Scale Setup

Last Modified on 08/15/2025 7:50 am PDT

The following scale setup applies to the various customer types processed at a landfill or transfer facility. For guidance on creating tickets and processing scale customers, refer to the Related Articles section at the bottom of this page.

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Universal Setup Requirements

Be sure to review each setup area to ensure scale transactions are processed correctly for every customer type.

Setup: Facility

Pathway: Setup > Operations > Facility

Create a facility to enable the inbound process and establish default settings to streamline scale transactions. **A facility is a required selection** on the Inbound/Outbound screen to create and manage scale tickets. For information about additional fields found in this screen, refer to the Facility Setup documentation.

UPDATE FACILITY									
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Add/Update Facility

The Add/Update Facility screen features two tabs containing essential settings for processing tickets on the Inbound/Outbound screen. Below are the field descriptions for essential fields in the Facility Settings and Inbound/Outbound tabs.

Field	Setting
Facility Settings	
Туре	Selection that is used to identify the type of facility that processes scale transactions.
Ownership	Select 'Internal'.
Division	Identifies the division the facility is located in.
Default Scale Unit of Measure	Select the default unit of measure used by the scale.
Weight UOM	Select the weight unit of measure that will be used. When the weight is captured, it is reflected on the work order using the UOM identified here.
Volume UOM	Select the volume unit of measure that will be used. When the volume is captured, it is reflected on the work order using the UOM identified here.
Inbound / Outbound	
Enable Inbound Order	Enable this field to process inbound scale transactions. If set to ' No ', the facility will not display as a selection option in the facility drop down on the Inbound/Outbound screen.
Enable Outbound Order	Enable this field to process outbound scale transactions. If disabled, the 'Create Outbound Order' option will not appear in the Inbound/Outbound screen's Add icon drop down.

Require Manual Weight Reason	Requires users to select a reason code when manually adding or modifying the tare-in or tare-out weight on an inbound or outbound ticket. This requires setting up 'Manual Weight' reason code types in <i>Setup > System ></i> <i>Reason Code</i> .
Default Scale Ticket Format	Option to set a default scale ticket format for printing receipts.
Search Default for Create New	An optional setting to define a default value for the <i>Search Type</i> field on the <i>Create New Transaction</i> screen. Setting a default can help streamline the process and improve efficiency.

Tab	Description
Division	Although this setting is not necessary for cash-pay customers, it may be necessary for third-party haulers to identify which divisions the facility is eligible to receive waste from.
Material Type	Select the Material Type tab to configure which materials are accepted by the facility. This tab is required to configure disposal rates in the Disposal Rate tab.
Disposal Rate	 Select the Disposal Rate tab to establish the rates specific to the material type and a unit of measure. If an internal truck should have a rate different from external trucks, use the Rate for Internal Trucks field to establish what the rate should be. * This field requires the configuration of material types in the the Material Type tab.
Material Areas/Grid	Optional configuration to designate specific areas within the facility for disposing of or transferring particular waste materials.

Facility Setup - Lower Grid tabs

Setup: Line of Business

Pathway: Setup > Services > Line of Business

A Line of Business (LOB) refers to distinct divisions or segments within a company's waste management operations, such as Roll-off, Residential, Commercial, and Scale. In scale transactions, the LOB is linked to work types, service codes, material origins and material types, which are essential for creating and processing transactions on an account. To facilitate scale transactions, create a dedicated Line of Business for scale. Additional information about the Line of Business setup screen can be found here:Line of Business Setup.

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Setup: Work Type

Pathway: Setup > Operations > Work Type

Work Type Setup defines the service action being performed and is recorded on a service record. Additional Inbound/Outbound settings are displayed when the setting for the **Action Category** is set to either **Inbound / Receiving** or **Outbound / Shipping**. To ensure accurate tracking, create a Work Type specifically for Scale-In and Scale-Out so that the service record reflects the correct transaction. Work Types are unique to each Line of Business and should be configured accordingly.

