

# 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.

INBOUND / OUTBOUND							OPERATIONS > INBOUND / OUTBOUND			
FACILITY QA Waste Transfer <span>In Progress</span>							CONFIGURE SCALE		Search	
Inbound		Outbound		History		Daily Totals				
ORDER #	DATE ↑	VEHICLE	ACCOUNT / SITE	TRANSPORT INFO	SERVICE INFO	MATERIALS / ADJUSTMENTS	WEIGHT	ADDITIONAL INFO		
TOTALS: 13 loads							3.25 tons	0.00 yd³		
41608 Inbound Order: 9463801	04/02/25 Start: 1:26 pm	QA TRK99 Type: LARGE License: LIC499	QA Scale Customer 2 (49199) QA Scale Customer 2 (49199001) 216 Pacific St, Pomona, CA	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash	Stored Tare: 2,352 tons			
41609 Inbound Order: 9463802	04/02/25 Start: 5:48 pm	QA TRK99 Type: LARGE License: LIC499	QA Scale Customer 2 (49199) QA Scale Customer 2 (49199001) 216 Pacific St, Pomona, CA	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash				
41611 Inbound Order: 9463804	04/02/25 Start: 5:49 pm		Scale Test QA (49334) Scale Test QA (49334001) 421 W Las Tunas Dr, San Gabriel, CA	Method: Truck	Scale Multiple Profiles Inbound Load Multiple Profiles	Trash Downtown (100%)				
41610 Inbound Order: 9463803	04/02/25 Start: 5:49 pm	AI's Trucks Type: LARGE License: 112233 Ext. Id: 123ABC	AI's Junk Hauling (49338) Scale Site Example (49338001) 2212 Glacier Dr, Saint Croix Falls, WI	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash				
41612 Inbound Order: 9463805	04/02/25 Start: 5:50 pm End: 5:50 pm		Junk Removers (49291) Junk Removers (49291001) 6200 Hermann Park Dr, Houston, TX	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash	Gross*: 3.5 tons Tare*: 2 tons Net: 1.5 tons	Manual Gross - Scale Down (Paul Gonzalez) Manual Tare - Scale Down (Paul Gonzalez)		
Origin pending										
41614 Inbound Order: 9463810	04/03/25 Start: 8:50 am	AI's Trucks Type: LARGE License: 112233 Ext. Id: 123ABC	AI's Junk Hauling (49338) Scale Site Example (49338001) 2212 Glacier Dr, Saint Croix Falls, WI	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash				
41615 Inbound Order: 9463811	04/03/25 Start: 8:50 am	QA TRK99 Type: LARGE License: LIC499	QA Scale Customer 2 (49199) QA Scale Customer 2 (49199001) 216 Pacific St, Pomona, CA	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash				
41616 Inbound Order: 9463812	04/03/25 Start: 8:52 am	AI's Trucks Type: LARGE License: 112233 Ext. Id: 123ABC	AI's Junk Hauling (49338) Scale Site Example (49338001) 2212 Glacier Dr, Saint Croix Falls, WI	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash				
41613 Inbound Order: 9463806	04/03/25 Start: 8:50 am	AI's Trucks Type: LARGE	AI's Junk Hauling (49338) Scale Site Example (49338001)	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash	Gross*: 10,000 lbs Stored Tare: 8,000 lbs	Manual Gross - Override by User Admin Comment		

## 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.

<b>Account / Site</b>	Links the account or site associated with the disposal record.
<b>Transport Info</b>	Displays the transport method recorded at the time the ticket was created.
<b>Service Info</b>	Shows the service code, work type, and additional service-related information.
<b>Materials / Adjustments</b>	Shows the material type that was logged when the ticket was created..
<b>Weight</b>	Displays the Gross, Tare and Net weights recorded for the vehicle.
<b>Additional Info</b>	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.
<b>Notes</b>	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.

