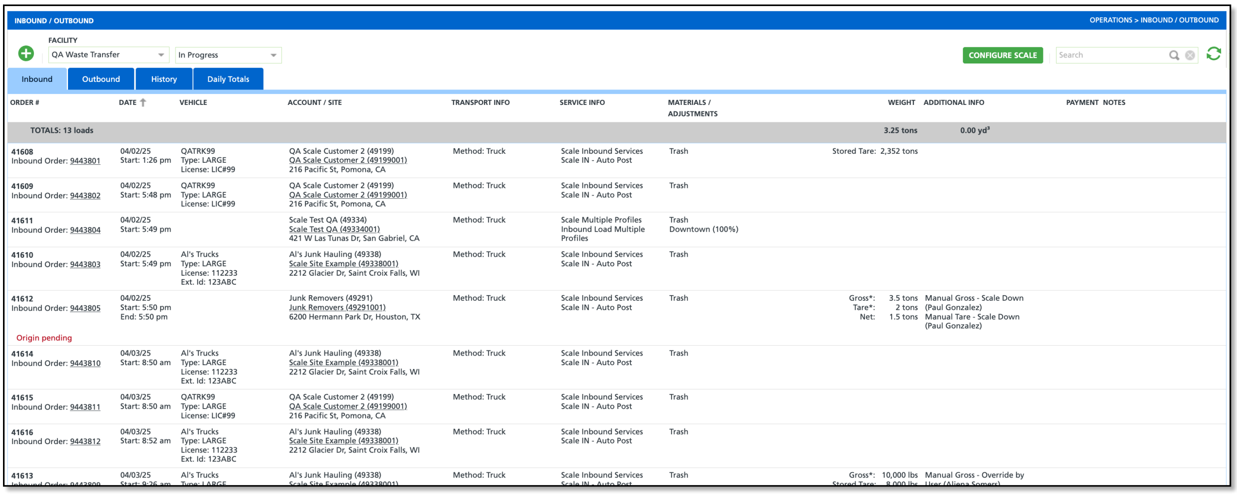
Inbound Ticket Creation (Scale)

Last Modified on 04/10/2025 11:51 am PDT

Pathway: *Operations > Inbound / Outbound*

Before using the Inbound/Outbound screen, specific scale-related setup requirements must be completed. Refer to the Scale-In Setup article for necessary setup information.



Permissions

The following permissions are required to use the Inbound screen:

Permission ID	Permission Name
99	Inbound/Outbound Processing

Setup Requirements

This setup is the standard requirement across all scale scenarios, including Roll-off, Cash, and Third-Party customers. Review the setup documentation here: Scale-In Setup to process scale tickets on the Inbound/Outbound screen.

Inbound Screen Field Descriptions

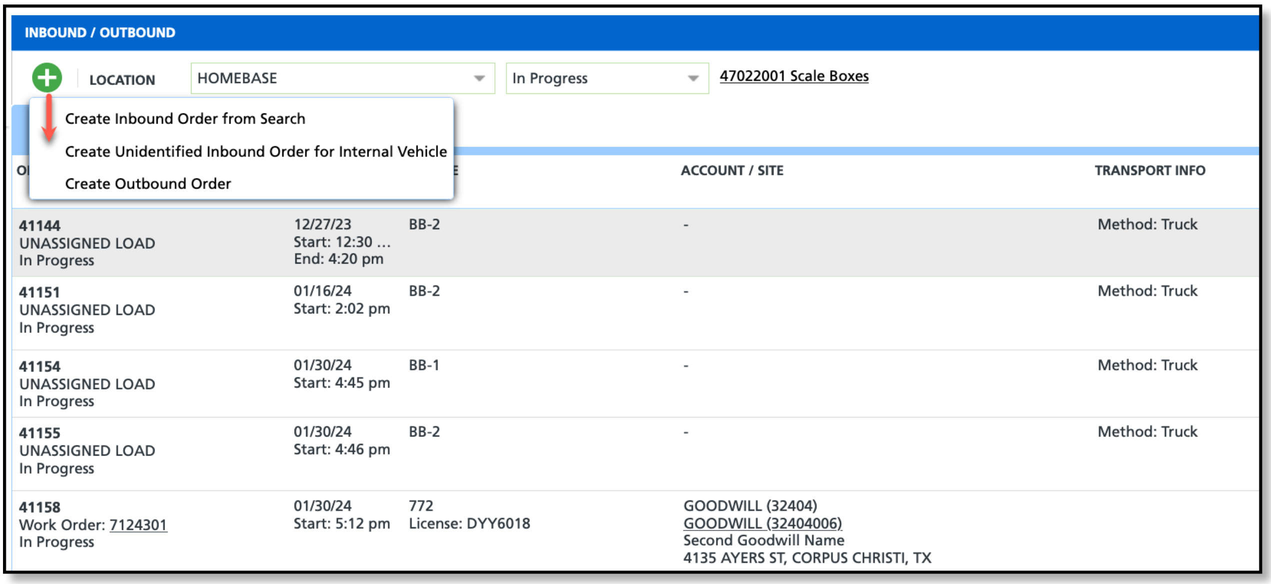
The following descriptions apply to the fields displayed on the Inbound/Outbound screen.

