

Customer Portal - Create an Order

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Pathway: *Customer Portal* > *[Create Order]*

The Create Order feature in the Customer Portal allows customers to request a service that has not yet been scheduled.

Given specific account requirements have been met, users can quickly initiate and submit orders mirroring the action of [Creating an On-Call Order](#) provided to dispatchers and CSRs via the application. The only difference is that orders created via the portal can't be scheduled for the same day as the request is being made.

The screenshot displays the Customer Portal interface. On the left, under 'SELECT ACCOUNT', the account '49517 Lex's Test Account' is selected. Below this, a 'TESTING LOGIN MESSAGE' shows a 'TOTAL DUE' of \$61.63 and a 'PAST DUE' of \$32.38. Navigation buttons include 'Make a Payment', 'Invoice History', 'Manage Auto Pay', 'Wallet', and 'Reports / Documents'. At the bottom left, there is a 'REQUESTS' section with a link to 'CLICK HERE TO SUBMIT ONLINE REQUEST'. On the right, under 'SELECT SERVICE LOCATION', the address '49517001 Lex's Test Account 1 S Broad St, Philadelphia PA' is selected. Below this is a table of 'CURRENT SERVICES' and a 'RECENT SERVICES' table. A red box highlights a '+' icon in the 'RECENT SERVICES' table, with a red arrow pointing to the 'Create Order' modal window. The modal window has a title bar with a close button and contains the following fields: '*Schedule Date' (05/13/26 Wednesday), 'PO Number', 'Shipping Tracking ID', '*Service', '*Order Type', and 'Quantity' (1). There is also an 'Order Note' text area and 'Save' and 'Cancel' buttons at the bottom.

Criteria

The ability to Create an Order from the customer portal is accessible after the customer logs into their portal account, if the following criteria is met.

- A service already exists for the site.
- The Account Class for the customer's account has been configured to enable on call orders.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface with the 'Customer Portal' tab selected. The 'ENABLE ON CALL ORDERS' dropdown menu is highlighted with a red box, and a red arrow points to it from the left. Other fields include 'ENABLE PORTAL ACCESS' (Yes), 'ENABLE ADD SITES' (No), 'NEW LOCATION BUNDLE', 'ENABLE REPORT ACCESS' (Yes), 'DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL' (Yes), 'AUTO SEND PORTAL INVITATION ON CONTACT CREATION' (Yes), 'CUSTOMER PORTAL HOME PAGE' (Standard), 'NEW LOCATION TEMPLATE' (COMM-Dayton), 'ENABLE VIEWING INACTIVE SITE' (Service History Only), 'DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL' (Yes), and 'ALLOW INVOICE-VERIFIED SELF REGISTRATION' (No). A green checkmark is visible in the bottom right corner.

