# 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.

| SERVICES         | VASTE VALUE   ACT-00068005 |           |                    | e Valued v           | Read Only  | 1                                | Cancel      |
|------------------|----------------------------|-----------|--------------------|----------------------|--|----------------------------------|-------------|
| Home U<br>Quotes | Search Q, NAME ROLE        | MODULE(S) | STATUS             | + Add User<br>ACTION |  |                                  |             |
| Billing          |                            |           | Items per page: 10 | ▼ 0 of 0 < >         | ZTERS WASTE VALUE   ACT-00068005                     |                                  | 😝 Val       |
| Easy Pay         |                            |           |                    |                      | Home Add User  | Let None*                        | E-mail (D)* |
| Users            |                            |           |                    |                      | Quotes     Autominia     Autominia     Standard User |                                  | L man D     |
|                  |                            |           |                    |                      | B Billing Assign Module(s) Assign Module(s) All Quer | tes Criders 🗹 Billing 💟 Easy Pay |             |
|                  |                            |           |                    |                      | 🕰 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 h<br>Ask about Trailers, Fence, Roll O | ere?<br>If Dumpsters and more? |  | Call us 🧧   | -888-320-1861 |
|------------|--|--------------------------------|--|---|---------------|
| Quotes     | Quotes   | Orders                         | New Order                                  | SHELL SHE |               |
| Orders     | 3<br>In-Process Quotes   | 155<br>Active Orders           |  |   |               |
| 🔊 Easy Pay | Easy Pay   |                                | Billing                                    |   |               |
| O) Users   | Manage automatic payment settings multiple orders.             | on single or                   | View current and par<br>payments, and open | st invoices, make one-time<br>billing inquiries.  |               |
|            | What We Offer  | Find a Branch Near You         | Customer S                                 | Support Gs Abou   | it 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**.

| TERS WASTE VALUE   ACT-00068005  |   |   | DETRADE =  | 🛞 No application selected 👻 💽 leslie.conner@devunitedsiteservices.com 🔹 📱 📳  |
|--|---|---|--|--|
| Home Quotes Corders Billing Billing Easy Pay Quotes Users Since the product of th | EXAMPLE Set Interview Transactions Payments Customer Inquiry User Management for Customers HOME Set Interview Transactions Payments Customer Inquiry User Management for Customers Home on United Transactions Payments. Go to the main menu and select EasyPay to manage orders and payment Tris Portal allows you to: 1. View all transactions 1. Pay your invoices 1. Make an inquiry 1. Make an inquiry | m ▼ I I I I I I I I I I I I I I I I I I | Administration<br>Administration<br>Administration<br>Additions<br>Ideo<br>By default, the page we<br>hand of the portal will<br>Document date:<br>Document da | tions       Payments       Customer Inquiry       User Management for Customers         Prf       unil give you an overview of all invoices issued by United Site Services to you.       It display all open invoices issued within the last 366 days, you will be able to dynamically filter. The filters on the up help you to quickly find the invoices you are looking for:         This filter allows you to filter for the invoice date, either on a specific day or within a specific time frame filter for all documents, only invoices or only credit notes         hebr: search by invoice number; if you would like to search for invoices starting by a specific number please add an only regular to the invoice or credit note linked to a specific PO number         allow you to filter for invoices in a specific status, example: open, paid in full, inquiry         Number: search for an invoice or credit note linked to a specific PO number         s         at of your invoices in the lower half of the portal, you will find specific information for each invoice. The portal will all day of your invoices to Excel for further processing or analysis by clicking on the button "Export to Excel".         inalities are available for you:         allow you to download a copy of your PDF invoice.         will allow you to pay your invoice. Please see further instructions in the "Payment" tab on this FAQ.         tor multiplication of this FAQ. |

## BILLING

United

🔓 Home

Duotes

Ø Orders

S Billing

💲 Easy Pay

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 WAS   | TE VALUE   ACT-00068005   |  | • •  |   |  | 😫 Valued  | <b>F</b> I  | rom the  | e hom   | iepa                     | ige, th   | e cu   | stom  | er ca  | n  |
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| ×<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10<br>10 | SIDETRADE<br>Home<br>Transactions<br>User Administration<br>Organizations<br>Help Video | TRANSACTIONS (0) Document Date - From 2023-06-13 Document Type PO Number Shipping State Search Reset  View by 50  Search Reset  View by 50  Search Document Date | No application selected   Document Date - To 2024-06-12  Document Number  Shipping Address | Payment Date - From X<br>Account Number | Payment Date - To<br>Status<br>Shipping City |   | P   | O num<br>elect <b>E</b><br>nd/or p   | ber, c<br><b>xpor</b> t<br>orint th   | t <b>to</b>              | Excel   | to d   | ownlo   | bad  | ,  |
|   |   | TRANSACTIONS (0) C<br>C Display mode:  C<br>Actions C Document Date<br>No data found   | ate Document # Str   | ipe - Pay Inquiry                       | Document Type                                | TRANSACTION:<br>Document Date<br>2022-09-18<br>Document Typ<br>PO Number<br>Shipping State<br>Search •  | (810)<br>- From<br>Reset +<br>Mel del Page 1 of 17 >> >Mel  | Document Date - To 2023-09-18 Document Number  Shipping Address Shipping Address Shipping Address Interfection of the shipping Address   |   | Paja<br>Accession<br>Shi | yment Date - From<br>iount Number<br>pping ZIP  |  | Payment D<br>Status<br>Custom<br>Custom<br>Custom<br>Custom<br>Custom<br>Custom<br>Custom<br>Custom | er inquiry - Already pa<br>er inquiry - Customer<br>er inquiry - Customer<br>er inquiry - Missed ser<br>er inquiry - Not valid o<br>er inquiry - Votregina<br>er inquiry - Vitrogina<br>er inquiry - Wrong PO<br>d | id<br>Inquiry - Pricin,<br>rvices<br>inder/wrong ac  |
|   |   |  |  |   |  | TRANSACTION:<br>Capita, mod<br>Actions<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q<br>Q | Image: Control of the contro | ent # Document Type Invoice In | Account Number<br>ACT-00068005<br>ACT-00709892<br>ACT-01055414<br>ACT-0008429<br>ACT-00842789<br>ACT-00849789<br>ACT-00249789<br>ACT-00249789<br>ACT-00200391 | PO Number                | Order Number<br>0-418367<br>0-369189<br>0-567640<br>0-393577<br>0-419445<br>0-394082<br>0-1618153<br>0-719256 | Stetus<br>Open<br>Open<br>Open<br>Open<br>Open<br>Open | Open<br>Paid In I<br>Message<br>Open<br>Open<br>Open<br>Open<br>Open<br>Open<br>Open                | Original Invoice An<br>116.02<br>336.61<br>105.74<br>511.97<br>878.86<br>229.74<br>202.88<br>989.04  | nount Remail<br>116.02<br>336.61<br>105.74<br>511.97<br>878.86<br>239.74<br>202.88<br>002.05 |