Field	Description
Filters	
Facility	Filters the screen to only display inbound disposal records for the selected location and affects the search function when creating a new disposal ticket.
Status	Filters what is displayed based on the Work Status of the Service Record.
Fields	
Order #	Displays the service record number as a clickable link.
Date	Shows the recorded date and time of ticket creation.
Vehicle	Shows the vehicle details for the recorded vehicle.

Account / Site	Links the account or site associated with the disposal record.
Transport Info	Displays the transport method recorded at the time the ticket was created.
Service Info	Shows the service code, work type, and additional service-related information.
Materials / Adjustments	Shows the material type that was logged when the ticket was created..
Weight	Displays the Gross, Tare and Net weights recorded for the vehicle.
Additional Info	When a work order is linked, the driver and line of business are displayed. If weights are manually adjusted and a reason code is required, the system also displays the user's name and the selected reason for the change.
Notes	Any notes added to the disposal ticket will appear here.

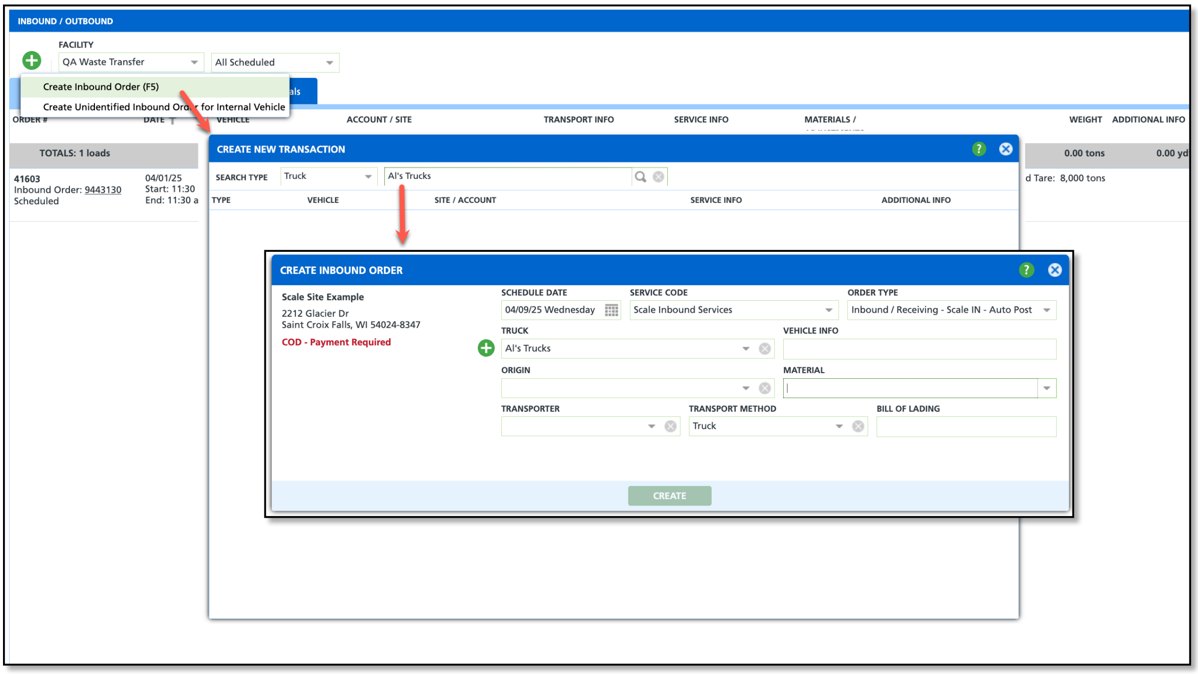
Create an Inbound Ticket

Inbound tickets can be created in two ways. The first way is from a work order in the Disposal / Ship tab. Otherwise, tickets can be created in the Inbound screen. The process to create an inbound ticket varies based on customer type.



