

Last Modified on 02/18/2026 1:09 pm PST

INBOUND / OUTBOUND
OPERATIONS > INBOUND / OUTBOUND

FACILITY
Doc Landfill

In Progress

TARE TRUCK OR EQUIPMENT

CONFIGURE SCALE WORKSTATION

Search

Inbound	Outbound	History	Daily Totals							
ORDER #	DATE ↓	VEHICLE	ACCOUNT / SITE	TRANSPORT INFO	SERVICE INFO	MATERIALS / ADJUSTMENTS	WEIGHT	ADDITIONAL INFO	PAYMENT NOTES	
TOTALS: 19 loads										(4) \$ 1,349.50
42021 Inbound Order: 11026514	02/18/26 Start: 2:03 pm	QATRK22								
42020 UNASSIGNED LOAD	02/18/26 Start: 1:24 pm									
41991 Inbound Order: 10994010	02/13/26 Start: 1:16 pm									
41992 Inbound Order: 10994011	02/13/26 Start: 1:18 pm									
41993 Inbound Order: 10994012	02/13/26 Start: 1:19 pm									
41995 Inbound Order: 10994014	02/13/26 Start: 1:23 pm									
41997 Transfer Order: 10994026	02/13/26 Start: 3:36 pm	TRK10 Type: LARGE License: 4TRK10 DEP: 56788 DOT: 99584								
41973 Inbound Order: 10986068	02/12/26 Start: 3:07 pm									
41974 Inbound Order: 10986069	02/12/26 Start: 3:27 pm									
41975 Inbound Order: 10986070	02/12/26 Start: 3:28 pm									
41976 Inbound Order: 10986071	02/12/26 Start: 3:36 pm									
41977 Inbound Order: 10986072	02/12/26 Start: 3:37 pm									\$ 0.00
41978 Inbound Order: 10986073	02/12/26 Start: 3:41 pm									
41979 Inbound Order: 10986074	02/12/26 Start: 3:43 pm									\$ 442.00

EDIT INBOUND / RECEIVING - TICKET NUMBER: 41991 - WORK ORDER: 10994010

Site # 49618001

DocScale Customer ✓

102 N Cascade St
Oscoda, WI 54020

COD - Payment Required

CREATED BY
Aliena Somers - Admin-NS (Sales) on 2/13/26
1:16 pm

ORDER REASON

TICKET NUMBER 41991 **WORK ORDER** 10994010 **QTY** 1

SERVICE CODE Scale Inbound Services (39344)

WORK TYPE SCALE_POST **ORDER TYPE** Inbound / Receiving

ORDER NOTES

TRUCK _____ **VEHICLE INFO** _____

PO NUMBER _____ **BLANKET PO** _____ **EXTERNAL ID** _____

RECEIVING FACILITY Doc Landfill **MATERIAL** C&D

TRANSPORTER _____ **TRANSPORT METHOD** _____ **BILL OF LADING** _____

WORK STATUS In Progress **EXCEPTION REASON** _____ **POSTING STATUS** Pending

Weights - Scale Version: 1.2 - CC XX-XXX

GROSS / IN	tons	START	02/13/26 Fri	01:16:16	000 P
TARE / OUT	tons	END	--:--:--	--:--:--	
NET	tons	VOLUME		yd³	

CHARGES \$ 210.00

SURCHARGES \$ 0.00

TAXES \$ 0.00

TOTAL \$ 210.00

Charges \$ 210.00 ! **Payments** **Origins** **Materials** **Completion** **Attachments** **Photos**

☒ Charges must match Equipment **WO MINIMUM**

☐ Charges must match Material

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
2.1			2.1	ton	Construction & Demolition	\$ 100.00		None		\$ 210.00

Select Print Format

ADD PAYMENT (F7)

SAVE (F2)

Payment \$210.00 pending / Origin pending

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

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.