INBOUND / OUTBOUND

+

LOCATION

HOMEBASE

In Progress

47022001 Scale Boxes

Create Inbound Order from Search

Create Unidentified Inbound Order for Internal Vehicle

Create Outbound Order

			ACCOUNT / SITE	TRANSPORT INFO
41144 UNASSIGNED LOAD In Progress	12/27/23 Start: 12:30 ... End: 4:20 pm	BB-2	-	Method: Truck
41151 UNASSIGNED LOAD In Progress	01/16/24 Start: 2:02 pm	BB-2	-	Method: Truck
41154 UNASSIGNED LOAD In Progress	01/30/24 Start: 4:45 pm	BB-1	-	Method: Truck
41155 UNASSIGNED LOAD In Progress	01/30/24 Start: 4:46 pm	BB-2	-	Method: Truck
41158 Work Order: <u>7124301</u> In Progress	01/30/24 Start: 5:12 pm	772 License: DYY6018	GOODWILL (32404) GOODWILL (32404006) Second Goodwill Name 4135 AYERS ST, CORPUS CHRISTI, TX	

### 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 <a href="#">Scale-In Setup</a> 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 <i>Customer Service &gt; Site Inventory &gt; Trucks</i> .
Work Order	Work orders created in Customer Service can be searched here, provided they use an inbound-type service code and work type.

- 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.
- 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.

The screenshot displays the 'INBOUND / OUTBOUND' system interface. At the top, there's a header bar with 'INBOUND / OUTBOUND' and a 'CONFIRM' button. Below the header, a 'FACILITY' dropdown is set to 'QA Waste Transfer' and a status dropdown is set to 'All Scheduled'. A green button labeled 'Create Inbound Order (F5)' is visible. A red arrow points to a button labeled 'Create Unidentified Inbound Order for Internal Vehicle'. Below this, a table shows a list of orders. The first row is highlighted, showing details for order 41603, dated 04/01/25, with a start time of 11:30 am and an end time of 11:30 am. The table columns include ORDER #, DATE, VEHICLE, ACCOUNT / SITE, TRANSPORT INFO, SERVICE INFO, MATERIALS / ADJUSTMENTS, WEIGHT, and ADDITIONAL INFO. A popup window titled 'ADD DISPOSAL / SHIPMENT' is open, showing fields for FACILITY (QA Waste Transfer), EXTERNAL TICKET #, STATUS (In Progress), TRANSPORT METHOD (Truck), and MATERIAL. It also has a 'NOTES' section. Below the notes, there's a 'Weights' section with input fields for GROSS / IN, TARE / OUT, and NET, along with a 'START' date and time (04/09/25 Wed 05:01:50.000 PM) and a 'QTY' field (0). There are also fields for DISPOSAL RATE, FEE 1, FEE 2, and TOTAL COST. At the bottom of the popup, there's a 'Ticket Image' section with a checkbox labeled 'Include Ticket Image With Invoice and make available in customer portal'. A 'SAVE (F2)' button is at the bottom right of the popup.

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.

EDIT DISPOSAL / SHIPMENT

PENDING WORK ASSIGNMENT

INTERNAL TICKET # 41649

FACILITY

QA Waste Transfer

EXTERNAL TICKET #

STATUS

In Progress

TRANSPORT METHOD

TRUCK

MATERIAL

Truck

NOTES

Weights

WEIGHT IN10000pc

WEIGHT OUT7500pc

NET2500pc

Ticket Image

+

☐ Include Ticket Image With In

ASSOCIATE DISPOSAL TO ROUTE OR WORK ORDER

SEARCH TYPE

Route

LA

Q

TYPE	VEHICLE	SITE / ACCOUNT	SERVICE INFO	ADDITIONAL INFO
Route: LA 101 - Thu 4/10/25 Scheduled		Multiple		Driver: Aliena Somers LOB: Commercial
Route: LA 101 - Fri 4/11/25 Scheduled		Multiple		Driver: Aliena Somers LOB: Commercial
Route: LA 103 - Wed 4/9/25 Scheduled		Multiple		LOB: Residential
Route: LA 104 - Thu 4/10/25 Scheduled	LA-1	Multiple		Driver: Eric Kyle LOB: Commercial
Route: LA 105 - Fri 4/11/25 Scheduled		Multiple		LOB: Commercial
Route: LA405 - Tue 4/8/25 Scheduled		Multiple		LOB: Commercial
Route: LA405 - Fri 4/11/25 Scheduled		Multiple		LOB: Commercial

## Related Articles

[Process Cash-Pay Customers](#)

[Scale Setup](#)