Create Inbound Order from Search

Select this option to open the 'Create New Transaction' popup, where users can quickly create a ticket by searching for customer sites, trucks, existing work orders, or routes associated with the disposal record. If this is a cash pay customer, search for the cash pay site to process transactions on.



In the **'Create New Transaction'** popup, select the search type to use. This field can be defaulted to a specific setting in Facility Setup. If 'Truck' is selected, the system will search the **site inventory** to match on either the truck name or license plate number. Available search type options include:

Search Option	Special Notes
Route	N/A
Waste Profile	N/A
Site	For cash pay customers, refer to the Scale-In Setup article on creating a site specific to Cash Pay to record cash pay customer transaction and payments on.
Truck	Boost efficiency and keep inbound traffic moving smoothly by preconfiguring your site's trucks and their license plate numbers in Customer *Service > Site Inventory > Trucks.*
Work Order	Work orders created in Customer Service can be searched here, provided they use an inbound-type service code and work type.

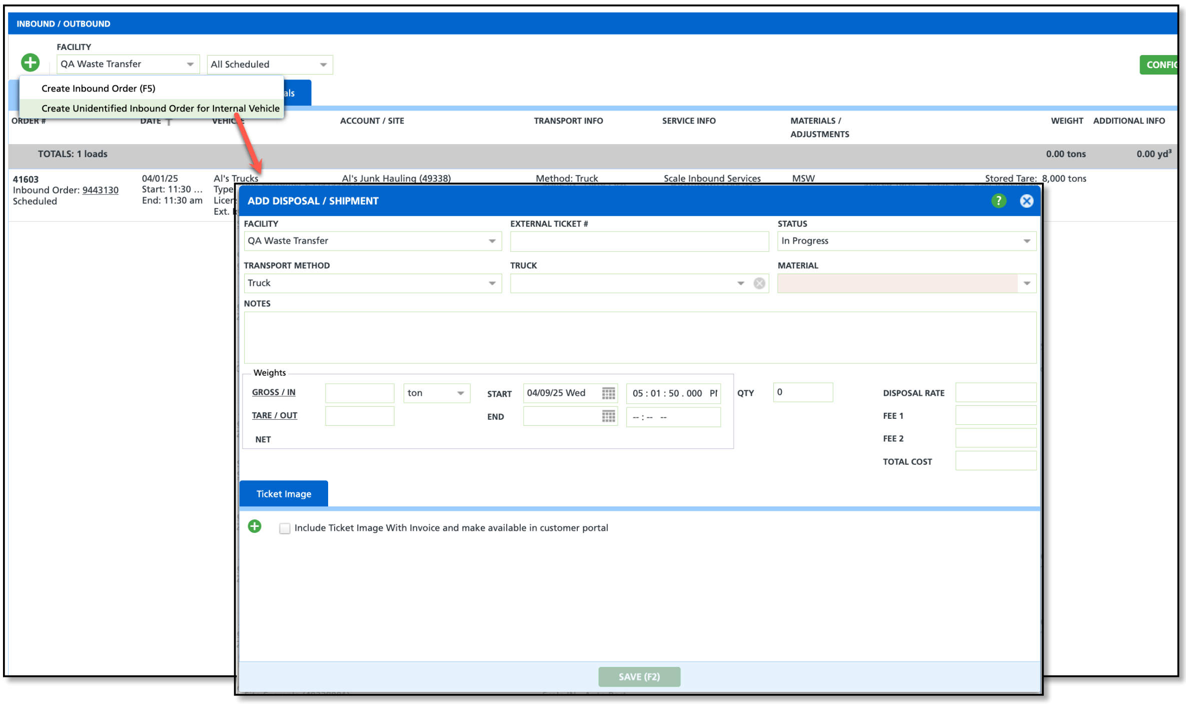
1. After entering the search information, if a match is found, the **'Create Inbound Order'** popup will appear. Enter the applicable details and click 'Create'. Things to note:
   - To improve efficiency and reduce errors, the Material field can be defaulted to a specific material type in Facility Setup.
2. Once created, the **Edit Service Record** screen will display where the gross and tare weights can be recorded as well as charges and payments collected. Things to consider:
   - **Trucks:**
     - Boost efficiency and keep inbound traffic moving smoothly by preconfiguring a trucks tare weights in *Customer Service > Site Inventory > Trucks* and *Setup > Operation > Truck.*
   - **Automate Posting Status:**
     - In Work Type Setup, automate the posting by enabling the 'Post Work Order When Completed' option.
   - **Weights:**
     - For tracking and auditing purposes, enable 'Require Manual Weight Reason' in Facility Setup (Inbound/Outbound tab) to ensure users record a reason for any weight changes.

