















Order Processing

Last Modified on 12/02/2024 2:19 pm PST

Pathway: [Accounts](#) > [Order Processing](#)

The Order Processing screen offers a platform to review new customers (and their services), service changes for existing customers and online on-call orders received from the portal. It allows for adjustments to be made to start dates and rates before the services begin, ensuring all necessary modifications are addressed in advance.

New Customer/Site		Service Changes		Online On-Call Orders	
DIVISION		CORPUS		Search   	
SUBMITTED DATE	SITE	DIVISION	SALES REP		
	05/10/21 01:03pm W & S Ag	CORPUS	Matt lori gmail Eckstrom		
	06/14/21 10:44am CAT 5	CORPUS	Matt lori gmail Eckstrom		
	10/14/21 01:13pm Taylor Renovations	CORPUS	Rob Tellez		
	10/21/21 10:41am Randy Villarreal	CORPUS	Rob Tellez		
	03/02/22 03:25pm Best Western North Padre Island	CORPUS	Matt lori gmail Eckstrom		
	08/17/22 09:16am Sunbelt Vacuum and Disposal	CORPUS	Matt lori gmail Eckstrom		
	08/17/22 09:16am Jim Knudtson	CORPUS	Matt lori gmail Eckstrom		
	08/17/22 09:16am Mike Cantu	CORPUS	Matt lori gmail Eckstrom		
	09/19/22 01:19pm Overland America	CORPUS	Matt lori gmail Eckstrom		
	11/01/22 10:43am Islamic Society of South Texas	CORPUS	Matt lori gmail Eckstrom		
	06/09/23 01:06pm Example Site 1	CORPUS	House Account		

Permissions

The following permissions are required to view and use the Order Processing screen:

Permission ID	Permission Name
62	Order Processing
256	Edit Order Processing Start Date
330	Edit Order Processing Rates

Tab: New Customer/Site

In order for a new account or site to be categorized under the "New Customer/Site" tab, two conditions must be met: first, the order form or contract must be approved and sold, and second, the account status must be designated as "Prospect." From this screen, users can review the new customers and sites and access their account by clicking on the site name.



Select the expand icon associated with each site to review its information. If a contract exists, it will display as a hyperlink selection option under 'Contract Start Date'.

New Customer/Site Service Changes Online On-Call Orders

DIVISION: CORPUS Search

SUBMITTED DATE	SITE	DIVISION	SALES REP
+ 05/10/21 01:03pm	Coming Home	CORPUS	Tom Pearse
+ 06/14/21 10:44am	CAT 5	CORPUS	Tom Pearse
+ 10/14/21 01:13pm	Taylor Renovations	CORPUS	Rob Johnson
+ 10/21/21 10:41am	Randy Erickson	CORPUS	Rob Johnson
+ 03/02/22 03:25pm	Best Western North Padre Island	CORPUS	Tom Pearse
+ 08/17/22 09:16am	Sunbelt Vacuum and Disposal	CORPUS	Tom Pearse
+ 08/17/22 09:16am	Jim Anderson	CORPUS	Tom Pearse
+ 08/17/22 09:16am	Mike Roberts	CORPUS	Tom Pearse
+ 09/19/22 01:19pm	The Staple	CORPUS	Tom Pearse
+ 11/01/22 10:43am	Cascade Nutrition	CORPUS	Tom Pearse
- 06/09/23 01:06pm	Example Site 1	CORPUS	House Account

GEocode Class: COMMERCIAL
VALIDATE ADDRESS Service Address:
 2222 Navu Cir,
 Corpus Christi, TX 78411
 Nueces County
 Billing Address:
 1234 Navu Way,
 Corpus Christi, TX 78411
 Contract Start Date:
 2023-06-07
 [View Signed Agreement](#)

In the image above, a new site was added that includes a signed service agreement. Selecting the site name will open the customer service screen for the site. Selecting the agreement will open the service agreement.

Tab: Service Changes

The **Service Changes** tab lists new and existing sites with pending services and service changes that are either awaiting review or placed on hold and not yet posted. For sites in divisions where **Auto Process Service Changes** is enabled, service changes are automatically posted and will not appear here for review. To load the screen: Select an option from each filter at the top of the screen, then click **Load**.

New Customer/Site Service Changes Online On-Call Orders

DIVISION: CORPUS STATUS: All Open SOURCE: Service Add/Change LOB: Commercial, Docun Show On Hold LOAD

SUBMITTED DATE	ACCOUNT	EFFECTIVE DATE	RATE CHANGE	REASON
- 06/09/23 1:06pm	Example Site 1 House Account 2222 Navu Cir, Corpus Christi PO# 123456	06/19/23	\$ 72.00	ADD-New Bus-From Competitor Service Contract CORPUS
New: 1 10 Yard Open Top Service On Call \$ 72.00 per month N/A				
Note: Delivery Date: 06/07/2023 Work Order: 2023-06-19 This is a note from the order processing screen.				