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.

|   |   |  |   |                     |   |  |  |   |  |   |     |   | SIDETRADI       |                           |  |                                      |  |              |   |              |   |  |
|---|---|--|---|---------------------|---|--|--|---|--|---|-----|---|-----------------|---------------------------|--|--------------------------------------|--|--------------|---|--------------|---|--|
|   |   |  |   |                     |   |  |  |   |  |   |     |   | 111 D           | TEANSACTIONS ()           |  |                                      | Payment Form   |              |   |              |   |  |
|   |   |  |   |                     |   |  |  |   |  |   |     |   | There allow     | THE R. P. LEWIS CO., Name | Invoice Details                              |                                      |  |              |   |              |   |  |
|   |   |  |   |                     |   |  |  |   |  |   |     | ר | (2 Westfor Inte |                           | Invoice Number<br>INV-3568014<br>INV-3489859 | Due Date<br>2023-06-20<br>2023-05-23 | Seller<br>United Site Services Ultimate Holdings, Inc<br>United Site Services Ultimate Holdings, Inc | Buy<br>CLEVE | yer Amour<br>GAREY \$293.4<br>GAREY \$293.4 | nt<br>9<br>9 |   |  |
| RANSACTIONS   | (810)   |  |   |                     |   |  |  |   |  |   | ^   |   |                 | Atlan 1                   | INV-3410279                                  | 2023-04-25                           | United Site Services Ultimate Holdings, Inc  | CLEVE        | GAREY \$293.4                               | 9 Messar     |   |  |
| ocument Date  | - From  | Document Date - To   |   |                     | Payment Date - From   |  |  | Payment Date - To   |  |   |     |   |                 |                           |  |                                      | Total to pay: \$880.47   |              |   |              |   |  |
| 2022-09-18  | ×   | 2023-09-18   |   | ×                   |   |  | ×  |   |  |   | ×   |   |                 | F 0, 200                  | Payment Details                              |                                      |  |              |   |              |   |  |
| ocument Type  |   | Document Number  |   |                     | Account Number  |  |  | Status  |  |   |     |   |                 | <b>4</b> , 205            | -  |                                      | â  |              |   |              |   |  |
|   | •   |  |   |                     |   |  |  |   |  |   | -   |   |                 |                           | Card   |                                      | US bank account  |              |   | -            |   |  |
|   |   |  |   |                     |   |  |  |   |  |   |     |   |                 |                           | Card number                                  |                                      | Depiration   | CVC          |   |              |   |  |
| 0 Number  |   | Shipping Address   |   |                     | Shipping ZIP  |  |  | Customer Inquiry  | - Already paid                         |   |     |   |                 |                           | 1234 1234 1234 123                           | 4                                    | MM / YY  | CVC          | -   | ~            |   |  |
|   |   |  |   |                     |   |  |  |   |  |   |     |   |                 |                           | Country                                      |                                      | 29   |              |   |              |   |  |
| hipping State   |   |  |   |                     |   |  |  |   |  |   | _   |   |                 |                           | United States                                |                                      | v 12345  |              |   | -            |   |  |
|   |   |  |   |                     | Shippin   | ng State                                     |  | PDF   |  | Stripe - P  | Pay |   |                 |                           | Remember this Card.                          | 0                                    |  |              |   |              |   |  |
| Search 👻  | Reset -   |  |   |                     |   |  |  |   |  |   |     |   |                 |                           | Saved Cards                                  |                                      |  |              |   |              |   |  |
|   |   |  |   |                     |   |  |  |   |  |   |     | - |                 |                           | Select                                       | Card                                 | Card Number  |              | Expiry                                      |              |   |  |
|   |   |  |   |                     |   |  | 3.0  |   |  |   |     |   |                 |                           |  |                                      |  |              |   |              |   |  |
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| Actions   | Hit         Her         Page         1         of 17         Her         Mod         Sort           (810)         C | by Document Date + 11<br>Document Type<br>Invoice  | Account Number<br>ACT-00068005<br>ACT-00709962  | PO N                | umber -   |  | View<br>View<br>View<br>View<br>View                                 |   | Pay<br>Pay<br>Pay<br>Pay<br>Pay        | ]<br>]<br>]<br>]  |     |   |                 |                           |  | via<br>D                             | nor nor nor 0278<br>Pay<br>Cancel  |              | 32023                                       |              |   |  |
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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   | c         | 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              | ÷  |
| D Q     | 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              | Pr |
| us Q    | 2023-08-24 00:00:00 CDT INV-3496321  | Invoice       | ACT-00200391   | 10 C      | O-396902     | Paid In Full | Invoice paid via Stripe | 277.51                  | 0.00              | P  |
| 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              | P  |
| 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              | P  |
| 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              | F  |
| 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              | P  |
| Q       | 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            | (  |
| ®,      | 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              | -  |
| Q       | 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              | (  |

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.