- **Source/Origins:**
  - Optional Source/Origins tabs will display on the service record if enforced in Work Type Setup. If these are required, the user will not be able to complete the service record until they have been recorded.

3. Click **'Save'** after all necessary information has been recorded.
   - If all weights are collected and requirements met, the system will prompt the user to complete the service record upon saving; otherwise, it will remain in a pending or scheduled status on the Inbound screen.

Create Unidentified Inbound Order for Internal Vehicle

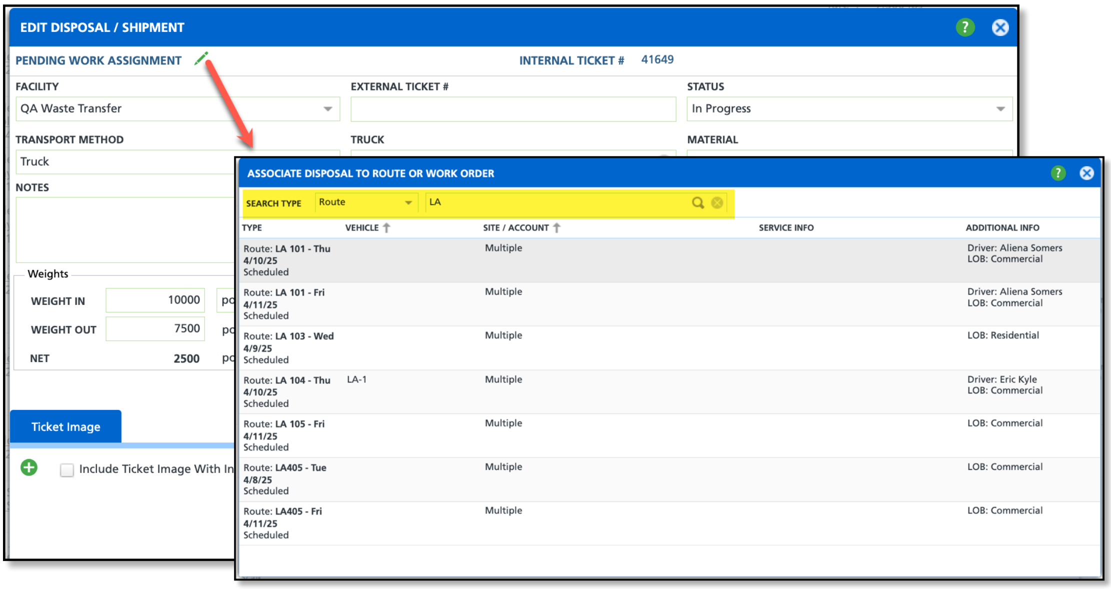
Select 'Create Unidentified Inbound Order for Internal Vehicle' to record disposal activity for internal trucks that are not searchable using the other method.



1. From the Inbound screen, select the **'Create Unidentified Inbound Order for Internal Vehicle'** option. This will display the Add Disposal / Shipment popup.
2. Select the Transport Method and Truck. **Note:**
   - The trucks displayed here are configured in *Setup > Operations > Truck.*
     - Boost efficiency and reduce errors by preconfiguring a truck's tare weight in Truck Setup.
3. After all necessary information has been recorded, the record can be saved.

Pending Work Assignment

After creating the ticket, link it to a route or work order by selecting the **Pending Work Assignment** icon in Edit Disposal Shipment. This opens the 'Associate Disposal to Route or Work Order' popup, where users can search for and select the appropriate route or work order.



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