Review additional information on Work Types here: Work Type Setup and Work Type Event Class

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Key Fields

Field	Description
ID	The work type ID that will display on the work order.
Name	The name of the work type.
Line of Business	The Line Of Business the work type belongs to.
Action Category	Categorizes the action that is performed by the work type and controls the display of additional fields. Select Inbound/Receiving to populate a grouping of Inbound/Outbound fields.
Inbound / Outbound Fie The following fields disp Shipping.	elds lay when the Action Category is either Inbound / Receiving or Outbound /
Post Work Order When Completed	Select 'Yes' to automate the posting of a completed work order for scale tickets.
Enable Weight Adjustment	Controls the ability to adjust Gross / In and Tare / Out weights on the scale ticket.
Track Inbound Source/Origin	Controls the display of either an Origins tab, or Source Location tab on the service record. If 'No', the tabs are hidden. The following options are available: • No • Require Source Location • Require Material Origin • Optional Material Origin

Load Material Composition	 Controls the display of the Materials tab on the service record. Disabled Hides the Materials tab. Enable Multiple Materials Displays the Material tab, allowing you to record multiple materials along with their Quantity and Percentage. Enable Multiple Profiles and Materials Displays the Material tab, enabling you to record multiple profiles and materials within the record.
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Setup: Material Type

Pathway: Setup > Operations > Material Type

Create Material Types and assign them to the Scale LOB, or the line of business that you will be managing and tracking scale transactions under. After Material Types are created, they are enabled for a facility under the Material Type tab on the Facility Setup screen.

Key Setup Associating Material Types to Facilities

In *Facility Setup*, enable each material type the facility can receive under the *Material Type* tab. To streamline the inbound process, assign a **default inbound material** type. This will automatically populate the material type on new inbound tickets, saving time and ensuring consistency.

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		Business Ho	ns Division	Material Type	Disposal Rate	Material Area	s/Grids	Tanks	Target Usage												
		Business Ho DEFAULT INBOI MATERIAL	rs Division (D Trash	Material Type	Disposal Rate	Material Area	s/Grids	Tanks	Target Usage								Search		(Q (2)	
		Business Ho DEFAULT INBOI MATERIAL MATERIAL TYPE	rs Division ND Trash	Material Type	Disposal Rate	Material Area	s/Grids	Tanks	Target Usage	ENABLE MATE	IIAL INVENTO	RY	DEFAULT MA	ATERIAL AR	EA		Search		(۹ ۵	
		Business Ho DEFAULT INBOI MATERIAL MATERIAL TYPE ASBESTOS	rs Division ND Trash > MATE Asbe	Material Type RIAL TYPE Istos Non-Frieable	Disposal Rate	Material Area	s/Grids DEFAUL	Tanks	Target Usage	ENABLE MATER No	IIAL INVENTO	RY	DEFAULT MA	ITERIAL AR	EA		Search			Q 0	
		Business Ho DEFAULT INBOI MATERIAL MATERIAL TYPE ASBESTOS MSW	n Division ND Trash D MATE Asbe MSM	Material Type IRIAL TYPE stos Non-Frieable	Disposal Aate	Material Area	s/Grids DEFAUL	Tanks T CHARGE C	Target Usage	ENABLE MATER No No	IIAL INVENTO	RY	DEFAULT MA	ATERIAL AR	EA		Search				
		Business Ho DEFAULT INBOI MATERIAL MATERIAL TYPE ASBESTOS MSW TRASH	In Division ND Trash > MATE Asbo MSV Trash	Material Type RIAL TYPE stos Non-Frieable	Disposal Nate	Material Area	s/Grids DEFAUL	Tanks T CHARGE C	Target Usage	ENABLE MATER No No No	IIAL INVENTO	RY	DEFAULT MA	ATERIAL AR	EA		Search				
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		Business Ho DefAult INBOI MATERIAL TYPE ASBESTOS INSW TRASH BRICK BRICK BRUSH	rs Division ND Trash > MATE Asbe MSYA Trash Birusk	Material Type IRIAL TYPE ISTOR Non-Frieable	Disposal Aate	Material Area	s/Grids DEFAUL	Tanks T CHARGE C	Target Usage	EMABLE MATEL No No No No	IIAL INVENTO	RY	DEFAULT MA	ATERIAL AR	EA		Search				
		Business Ho Default INBO MATERIAL SBESTOS MSW TRASH BRICK BRICK BRICK BRICK BRICK	rs Division ND Trash Adots MSW Trash Brick Brick Brick CAD	Material Type IRIAL TYPE ISSN Non-Frieable	Disposal Nate	Material Area	s/Grids DEFAUL	Tanks	Target Usage	ENABLE MATEI No No No No No	IIAL INVENTO	RY	DEFAULT M/	ITERIAL AR	EA		Search				
		Business Ho DEFAULT INBOIN MATERIAL MATERIAL TYPE ASBESTOS MSW TRASH BRICK BRICK BRICK CABD CHEMO CHEMO	rs Dhúlen ND Trach 2 MATT Brút Brút Céolo Cher	Material Type Material Type Material Type Material Materi	Doposel Rate	Material Area	skārids DEFAUL	Tanks	Target Usage	ENABLE MATEL No No No No No No	IIAL INVENTO	RY	DEFAULT M/	ATERIAL AR	EA		Search				
		Business Mo Default INBOI MATERIAL MATERIAL TYPE ASBESTOS MSW TRASH BRICK BRICK BRICSH CAD CAD CLEARGIS CHEMO CLEARGIS	n Division NO Trash Asbe MSV Bridi Bridi Bridi Cab Chemer	Material Type RAL TYPE stos Non-Frieable s h h n Glass c Glass	Disposal Rate	Material Area	DEFAUL	Tanks T CHARGE C	Target Usage	FRABLE MATTEL No No No No No No No No	IIAL INVENTO	RY	DEFAULT M/	iterial ar	EA		Search				
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		Business Ho DEFAULT INBOI MATERIAL TYPE ASSESTOS MSW TRASH BRICK BRUSH CHEMO CLEARGIS CONCRETE DIRSES FLIP DIRSES FLIP	ns Division ND Trash Aubu MSS MSS Broki Cabo Cher Colo Con Bana	Material Type Mala TyPe stos Non-Frieable v s s c h h n n Glass zrete emable Inuida NOS	Dipusi kin	Material Area	DEFAUL	Tanks	Target Usage	EMABLE MATEL No No No No No No No No No No No	IIAL INVENTO	RY	DEFAULT MA	ITERIAL AR	EA		Search				