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



# Orders

| ົ່ງ Home                    | Don't see what you need<br>Ask about Trailers, Fence, Roll | here?<br>Off Dumpsters and more? |  | <b>Call us</b> 1-888-320-1861 |
|-----------------------------|--|----------------------------------|--|-------------------------------|
| Quotes<br>Orders<br>Billing | Quotes<br>3<br>In-Process Quotes                           | Orders<br>155<br>Active Orders   | New Order  |                               |
| Easy Pav                    | Easy Pay   |                                  | Billing  |                               |
| Users                       | Manage automatic payment settin<br>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.

| lome    | Orders     |   |                | 🖨 🗆 Мар          | Vi w + Create Order |
|---------|------------|---|----------------|------------------|---------------------|
| Juotes  | Active     | Inactive  |                |                  |                     |
| Orders  | search     | Q Filter All  |                |                  |                     |
| Billing | order id ↓ | SITE ADDRESS  | PAYMENT METHOD | STATUS           | ACTION              |
|         | 0-98619    | 46433 Southeast 174th Street, North Bend, WA, 98045 | Manual         | Pending Delivery | 0                   |
| asy Pay | 0-95404    | 731 West 3600 South, Bountiful, UT, 84010           | Manual         | Pending Delivery | 0                   |
| Jsers   | 0-93733    | 29180 South Dixie Highway, Homestead, FL, 33033     | Manual         | Pending Delivery | 0                   |
|         | O-90006    | 11720 Southwest 20th Street, Davie, FL, 33325       | Manual         | Activated        | Ø                   |
|         | O-89930    | 16122 Construction 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                   |
|         | O-895098   | 1156 East Shore Drive, Madison, NH, 03875           | Manual         | Activated        | 0                   |
|         | 0-894382   | 237 Cox Creek Parkway, Florence, AL, 35630          | Manual         | Activated        | 0                   |
|         |            |   |                |                  |                     |



| Home     | Order ID #O-520265<br>Activated | 14216 NW Lakeshore Ct, Portland, OR, U | Env<br>SA, Portland, OR, 97229 | ironment - 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               |
|          |                                 |  |                                |                        | ltems 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<br>Orders | Change Quantity<br>Note - Bundle cannot be increased and decreased at the<br>Note - Check service details on order for change quanti | : same time. Please use Move feature.<br>ty requested.  |          |
| Easy Pay         | Quote Summary <ul> <li>Total Quantity</li> </ul>   | 14216 NW Lakeshore Ct, Portland, OR, USA - 14216 NW Lakeshore Ct, Po - Portland - OR<br>by the gazebo |          |
| Cases<br>Users   | Restroom Bundle<br>Standard Restroom<br>1 Service 2 Days per Week<br>Add Ons   | - 1 +   |          |
|                  |  |   |          |
|                  |  |   |          |
|                  |  |   |          |
|                  |  |   |          |
|                  |  |   |          |
|                  |  |   |          |
|                  |  |   |          |

The customer can change the number of products.



| Prime   Image: Prim   | TE SERVICES              | MyUSS Test CI T   ACT-01040863  | Environ  | nent - Develoament  |                            | • • • • • • • • • • • • • • • • • • • |
|---|--------------------------|---|--|---|----------------------------|---------------------------------------|
| Codes Co  | ၂) Home                  | O-520264 > Edit Order > Change Quantity   |  | Restroom Bundle   |                            |                                       |
| Image: Image   | 🗒 Quotes                 | Change Quantity<br>Note - Bundle cannot be increased and decreased at the same tim<br>Note - Check service details on order for change quantity request | ne. Please use Move feature.<br>ted.   | 136 Pleasant Street, Brookline, MA, USA - 13<br>Brookline - MA   put them all in the driveway<br>What you want to do? | 36 Pleasant Street, Broo - | See Details 🗸 🗸                       |
| Cases   X Users     Restroom Bundle   Standard Restroom   1 Service 1 Day per Week   Add Ons     Add Ons     Carrent Order Quantity     Carrent Order Quantity     Add Order Quantity     Carrent Order Quantity     Carrent Order Quantity     Add Order Quantity     Carrent Order Quantity     Carrent Order Quantity     Carrent Order Quantity     Add Order Quantity     Carrent Order Quantity </td <td>ै) Billing<br/>§ Easy Pay</td> <td>Quote Summary T<br/>• Total Quantity</td> <td>136 Pleasant Street, Brookline, MA, USA - 136 Pleasa<br/>put them all in the driveway</td> <td>Add more units Reduce units</td> <td></td> <td></td>   | ै) Billing<br>§ Easy Pay | Quote Summary T<br>• Total Quantity   | 136 Pleasant Street, Brookline, MA, USA - 136 Pleasa<br>put them all in the driveway | Add more units Reduce units   |                            |                                       |
| Add Ons 1 Add Order Quantity by 1 *<br>Total Order Quantity by 3<br>Total Order Quantity 3<br>Effective Date<br>Total Order Quantity by 1 *<br>Total Order Quantity by 3<br>Effective Date<br>Total Order Quantity | Cases                    | Restroom Bundle<br>Standard Restroom<br>1 Service 1 Day per Week  |  | Current Order Quantity  | 2                          |                                       |
| Effective Date  Effective Date  Effective Date  Cancel Save   |                          | Add Ons 1   |  | Add Order Quantity by   | 1 -                        |                                       |
| Notes*<br>Please call when you arrive 555-5555<br>Cancel Save   |                          |   |  | Effective Date  | Effective Date*            |                                       |
| Cancel Save   |                          |   |  | 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.



