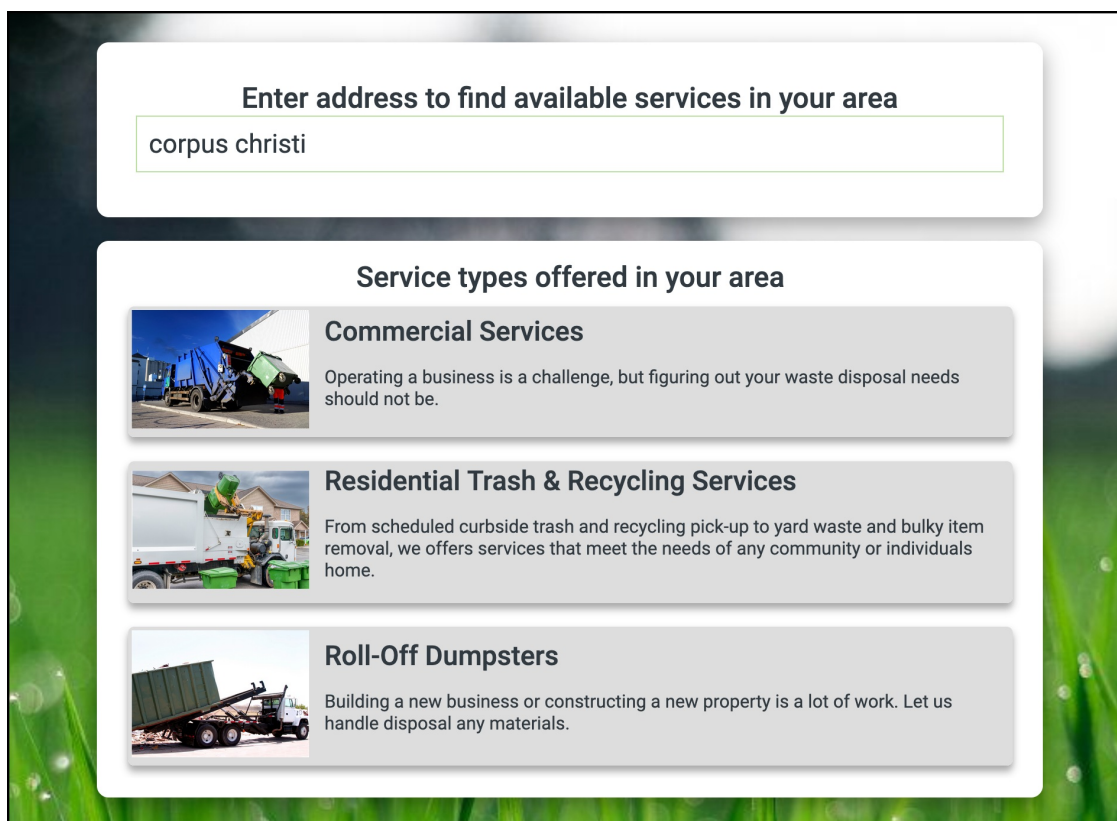


Service Bundle (Online Order) Setup

Last Modified on 07/20/2026 6:45 am PDT

Service bundles act as location-based packages of services. They ensure that customers searching online by address are shown only what's available in their region, while also helping users in the system streamline account and service setup. Convenient access to service bundles are provided a few ways:

- Directly to the customer via the [Online Order process](#).
- To system users through these **Quick Add** options:
 - Quick Add Account & Bundle
 - Active Services



Enter address to find available services in your area

corpus christi

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.

Required Setup

1. 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.

SERVICE REGION SETUP							
+ DIVISION		ALL					
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.

NOTE: See the Default Service Region setup in the System Options (Optional Setup) section below for additional configuration steps if an address is outside a service region.

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.

