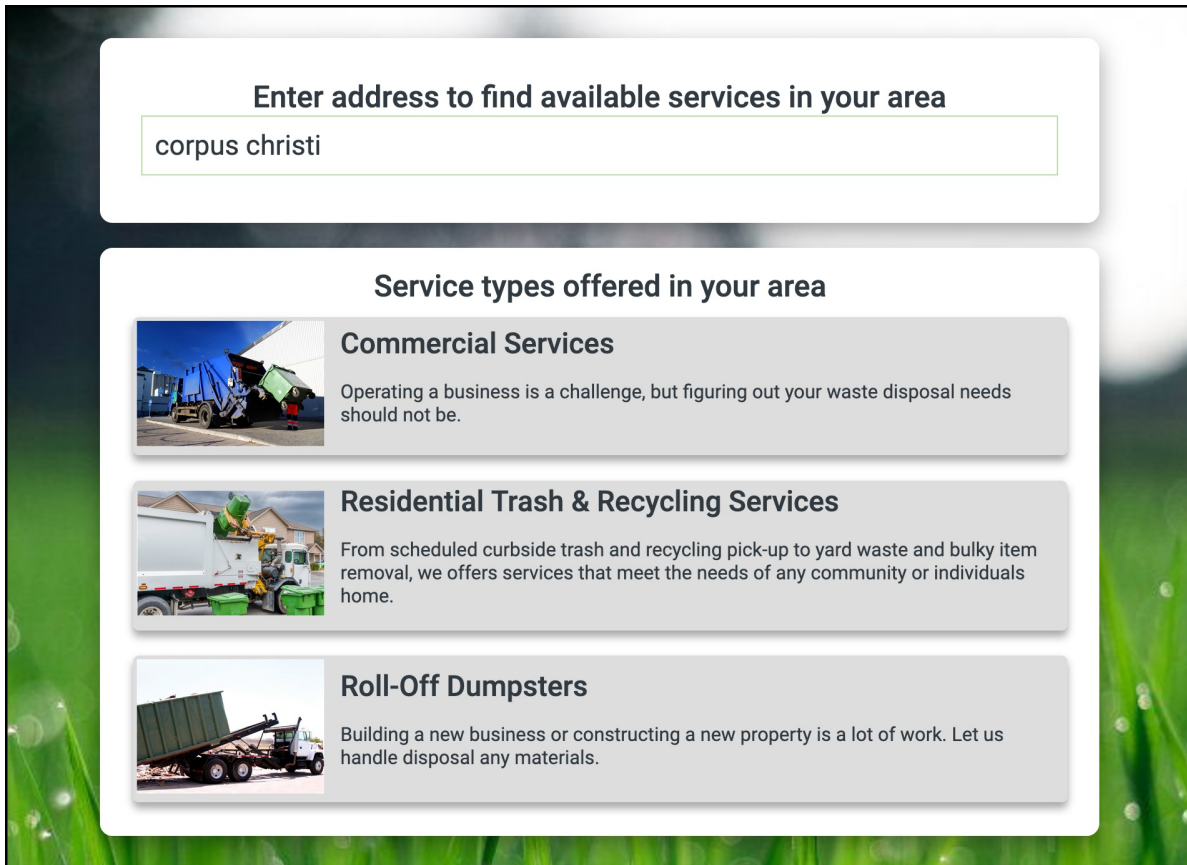


Service Bundle/Online Order Setup

Last Modified on 02/20/2025 10:56 am PST

Service bundles are predefined groups of services tailored to specific geographic regions, ensuring customers see only the options available to their location. These bundles streamline the selection process and enhance user experience. Service bundles are available in three locations: online ordering, quick order and the active services menu, providing flexibility and convenience across different access points.



The screenshot displays a user interface for finding services in a specific area. At the top, a heading reads "Enter address to find available services in your area". Below this, a text input field contains the address "corpus christi". Underneath the input field, a section titled "Service types offered in your area" lists three service categories, each with a representative image and a brief description:

- Commercial Services**: Operating a business is a challenge, but figuring out your waste disposal needs should not be. (Image: A blue commercial truck with a green recycling bin.)
- Residential Trash & Recycling Services**: From scheduled curbside trash and recycling pick-up to yard waste and bulky item removal, we offers services that meet the needs of any community or individuals home. (Image: A white residential trash truck with a green recycling bin.)
- Roll-Off Dumpsters**: Building a new business or constructing a new property is a lot of work. Let us handle disposal any materials. (Image: A green roll-off dumpster on a truck.)

Required Setup

Service Region Setup

Pathway: [Setup](#) > [Services](#) > [Service Region](#)

Service bundles are linked to specific service regions, which define the geographic boundaries where services are available. Establishment of these regions ensures that service bundles are displayed for availability only when they align with the address provided.