| Home<br>Quotes<br>Orders | Case Details Case List > 04647310<br>Opening date Order ID Case no<br>07/10/2024 O-520264 046473   | imber Status<br>10 New | Pre-lopment<br>Order Information<br>Adam Studdard Customer myusstest+ci1@gmail.com<br>5415549030 136 Pleasant Street, Brookline, MA, USA, Brookline | Owner: Adam Studdard Custome |
|--------------------------|--|------------------------|---|------------------------------|
| Billing<br>Easy Pay      | © View Attached Files Case Description   |                        | Comments  | + Add comment                |
| Users                    | Effective Date- 07/17/2024<br>Placement Notes- Asset Serial Numbers - Not provided   Notes - Please call when y<br>Product Details<br>Asset- Standard Restroom<br>Increased Quantity Count- 1<br>Service Frequency- 1 Service 1 Day per Week | ou arrive 555-555-5555 | No comments added to the case.  |                              |
|                          |  |                        |   |                              |

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

2





| USS Order<br>00211313<br>ount Name | Status US                | S Order Start Date US | Order End Date USS Or           | rder Term (months)    | Amend Order      | Change Unit Quantity | Change End Date C  | reate Ad Hoc Quote | Schedule On Demand | Service 💌        |
|------------------------------------|--------------------------|-----------------------|---------------------------------|-----------------------|------------------|----------------------|--------------------|--------------------|--------------------|------------------|
| JSS Test Cl 1                      | Activated 7/1            | ed Cases Subscription | 31/2049 306                     | ntenance Plans (FSI ) | Work Order (ESL) | Billing Info Ass     | et Locations Deno  | sit Schedules      | BIO Records Mo     |                  |
| Case-Order Relat                   | ionships (1)             |                       |                                 |                       |                  |                      |                    |                    |                    | <sup>2</sup> New |
| item • Updated a few seco          | nds ago<br>Relati V Case | ✓ Case Subject        |                                 |                       | ✓ Case St        | atus ∨ Case Date/Ti  | me Opened ∨ Case R | ecord Tv V Cas     | se Owner           | ~                |
| COR-00000                          | 283 <u>04047</u>         | MyUSS Test C          | I 1/P4-ET/Sanitation/Amendment, | /520264               | New              | 7/10/2024 5:4        | 5 AM Order 5       | upport Ord         | er Support Queue   | <b>v</b>         |
|                                    |                          |                       |                                 | View /                | All              |                      |                    |                    |                    |                  |
|                                    |                          |                       |                                 |                       |                  |                      |                    |                    |                    |                  |
|                                    |                          |                       |                                 |                       |                  |                      |                    |                    |                    |                  |

### You can find the case number in Salesforce.



|  | Q Search                                       |                |   |     | ★ 🖬 🕾 '                | ? 🌣 🛉 🔘 |
|--|--|----------------|---|-----|------------------------|---------|
| USS CPQ App Accounts V                   | MyUSS Test CI 1   A 🗸 🗙                        |                |   |     |                        |         |
| fyUSS Test CI 1 🖺 00211313 ∨ × 👗 COR-000 |  |                |   |     |                        |         |
| ATTACK ON ALLERA                         | Details Activity Submitter Histor              | y Archive      | ed Email Messages Related USS Order     |     | Martin Call            | 0.112   |
| Case History                             |  | 3              |   |     | Service Appointment    | •       |
|  | ✓ MyUSS Information                            |                |   |     |                        |         |
|  | Case Comment Status<br>Type                    | /              | Last comment                            | / 0 | Link a related record. |         |
|  | Most recent What's the status of this? comment | 1              |   | Sea | rch Scheduled Visits   | ٩       |
|  | ✓ Description                                  |                |   |     | Emails (0)             |         |
|  | From Address                                   |                |   | /   |                        | _       |
|  | Description                                    |                |   | /   | MyUSS Case Comments    |         |
|  | Subject MyUSS Test CI 1/P4-ET/Sa               | nitation/Ameno | Iment/520264                            |     |                        |         |
|  | Systems to Update Salesforce                   |                | •                                       |     |                        |         |
|  | Parent Case                                    |                |   | =   |                        |         |
|  | Tableau Report URL Open Orders Tableau Rep     | ort            |   |     |                        |         |
| Child Cases                              | Account Number                                 |                |   |     |                        |         |
| Child Cases                              | Applicable<br>Geography                        |                |   |     |                        |         |
|  | Case Owner Order Support Queue                 | £              | Status New                              | / - |                        |         |
|  | Service Group East Order Support               | /              | On Hold Reason 🕚                        | 1   |                        |         |
|  | Case Record Order Support<br>Type              | £7             | Case Type Amendment                     |     |                        |         |
|  | Priority P4-ET                                 |                | Case Sub-type Quantity/Frequency Change | /   |                        |         |
|  | Account Name MyUSS Test CI 1                   | /              | If 'Other', pro-<br>vide Reason         |     |                        |         |
|  | Account Id 💿                                   |                | Case Origin Web                         | /   |                        |         |