+

DIVISION

ALL

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				
1005	KINGS LAKE ESTATES	DAYTON	No				
1006	HUMBLE - NEW CANEY	DAYTON	No				
1007	ATASCA OAKS	DAYTON	No				
1008	OAKS OF ATASCOCITA	DAYTON	No				
1009	STILLWATER HOA	DAYTON	No				
1010	KINGWOOD GREENS	DAYTON	No				
1011	LIBERTY COUNTRY C...	DAYTON	No				
1012	THE COMMONS	DAYTON	No				
1013	PINEY WOODS	DAYTON	No				
1014	ENCLAVE AT OLDE O...	DAYTON	No				
15	15	DAYTON	No				
BUNN	Bunn NC	QAWASTE	Yes				
CORPUS	CORPUS OPEN MAR...	CORPUS	No				
DAYTON	DAYTON OPEN MAR...	DAYTON	No				

MAP AREA - SERVICE REGION: THE COMMONS

ZOOM TO SITES

ZOOM TO MAP AREA

HIDE SITES

REMOVE SELECTED SHAPE

Map

WILDWOOD HILLTOP

TAYME RANCHETTES

NORTHWOOD COUNTRY ESTATES

HUFFMAN CLEVELAND Rd - Huffman Cleveland Rd

HUFFMAN HILLS

CYPRESS POINT

PANTATON

Classy Creations Childcare

McCrory's Auto Repair

Legend

Active

IMPORT

SAVE

2. 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.

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BUNDLE SETUP

SETUP > SERVICES > BUNDLE

ID	NAME	ACTIVE	ONLINE ORDER	QUICK ORDER	ADD SERVICE MENU	DIVISION	SERVICE REGION	PROPOSAL FORMAT	PROPOSAL FORMTYPE	COLLECT PAYMENT NOTIFICATION	REQUIRE PAYMENT FOR ONLINE ORDER	ONLINE ORDER COLLECT AMOUNT	PREVIEW SUMMARY	PREVIEW MESSAGE
1000	FCC test onlin...	Active	✓	✓	✓	HOUSTON OPEN...	Test Service Con...	A-New Custome...	Order Form	To Current Bl...			Preview	Preview
1001	Resi Bundle Tr...	Active	✓	✓	✓	CORPUS	CORPUS OPEN ...		Order Form	Thru Next Bil...			Preview	Preview View
1002	QA RESI BUNDL...												Preview	Preview
1003	QA RESI BUND...												Preview	Preview
1004	STILLWATER H...												Preview	Preview
1005	QA RESI 2 BUN...												Preview	Preview
1006	Houston Com...												Preview	Preview

ADD BUNDLE

NAME

ACTIVE

Active

DIVISION

SERVICE REGION

Bundle Availability

ONLINE ORDER

QUICK ORDER

ADD SERVICE MENU

DOCUMENT FORMAT

DOCUMENT TYPE

COLLECT PAYMENT / ACCEPT ORDER NOTIFICATION

ORDER SOURCE

REQUIRE PREPAYMENT

REQUIRE AUTO PAY ENROLLMENT

Defaults for New Account

ACCOUNT CLASS

BILL GROUP

COMPLETION MESSAGE

SUMMARY

PREVIEW

PREVIEW

SAVE

Field Descriptions

Field and Application for Use	Description
The following fields display when first adding a bundle.	
Name	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.
Bundle Availability	Displays check box options for where the bundle is specifically available for user. • Online Order ◦ Select this box to make the service bundle available online, allowing customers to choose it based on their location. • Quick Order ◦ Select this box to make the service bundle accessible in the "Quick Add Account & Bundle" section of the Accounts module. • Add Service ◦ Select this box to make the service bundle available for selection when adding a service on the Customer Service screen.
Document Format <i>Online Order, Quick Order</i>	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.
Document Type <i>Online Order, Quick Order</i>	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. 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.
Order Source <i>Online Order, Quick Order</i>	Streamlines source tracking for new accounts created through online or quick orders.
Quick Order - Max Backdated <i>Quick Order</i>	Setting that places a limit on how far back a quick order's start date can be backdated.
Forced Future Start Date <i>Online Order, Quick Order</i>	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.

Content Image <i>Online Order, Quick Order</i>	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.
Completion Message <i>Online Order</i>	Message that displays for the customer after they have placed an online or quick order.
Summary <i>Online Order</i>	Add a summary describing the service to enhance the customer experience by helping them select the service bundle that best fits their needs. Important: • Copy and paste this code at the bottom of the summary to only display the summary: ◦ <code>{?ServiceSummary}</code> • Copy and paste this code at the bottom of the summary to display the summary and any service charges it includes: ◦ <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.