Setup: Service Code

Pathway: Setup > Services > Service Code

Service Codes identify the types of services offered under a Line of Business and populate for selection in the Service Code drop down field when adding an active service to a site, or to a proposal. Setup here affects many areas related to servicing and billing a site. Create a scale-specific service code and add it as an active service to the sites that use scale. Additional information about the Service Code setup screen can be found here: Service Code Setup.

After creating a service code, navigate to the Available Service Code Setup screen to specify its availability to the service regions in a division.

Key Setup Fields

Field	Description
Work Type Event Class	Select the work type event class that relates to inbound scale.

Service Code Surcharges									
SERVICE CODE	SCALE_IN				ACTIVE	Yes			
NAME	Scale Inbou	nd Servic	es		ENABLE ROUTING	No	-		
LINE OF BUSINESS	Scale				REQUIRE FREQUENCY	No	*		
QUIPMENT TYPE					ENABLE PARENT SERVICE LINKING	No	~		
MATERIAL TYPE					ENABLE DRIVER UPDATE	No	*		
UOM	service				ENABLE ACCOUNT SIGNATURE	No	*		
TAXABLE	No 👻	CLASS		*	ENABLE DRIVER SIGNATURE	No	*		
GL ACCOUNT				-	ENABLE WORK ORDER MINIMUM	No	Ŧ		
TEMPORARY SERVICE GL ACCOUNT				-	ENABLE RENTAL FEE	No	Ŧ		
PRORATION METHOD	Do Not Prorate		Do Not Prorate		-	ENABLE DEFAULT DESTINATION	No	Ŧ	
VACATION HOLD PRORATION	Do Not Prorate 👻			-	ENABLE NEGATIVE AMOUNT	No	~		
BILL WHILE ON CREDIT HOLD	Yes			-	ENABLE ESTIMATES TRACKING	No	*		
IS AP TRANSACTION	No			-	ENABLE EQUIPMENT OWNERSHIP	No	*		
EST MONTHLY VOL UOM				*	ENABLE SHARE	No	*		
IS SHELL	No			Ŧ	ENABLE VENDOR	No	*		
PRICING MODEL	None			Ŧ	ENABLE SITE SERVICE CLASS	No	~		
CALCULATE RATE PER YARD	No			Ŧ	ENABLE DISCOUNTS	No	*		
WORK TYPE EVENT CLASS	Scale IN		~	\otimes	COMPOSITION MATERIAL CLASS		- 🛞		
BILL ZERO AMOUNT	No			-					

Setup Specific to Cash-Pay Customers

The following setup applies to cash-pay customers—those who infrequently bring waste to the facility for disposal and do not have an account it can be charged against.

