Inbound Ticket Creation (Scale)

Last Modified on 08/15/2025 7:49 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 Transf	er –	In Progress	*						CONFIGURE SCALE	Search	۵ 🛛 🕄
Inbour	d Outbour	nd Histor	y Daily Totals									
ORDER #		date 🕆	VEHICLE	ACCOUNT / SITE	TRANSPORT INFO	SERVICE INFO	MATERIALS / ADJUSTMENTS		WEIGHT	ADDITIONAL INFO	PAYMENT NOTES	
тот	ALS: 13 loads								3.25 tons	0.00 yd ³		
41608 Inbound	Drder: <u>9443801</u>	04/02/25 Start: 1:26 pm	QATRK99 Type: LARGE License: LIC#99	QA Scale Customer 2 (49199) <u>QA Scale Customer 2 (49199001)</u> 216 Pacific St, Pomona, CA	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash	Stored Tare:	2,352 tons			
41609 Inbound	Drder: <u>9443802</u>	04/02/25 Start: 5:48 pm	QATRK99 Type: LARGE License: LIC#99	QA Scale Customer 2 (49199) <u>QA Scale Customer 2 (49199001)</u> 216 Pacific St, Pomona, CA	Method: Truck	Scale Inbound Services Scale IN - Auto Post	Trash					
41611 Inbound	Drder: <u>9443804</u>	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	Drder: <u>9443803</u>	04/02/25 Start: 5:49 pm	Al's Trucks Type: LARGE License: 112233 Ext. Id: 123ABC	Al'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 I	Order: <u>9443805</u> ending	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*: Tare*: Net:	3.5 tons 2 tons 1.5 tons	Manual Gross - Scale Down (Paul Gonzalez) Manual Tare - Scale Down (Paul Gonzalez)		
41614 Inbound	Drder: <u>9443810</u>	04/03/25 Start: 8:50 am	Al's Trucks Type: LARGE License: 112233 Ext. Id: 123ABC	Al'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	Drder: <u>9443811</u>	04/03/25 Start: 8:50 am	QATRK99 Type: LARGE License: LIC#99	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	Drder: <u>9443812</u>	04/03/25 Start: 8:52 am	Al's Trucks Type: LARGE License: 112233 Ext. Id: 123ABC	Al'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	Jedan 0442800	04/03/25 Start: 9:25 am	Al's Trucks Turne: LARGE	Al's Junk Hauling (49338) Scale Site Example (49338001)	Method: Truck	Scale Inbound Services	Trash	Gross*: Stored Tare	10,000 lbs	Manual Gross - Override by User (Aliena Somers)		

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.

INBOUND / OUTBOUND	INBOUND / OUTBOUND							
Create Inbound Or	LOCATION HOMEBASE Create Inbound Order from Search		 47022001 Scale Boxes 					
O Create Unidentified Create Outbound C	d Inbound Order for Internal Drder	Vehicle E	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) <u>GOODWILL (32404006)</u> 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.

FACILITY						
QA Waste Transfer 👻 All Schee	duled 👻					
Create Inbound Order (F5)	als					
Create Unidentified Inbound Order for Internal ORDER # DATE VEHICLE	Vehicle ACCOUNT / SITE	TRANSPORT INFO	SERVICE INFO	MATERIALS /	WEIGHT	ADDITIONAL INFO
TOTALS: 1 loads CREATE	NEW TRANSACTION			? 🗙	0.00 ton	s 0.00 vdi
44602 04/01/25 SEARCH T	TYPE Truck - Al's Trucks		0.0		d Tare: 8 000 ton	s 0.00 yu
41603 Start: 11:30 Start: 11:30 TYPE	VEHICLE SITE / ACCOUNT		SERVICE INFO	ADDITIONAL INFO	d fare: 6,000 ton:	s
Surcoured						
	· · · · · · · · · · · · · · · · · · ·					
	CREATE INBOUND ORDER					
	Saula Cita Suomala	SCHEDULE DATE	SERVICE CODE	ORDER TYPE		
	2212 Glacier Dr	04/09/25 Wednesday	Scale Inbound Services	- Inbound / Receiving - Scale IN - Auto	Post 👻	
	Saint Croix Falls, WI 54024-8347	TRUCK		VEHICLE INFO		
	COD - Payment Required	Al's Trucks	- 🛛			
		ORIGIN		MATERIAL		
			- 😒	1	-	
		TRANSPORTER	TRANSPORT METHOD	BILL OF LADING		
			👻 🛞 Truck	- O		
			CREATE			
	<u></u>					

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 <i>Service > Site Inventory > 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.

- 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.

INBOUND / OUTBOUND						
FACILITY QA Waste Transfer V All Sch	cheduled 👻					CONFIC
Create Inbound Order (F5)	als					
ORDER # DATE _ VEHIC	ACCOUNT / SITE	TRANSPORT INFO	SERVICE INFO	MATERIALS / ADJUSTMENTS	WEIGH	IT ADDITIONAL INFO
TOTALS: 1 loads	N				0.00 to	ns 0.00 yd ³
41603 04/01/25 Al's T	Trucks Al's Junk Hauling (49338)	Method: Truck	Scale Inbound Services	MSW	Stored Tare: 8,000 to	ns
Scheduled End: 11:30 am Licer Ext.	ADD DISPOSAL / SHIPMENT				7 😣	
	FACILITY	EXTERNAL TICKET #		STATUS		
	QA Waste Transfer	v		In Progress	Ψ	
	TRANSPORT METHOD	TRUCK		MATERIAL		
	Truck	*	- O		· ·	
	NOTES					
	Mainhas					
	GROSS (IN	04/00/25 M/s.d				
	GR033714	START 04/09/25 Wed	05:01:50.000 PI QIT	0 DISPOSAL RATE		
	TARE / OUT	END	-:	FEE 1		
	NET			FEE 2		
				TOTAL COST		
	Ticket Image					
	Include Ticket Image With Invoice and make	available in customer portal				
		available in castomer portar				
u			SAVE (F2)		-	

- 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						2 😣
PENDING WORK ASSIGNMENT			INTERNAL TICKET #	41649		
FACILITY		EXTERNAL TICKET	#	STATUS		
QA Waste Transfer	- ·			In Progre	SS	
TRANSPORT METHOD	N	TRUCK		MATERIAL		
Truck			PKORDER			2
NOTES	SEARCH TYPE Rout	e - LA		Q (8)		
	туре	VEHICLE 🕆	SITE / ACCOUNT 🕇		SERVICE INFO	ADDITIONAL INFO
Weights	Route: LA 101 - Thu 4/10/25 Scheduled		Multiple			Driver: Aliena Somers LOB: Commercial
WEIGHT IN 10000	pc Route: LA 101 - Fri 4/11/25 Scheduled		Multiple			Driver: Aliena Somers LOB: Commercial
WEIGHT OUT 7500 NET 2500	pc 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
Ticket Image	Route: LA 105 - Fri 4/11/25 Scheduled		Multiple			LOB: Commercial
Include Ticket Image With	In 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 Scale Photos Application (NavuNav)