The screenshot displays the 'UPDATE FACILITY' interface. The 'Facility Settings' tab is selected, showing various input fields for facility information. The 'Inbound / Outbound' tab is also visible, showing settings for inbound and outbound orders. The 'Facility Settings' tab includes fields for NAME, ABBREVIATION, TYPE, OWNERSHIP, DIVISION, EXTERNAL ID, ADDRESS LINE 1, ADDRESS LINE 2, CITY, STATE / POSTAL CODE, PHONE, CONTACT NAME, EPA ID, and STATE ID. The 'Inbound / Outbound' tab includes fields for ENABLE INBOUND ORDER, ENABLE OUTBOUND ORDER, REQUIRE MANUAL WEIGHT REASON, DEFAULT SCALE TICKET FORMAT, and SEARCH DEFAULT FOR CREATE NEW.

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	
Type	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 inbound 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 inbound 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 when manually adding or modifying the tare-in or tare-out fields on an inbound or outbound ticket. This requires setting up Manual Weight reason code types in <i>Setup > System > 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 configure a default value for the <i>Search Type</i> field on the Create New Transaction screen. Setting a default can help streamline the process and improve efficiency.

Facility Setup - Lower Grid tabs

Tab	Description
Business Hours	Enter the hours of operation for a facility in the Business Hours tab.
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. <i>* This field requires the configuration of material types in the the Material Type tab.</i>
Origin Fees	Select the Origin Fees tab to establish origin-specific fees at the facility level. Configuring fees here enables multiple origin fees to be created for a single facility, each with its own rate, material type, charge code, and effective date range, providing flexibility to support varying pricing structures by origin.
Material Areas/Grid	The Material Areas/Grid is an optional configuration to designate specific areas within the facility for disposing of or transferring particular waste materials.
Tanks	For facilities that use tanks, the Tanks tab is used to capture the capacity and volume of each tank at the locatio
Target Usage	Create one to multiple unique target usage goals for a disposal location in the Target Usage tab. Setup here is required to calculate and track target usage progress in the Disposal Activity screen (Operations).

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](#).

LINE OF BUSINESS SETUP

+

ID	NAME	SCREEN TYPE	ENABLE MANIFEST PROCESSING	GL SEGMENT	TEMPORARY SERVICE GL	WORK ORDER MINIMUM	OVER MAX-WEIGHT CHARGE	UNEARNED REVENUE GL	ENABLE USED OIL	AUTO COMPLETE	DAYS AVAILABLE TO	RECEIPT H
DOCDEST	Document Destruction											
FEL	Commercial											
HAZ	Hazardous Material											
INACTIVE	INACTIVE LOB											
LF	Inbound and Outbound											
MEDICAL	Medical Waste											
MISC	Miscellaneous											
RESI	Residential											
RO	Roll Off											
SCALE	Scale											
test	test											
TEST2	TEST LOB											
UO	Used Oil Collection											

UPDATE LINE OF BUSINESS

LOB ID

SCALE

NAME

Scale

ACTIVE

Yes

Settings

Mobile

Optimization

Self-Service Ordering

Productivity and Profitability

SCREEN TYPE

1

ENABLE USED OIL COLLECTION

No

GL SEGMENT

SCL

ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK

No

TEMPORARY SERVICE GL SEGMENT

ENABLE MANIFEST PROCESSING

No

UNEARNED REVENUE GL ACCOUNT

Unearned Revenue

ENABLE MANIFEST GROUP WEIGHT ROUNDING

No

WORK ORDER MINIMUM CHARGE CODE

ENABLE ACTIVE DISPATCH

No

OVER MAX WEIGHT CHARGE CODE

ENABLE CHARGE CODE WASTE CODES

No

RENTAL CHARGE CODE

ENABLE WORK TYPE DEFAULT CHARGE CODES

No

RECURRING MINIMUM CHARGE CODE

ENABLE BIC REPORTING

No

LIMIT CHARGE CODE TO MATCHING EQUIPMENT

No

ENABLE LABOR TRACKING

No

LIMIT CHARGE CODE TO MATCHING MATERIAL

No

ROUTE CUTOFF TIME

09:00:00 PM

INVOICE SUMMARY DESCRIPTION

PRODUCTIVITY UNIT NAME

Service Frequencies

NavuNav

FREQUENCY TYPE

Setup: Work Type

Pathway: [Setup](#) > [Operations](#) > [Work Type](#)