Setup: Bill Group

Pathway: Setup > Accounting > Bill Group

The Bill Group defines billing and invoicing configurations the account will follow. For Cash Pay accounts, these settings are minimal. This setup is optional if another bill group applies.

UPDATE BILL GROUP			? ⊗
Settings Notifications			
ID	52	INVOICE EMAIL FROM	
ACTIVE	Yes 💌	PRINT SEQUENCE	Invoice Number 👻
NAME	SCALE CASH	INVOICE LOGO	Select Image BROWSE
DIVISION	- 🛞	UPLOADED INVOICE LOGO	
ТҮРЕ	Arrears -	INVOICE LOGO 2	Select Image. BROWSE
FREQUENCY	Monthly -	UPLOADED INVOICE LOGO 2	
INVOICE FORMAT	Navu Base Product Format A 📼	WORK ORDER HEADER TEXT	
BILLING EXPORT FORMAT	•	SURCHARGE HEADER TEXT	
CUSTOMER PORTAL URL		FINANCE CHARGES TEXT	Finance Charges
MESSAGE DUE IN PAST 1-30 DAYS		BILLING AUTO PAY PROCESS DATE	- 🛛
MESSAGE DUE IN PAST 30-60 DAYS		SCHEDULED AUTO PAY TIME	03:00:00.000 PM
MESSAGE DUE IN PAST 61-90 DAYS		PAPER BILL FEE CHARGE CODE	- 🛞
MESSAGE DUE IN PAST 91 DAYS		PAPER BILL FEE (PER INVOICE)	
CUSTOM 1		MINIMUM INVOICE AMOUNT TO BE NOTIFIED	0.00
CUSTOM 2		MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	0.00
		ONE INVOICE PER	Disabled 👻
		DISABLE AUTOMATIC BILLING BATCH CREATION	No 👻
		DISABLE EMAIL INVOICE AS AN ATTACHMENT	No 👻

Key Fields

Field	Description
Invoice Format	Select the invoice format for printing and providing to the customer as a receipt.

Setup: Account Class

Pathway: Setup > Account > Account Class

The Account Class defines the billing and payment processing criteria for an account or group of accounts while also serving as a metric for revenue tracking. For a cash pay account, consider creating a dedicated **Scale** account class.

You can find more details on how to set up an Account Class in the following section: Account Class Setup

UPDATE ACC	OUNT CLASS						?	8	
Details	Customer Portal	Payment Processing	Status Management	Finance Charges and	Other Fees				
NAME		SCALE	CREATE CO	INTACT DEFAULT	Account		-		
ACTIVE		Yes	T DEFAULT C	ONTACT SERVICE NOTIFICA	TION Yes		Ŧ		
ТҮРЕ		Business	- GEOCODIN	IG TYPE	Roof Top		~		
GL ACCOUNT		Accounts Receivable	e 👻 🛞 GEOFENCE	RADIUS (METERS)	30				
GL SEGMENT		12000	NEW ACCO	NUNT NOTIFICATION TEMPL	ATE		- 0		
DEPOSIT GL A	CCOUNT	48988	Example Account						48988001
DEPOSIT GL SI	EGMENT OUNT CREDIT LIMIT		1234 San Gabriel Blvd Rosemead, CA 91770-3 US (O) +1 555-555-0501	3642	Active DIVISION ACCOUNT MG	QA Was R House A	ste Services Account		<u>1 of 1</u>
DEFAULT ACCO	OUNT TERM ATE PAYMENT TYPE		TERMS N INVOICE DELIVERY P	Net 20 Printed	CLASS BILL GROUP ADVANCE -	Scale DAY-Q2 Billed T	-FEB-MAY-AUG- hru Date None	-NOV	
DEFAULT BILL	BY SITE		CURRENT 1-	30 31-60	61-90	91-120	120+	TOTAL	-
			0.00 0.0	0.00	0.00	0.00	0.00	0.00	
		нісні існтя			PEN	IDING	Auto Pay N	lot Enabled	
					3	1004 Price		Paul Gor	nzalez
			ICES (1) Standard		- C 🔒		TOTAL RECU	RRING \$65.00	
		QTY SER	VICE CODE			SERVICE ID	FREQUENC	Y SCHEDU	ILE PER UNI
		+ 1 20	Yard Open Top Service			D3D3	1x per wee	ek M	\$
		🔥 CALENDAR	📃 🔇 August, 2024	1 📰 📏 EV	ENTS			Ŧ	