All the details entered by the customer will appear.



| 911-21-2               |   |  |  |  | Amend Order C   | hange Unit Quantity Change  | End Date Create Ad Hr   | oc Quote Schedule On Demand Ser   | vice v                                    |
|------------------------|---|--|--|--|---|---|---|---|---|
| 211313                 |   |  |  |  | Amend Order   | change  |   | Schedule On Demand Ser  | Vice +                                    |
| me Stat<br>st CI 1 Act | tus USS Order<br>tivated 7/10/2024  | Start Date         USS Order End           J         12/31/2049  | d Date USS Ord<br>306  | er Term (months)   |   |   |   |   |   |
|                        |   |  |  |  | _   |   |   |   |   |
| der Details A          | ctivity Related Cas   | es Subscriptions FS  | 3L Orders Mainte   | enance Plans (FSL)   | Work Order (FSL)  | Billing Info Asset Locati   | ons Deposit Sched   | ules BIQ Records More   | ~   |
| ork Orders (5)         |   |  |  |  |   |   |   | (a)   | New                                       |
| Sorted by Start Date   | Updated a few seconds ago   |  |  |  |   |   |   |   | New                                       |
| Work Orde V            | Site Name 🗸   | Site Address   | ✓ Service  | v Origin v Str   | tus 🗸 Subject   | ✓ Start Date ↓ ✓  | End Date  | Product Information   | ~   |
| 17624068               | 136 Pleasant Street Bro   | 136 Pleasant Street Broo - Broo'   | kline - MA FOX-B   | New New  | w Pickup  | 12/31/2049 12:01 AM   | 12/31/2049 11:59 PM   | Std Rest : 2 Hand Sani Refill : 2   |   |
| 17624076 1             | 136 Pleasant Street, Bro  | 136 Pleasant Street, Broo - Brool  | kline - MA FOX-B   | Quantity Ch., Ne   | w Pickup  | 12/30/2049 12:01 AM   | 12/30/2049 11:59 PM   | Hand Sani Refill : 1. Std Rest : 1  |   |
| 17624075 1             | 136 Pleasant Street, Bro  | 136 Pleasant Street, Broo - Brool  | kline - MA FOX-B   | Quantity Ch Ne   | w Delivery  | 7/17/2024 12:01 AM  | 7/17/2024 11:59 PM  | Hand Sani Refill : 1, Std Rest : 1  |   |
| 17624067 1             | 136 Pleasant Street, Bro  | 136 Pleasant Street, Broo - Brool  | kline - MA FOX-B   | New Cor  | mpleted Delivery  | 7/12/2024 12:01 AM  | 7/12/2024 11:59 PM  | Std Rest : 4, Hand Sani Refill : 4  |   |
| 17624069 1             | 136 Pleasant Street, Bro  | 136 Pleasant Street, Broo - Brool  | kline - MA FOX-B   | Quantity Ch Cor  | mpleted Pickup  | 7/10/2024 12:01 AM  | 7/10/2024 11:59 PM  | Hand Sani Refill : 2, Std Rest : 2  |   |
|                        |   |  |  |  |   |   |   |   |   |
|                        |   |  |  | View /   | All   |   |   |   |   |
|                        |   |  |  |  |   |   |   |   |   |
|                        |   |  |  |  |   |   |   |   |   |
|                        | ne Stat<br>tit CI 1 Act<br>Act<br>ter Details A<br>rk Orders (5)<br>Sorted by Start Date -<br>Work Orde ✓ 1<br>17624068 1<br>17624075 1<br>17624067 1<br>17624069 1 | ne Status USS Order<br>Activated 7/10/2024<br>Her Details Activity Related Cass<br>rk Orders (5)<br>Sorted by Start Date - Updated a few seconds ago<br>Work Orde V Site Name V<br>17624068 136 Pleasant Street, Bro<br>17624075 136 Pleasant Street, Bro<br>17624069 136 Pleasant Street, Bro<br>17624069 136 Pleasant Street, Bro<br>17624069 136 Pleasant Street, Bro | ne Status USS Order Start Date USS Order Ent<br>Activated 7/10/2024 12/31/2049<br>Her Details Activity Related Cases Subscriptions FS<br>rk Orders (5)<br>Sorted by Start Date - Updated a few seconds ago<br>Work Orde V Site Name V Site Address<br>17624068 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Broo<br>17624076 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Broo<br>17624075 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Broo<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Broo<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Broo<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Broo | ne Status USS Order Start Date USS Order End Date USS Order End Date Activity Related Cases Subscriptions FSL Orders Maintee Rk Orders (5)<br>Sorted by Start Date - Updated a few seconds ago<br>Work Orde V Site Name V Site Address V Service .<br>17624068 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B<br>17624075 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B | ne Status Activited 7/10/2024 USS Order End Date USS Order Term (months) 306<br>ter Details Activity Related Cases Subscriptions FSL Orders Maintenance Plans (FSL)<br>rk Orders (5)<br>Sorted by Start Date - Updated a few seconds ago<br>Work Orde ✓ Site Name ✓ Site Address ✓ Service ✓ Origin ✓ Sta<br>17624068 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624075 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624067 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Cor<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Cor | ne Activite VSS Order Start Date VSS Order End Date 2015 Order Term (months)<br>Activite Related Cases Subscriptions FSL Orders Maintenance Plans (FSL)<br>Work Order (FSL)<br>VSS Order Term (months)<br>Status VSE Order (FSL)<br>Work Order (FSL)<br>VSS Order Start Date - Updated a few seconds ago<br>Work Order V Site Name V Site Address VS Service V Origin V Status V Subject<br>17624068 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B New New Pickup<br>17624075 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B New Completed Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Completed Pickup<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Completed Pickup<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Completed Pickup<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Bro Brookline - MA FOX-B Quantity Ch Completed Pickup | ne Activited VS Order Start Date USS Order End Date 12/31/2049 306<br>Her Details Activity Related Cases Subscriptions FSL Orders Maintenance Plans (FSL) Work Order (FSL) Billing Info Asset Location Asset Location Asset by Start Date - Updated a few seconds ago<br>Work Order✓ Site Name ✓ Site Address ✓ Service ✓ Origin ✓ Status ✓ Subject ✓ Start Date ↓ ✓ 12/31/2049 12:01 AM<br>17624068 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Pickup 12/30/2049 12:01 AM<br>17624067 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch New Delivery 7/17/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Completed Pickup 7/10/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant Street, Broo - Brookline - MA FOX-B Quantity Ch Completed Pickup 7/10/2024 12:01 AM<br>17624069 136 Pleasant Street, Bro 136 Pleasant | ne Activated 7/10/2024 USS Order End Date 1/2/31/2049 036<br>Her Details Activity Related Cases Subscriptions FSL Orders Maintenance Plans (FSL) Work Order (FSL) Billing Info Asset Locations Deposit Sched<br>Her Details Activity Related Cases Subscriptions FSL Orders Maintenance Plans (FSL) Work Order (FSL) Billing Info Asset Locations Deposit Sched<br>Her Details Activity Related Cases Subscriptions FSL Orders Maintenance Plans (FSL) Work Order (FSL) Billing Info Asset Locations Deposit Sched<br>Her Details Activity Related Cases Subscriptions FSL Orders Maintenance Plans (FSL) Work Order (FSL) Billing Info Asset Locations Deposit Sched<br>Her Orders (5)<br>Work Order (FSL) Billing Info Asset Locations Deposit Sched<br>Horder (FSL) Billing Info Asset Locations Deposit Sched<br>Her Orders (5)<br>Her Order (FSL) Billing Info Asset Locations Deposit Sched<br>Her Order (FSL) Billing Info Asset Locations Deposit Sch | ne di |