Create a Service Region

In Service Region Setup, once a service region is added and saved, it appears on the Service Region Setup screen with a mapping icon. The icon is red if the service region has not been mapped and green if it has. Service regions configured here are used for selection and assignment in the Service Bundle setup screens. Review the [Service Region Setup](#) documentation for additional setup information.

Note: For online and quick orders, once a service contract is submitted, the default sales representative for the region is automatically assigned. The contract will then appear under their Quotes and Contracts list

on the Recent Activity home screen.

ID ↑	NAME	DIVISION	REQUIRE SURCHARGE GROUP	DEFAULT SURCHARGE GROUP	GL SEGMENT	DEFAULT BUNDLE ORDER SALES REP	PARENT SERVICE REGION
1001	WOODCREEK	DAYTON	Yes	Fuel Surcharge - Residential	SVCD1001	House Account - House Account (...)	
1002	PARKSIDE AT KW GLEN	DAYTON	No	Fuel Surcharge - Residential	SVCD1002	House Account - House Account (...)	
1003	ATASCA WOODS	DAYTON	No	Fuel Surcharge - Residential	SVCD1003	House Account - House Account (...)	
1004	ATASCOCITA NORTH	DAYTON	No	Fuel Surcharge - Residential	SVCD1004	House Account - House Account (...)	
1005	KINGS LAKE ESTATES	DAYTON	No	Fuel Surcharge - Residential	SVCD1005	House Account - House Account (...)	
1006	HUMBLE - NEW CANEY	DAYTON	No		12345678901234567...	House Account - House Account (...)	
1007	ATASCA OAKS	DAYTON	No		SVCD1007	House Account - House Account (...)	
1008	OAKS OF ATASCOCITA	DAYTON	No		SVCD1008	House Account - House Account (...)	
1009	STILLWATER HOA	DAYTON	No	Fuel Surcharge - Residential	SVCD1009	House Account - House Account (...)	
1010	KINGWOOD GREENS	DAYTON	No	Fuel Surcharge - Residential	SVCD1010	House Account - House Account (...)	
1011	LIBERTY COUNTRY C...	DAYTON	No		SVCD1011	House Account - House Account (...)	
1012	THE COMMONS	DAYTON	No	Fuel Surcharge - Residential	SVCD1012	House Account - House Account (...)	
1013	PINEY WOODS	DAYTON	No		SVCD1013	House Account - House Account (...)	
1014	ENCLAVE AT OLDE O...	DAYTON	No		SVCD1014	House Account - House Account (...)	
15	15	DAYTON	No			House Account - House Account (...)	
BUNN	Bunn NC	QAWASTE	Yes				
CORPUS	CORPUS OPEN MAR...	CORPUS	No	Fuel Surcharge - Commercial	SVCDCORPUS	House Account - House Account (...)	
DAYTON	DAYTON OPEN MAR...	DAYTON	No	Fuel Surcharge - Residential	SVCDDAYTON	House Account - House Account (...)	

Map Area

Service region mapping is critical to service bundle setup as it determines which bundles are available for a given address. If an entered address falls within the defined perimeter of a service region, only the service bundles associated with that region will be displayed as available. This ensures accurate service availability and prevents the display of options outside the specified geographic boundaries.

To create:

In the Service Region Setup screen, click the map icon to open the map. Then, select the Perimeter icon at the top of the map screen to draw a perimeter around the service area. Click Save when finished. **Note:** This feature allows multiple perimeter groupings within a region.

The screenshot shows the 'SERVICE REGION SETUP' interface. On the left is a table with columns: ID, NAME, DIVISION, REQUIRE SURCHARGE GROUP, DEFAULT SURCHARGE GROUP, GL SEGMENT, DEFAULT BUNDLE ORDER SALES REP, and PARENT SERVICE REGION. The row for 'HUMBLE - NEW CANEY' (ID 1006) is highlighted in red. A red arrow points from this row to a map window titled 'MAP AREA - SERVICE REGION: THE COMMONS'. The map shows a geographic area with several green location pins. A black polygonal perimeter is drawn around a cluster of pins in the 'THE COMMONS' area. The map interface includes controls for zooming, hiding sites, and removing the selected shape. At the bottom of the map window are 'IMPORT' and 'SAVE' buttons.