Work Type Setup defines the service action being performed and is recorded on an inbound order. 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](#)

WORK TYPE SETUP

+

LINE OF BUSINESS

All

ID	NAME	LOB	ACTION CATEGORY
RMW_Setup	Setup RMW Site	Medical Waste	
RMW_SVC	Scheduled RMW Service		
RMW_XTRAPU	Extra RMW Pickup		
RO_DELIVER	RO Delivery		
RO_DUMPRET	RO Dump/Return		
RO_RELOCAT	RO Relocate		
RO_REMOVE	RO Removal		
RO_REPAIR	RO/Packer Repair		
RO_SWAP	RO Swap		
RODUMPYB	Dump Yard Box		
RS_BULKY	RS Bulk Pickup		
RS_DELIVER	RS Delivery		
RS_EXCHNGE	RS Exchange		
RS_EXTRAPU	RS Extra Pick Up		
RS_MISSED	RS Missed Pick Up		
RS_REMOVE	RS Removal		
RS_REPLACE	RS Replacement		
RS_SERVICE	RS Service		
SCALE_IN	Scale IN		
SCALE_OUT1	Scale Outbound		
SCALE_POST	Scale IN - Auto Post		
SCALEOTMLT	Scale Outbound - Multiple Profiles		
SCVC_HAZ	Service HAZ		

UPDATE WORK TYPE

Details

Nav/Nav Settings

ID

SCALE_IN

NAME

Scale IN

SELF-SERVICE LABEL

LINE OF BUSINESS

Scale

INVENTORY MOVE TYPE

None

ACTION CATEGORY

Inbound / Receiving

MANIFEST NOTIFICATION TEMPLATE

CREATE ONE SERVICE RECORD PER QUANTITY

No

ENABLE DISPOSAL ENTRY

Yes

ENABLE CONSOLIDATION BATCH LINK

No

PRODUCTIVITY UNITS

1.00

DESTRUCTION DATE TRACKING

Disabled

Inbound / Outbound

POST WORK ORDER WHEN COMPLETED

No

ENABLE WEIGHT ADJUSTMENT

No

TRACK INBOUND SOURCE / ORIGIN

Require Material Origin

LOAD MATERIAL COMPOSITION

Enable Multiple Profiles and Materials

Route Optimization

ORDER BASELINE SECONDS

DEFAULT SECONDS PER UNIT

0

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 Fields The following fields display when the Action Category is either Inbound / Receiving or Outbound / Shipping .	
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: <ul style="list-style-type: none"> 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.

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**. This will automatically populate the material type on new inbound tickets. Only the materials enabled here will be available for selection when creating a new inbound order for the facility.

MATERIAL TYPE SETUP

MATERIAL CLASS: All LINE OF BUSINESS: Scale

ID	NAME	GL SEGMENT	EXTERNAL ID	IDENTIFIER	PACKAGE SIZE	MATERIAL CLASS	PROFILED MATERIAL	UN HAZARDOUS MATERIAL	LEED REPORTABLE	DEFAULT UOM	RECYCLABLE
BRICK	Brick				1	C&D	No		Yes	pound	No
DIRT	Dirt & Clean Fill				1	C&D	No		No		No
HAZCHEM	Hazardous Chemicals		Haz Chemicals	X	1	HAZARDOUS	Yes		No		No
MSW	MSW				1	MSW	No		Yes	pound	Yes
TRASH	Trash										No