# A work order for this request is also created.



| i] Quotes | O-520265 > Edit Order > Change Service Frequency                                       |          | Select all units |
|-----------|--|----------|------------------|
| Ørders    | A 14216 NW Lakeshore Ct. Portland. OR. USA - 14216 NW Lakeshore Ct. Po - Portland - OR |          |                  |
| Billing   | by the gazebo  |          |                  |
| Easy Pay  | Unit Number: 98765432  |          |                  |
| Cases     | Asset Standard Restroom  | <b>h</b> |                  |
| 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   |
| Casas    | Asset Standard Restroom  | 7/15/2024  |
| Cases    | Frequency 1 Service 2 Days per Week  | Unit Number  |
| Users    | Additional Services -  | Unit Number<br>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 Orde 07/11/2024 O-52  | er ID Case number<br>0265 01647323                      | Status<br>New | Order Information<br>Adam Studdard Customer myusstest+ci1@gmail.com<br>5415549030 14216 NW Lakeshore Ct, Portland | 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 ~  | Im MyUSS Test Cl 1   A ∨ × 🛍 04647322   Case  | ∨ × 💼 04647323   Case ∨ ×  |                           |
| Case History (3+)   | Related Work a<br>Order Line Item   | FSL Urder<br>Global<br>Reference<br>Number   | Service Appointment       |
| te: 7/11/2024 1:19 PM<br>Id: Created.   | Quote   | Customer Call Deck Status  | Link a related record.    |
| ar: MyUSS System User<br>ginal Value:<br>w Value:   | Convert Quote a<br>to Order?  | Skill Sanitation;Amendment;Pacific Requirement   | Search Scheduled Visits Q |
| te: 7/11/2024 1:19 PM<br>d: Service Group<br>ar: MyUSS System User<br>ginal Value: Order Support<br>value:  | B&R request   | Due Date 7/15/2024<br>Who in Ops<br>approved this<br>same day<br>ticket                        | Emails (0)                |
| ie:         7/11/2024 1:19 PM           id:         Case Owner           if:         MyUSS System User           imal Value         MyUSS System User |   | Who In Ops<br>Approved   | MyUSS Case Comments (0)   |
| w Value: Order Support Queue  | ✓ Additional Information  |  | Files (0)                 |
| View All Child Cases (0)  | Instructions for<br>Order Support<br>Change Service Frequency -<br>Effective Date: 07/15/2024<br>Units: All Units on Site<br>Additional Instructions: Please give | me a call to discuss pricing   | C Upload Files            |
| Cases for Parent Account (3+)   | Details -<br>Location: 14216 NW Lakeshore Ct,<br>Portland - OR (by the gazebo)<br>(1) Standard Restroom at 1 Service<br>Unit Numbers: 98765432                    | Portland, OR, USA - 14216 NW Lakeshore Ct, Po -<br>2 Days per Week > 1 Service 3 Days per Week | Work Orders (0)           |
| tact Na Adam Studdard Customer<br>ject: MyUSS Test CI 1/P4-PT/Sanitation/A<br>rity: P4-PT   | Reopen Reason   |  | Notes (0)                 |
| Adam Studdard Customer<br>iject: MyUSS Test Cl 1/P4-PT/Sanitation/A   | Pricing Information  Price Increase or Decrease   | Approved by<br>DOS   | Articles (0)              |
| 647312 The studdard Customer  | ······································  |  | Knowledge                 |