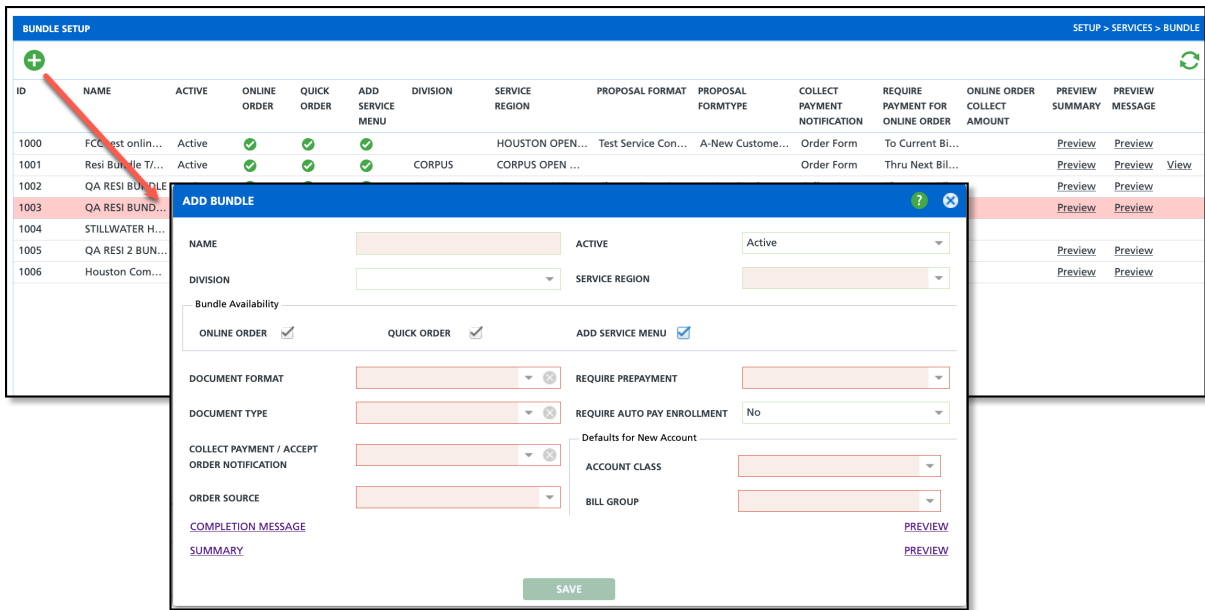
Service Bundle Setup

Pathway: Setup > Services > Bundle

Before proceeding, verify that the necessary Service Region setup covered in the section above is complete. Bundles are what will display for selection in Online Orders, Quick Orders and the Service Menu based on regional location.

Add Bundle

Create a bundle for each Line of Business and Service Region a service bundle is available. Service bundles are specific to the selected service region and can only have one service region linked to it.



Field Descriptions

Field and Application for Use	Description
The following fields display when first adding a bundle.	
Name	Enter the name of the bundle that will be available to the service region.
Active	Controls the availability of the service region in other screens. If inactive, the background color for the row will display in red.

<p>Bundle Availability</p>	<p>Displays check box options for where the bundle is specifically available for user.</p> <ul style="list-style-type: none"> • Online Order <ul style="list-style-type: none"> ◦ Select this box to make the service bundle available online, allowing customers to choose it based on their location. • Quick Order <ul style="list-style-type: none"> ◦ Select this box to make the service bundle accessible in the "Quick Add Account & Bundle" section of the Accounts module. • Add Service <ul style="list-style-type: none"> ◦ Select this box to make the service bundle available for selection when adding a service on the Customer Service screen.
<p>Document Format <i>Online Order, Quick Order</i></p>	<p>Links a service contract to the service bundle. When a service is ordered, a contract is created. Selecting the document format here will auto-populate the Document Format field in the contract.</p>
<p>Document Type <i>Online Order, Quick Order</i></p>	<p>Identifies the specific document type used for the service. Settings in Document Type Setup control the approval and pre-authorization process for contracts and influence the workflow for contracts generated from online or quick orders in the sales process.</p> <p>Note: If the Document Type is set to require pre-authorization, the contract will display in the Sales Management screen under the Pre-Authorization Pending column.</p>
<p>Order Source <i>Online Order, Quick Order</i></p>	<p>Streamlines source tracking for new accounts created through online or quick orders.</p>
<p>Quick Order - Max Backdated <i>Quick Order</i></p>	<p>Setting that places a limit on how far back a quick order's start date can be backdated.</p>
<p>Forced Future Start Date <i>Online Order, Quick Order</i></p>	<p>This setting ensures that all new sign-ups within a designated area, such as those under a municipal contract, are assigned a specific start date. This prevents immediate service activation and aligns all customers with the predetermined schedule. The start date here overrides any customer selected start dates.</p>
<p>Content Image <i>Online Order, Quick Order</i></p>	<p>Option to upload an image that will display for customers. Images may help customers better identify the service bundle from another if the service region includes more than one bundle option.</p>
<p>Completion Message <i>Online Order</i></p>	<p>Message that displays for the customer after they have placed an online or quick order.</p>
<p>Summary <i>Online Order</i></p>	<p>Add a summary describing the service to enhance the customer experience by helping them select the service bundle that best fits their needs.</p> <p>Important:</p> <ul style="list-style-type: none"> • Copy and paste this code at the bottom of the summary to only display the summary: <ul style="list-style-type: none"> ◦ <code>{?ServiceSummary}</code> • Copy and paste this code at the bottom of the summary to display the summary and any service charges it includes: <ul style="list-style-type: none"> ◦ <code>{?ServiceSummary}{?ServiceChargeSummary}</code>