Key Fields

Field	Description
GL Segment	The <i>GL Segment</i> enables tracking of revenue streams for improved financial reporting and analysis.
Default Account Term	Select 'COD' - Cash on Demand

Setup: Create Account Specific to Cash-Pay Customers

Pathway: Accounts > Add Account

For cash-pay customers—those who don't have an active account and typically use the facility infrequently create a searchable account that scale operators can use to process payments on. This will streamline the process by eliminating the need to add a new account for each customer that comes through. For more information about account creation, review the documentation here: Add Account.

REATE ACCOUNT						ACCOUNTS > ADD ACCO
ATUS SOUF	CE	ACCOUNT DIVISION		SITE DIVISION	ACCOUNT CLASS	
ctive - Exis	ing Customer	- QAWASTE	Ŧ	QAWASTE	SCALE2	-
Service Address				Billing Address		
AME	CASH PAY				✓ Same as service ad	dress
AME 2				NAME		
ADDRESS LINE 1	5555 Hermann Park Dr			NAME 2		
DDRESS LINE 2				ATTN		
TTY/STATE/POSTAL CODE	Houston	TX - 77030			Enter a location	
HONE				ADDRESS LINE T	Linter a location	
VEDENTE	(213) 333 3333			ADDRESS LINE 2		
/EBSITE				CITY/STATE/POSTAL COD	DE	~
0#				PHONE	• (999) 999-99	199
PA						
IGNATURE REQUIRED						
ONTACT NAME		TITLE		CONTACT	MAII	
	- (000) 000 0000					
	• (555) 555-5555	PHONE ITPE		+ BILLING CC	NIACI 👻	
Billing						AP
ILL GROUP	SCALE CASH	-	SURCHARGE GROUP		~	DEFAULT WALLET
IVOICE BY EMAIL	No	~	AUTO STATUS UPDAT	E EXCLUDE FROM P	AST DUE	Account Payment Portal
ERM	COD	-	APPLY FINANCE CHAR	GES OTIFICATION		PAYEE
REDIT LIMIT	0	\$				1099
			SERVICE REGION	TAX REGION	Q 🖉	ORIGIN
ALES REP	SITE CLASS					
ALES REP Jiena Somers	COM	- ®	QA Waste OPEN N	IARKET - RIS COUNT	Y-HOUSION MIA 👻 🔯	▼ ⊗
ILES REP Iliena Somers ACCOUNT CUSTOM	COM	- ©	QA Waste OPEN N	IARKET - RIS COUNT	Y-HOUSION MIA 👻 💿	• 🛛

Key Fields:

Field	Setup
Account Class	Select a previously created account class that applies to scale or cash-pay customers.
Name	Name the account with a name that can be easily searched by scale operators.
Address	Recommended: enter the address for the facility.
Bill Group	Select a previously created Bill Group that applies to cash-pay customers.
Invoice By Email	Select 'No' for this field.
Term	Select 'COD' (Cash on Delivery) to require the scale operator to collect payment before the Work Status can be changed to "Completed."
Tax Region	Select the tax region that applies to the facility's location.

Setup: Assign Active Service to Cash Account

Pathway: Accounts > Account (Customer Service Screen) > Add Active Service

For the cash-pay account, assign the appropriate active service that applies to inbound scale processing.