FACILITY SETUP

TYPE: Transfer Station DIVISION: QAWASTE

ID	NAME	ABBREV	DIVISION	TYPE	OWNERSHIP	ACTIVE	ADDRESS LINE 1	CITY	STATE	POSTAL CODE	SCALE UOM	WEIGHT UOM	VOLUME UOM	OWNERSHIP	SIGNATURE BY	SIGN	ICON
1045	QA Waste Transfer	QA	QAWASTE	Transfer Station	Internal	Active	1234 Main St	Houston	TX	45678	ton	ton	cubic y...	Internal	Stan Manny	View	
1048	LA TRANSFER STATION	LATS	QAWASTE	Transfer Station	Internal	Active	2509 Rosecr...	Los Angeles	CA	90059	ton	ton	cubic y...	Internal			

Material Type

MATERIAL TYPE ID	MATERIAL TYPE	DEFAULT CHARGE CODE	ENABLE MATERIAL INVENTORY	DEFAULT MATERIAL AREA
ASBESTOS	Asbestos Non-Friable		No	
MSW	MSW		No	
TRASH	Trash		No	
BRICK	Brick		No	
BRUSH	Brush		No	
C&D	C&D		No	
CHEMO	Chemo		No	
CLEARGLS	Clear Glass		No	
COLORGLS	Colored Glass		No	
CONCRETE	Concrete		No	
DIESELFUEL	Flammable Liquids NOS		No	
DIRT	Dirt & Clean Fill		No	

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.

UPDATE SERVICE CODE

Service Code

Surcharges

SERVICE CODE	SCALE_IN	ACTIVE	Yes
NAME	Scale Inbound Services	ENABLE ROUTING	No
LINE OF BUSINESS	Scale	REQUIRE FREQUENCY	No
EQUIPMENT 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
TEMPORARY SERVICE GL ACCOUNT		ENABLE RENTAL FEE	No
PRORATION METHOD	Do Not Prorate	ENABLE DEFAULT DESTINATION	No
VACATION HOLD PRORATION METHOD	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	ENABLE VENDOR	No
PRICING MODEL	None	ENABLE SITE SERVICE CLASS	No
CALCULATE RATE PER YARD	No	ENABLE DISCOUNTS	No
WORK TYPE EVENT CLASS	Scale IN	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

ACTIVE

Yes

NAME

SCALE CASH

DIVISION

TYPE

Arrears

FREQUENCY

Monthly

INVOICE FORMAT

Navu Base Product Format A

BILLING EXPORT FORMAT

CUSTOMER PORTAL URL

MESSAGE DUE IN PAST 1-30 DAYS

MESSAGE DUE IN PAST 30-60 DAYS

MESSAGE DUE IN PAST 61-90 DAYS

MESSAGE DUE IN PAST 91 DAYS

CUSTOM 1

CUSTOM 2

INVOICE EMAIL FROM

PRINT SEQUENCE

Invoice Number

INVOICE LOGO

Select Image

BROWSE...

UPLOADED INVOICE LOGO

INVOICE LOGO 2

Select Image

BROWSE...

UPLOADED INVOICE LOGO 2

WORK ORDER HEADER TEXT

SURCHARGE HEADER TEXT

FINANCE CHARGES TEXT

Finance Charges

BILLING AUTO PAY PROCESS DATE

SCHEDULED AUTO PAY TIME

03 : 00 : 00 . 000 PM

PAPER BILL FEE CHARGE CODE

PAPER BILL FEE (PER INVOICE)

MINIMUM INVOICE AMOUNT TO BE NOTIFIED

0.00

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 ACCOUNT CLASS

Details

Customer Portal

Payment Processing

Status Management

Finance Charges and Other Fees

NAME

SCALE

CREATE CONTACT DEFAULT

Account

ACTIVE

Yes

DEFAULT CONTACT SERVICE NOTIFICATION

Yes

TYPE

Business

GEOCODING TYPE

Roof Top

GL ACCOUNT

Accounts Receivable

GEOFENCE RADIUS (METERS)