Require Prepayment <i>Online Order, Quick Order</i>	Optional setting that will require customers to pay for their services before servicing can start.
Require Auto Pay Enrollment <i>Online Order</i>	Optional setting that forces customers to enroll in auto pay. NOTE: Verify your system setup includes auto pay before enabling this setting. Auto Pay setup can be reviewed here: Auto Pay Setup
Account Class <i>Online Order, Quick Order</i>	Default setting that will auto-assign an account class to an account that is created from an online order, or quick order.
Bill Group <i>Online Order, Quick Order</i>	Default setting that will auto-assign a bill group to an account that is created from an online order, or quick order.
Terms <i>Online Order, Quick Order</i>	Default setting that will auto-assign a term to an account that is created from an online order, or quick order.

Add Bundle Service

After creating a bundle, select its row in the upper grid to add included service offerings and applicable charges from the lower grid.

The screenshot displays the 'BUNDLE SETUP' interface. At the top, there is a table with columns: ID, NAME, ACTIVE, ONLINE ORDER, QUICK ORDER, ADD SERVICE MENU, DIVISION, SERVICE REGION, PROPOSAL FORMAT, PROPOSAL FORMTYPE, COLLECT PAYMENT NOTIFICATION TEMPLATE, and REQUIRE PAYMENT FOR ONLINE ORDER. Below this table, an 'ADD BUNDLE SERVICE' modal window is open, showing fields for QTY, EQUIPMENT, SERVICE CODE, FREQUENCY, PER UNIT, and SVC FEES. A red arrow points from the 'ADD BUNDLE SERVICE' icon in the bundle table to the modal window.

1. Select the bundle from the top of the screen to add the services it includes in the lower portion of the screen.
2. Click the green "add" icon to open the **Add Bundle Service**.
3. Enter the details of the service that is being added to the bundle.
 - Add applicable charge codes to the service by selecting the green 'Add' icon that is display above the Service Charges section.
4. **Online Order Important Note: A Summary** is required for the service bundle to display.
5. Click **Save** when all details have been filled out and the service will be added to the bundle.
6. Continue this process until all services have been added to the bundle.

Considerations

Although these settings are not critical to service bundle functionality, they may enhance the customer

experience.

Display Bundles in Specific Order

The system arranges service bundles based on their ID, displaying the lowest ID first. To control the display order, such as sorting by bin size in ascending or descending order, manually enter the service bundles in the desired sequence.

The screenshot shows the 'BUNDLE SETUP' interface. On the left is a table with columns: ID, NAME, ACTIVE, ONLINE ORDER, QUICK ORDER, ADD SERVICE MENU, DIVISION, and SERVICE REGION. Rows include 1000 (10 yard Dumpster), 1001 (20 yard Dumpster), 1002 (30 yard Dumpster), 1003 (30 yard Dumpster 5), 1004 (STILLWATER HOA), 1005 (Houston Resident...), 1006 (Houston Roll Off...), and 1007 (Houston Commer...). A red box highlights the first three rows, and a red arrow points from this box to a detailed view on the right. This view shows three service cards: '10 yard Dumpster', '20 yard Dumpster', and '30 yard Dumpster'. Each card includes an icon of the dumpster, a 'SELECT THIS SERVICE' button, and a table for 'Recurring Services and fees' with columns for Quantity, Service, Frequency, and Service Days.

ID	NAME	ACTIVE	ONLINE ORDER	QUICK ORDER	ADD SERVICE MENU	DIVISION	SERVICE REGION
1000	10 yard Dumpster	Active	✓	✓	✓		HOUSTON OPEN M...
1001	20 yard Dumpster	Active	✓	✓	✓	CORPUS	CORPUS OPEN MAR...
1002	30 yard Dumpster	Active	✓	✓	✓	QAWASTE	QA Waste OPEN M...
1003	30 yard Dumpster 5						
1004	STILLWATER HOA						
1005	Houston Resident...						
1006	Houston Roll Off...						
1007	Houston Commer...						

10 yard Dumpster [SELECT THIS SERVICE](#)

Quantity	Service	Frequency	Service Days
1	10 Yard Trash Service	on call	TBD

20 yard Dumpster [SELECT THIS SERVICE](#)

Quantity	Service	Frequency	Service Days
1	20 Yard Trash Service	on call	TBD

30 yard Dumpster [SELECT THIS SERVICE](#)

Quantity	Service	Frequency	Service Days
1	30 Yard Trash Service	on call	TBD

Optional Setup

While not required, the following setup enhances the online experience by grouping services and providing additional details for each offering.