Ð	49158	Examp	le Account - S	icale											49158001	Example Accou	int - Scale			
	100	5555 H Housto	ermann Park	Dr 1718				Active							<u>1 of 1</u>	SS55 Herm	nann Park Dr TX 77030-1718			Active
	Ä	US						DIVISION	ACR	QAWASTE Aliana Somerr						Harris Cou	inty Houston Museu	im District		DIVISION SERVICE REGION
	6	TERMS		COD				CLASS	NGR	SCALE2						US				SALES REP
	Ø	INVOIC	E DELIVERY	Email wit	h Link			BILL GROUP		QA Billing Cycle					S.					SOURCE
								ADVANCE -	MONTHLY	Billed Thru Date Non	e				•					GENERATOR
	ā		CURRENT		1-30	3	1-60	61-9	0	91-120		120+	TOTAL							TAX REGION
			0.00		0.00		0.00	0.00)	0.00		0.00	0.00	2						TAX EXEMPT
													Auto Pay Not E	nabled						LEED REPORTABLE
HIGHLIG	HTS									PENDING										
	TIVE SERV	ICES (0)	Notes		- T	2 🕀	-	TOTAL R	ECURRING											
	TY SER	VICE COD	E				Commercial			9	SERVICE ID	FREQUENCY	SCHEDULE			ACCO	DUNT		RATE	
							Document De	truction												
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				Jul	28		Medical waste		29			Jul 30				Jul 31			Aug 1	
							Miscellaneous		_											
							Residential	ADD	ACTIVE S	ERVICE									2	8
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Setup Specific to Internal and External Haulers

The following setup applies to roll-off, third party and internal customers.

Truck Setup

Truck setup is essential for tracking vehicles using the facility and accurately recording both internal and external scale transactions.

Trucks can be added in two ways: through **Truck Setup** where they will appear in the Truck drop down on inbound work orders, or in **Site Inventory** to define authorized customer trucks that can be searched.

Truck Setup vs Site Inventory - Trucks

	Description of Use	Important Setup Requirements
Truck Setup	Defines the trucks available for selection in the Truck drop down on the Edit Service Record screen.	N/A
Site Inventory - Trucks	Associates trucks to the site they belong to, enabling scale operators to quickly search for trucks on the Inbound/Outbound screen when creating a new inbound work order.	If a site does not have an active inbound service associated with it, the truck cannot be searched when creating a new inbound order.

Truck Setup

Setup > Operations > Truck and Customer Service Screen > Site Details > Site Inventory > Trucks (tab)

Add trucks in Truck Setup to include them on inbound work orders. Trucks added here will appear in the

Truck drop down on the Inbound Order screen and streamline the process with pre-defined tare weights.

TRUCK SETUP												
	QAWAST	ΓE	LINE OF BUSINES	s All		how Inactive						
NAME ↑	LICENSE PLATE	DIVISION	LINE OF BUSINESS	TRUCK TYPE DEP	DOT	FUEL TYPE	VOLUME CAPACITY	COMPACTION RATIO	WEIGHT	TARE WEIGHT II	NSPE TYPE	CAMERA SYSTEM
151	GNV3838	QAWASTE	Commercial	LARGE		Other	0 yd³		7,100 lbs		DVIR	None
BB-1		QAWASTE	Scale	LARGE		Other	100 m ³		10 tons	2,650 lbs		None
BB-2		QAWASTE	ADD TRUCK							🛞 100 lbs		None
BB-3		QAWASTE	NAME			TRUCK TYPE			-			None
DTRUCK		QAWASTE	NAME			TROCK TTPE	0.1		-			None
LA-1		OAWASTE	DIVISION		Ŧ	FUEL TYPE	Other		Ŧ		DVIR	None
			LINE OF BUSINESS		*	VEHICLE INSPECTION TYP	E		~			
RESTRKA1	RESTRKA1	QAWASTE	OWNERSHIP		~	LICENSE PLATE					DVIR	None
TR1		OAWASTE	ODOMETER UOM		- ©	VIN				000 lbs		None
			SPEED UOM		- ©	EXTERNAL ID						
TR2		QAWASTE								000 lbs		None
TR3		QAWASTE	Capacity Onbo	pard Permits	Attributes					000 lbs		None
			VOLUME CAPACITY		UOM	-						
			COMPACTION RATIO		\$							
			WEIGHT CAPACITY		UOM	~						
			TARE WEIGHT			-						
			IARE WEIGHT		UUM	Ť						
					_							
						SAVE						

Additional information about the Truck Setup screen can be reviewed here: Truck Setup.

Site Inventory - Trucks

Pathway: Customer Service Details > Site Inventory > Trucks [tab]

Add trucks to a site's inventory to define a customer's authorized trucks and define the truck's tare weight for faster ticket processing. This setup also allows scale operators to quickly search trucks across sites within the same division as the facility based on details like name or license plate number.