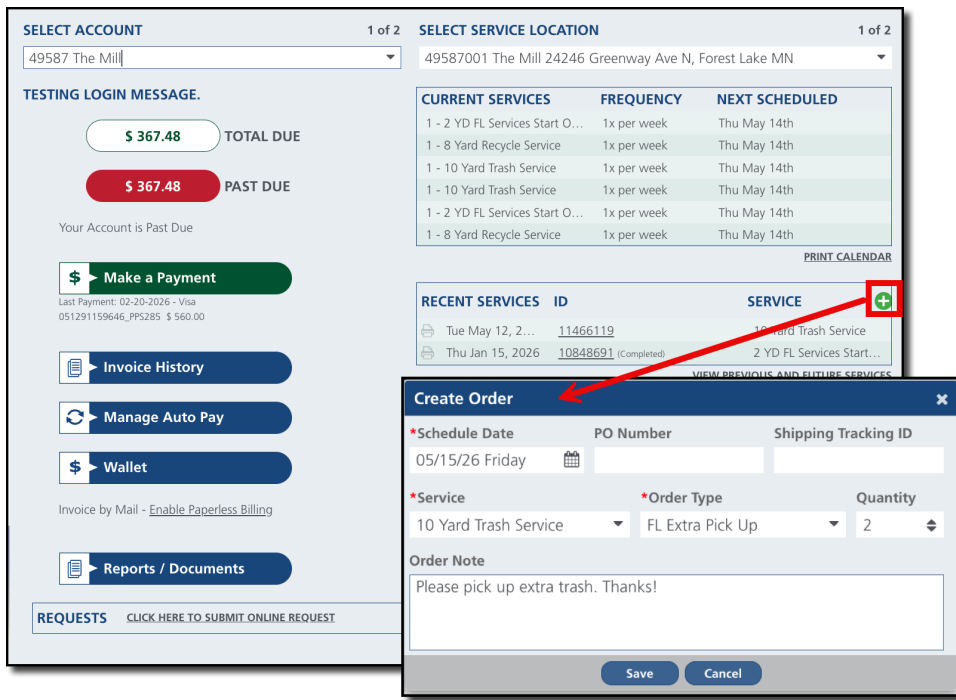
Screen Descriptions

The following fields apply to the *Create Order* screen.

Screen Option	Description
Scheduled Date	The date the service is being requested for. By default, the date loaded is the next day.
PO Number	Optional PO Number to bind to this service order.
Shipping Tracking ID	Optional Shipping Tracking ID to associate this service order to.
Service	The type of service being requested. The options provided are based on existing services for a site.
Order Type	Depending on the service selected, what is the specific work needed.
Quantity	How many of this type of service is being requested. By default this is set to 1.
Order Note	Optional information with respect to the service request.

Create an Order

After both criteria have been met, the **green +** icon will be displayed in the top right corner of the Recent Services area which, when selected, will initiate the Create Order process.



1. Select the **green +** icon from the Recent Services area of Customer Portal home screen. This will open the *Create Order* screen.
2. Select the **Schedule Date** that the service is being requested for.
3. Select the **Service** needed. This list is based on current services.
4. Based on the Service selected, the Order Type list will be populated. Select the **Order Type** needed.
5. Enter a **Quantity** if greater than 1.
6. Enter a **Note** about the Service being requested. This is optional but it can prove helpful.
7. Optional fields to enter, as needed:
 - a. PO Number
 - b. Shipping Tracking ID
8. Click **Save**. When the order is created, a message will be displayed with the Order Number.

After successfully creating an order, the newly created service can be viewed by clicking the **View Previous and Future Services** hyperlink as shown below.

SELECT ACCOUNT 1 of 2

49587 The Mill

TESTING LOGIN MESSAGE.

\$ 367.48 TOTAL DUE

\$ 367.48 PAST DUE

Your Account is Past Due

Make a Payment

Last Payment: 02-20-2026 - Visa
051291159646_PPS285 \$ 560.00

Invoice History

Manage Auto Pay

Wallet

Invoice by Mail - [Enable Paperless Billing](#)

Reports / Documents

REQUESTS [CLICK HERE TO SUBMIT ONLINE REQUEST](#)

SELECT SERVICE LOCATION 1 of 2

49587001 The Mill 24246 Greenway Ave N, Forest Lake MN

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 2 YD FL Services Start O...	1x per week	Thu May 14th
1 - 8 Yard Recycle Service	1x per week	Thu May 14th
1 - 10 Yard Trash Service	1x per week	Thu May 14th
1 - 10 Yard Trash Service	1x per week	Thu May 14th
1 - 2 YD FL Services Start O...	1x per week	Thu May 14th
1 - 8 Yard Recycle Service	1x per week	Thu May 14th

[PRINT CALENDAR](#)

RECENT SERVICES	ID	SERVICE
Tue May 12, 2...	11466119	10 Yard Trash Service
Thu Jan 15, 2026	10848691 (Completed)	2 YD FL Services Start

[VIEW PREVIOUS AND FUTURE SERVICES](#)

Service History

From Period: May 2026 thru May 2026 [Print Selected](#)

SCHEDULED DATE	ID	SERVICE	QTY	EQUIPMENT	SVC QTY	WORK STATUS
Thu 05/28/26	11295277	FL Service	1	10 Yard FL (...)		Scheduled
Thu 05/21/26	11261741	FL Service	1	2 Yard FL (...)		Scheduled
Fri 05/15/26	* 11472551	FL Extra Pick Up	2	10 Yard FL (...)		Scheduled
Thu 05/14/26	11223451	FL Service	1	10 Yard FL (...)		Scheduled

From Portal to Office: Application Visibility

Orders submitted via the Customer Portal behave identically to on-call orders created manually by staff from the application. This ensures that existing dispatching and CSR workflows remain consistent, regardless of who initiates the request.