System Options Setup

Pathway: Setup > System > System Options > Online Order [tab]

In the Online Order tab of the System Options Setup screen, the 'Group Bundles By LOB' setting organizes services by line of business, improving navigation for customers during the online order process. **This setting is necessary for configurations set at the line of business level to operate correctly.**

SYSTEM OPTIONS SETUP

System Sales Integration Account Operations Customer Portal Broker **Online Order**

HTML HEADER [PREVIEW](#)

HTML FOOTER [PREVIEW](#)

GROUP BUNDLES BY LOB

DEFAULT SERVICE REGION HOUSTON OPEN MARKET


DEFAULT ACCOUNT CLASS RO


DEFAULT SOURCE SEC


Enter address to find available services in your area

300 South 4th Street, Houston, TX

Service types offered in your area

Commercial Services

 Operating a business is a challenge, but figuring out your waste disposal needs should not be.

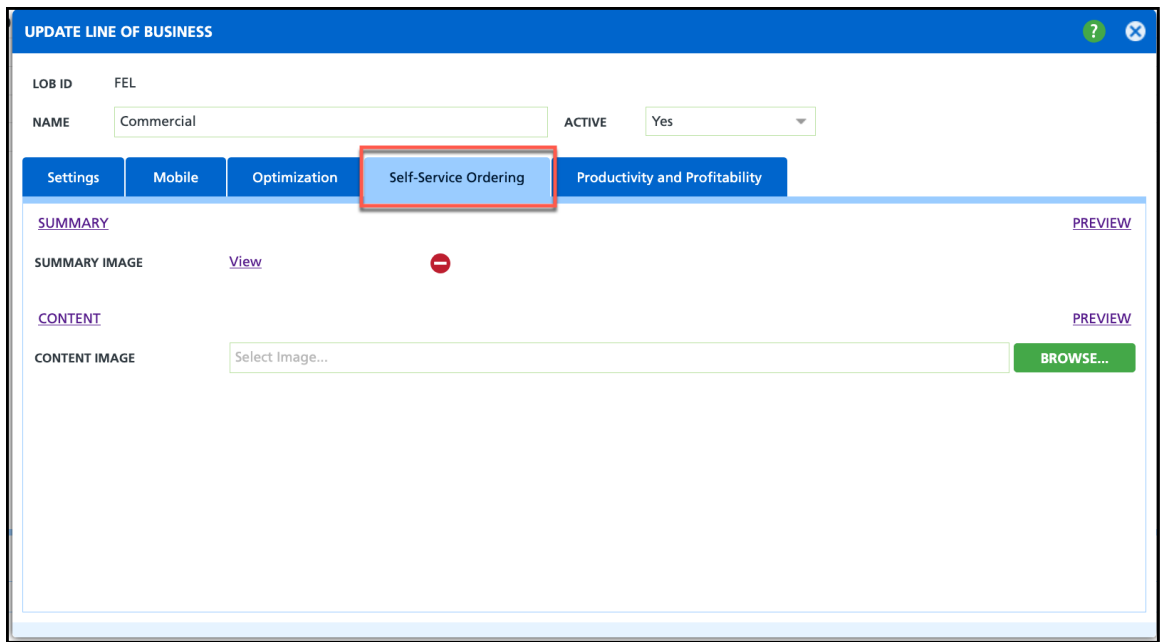
Residential Trash & Recycling Services

 From scheduled curbside trash and recycling pick-up to yard waste and bulky item removal, we offers services that meet the needs of any community or individuals home.

Roll-Off Dumpsters

 Building a new business or constructing a new property is a lot of work. Let us handle disposal any materials.