Additional information about site inventory can be reviewed here: Site Inventory (Trucks)

49338001 Scale Si	ite Example						
1 of 1	12 Glacier Dr int Croix Falls, WI 54024	-8347			Active DIVISION SERVICE REGION SALES REP SOURCE GENERATOR	QAWASTE QA Service House Acco Call In Small Quan	Region 2 ount - House Acc ntity Generator
	Equipment Trucks	D				(?) ⊗	<u>rge - Commerci</u>
- House Account (NA	IME 🕈	LICENSE PLATE LINE C	OF BUSINESS	TRUCK TYPE DEP	DOT	TARE WEIGHT	
Al'	's Trucks	ADD TRUCK				800 lbs	-
- House Account		NAME	1				
- House Account (1				
House Account (LINE OF BUSINESS		÷			
- House Account		TRUCK TYPE		¥			
		LICENSE PLATE					
		VIN					
		EXTERNAL ID					-
		TARE WEIGHT		UOM	-	6.0.00 ===	r montn
		Permits Attributes				\$ 0.00 per	service
		DEP		EXPIRATION DATE	1		
		DOT		EXPIRATION DATE			
				SAVE			

Optional Setup

The following setup is optional and only necessary if it is part of your process.

Material Origin Setup

Pathway: Setup > Operations > Material Origin

Material Origin Setup determines which material origins are available on the Origins tab within a Service Record. Since origins are division-specific, the Origins tab will only be visible if the facility's division matches the division assigned to the material origin. If a division is not assigned, the tab will display on all service records.

Origins [Tab]

To track and record Material Origin on a Service Record, the **Track Inbound Source/Origin** field in **Work Type Setup** must be set to either **"Require Material Origin"** or **"Optional Material Origin."** If neither option is selected, the **Origins** tab will not be displayed. If origins are recorded, their total percentage must sum to 100%.

MATERIAL ORIGIN	SETUP					SI	ETUP > OP	PERATIONS > MATERIAL C
O								
ID	NAME	I	EXTERNAL ID	DIVISION		AC	TIVE	
1000	Midtown		Test			Ad	tive	
1001	Downtown					Ad	ctive	
1002	Baytown (TX)			HOUSTON		Ad	tive	
1003	test 2		test	CORPUS		Ad	tive	
1004	DTLA	FDIT SERVICE RECORD						2 🗴
		Site # <u>49338001</u> Scale Site Example / 2212 Glacier Dr Saint Croix Falls, WI 54024-8347	TICKET NUMBER 41601 ORDER NOTES	WORK ORDER QTY 9443128 1	SERVICE CODE Scale Inbound Services	WORI SCALE	K TYPE E_POST	ORDER TYPE Inbound / Receiving
		COD - Payment Required PHONE +1 715-483-1399	TRUCK	VEHI	CLE INFO	PO NUMBER		EXTERNAL ID
		CREATED BY	Al's Trucks	- ©				
		Aliena Somers - Admin-NS (Sales) on 4/1/25 9:37 am	RECEIVING FACILI	тү	MATERIA	AL		
		ORDER REASON	QA Waste Tran	sfer	Trash			Ŧ
			TRANSPORTER		TRANSPORT METHOD		BILL OF LAD	DING
				→ (2)	Iruck	→ (3)		
			WORK STATUS	_	EXCEPTION REASON	- 0	POSTING S	TATUS
			Introgress			• @	renuing	
			Weights		04/01/25 Tue			CHARGES
			GROSS / IN	tons	START 04/01/25 Tue	09:37	: 17.00	SURCHARGES
			TARE / OUT	8000 tons	END	-:		TAXES
			NET	tons	Adjust			TOTAL
		Charges 2 Payments 0	rigins Materials	Completion	Attachments Photos			
		ORIGIN T						PERCENTAGE
		Downtown						
		Midtown						
								Total:
		Select Print Format		SA	VE (52) Origin pendin			

Manual Weight Reason Codes

Pathway: Setup > System > Reason Code

If *Require Manual Weight Reason* is set to 'Yes' for the facility, users must select a *Reason Code* when manually adding or changing the *Gross/In* or *Tare/Out* weights before saving.

Reason Code Setup

In *Reason Code Setup*, add each possible *Manual Weight Type* scenario that may require a user to manually enter or adjust weights on the service record.



Related Articles

Inbound Ticket Creation Process Cash-Pay Customers Scale Photos Application (NavuNav)