All the information entered by the customer appears in Salesforce.



| SS Test Cl 1   ACT-01640863  | 🥐 😝 Adam -   |
|--|--|
| Case Details Case List > 04647322  | nt - Development   |
| Opening date Order ID Case number Statu<br>07/11/2024 O-520265 04647322 New  | Order Information       Adam Studdard Customer     myusstest+ci1@gmail.com       5415549030     14216 NW Lakeshore Ct, Portland, OR, USA, Portland |
| Case Description   | Comments + Add4_comment  |
| Effective Date- 07/16/2024<br>Placement Notes-Asset Serial Numbers - 98765432   Notes - test<br>Product Details<br>Asset- Standard Restroom<br>Quantity- 1<br>Changed Frequency- 1 Service 3 Days per Week | No comments added to the case.   |

# The customer can also add a comment.



| 00  | Case Details Case List > 04   | 4647322  |               |  | 8 Case Owner: Adam Studdard Customer  |  |
|---|---|--|---------------|--|---|--|
| Quotes  | Opening date<br>07/11/2024  | Order ID Case number<br>O-520265 04647322                                      | Status<br>New | Order Information<br>Adam Studdard Customer m<br>5415549030 14 | yusstest+ci1@gmail.com<br>4216 NW Lakeshore Ct, Portland, OR, USA, Portland   |  |
| <ul> <li>Billing</li> <li>Easy Pay</li> <li>Cases</li> <li>U</li> </ul> | Case Description<br>Case Request- Change Service<br>Effective Date- 07/16/2024  | Frequence     Add Comment     Type of comment     Add comment type*     Status |               |  | + Add comment   |  |
| - Users   | Placement Notes- Asset Serial Product Details   | What's the status of my request?   |               |  |   |  |
| G Users   | Placement Notes- Asset Serial<br>Product Details<br>Asset- Standard Restroom<br>Quantity- 1<br>Changed Frequency- 1 Service | What's the status of my request?   | ×             | 32/4000<br>Cancel Add  | Add Attachment for Case Comment<br>Add your documents here, and you can upload up to 5 files max<br>Note: Once you select file to upload, it will be uploaded automatically<br>Drag your file(s) here or browse<br>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 Search            |                  |               |                   |   | the questions or                                   |
|-------------------|-----------|--|---------------------|------------------|---------------|-------------------|---|--|
| USS CPQ App       | Accounts  | ✓ I MyUSS Te                                     | st CI 1   A 🗸 🗎 046 | 47322   Case 🗸 🗸 | × 🛍 0464732   | 3   Case $\vee$ X |   | comments from the                                  |
| ● 04647322   Case | ew My ~ × |  |                     | New MyUSS        | Case Com      | TL                | * = Required Information                    | customer.  |
|                   |           | Information                                      |                     |                  |               |                   |   |  |
|                   |           | MyUSS Case<br>Comment Name<br>Comment            | II                  |                  | Owner         | 🖰 Adam Studdard   |   | Adam   |
|                   |           | Case   | 04647322            | ×                |               |                   | Jevelopment                                 | 8 Case Owner: Adam Studdard Custo                  |
|                   |           | Comment Type                                     | None                | •                |               |                   | Order Information<br>Adam Studdard Customer | myusstest+ci1@gmail.com                            |
|                   |           | Commented By                                     | Search Contacts     | Q                |               |                   | 5415549030                                  | 14216 NW Lakeshore Ct, Portland, OR, USA, Portland |
|                   |           | Commented By<br>MyUSS User<br>Case Authorized By | Search Contacts     | Q                |               |                   | Comments                                    | + Add comment                                      |
|                   |           | Case Owner                                       | Search People       | Q                |               |                   | Adam Studdard                               | 07/11/2024 • 1:22 PM                               |
|                   |           |  |                     |                  |               |                   | I'm working o <mark>y</mark> it!            |  |
|                   |           |  |                     | Cancel Sav       | re & New Save |                   | Adam Studdard Customer 5                    | 07/11/2024 • 1:22 PM                               |



# Quotes

| ] Home                      | Don't see what you need<br>Ask about Trailers, Fence, Rol | here?<br>Off Dumpsters and more! |     |   |                                  | Call us 1-88 | 8-320-1861 |
|-----------------------------|---|----------------------------------|-----|---|----------------------------------|--------------|------------|
| Quotes<br>Orders<br>Billing | Quotes<br>3<br>In-Process Quotes                          | Orders<br>155<br>Active Orders   | Ż.  | New Order   | SHID<br>SHID                     |              |            |
| Easy Pay                    | Easy Pay  |                                  |     | Billing   |                                  |              |            |
| Users                       | Manage automatic payment settir<br>multiple orders.       | igs on single or                 |     | View current and past in payments, and open billi | voices, make or<br>ng inquiries. | ne-time      |            |
|                             | What We Offer   | Find a Branch Near               | You | Customer Supp                                     | ort                              | 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.