In the image above, a new site was added and the details of the service are displayed.

Setup Requirements

In Division Setup, the **Auto Process Service Changes** field determines whether service changes for the division are automatically processed or require manual review before being applied to the site. If a change is submitted for an existing service and auto processing is disabled, the service will appear with a blue banner on the site. The following setup options are available:

- **None:** all service changes must be reviewed and manually posted in Order Processing.
- **All:** all service changes are automatically processed and posted to the site.
- **Active Service:** all service changes for active services are automatically processed and posted to the site.

ADD DIVISION

Details | Credit Card / ACH Processing | Inter-company | **Addresses**

NAME: [Text Field] **AUTO PROCESS SERVICE CHANGES**: None | None | All | Active Service

MAIN PHONE: (999) 999-9999 **ENABLE INTEGRATION**

TOLL FREE PHONE: (999) 999-9999 **LOCK BOX IMPORT FORMAT**

FAX: (999) 999-9999 **LOCK BOX NON-MATCHING**

HIGHLIGHTS | PENI

Account is significantly past due

ACTIVE SERVICES Standard | TOTAL RECURRING \$ 536.61

QTY	SERVICE CODE
1	8 Yard Trash Service

Blue banner indicates auto processing is not enabled for service changes

Editable Fields

The following fields can be edited if the user has the necessary permissions. Refer to the Permissions section in this article to learn more.



After a service has been posted, any modifications made to the fields listed in the table below will no longer be reflected in the service or the work order.

Effective Date	Click on the date to open the field and select a new date. <i>*If the service effective date should match the work order delivery date, it is advisable to also update the Work Order Date accordingly.</i>
Rate Change	Select the underlined rate to update.
Work Order	Select the underlined date for the work order to update the Scheduled Date for the work order. The option to add a note is also provided and will display on the work order under "Order Notes".

Hold or Post a Service Change

The 'Put Hold' and 'Post' selection options are available by right-clicking within the service.

New Customer/Site Service Changes Online On-Call Orders

DIVISION: CORPUS | STATUS: All Open | SOURCE: Service Add/Change | LOB: Commercial, Docun | Show On Hold | **LOAD**

SUBMITTED DATE	ACCOUNT	EFFECTIVE DATE
06/09/23 1:06pm	Example Site 1 House Account 2222 Navu Cir, Corpus Christi PO# 123456	06/19/23
New: 1	10 Yard Open Top Service	On Call \$ 72.00 per month N/A

Note: Delivery Date: 06/07/2023
Work Order: 2023-06-19 This is a note from the order processing screen.

Right click context menu: Put Hold, Post

Put Hold

Select "Put Hold" and the service will be placed in a holding status. To review services where a hold has been applied, check the box labeled "Show On Hold" at the top of the screen and then click 'Load.'

Post

Choose the option "Post" to create the service for the account and generate a work order. Once posted, any changes made to the date fields and rate on the screen will not affect the service or the work order.

Tab: Online On-Call Orders

The "Online On-Call Orders" tab displays sites that have requested an on-call order via the Account Portal. Sites can only submit on-call order requests through the portal if the "Enable On Call Orders" field is set to "Yes" in the Account Class settings. To load the screen: Select an option from the Division filter at the top of the screen, then click Load.

New Customer/Site Service Changes Online On-Call Orders

DIVISION: CORPUS | **LOAD**

SITE ID	SITE NAME	ADDRESS	STATUS	WO#	CONTACT	SCHEDULED DATE
32010001	YOUNG LYNDA	1234 Navusoft ROAD GEORGE WEST, TX	Inactive	2710270		Fri 11/26/21
33227001	CARLOS LOPEZ	123 County Road222 ORANGE GROVE, TX	Active	2709059		Fri 11/26/21
32953023	CITY OF CORPUS CHRISTI	3456 Cascade STREET CORPUS CHRISTI, TX	Active	4292258		Tue 7/5/22

Required Setup

For portal users to submit on-call orders, the "Enable On Call Orders" field must be set to "Yes". Once a portal user submits an on-call order, it will be displayed on the Online On-Call Orders screen.

ADD ACCOUNT CLASS



Details

Customer Portal

Payment Processing

Status Management

Finance Charges and Other Fees

ENABLE PORTAL ACCESS	Yes
CUSTOMER PORTAL HOME PAGE	
ENABLE ADD SITES	No
NEW LOCATION TEMPLATE	
NEW LOCATION BUNDLE	
ENABLE ON CALL ORDERS	Yes
ENABLE REPORT ACCESS	
ENABLE VIEWING INACTIVE SITE	No
DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL	No
DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL	No