

Quick Add Account & Bundle

Last Modified on 12/09/2025 10:48 am PST

Service bundles serve as location-specific packages of services, streamlining account and service setup by displaying only the options available in that area. For additional guidance on setup requirements and enabling service bundles for customers online, review the Related Articles section at the bottom of this page.

QUICK ADD ACCOUNT & BUNDLE

ACCOUNTS > QUICK ADD ACCOUNT & BUNDLE

ADDRESS LINE 1527 Washington St

ADDRESS LINE 2

CITY/STATE/POSTAL CODEHoustonTX77020

CLEAR

Houston Residential Trash and Recycling

QUANTITY	SERVICE	FREQUENCY	SERVICE DAYS		DUE TODAY
1	Trash Svc - 96 Gallon Cart	1x per week	TBD	\$ 105.00	
1	Recycle Svc - 96 Gallon Cart	2x per week	TBD	\$ 105.00	
	Surcharges			\$ 38.24	
	Taxes			\$ 20.48	
	Total			\$ 268.72	\$ 38.24
				Due Quarterly	

SELECT THIS BUNDLE

Houston Roll Off Services

QUANTITY	SERVICE	FREQUENCY	SERVICE DAYS		DUE TODAY
1	10 Yard Open Top Service - Recycle	every 14 days	TBD	\$ 75.00	
1	10 Yard Open Top Service	1x per week	TBD	\$ 55.00	
	Surcharges			\$ 10.02	
	Taxes			\$ 11.56	
	Total			\$ 151.58	\$ 10.02
				Due Monthly	

SELECT THIS BUNDLE

Permission

The following permissions are required to add an account using the Quick Add Account & Bundle tool:

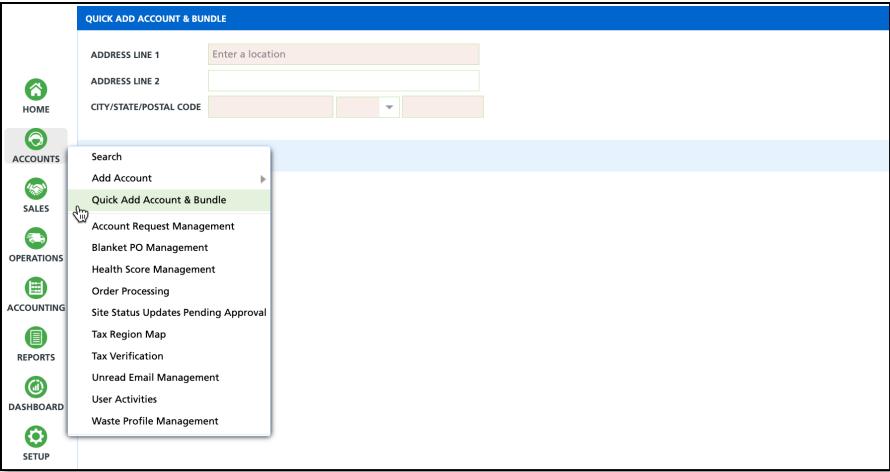
Permission ID	Permission Name
463	Quick Add Account & Bundle

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.

Confirmation of Information

QUICK ADD ACCOUNT & BUNDLE

ACCOUNTS - QUICK ADD ACCOUNT & BUNDLE

ADDRESS LINE 1

527 WashingtonSt

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

HoustonTX77020-5143

CLEAR

	QUANTITY	SERVICE	FREQUENCY	SERVICE DAYS	DUE TODAY
Houston Res Bundle	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

SELECT THIS BUNDLE

Potential duplicates found.

ID	NAME	ADDRESS	DIVISION	STATUS	CREATED ON	SALES REP
A49279	John	527 WashingtonSt	HOUSTON	Active		House Account - House A
A49278	Allena	527 WashingtonSt	HOUSTON	Prospect	Jan 16, 2025	House Account - House A
549278001	Allena	527 WashingtonSt	HOUSTON	Prospect	Jan 16, 2025	House Account - House A

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
					Due Quarterly	\$ 54.63
					For charges thru Dec 31, 2022	

Confirm your service address

Enter your contact information

ADDRESS LINE 1

527 Washington St

ADDRESS LINE 2

CITY

Houston

STATE

TX

POSTAL CODE

77020-5143

DELIVERY INSTRUCTION

NAME

EMAIL

MOBILE

(999) 999-9999

HOME

(999) 999-9999

PREFERRED CONTACT METHOD

☐ Text Message

☒ Email

DESIRED SERVICE START

01/18/2025

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)	
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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

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.

+

49279 John Doe

100

527 Washington St
Houston, TX 77020-5143
(B) +1 555-555-7026
(O) +1 555-555-7026

Active

DIVISION HOUSTON

ACCOUNT MGR House Account - House Account (Sales)

CLASS RESIDENTIAL

BILL GROUP HOU-Q1-JAN-APR-JUL-OCT

ADVANCE - Billed Thru Date None

TERMS Net 30

INVOICE DELIVERY Printed

CURRENT	1-30	31-60	61-90	91-120	120+
0.00	0.00	0.00	0.00	0.00	0.00

HIGHLIGHTS

PENDING

ACTIVE SERVICES (0)

Standard

+

TOTAL RECURRING

QTY SERVICE CODE

CALENDAR

January, 2025

EVENTS

SUN

Dec 29, 2024

TUE

Dec 31, 2024

Jan 5

Jan 7

Commercial

Document Destruction

Inbound and Outbound

Medical Waste

Miscellaneous

Residential

Roll Off

Scale

Houston Res Bundle

Related Articles

Service Bundle and Online Order Setup