| .0         |   |       |            |                  |
|------------|---|-------|------------|------------------|
|            | Create new site   | Map S | Satellite  | - 0              |
| Duotes     | Enter address / area / landmark   | 26    | th St SW   | 26th St SW       |
| D Orders   | Choose from Existing Sites  |       |            |                  |
| \$ Billing | 180 POMFRET RD, EASTFORD, CT, 06242   |       |            | Stacie Made That |
| 💲 Easy Pay | ● 16720 GOLDEN RIDGE ROAD, APPLEGATE, CA, 95703                                 |       |            | 27th St SW       |
|            | ● 4000 HANNEGAN RD, BELLINGHAM, WA, 98226                                       | 2     | 7th St SW  | 2/11/01/01       |
| O) Users   |   |       |            |                  |
|            | <ul> <li>11955 TX 195, KILLEEN, TX, 76542</li> </ul>                            |       |            |                  |
|            | Hampingungung an European ( )   |       |            | 28th St SW       |
|            | Note: Once saved, you cannot change the Site address for the Quote.     Confirm |       |            |                  |
|            |   |       |            | -                |
|            |   |       | 29th St SW | 29th St S        |
|            |   |       |            |                  |



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

| Home                               | 1<br>Units & Services   | 2<br>View & Accept Quote                       | 3<br>Site Details   | Billin | 4 ng & Payment  | 5<br>Order Confirmation  |
|------------------------------------|---|--|---------------------|--------|---|--|
| Duotes                             | Quote: Q-926942   |  |                     |        | Quote Summary   | ,  |
| ی Orders<br>۱۱۱۱ing<br>دی Easy Pay | Custom Quote<br>End Date Type:  Estimated Start Date* 6/20/2024 | Fixed  End Date                                | 224                 | ii.    | Start Date 06/20/20<br>Product Name<br>Asset<br>Quantity<br>Frequency | 224 End Date 08/10/2024<br>Restroom Bundle<br>Standard Restroom<br>1<br>1 Service 1 Day per Week |
|                                    | Restroom Bund<br>Select Asset*<br>Standard Restro               | le<br>2  V Select Frequency* I Service 1 Day V | Additional Services | •      |   |  |
|                                    |   |  |                     |        |   | Save Dialt<br>Get Quote  |





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





|                             | Opportunities           |  | Q, Search  | E. Tom Claville Tast I &  | 0 407 01767                 | 712 64            | damis Constructio | *•                             | ? \$ 🖡 🐻                         |  |
|-----------------------------|-------------------------|--|--|---|-----------------------------|-------------------|-------------------|--------------------------------|----------------------------------|--|
| Adam's Constru              | ₩ Quotes × ×            | · • • • •                                  | En ETAL CORP   Accou   | V X Es Ion Slowik Test   A.                                     | C ACI-01/62                 | /13-38 V X III/   | dam's constructio | × ^                            |                                  |  |
| Accounts > Adam's<br>Quotes | Construction 2024-07-11 |  |  |   |                             |                   |                   |                                | Change Owner                     |  |
| Quote Num.                  | ✓ Status ↑<br>Pesented  | Order Classifica      Recurring without En | First Invoi ∨         Recu           \$359.00         \$274. | rring v     Ship To Street     v       62     118 Flanders Road | Ship To City<br>Westborough | ✓ Ship To St ✓ MA | Ship To Zi V      | Created By<br>MyUSS System Use | <ul> <li>✓</li> <li>✓</li> </ul> |  |
|                             |                         |  |  |   |                             |                   |                   |                                |                                  |  |

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    |   |                     |   |                          |           |
|------------------------|---------------------|-----------------------------------|-----------------------|-----------------------|---|---------------------|---|--------------------------|-----------|
| < Back Quote: Q-927037 |                     |                                   | _                     |                       |   |                     |   |                          |           |
| Site Details           |                     |                                   |                       | ^                     |   |                     |   |                          |           |
| Site Contact           |                     | Choose from saved contacts $\sim$ | Map Satellite         |                       |   |                     |   |                          |           |
| First Name*            | Last Name*          |                                   |                       |                       |   |                     |   |                          |           |
| Email ID*              | Phone Number        | r                                 |                       |                       |   |                     |   |                          |           |
| Site Address           |                     |                                   | Bellingham Truck Wash | United                | ZTERS WASTE VALUE   ACT-00068005                |                     |   |                          |           |
| 4000 HANNEGAN RD       |                     |                                   |                       | V SITE SERVICES       |   |                     | •                                       | •                        |           |
| City<br>BELLINGHAM     |                     |                                   | •                     | ( <sub>Л</sub> ) Home | Units & Services                                | View & Accept Quote | Site Details                            | Billing & Payment        |           |
| State<br>WA            |                     |                                   |                       | Quotes                | < Back Quote: Q-926942                          |                     |   | Payment Method           |           |
| Zipcode                |                     |                                   |                       | Drders 🖓              | Purchase Order Details                          |                     |   | Autopay O Manual Payment |           |
| 98226                  |                     |                                   |                       | \$ Billing            | PO Number                                       |                     |   |                          |           |
| 48.78439               | -122.44072          |                                   |                       | 🕃 Easy Pay            | Billing Contact                                 |                     |   | + Add New Paymer         | nt Method |
| Site Information       |                     | ~                                 |                       | S Users               | Valued  | Customer            |   |                          |           |
|                        |                     |                                   | Google                |                       | Email ID*<br>leslie.conner@devunitedsiteservice | Phone Number*       |   |                          |           |
|                        |                     |                                   |                       |                       | Secondary Bill Contact                          |                     | Choose from saved contacts $\checkmark$ |                          |           |
|                        |                     |                                   |                       |                       | First Name                                      | Last Name           |   |                          |           |
|                        |                     |                                   |                       |                       |   |                     |   |                          |           |