Customer Account

49587 The Mill (Parent: 48990 - Example Account 1)

24246 Greenway Ave N
Forest Lake, MN 55025-8783
US

TERMS Net 20
INVOICE DELIVERY Printed

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	346.50	0.00	20.98	0.00	0.00	367.48

ADVANCE - MONTHLY Billed Thru Date Apr 30, 2026

Auto Pay Not Enabled

49587001 The Mill

24246 Greenway Ave N
Forest Lake, MN 55025-8783
US

DIVISION QAWASTE
ACCOUNT MGR Aliena Somers - Admin-NS (Sales)
CLASS COMMERCIAL
BILL GROUP QA Billing Cycle

SERVICE REGION QA Waste OPEN MARKET
SALES REP Aliena Somers - Admin-NS (Sales)
SOURCE Call In
GENERATOR Small Quantity Generator
SITE CLASS COM
SURCHARGE GRP Fuel Surcharge - Residential
TAX REGION <Not Set>

HIGHLIGHTS

PENDING

- 4218 Proposal Aliena Somers - Admin-NS (Sales) 03/09/2026
- 4219 Proposal Aliena Somers - Admin-NS (Sales) 03/09/2026
- 69391 NSF Fee Paul Gonzalez - QA Expert (Sales) 04/24/2026 Amount: \$ 101.00 , Note: From this date to that date

TOTAL RECURRING \$ 645.75

CALENDAR May, 2026

SUN	MON	TUE	WED	THU	FRI	SAT
Apr 26	Apr 27	Apr 28	Apr 29	Apr 30	May 1	May 2
May 3	May 4	May 5	May 6	May 7	May 8	May 9
May 10	May 11	May 12	May 13	May 14	May 15	May 16
May 17	May 18	May 19	May 20	May 21	May 22	May 23

Work Order: 11472551
Quantity: 2
Status: Scheduled
Posting Status: Pending
Reason: CHG Price Increase
Work Type: FL Extra Pick Up
Equipment Type: 10 Yard FL (Ser)
Material Type: MSW
Note: Please pick up extra trash. Thank!

DISPATCH OPERATIONS > DISPATCH

FROM: 05/15/26 TO: 05/15/26 DIVISION: QAWASTE YARD: No Yard Assigned ROUTE PRIMARY LINE OF BUSINESS: Commercial

Standard Select Route Sheet

ROUTE	TRUCK	DRIVER	PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS	DISPOSAL
QAWASTE > Commercial > Friday May 15, 2026 0 of 3 completed (0 checked in)											
<input checked="" type="checkbox"/>	NO ROUTE ASSIGNED					1	0	1 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	DOC COM 101	DOCT1				1	0	1 (100%)	0	0	0 (0 tons)
<input type="checkbox"/>	LA 102					8	0	8 (100%)	0	0	0 (0 tons)

SERVICES LIST

Dispatch Select Print Format

PRINT COMPLETED

ROUTE	SEQ	ORDER NOTE	SITE	SCHEDULED DATE	CREATED ON	WO#	WO TYPE	SERVICE TYPE	QTY	EQUIPMENT	PHOTOS
		Please pick up extra trash. Thank!	49587001 The Mill 25246 Greenway Ave N, Forest Lake	Fri 5/15/26	5/12/26 2:02pm	11472551 *	On Call	FL Extra Pick Up	2	10 Yard FL (Ser)	

Related Articles

[Create On Call Order](#)