Line of Business Setup

Pathway: Setup > Services > Line of Business

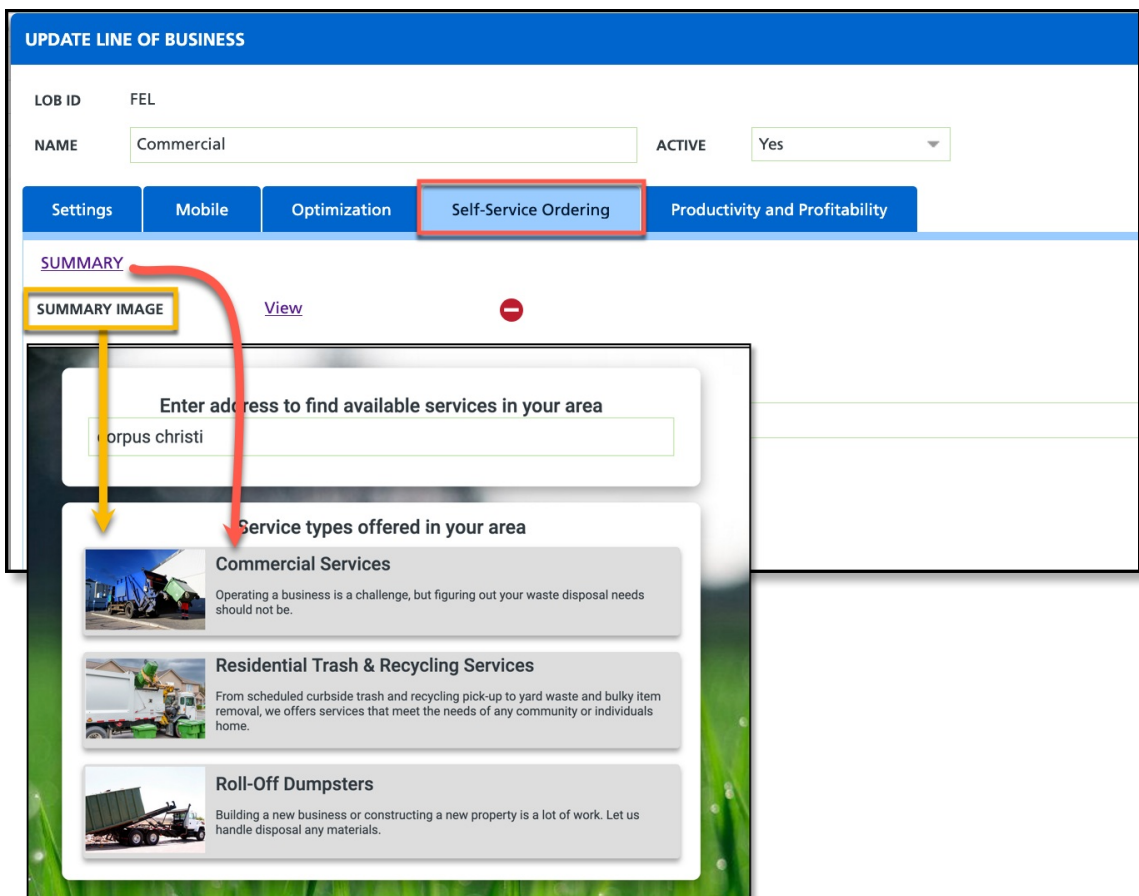
The line of business setup determines how the service appears on the first screen after a customer enters their address, including its description and associated image. While not required for the online order feature to function, this setup helps communicate key service details to the customer.



Self-Service Ordering (tab)

Summary and Summary Image

The Summary and Summary Image options in the Self-Service Ordering tab control what is displayed on the first screen the customer sees after they have entered their address in the available services search.



Content

The Content option in the Self-Service Ordering tab allows for the configuration of more detailed information about the services that are offered. Information entered here will display above the service bundle after the customer has selected a line of business from the first screen.

The screenshot shows the 'UPDATE LINE OF BUSINESS' interface. The 'Self-Service Ordering' tab is selected, and a 'CONTENT' configuration window is open. The window displays the title 'Residential Trash and Recycling' and the following text:

Our Residential Pickup Services Offer:

- Weekly trash pickup
- Bi-weekly recycling pickup
- Extra pickups with a flat rate of \$25

Our routes run Monday-Saturday with earliest pickup at 6am.

The main interface also shows a 'Resident Subscription Service' section with a 'SELECT THIS SERVICE' button and a table of recurring services and fees.

Recurring Services and fees			
Quantity	Service	Frequency	Service Days
1	96 Gal Trash - Comm	1x per week	TBD
1	96 Gal Recycle - Comm	1x per week	TBD
			Taxes
			Total
			\$ 324.75
			Due Quarterly

Additional Services and one-time fees

Bulk Pickup	\$ 50.00
-------------	----------

Customer Online Order Experience

This section outlines the process a customer experiences based on the service bundle configuration for their region. The illustrated workflow matches the workflow the customer will follow. Some screens shown are optional and will appear only if enabled in the setup.

Search for Available Services


After the customer enters their address, if it is within the mapped area of a service region, the available bundles will display. If multiple service bundles are available for the customer's region, all options will be shown.

The example illustrated here includes configurations in **System Options** and **Line of Business**. If those settings were not configured, only the service bundle options (example: 8 yard trash service and 6 yard trash service) would display.

The **Content Image** uploaded for a specific bundle will be displayed alongside the corresponding bundle. In the example, these are the 8-yard and 6-yard images.


Enter address to find available services in your area

Service types offered in your area




Commercial Services

Operating a business is a challenge that should not be.



Residential Trash & Removal

From scheduled curbside trash removal, we offer services throughout your home.




Roll-Off Dumpsters

Building a new business or construction site? We handle disposal of any materials.

