q. Search.		Tom Slowik Test A	✓ X Q ACT-017627	13 - Se v ×	Adam's Constructio		/ 4 ‡ 🕥
🖥 Adam's Constru 🦷 Quote	A REAL PROPERTY AND INCOME.		1-22-0-2	9-17-54	2011-211-2		- 1991-1991			
Accounts > Adam's Construct Quotes									[Change Owner
Quote Num V		Order Classifica V Recurring without En		Recurring ∨	Ship To Street ~	Ship To City Westborough	 ✓ Ship To St ✓ MA 	Ship To Zi ~	Created By MyUSS System User	~
	-					2255205662993535 — 5.5				

And you can find this quote in Salesforce.



Then the customer can accept the quote.





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

	View & Accept Quote	Site Details	Billing & Payment	Order Confirmation				
K Back Quote: Q-927037								
Site Details				^				
Site Contact		Choose from saved contacts \checkmark	Map Satellite	[]]				
First Name*	Last Name*							
Email ID*	Phone Numb	er						
Site Address			Bellingham Truck Wash	United	ZTERS WASTE VALUE ACT-00068005			
4000 HANNEGAN RD					Ø		0	4
City BELLINGHAM			•	Home	Units & Services	View & Accept Quote	Site Details	Billing & Payment
State WA				Quotes	< Back Quote: Q-926942			Payment Method
Zipcode				Drders 🖓	Purchase Order Details			Autopay Manual Payment
98226 Latitude				\$ Billing	PO Number			
48.78439	Longitube -122.44072			💲 Easy Pay	Billing Contact			+ Add New F
Site Information		~		O Users	Valued	Last Name* Customer		
			Goode		Email ID* leslie.conner@devunitedsitesen	vices.com Phone Number*		
					Secondary Bill Contact		Choose from saved contacts $ \!$	
					First Name	Last Name		
						Phone Number		