BUNDLE SETUP

ID	NAME	ACTIVE	ONLINE ORDER	QUICK ORDER	ADD SERVICE MENU	DIVISION	SERVICE REGION	PROPOSAL FORMAT	PROPOSAL FORMTYPE	COLLECT PAYMENT NOTIFICATION TEMPLATE	REQUIRE PAYMENT FOR ONLINE ORDER
1000	FCC test onli...	Active	✓	✓		HOUSTON	HOUSTON OP...	Test Service C...	A-New Cust...	Order Form	To Current...
1001	Resi Bundle ...	Active								Form	Thru Next ...
1002	QA RESI BU...	Active								tt Pay...	Thru Next ...
1003	QA RESI BU...	Inactive								tt Pay...	None
1004	STILLWATER ...	Active									None
1005	QA RESI 2 B...	Active								tt Pay...	None
1006	Houston Res...	Active								Form	None

ADD BUNDLE SERVICE

QTY: EQUIPMENT: SERVICE CODE: FREQUENCY: PER UNIT: SVC FEES:

DISPLAY DEFAULT CHARGES:

NOTE:

SERVICE CHARGES

RATE	UOM	NO CHARGE QTY	MINIMUM TYPE	MINIMUM	OVER MAX WEIGHT	OVER MAX WEIGHT RATE

SAVE

ID	BUNDLE	QUANTITY	SERVICE	FREQUENCY	FREQUENCY TYPE	RATE

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. Refer to the Summary description in the table above for additional information.
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.

Customer Experience Enhancement

Although not critical to the service bundle functionality, you can enhance the customer experience, by configuring the bundles to display in a specific order.

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.

BUNDLE SETUP

+

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	50 yard Dumpster 5						
1004	STILLWATER HOA						
1005	Houston Resident...						
1006	Houston Roll Off...						
1007	Houston Commer...						

10 yard Dumpster



Recurring Services and fees

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

SELECT THIS SERVICE

20 yard Dumpster



Recurring Services and fees

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

SELECT THIS SERVICE

30 yard Dumpster



Recurring Services and fees

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

SELECT THIS SERVICE

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]

Group Bundles By LOB

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.

Fallback Service Region (If None Matched)

If a customer's address does not match a service region defined in the Service Region Map within Service Region Setup, the system will default to the service region specified here. If no fallback service region should be used, and no options should be available when an address falls outside a region map, leave this field blank.

SYSTEM OPTIONS SETUP

System

Sales

Integration

Account

Operations

Customer Portal

Broker

Online Order

HTML HEADER

PREVIEW

HTML FOOTER

PREVIEW

GROUP BUNDLES BY LOB

FALLBACK SERVICE REGION (IF NONE MATCHED)

HOUSTON OPEN MARKET

DEFAULT ACCOUNT CLASS

ROLL OFF-TEMP

DEFAULT SOURCE

SEO Web Inquiry

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.

UPDATE LINE OF BUSINESS

LOB ID

FEL

NAME

Commercial

ACTIVE

Yes

Settings

Mobile

Optimization

Self-Service Ordering

Productivity and Profitability

SUMMARY

PREVIEW

SUMMARY IMAGE

View

CONTENT

PREVIEW

CONTENT IMAGE

Select Image...

BROWSE...

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.

UPDATE LINE OF BUSINESS

LOB ID

FEL

NAME

Commercial

ACTIVE

Yes

Settings

Mobile

Optimization

Self-Service Ordering

Productivity and Profitability

SUMMARY

SUMMARY IMAGE

View

Enter address to find available services in your area

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Service types offered in your area



Commercial Services

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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.

[Back to categories](#)

Residential Trash and Recycling

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.

Resident Subscription Service

[SELECT THIS SERVICE](#)

Through our residential subscription programs, we provide individual homes with regular, reliable curbside trash pickup service. We offer a range of service options and an appropriate cart or container to hold trash until it's collected.

Recurring Services and fees

Quantity	Service	Frequency	Service Days	
1	96 Gal Trash - Comm	1x per week	TBD	\$ 195.00
1	96 Gal Recycle - Comm	1x per week	TBD	\$ 105.00
				Taxes \$ 24.75
				Total \$ 324.75
				Due Quarterly

Additional Services and one-time fees

Bulk Pickup	\$ 50.00
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UPDATE LINE OF BUSINESS

LOB ID RESI

NAME Residential

ACTIVE Yes

Settings Mobile Optimization Self-Service Ordering Productivity and Profitability

SUMMARY

SUMMARY IMAGE View

CONTENT

CONTENT IMAGE Select Image

UPDATE CONTENT

Content

Residential Trash and Recycling

Our Residential Pickup Services Offer:

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

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Related Articles

[Online Order](#)

[Quick Add Account & Bundle](#)