Our Commercial Pickup Services Offer:


- Convenience:** With online services like account management and bill pay, we put the tools you need at your fingertips
- Versatility:** If you find yourself with more waste than normal, we offer extra pickups
- Reliability:** You can count on us to be consistent, efficient, and safe
- Choice:** We offer bins in multiple sizes to handle your needs

8 yard trash service SELECT THIS SERVICE



Recurring Services and fees			
Quantity	Service	Frequency	Service Days
1	8 Yard Trash Service	2x per week	TBD
			\$ 150.00
			Surcharges \$ 34.95
			Total \$ 184.95
Due Monthly			

6 yard trash service SELECT THIS SERVICE



Recurring Services and fees			
Quantity	Service	Frequency	Service Days
1	6 Yard Trash Service	2x per week	TBD
			\$ 120.00
			Surcharges \$ 27.96
			Total \$ 147.96
Due Monthly			

Enter Contact Information

Back to service selection

Selected Service

8 yard trash service

Recurring Services and fees		Frequency	Service Days	
Quantity	Service	2x per week	TBD	\$ 150.00
1	8 Yard Trash Service			\$ 34.95
			Surcharges	
			Total	\$ 184.95
				Due Monthly

Enter your contact information

NAME

EMAIL

MOBILE HOME

PREFERRED CONTACT METHOD
 Text Message Email

DESIRED SERVICE START

Confirm your service address

ADDRESS LINE 1

ADDRESS LINE 2

CITY STATE POSTAL CODE

Once the customer selects their desired service bundle, they will be prompted to enter their contact information.

Auto Pay Setup (Optional)

In Bundle Setup, if **Require Auto Pay Enrollment** is set to 'Yes', the user will be prompted to enter a credit card or bank account for auto pay after providing their contact information.

The message that displays above *Payment Method* can also be configured in Bundle Setup in the **Auto Pay Enrollment Message** field.

Hello auto pay required

PAYMENT METHOD

NAME

Clicking **Accept & Start My Service** means you are agreeing to the following [Service Agreement](#) and that automatic payment will begin on your next billing date.

Require Prepayment (Optional)

\$ 0.00 due today, payment information is required to verify account and enroll in automatic payments.

PAYMENT METHOD
Credit Card

NAME

CARD NUMBER

MONTH YEAR CVV POSTAL CODE

Clicking **Accept & Start My Service** means you are agreeing to the following [Service Agreement](#) and that automatic payment will begin on your next billing date.

ACCEPT & START MY SERVICE

In Bundle Setup, if the **Require Prepayment** field is set to anything other than 'None' the following payment screen is displayed.

Order Complete

After the customer has submitted their online order, the **Completion Message** is displayed. Format what is displayed here in Bundle Setup from the **Completion Message** hyperlink.

Selected Service

8 yard trash service

Recurring Services and fees		Frequency	Service Days	
Quantity	Service			
1	8 Yard Trash Service	2x per week	TBD	\$ 150.00
			Surcharges	\$ 34.95
			Total	\$ 184.95
				Due Monthly

Order # 15871

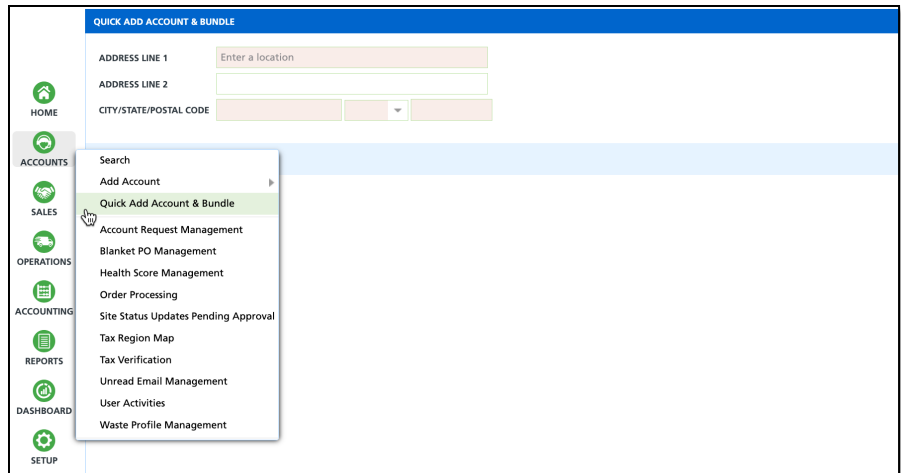
Requested Start Date 02/15/25

Quick Add Account and Bundle Process

This section outlines the process a system user will experience using the Quick Add Account and Bundle feature available in the Accounts module.

Accounts Module

Users with permission 463 (Quick Add Account & Bundle) will have access to the Quick Add Account & Bundle option in the Accounts module.



Add bundle

From the **Quick Add Account & Bundle** screen, system users can enter an address to search for service bundles available in the region. Because this process will also create an account, the system will search for potential duplicates, a similar method used by *Add Account*.

Note: *Service Days* is defaulted based on the stops closest to the service location.