30

GL SEGMENT

13000

NEW ACCOUNT NOTIFICATION TEMPLATE

48988

Example Account

48988001

100

1234 San Gabriel Blvd

Active

1 of 1

1

Rosemead, CA 91770-3642

DIVISION

QA Waste Services

1

US

ACCOUNT MGR

House Account

1

(O) +1 555-555-0501

CLASS

Scale

1

TERMS

Net 20

BILL GROUP

DAY-Q2-FEB-MAY-AUG-NOV

1

INVOICE DELIVERY

Printed

ADVANCE -

Billed Thru Date None

1

CURRENT

1-30

31-60

61-90

91-120

120+

TOTAL

1

0.00

0.00

0.00

0.00

0.00

0.00

1

Auto Pay Not Enabled

HIGHLIGHTS

PENDING

1004

Price

Paul Gonzalez

ACTIVE SERVICES (1)

Standard

TOTAL RECURRING

\$ 65.00

QTY

SERVICE CODE

SERVICE ID

FREQUENCY

SCHEDULE

PER UNIT

1

20 Yard Open Top Service

D3D3

1x per week

M

\$

CALENDAR

August, 2024

EVENTS

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](#).

CREATE ACCOUNT

ACCOUNTS > ADD ACCOUNT

STATUS

Active

SOURCE

Existing Customer

ACCOUNT DIVISION

QAWASTE

SITE DIVISION

QAWASTE

ACCOUNT CLASS

SCALE2

Service Address

NAME

CASH PAY

NAME 2

ADDRESS LINE 1

5555 Hermann Park Dr

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

HoustonTX77030

PHONE

(999) 999-9999

WEBSITE

PO#

EPA

SIGNATURE REQUIRED

Billing Address

Same as service address

NAME

NAME 2

ATTN

ADDRESS LINE 1

Enter a location

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

PHONE

(999) 999-9999

CONTACT NAME

TITLE

CONTACT EMAIL

CONTACT PHONE

(999) 999-9999

PHONE TYPE

BILLING CONTACT

Billing

BILL GROUP

SCALE CASH

INVOICE BY EMAIL

No

TERM

COD

CREDIT LIMIT

0

SURCHARGE GROUP

AUTO STATUS UPDATE

APPLY FINANCE CHARGES

EXCLUDE FROM PAST DUE NOTIFICATION

AP

DEFAULT WALLET

Account Payment Portal

PAYEE

1099

SALES REP

Aliena Somers

SITE CLASS

COM

SERVICE REGION

QA Waste OPEN MARKET

TAX REGION

RIS COUNTY-HOUSTON MTA

ORIGIN

ACCOUNT CUSTOM PROPERTIES

SITE CUSTOM PROPERTIES

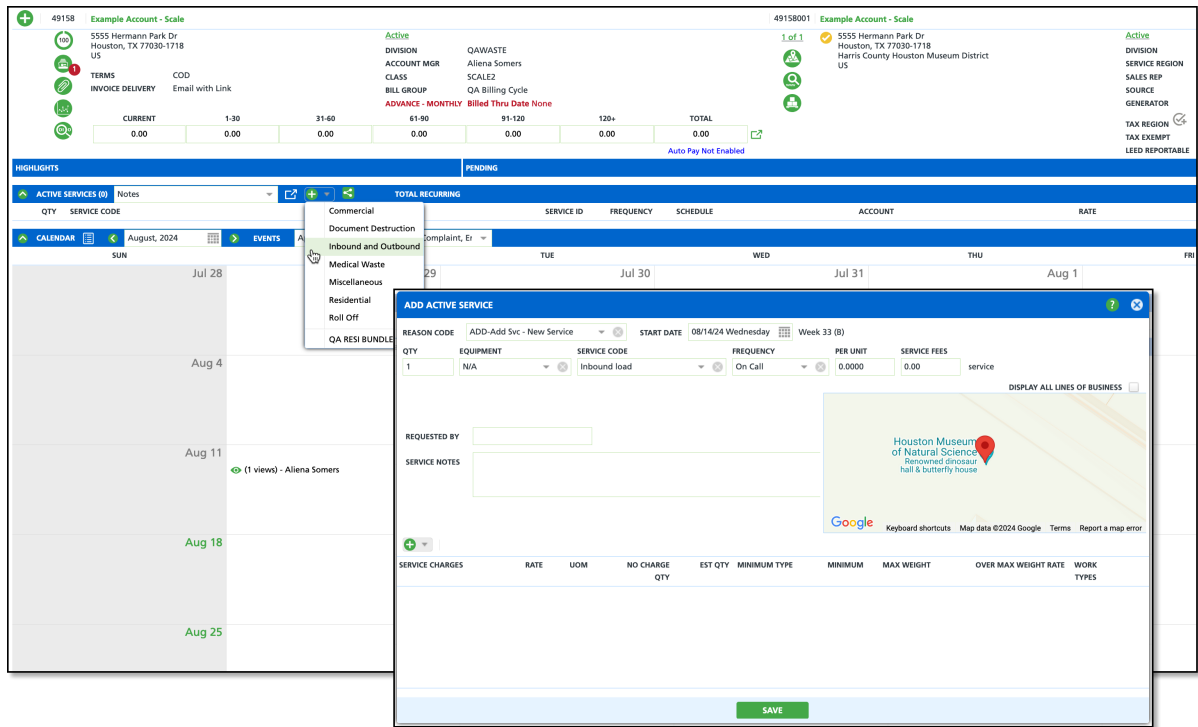
Key Fields:

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.



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.

Additional information about the Truck Setup screen can be reviewed here: [Truck Setup](#).

TRUCK SETUP

DIVISION

QAWASTE

LINE OF BUSINESS

All

Show Inactive

NAME	LICENSE PLATE	DIVISION	LINE OF BUSINESS	TRUCK TYPE	DEP	DOT	FUEL TYPE	VOLUME CAPACITY	COMPACTION RATIO	WEIGHT CAPACITY	TARE WEIGHT	INSPE... TYPE	CAMERA SYSTEM
151	GNV3838	QAWASTE	Commercial	LARGE			Other	0 yd³		7,100 lbs		DVIR	None
BB-1		QAWASTE	Scale	LARGE			Other	100 m³		10 tons	2,650 lbs		None
BB-2		QAWASTE									100 lbs		None
BB-3		QAWASTE											None
DTRUCK		QAWASTE											None
LA-1		QAWASTE										DVIR	None
RESTRKA1	RESTRKA1	QAWASTE										DVIR	None
TR1		QAWASTE									000 lbs		None
TR2		QAWASTE									000 lbs		None
TR3		QAWASTE									000 lbs		None

ADD TRUCK

NAME

TRUCK TYPE

DIVISION

FUEL TYPE

Other

LINE OF BUSINESS

VEHICLE INSPECTION TYPE

OWNERSHIP

LICENSE PLATE

ODOMETER UOM

VIN

SPEED UOM

EXTERNAL ID

Capacity

Onboard

Permits

Attributes

VOLUME CAPACITY

UOM

COMPACTION RATIO

WEIGHT CAPACITY

UOM

TARE WEIGHT

UOM

SAVE

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 establish each truck's tare weight for faster ticket processing. This setup also enables scale operators to quickly search for trucks across sites within the same division as the facility using details such as truck name or license plate number.

Additional information about site inventory can be reviewed here: [Site Inventory \(Trucks\)](#)

49338001 Scale Site Example

1 of 1 2212 Glacier Dr
Saint Croix Falls, WI 54024-8347
US

Active

DIVISION QAWASTE
SERVICE REGION QA Service Region 2
SALES REP House Account - House Account
SOURCE Call In
GENERATOR Small Quantity Generator

SITE INVENTORY

Equipment Trucks **1**

☐ Show Inactive

NAME	LICENSE PLATE	LINE OF BUSINESS	TRUCK TYPE	DEP	DOT	TARE WEIGHT
Al's Trucks						00 lbs

ADD TRUCK

NAME

LINE OF BUSINESS

TRUCK TYPE

LICENSE PLATE

VIN

EXTERNAL ID

TARE WEIGHT UOM

Permits Attributes

DEP EXPIRATION DATE

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 on an inbound order. 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. Further setup of origins and origin based fees can be reviewed here: [Material Origin Setup](#)

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%.

TICKET NUMBER	WORK ORDER	QTY	SERVICE CODE	WORK TYPE	ORDER TYPE
41601	9443128	1	Scale Inbound Services	SCALE_POST	Inbound / Receiving

ORDER NOTES

TRUCK: AI's Trucks
VEHICLE INFO:
PO NUMBER:
EXTERNAL ID:

RECEIVING FACILITY: QA Waste Transfer
MATERIAL: Trash

TRANSPORTER:
TRANSPORT METHOD: Truck
BILL OF LADING:

WORK STATUS: In Progress
EXCEPTION REASON: Pending
POSTING STATUS: Pending

Weights

GROSS / IN	Tons	START	TIME
		04/01/25 Tue	09 : 37 : 17 . 00
TARE / OUT	Tons	END	TIME
	8000		-- : -- : --
NET	Tons	Adjust	

CHARGES
SURCHARGES
TAXES
TOTAL

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.

REASON CODE SETUP

SETUP > SYSTEM > REASON CODE

+

TYPEManual Weight

1

TYPE	LINE OF BUSINESS	REASON CODE	NAME	EXTERN... ID	SALES RESULTS REPORT TYPE	IS NEW OWNER	IS OLD OWNER	APPLY 1085 RULE	EXCLUDE FROM 1085	EXCLUDE FROM COMMISSION	ENABLE TEMPORARY SERVICE	DISPLAY IN MOBILE	CAPTURE COMPETITOR	GL ACCOUNT	RESULT	ACTIVE
Manual Weight	MWO...		Override by User		Temp ...	No	No	No	No	No	No		No			Yes
Manual Weight	MW...		Scale Down		Temp ...	No	No	No	No	No	No		No			Yes

UPDATE FACILITY

Facility Settings

Manifest Processing

Inbound / Outbound

ENABLE INBOUND ORDER

Yes (Truck Required)

ENABLE OUTBOUND ORDER

Yes

2

REQUIRE MANUAL WEIGHT REASON

Yes

DEFAULT SCALE TICKET FORMAT

SEARCH DEFAULT FOR CREATE NEW

Truck

EDIT SERVICE RECORD

Site # 49338801

Scale Site Example

2212 Glacier Dr

Saint Croix Falls, WI 54024-8347

PHONE +1 715-483-1399

CREATED BY Allena Somers - Admin NS (Sales) on 4/1/25 9:37 am

ORDER REASON

TICKET NUMBER 41601

WORK ORDER 9443128

QTY 1

SERVICE CODE Scale Inbound Services

WORK TYPE SCALE_POST

ORDER TYPE Inbound / Receiving

ORDER NOTES

TRUCK AI's Trucks

VEHICLE INFO

PO NUMBER

EXTERNAL ID

RECEIVING FACILITY QA Waste Transfer

MATERIAL Trash

TRANSPORTER

TRANSPORT METHOD Truck

BILL OF LADING

WORK STATUS In Progress

EXCEPTION REASON

POSTING STATUS

ENTER MANUAL WEIGHT REASON

REASON CODE

SCALE

Override by User

Scale Down

Please provide reason to update weight

DONE

Charges

Source Location

Payments

Materials

Completion

Find existing source location

LOCATION ID

NAME

ADDRESS

ADDRESS2

CITY, STATE, ZIP

PHONE

STATE ID

NOTE

LINKED CHARGES

Source Location E... 2669 Viebrock Dr

Osceola, WI 54020-4042

+16512387026

123

This is a source locatio...

0 of 2

Select Print Format

SAVE (F2)

Related Articles

- [Inbound Ticket Creation](#)
- [Process Cash-Pay Customers](#)
- [Scale Photos Application \(NavuNav\)](#)
- [Material Origin Setup](#)