QUANTITY	SERVICE	FREQUENCY	SERVICE DAYS	DUE TODAY
1	96 Gal Trash - Comm	1x per week	TBD	\$ 195.00
1	96 Gal Recycle - Comm	1x per week	TBD	\$ 105.00
			Surcharges	\$ 54.63
			Taxes	\$ 29.27
			Total	\$ 383.90
			Due Quarterly	\$ 54.63
				For charges thru Dec 31, 2022

Potential duplicates found.

ID	NAME	ADDRESS	DIVISION	STATUS	CREATED ON	SALES REP
459279	John	527 WashingtonSt	HOUSTON	Active		House Account - House A
459278	Aliena	527 WashingtonSt	HOUSTON	Prospect	Jan 16, 2025	House Account - House A
549278001	Aliena	527 WashingtonSt	HOUSTON	Prospect	Jan 16, 2025	House Account - House A

Confirmation of Information

If no duplicates are found and the system user continues, the next screen will prompt them to confirm the contact information for the customer account being created. Once all required fields are completed, the contract will be sent to the customer for review.

QUICK ADD ACCOUNT & BUNDLE ACCOUNTS > QUICK ADD ACCOUNT & BUNDLE

[Back to service selection](#)

Selected Service

Houston Res Bundle	QUANTITY	SERVICE	FREQUENCY	SERVICE DAYS	DUE TODAY
	1	96 Gal Trash - Comm	1x per week	TBD	\$ 195.00
	1	96 Gal Recycle - Comm	1x per week	TBD	\$ 105.00
Surcharges					\$ 54.63
Taxes					\$ 29.27
Total					\$ 383.90
					\$ 54.63
					Due Quarterly For charges thru Dec 31, 2022

Confirm your service address

ADDRESS LINE 1: 527 Washington St
 ADDRESS LINE 2:
 CITY: Houston STATE: TX POSTAL CODE: 77020-5143
 DELIVERY INSTRUCTION:
 DESIRED SERVICE START: 01/18/2025

Enter your contact information

NAME:
 EMAIL:
 MOBILE: (999) 999-9999 HOME: (999) 999-9999
 PREFERRED CONTACT METHOD: Text Message Email

SEND ORDER APPROVAL TO CUSTOMER

Order Details

A final order details screen is displayed, confirming that the service notification has been sent to the prospective customer.

QUICK ADD ACCOUNT & BUNDLE ACCOUNTS > QUICK ADD ACCOUNT & BUNDLE

Account and Order details

Account #: 49280
 Account Name: John Doe
 Address: 527 Washington St, Houston, TX 77020
 Order #: 4119

Notification has been submitted to prospect at JohnDoe@FakeEmail.com

DONE

Orders, Quotes and Contracts

After the order is completed, a new account is created, and the service bundle becomes accessible in the Orders, Quotes, and Contracts sections.

ORDERS, QUOTES, AND CONTRACTS (1)

ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE	AUTH/APPROVAL
4116	01/31/25	01/16/25	Medium	Service Contract A-New Customer-2	Submitte...	\$ 100.00	House Account - House... DO NOT USE (Admin)	

EDIT DOCUMENT - SERVICE CONTRACT 4116

Settings Services 2 History 1 Attachment Master Agreement Term Addendums Surcharge Rates

MAP SERVICE LOCATIONS

SITE ID	START DATE	QTY	SERVICE CODE	FREQUENCY	RATE	VENDOR RATE	
					Total	\$ 100.00	\$ 0.00
+	49277001	01/31/25	1	96 Gal Trash - Comm	1x per week	\$ 65.00	month
+	49277001	01/31/25	1	96 Gal Recycle - Comm	1x per week	\$ 35.00	month

SAVE PRINT EMAIL ACCOUNT SIGNATURE Saved at 9:34 am.

Add Service Menu Process

This section outlines the process a system user follows to add a service bundle from the Customer Service screen. An active account is required to complete the bundle selection process from the Add Service menu.

Add Active Service

The screenshot displays a customer service interface for an active account. At the top, account details for 'John Doe' (49279) are shown, including address (527 Washington St, Houston, TX 77020-5143) and phone numbers. The account status is 'Active'. Below this, a table shows invoice delivery terms (Net 30, Printed) and a billing schedule table with columns for CURRENT, 1-30, 31-60, 61-90, 91-120, and 120+, all showing 0.00. A 'HIGHLIGHTS' section is visible, with 'ACTIVE SERVICES (0)' set to 'Standard' and 'TOTAL RECURRING' set to 'PENDING'. A 'CALENDAR' view for January 2025 is shown, with a dropdown menu open for adding services. The dropdown menu lists various service categories: Commercial, Document Destruction, Inbound and Outbound, Medical Waste, Miscellaneous, Residential, Roll Off, Scale, and Houston Res Bundle. A red arrow points to the 'Houston Res Bundle' option.

Service bundles that have the 'Add Service Menu' check box marked in Bundle Setup, will display as an option in the **Active Services** drop down list. After selecting the bundle, and entering an effective date, it will be added to the site's active services.