

# Scale Setup

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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.

The screenshot shows the Scale Setup interface. The main window is titled 'INBOUND / OUTBOUND' and 'OPERATIONS > INBOUND / OUTBOUND'. It displays a list of 19 Inbound orders. A detailed dialog box is open for 'EDIT INBOUND / RECEIVING - TICKET NUMBER: 41991 - WORK ORDER: 10994010'. The dialog includes sections for 'Site # 49518001', 'TICKET NUMBER: 41991', 'WORK ORDER: 10994010', 'QTY: 1', 'SERVICE CODE: Scale Inbound Services (39344)', 'WORK TYPE: SCALE\_POST', and 'ORDER TYPE: Inbound / Receiving'. It also includes sections for 'ORDER NOTES', 'TRUCK', 'VEHICLE INFO', 'PO NUMBER', 'BLANKET PO', 'EXTERNAL ID', 'RECEIVING FACILITY', 'MATERIAL', 'TRANSPORTER', 'TRANSPORT METHOD', 'BILL OF LADING', 'WORK STATUS: In Progress', 'EXCEPTION REASON', 'POSTING STATUS: Pending', and a 'Weights - Scale Version: 1.2 - CC: XX-XXX' table. The table shows 'GROSS / IN' tons, 'TARE / OUT' tons, 'START: 02/13/26 Fri', 'END: 01:16:16 . 000 P', 'VOLUME: yd³', and 'TOTAL: \$ 210.00'. The dialog also includes tabs for 'Charges \$ 210.00', 'Payments', 'Origins', 'Materials', 'Completion', 'Attachments', and 'Photos'. At the bottom of the dialog, there are buttons for 'Select Print Format', 'ADD PAYMENT (F7)', 'SAVE (F2)', and 'Payment \$210.00 pending / Origin pending'.

## 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.

## 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
<b>Facility Settings</b>	
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.
<b>Inbound / Outbound</b>	
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.

<b>Enable Outbound Order</b>	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.
<b>Require Manual Weight Reason</b>	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 <b>Manual Weight</b> reason code types in <i>Setup &gt; System &gt; Reason Code</i> .
<b>Default Scale Ticket Format</b>	Option to set a default scale ticket format for printing receipts.
<b>Search Default for Create New</b>	An optional setting to configure a default value for the <i>Search Type</i> field on the <b>Create New Transaction</b> screen. Setting a default can help streamline the process and improve efficiency.

### Facility Setup - Lower Grid tabs

Tab	Description
<b>Business Hours</b>	Enter the hours of operation for a facility in the <b>Business Hours</b> tab.
<b>Division</b>	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.
<b>Material Type</b>	Select the <b>Material Type</b> tab to configure which materials are accepted by the facility. This tab is required to configure disposal rates in the Disposal Rate tab.
<b>Disposal Rate</b>	Select the <b>Disposal Rate</b> 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>
<b>Origin Fees</b>	Select the <b>Origin Fees</b> 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.
<b>Material Areas/Grid</b>	The <b>Material Areas/Grid</b> is an optional configuration to designate specific areas within the facility for disposing of or transferring particular waste materials.
<b>Tanks</b>	For facilities that use tanks, the <b>Tanks</b> tab is used to capture the capacity and volume of each tank at the location
<b>Target Usage</b>	Create one to multiple unique target usage goals for a disposal location in the <b>Target Usage</b> tab. Setup here is required to calculate and track target usage progress in the <b>Disposal Activity</b> 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](#).

The screenshot shows the 'LINE OF BUSINESS SETUP' screen with a list of existing lines of business on the left and a 'UPDATE LINE OF BUSINESS' dialog box on the right. The dialog box is for the 'SCALE' line of business, which is currently active. The 'Productivity and Profitability' tab is selected. The configuration includes:

- SCREEN TYPE: 1
- GL SEGMENT: SCL
- TEMPORARY SERVICE GL SEGMENT: Unearned Revenue
- UNEARNED REVENUE GL ACCOUNT: Unearned Revenue
- WORK ORDER MINIMUM CHARGE CODE: (dropdown)
- OVER MAX WEIGHT CHARGE CODE: (dropdown)
- RENTAL CHARGE CODE: (dropdown)
- RECURRING MINIMUM CHARGE CODE: (dropdown)
- LIMIT CHARGE CODE TO MATCHING EQUIPMENT: No
- LIMIT CHARGE CODE TO MATCHING MATERIAL: No
- INVOICE SUMMARY DESCRIPTION: (dropdown)
- PRODUCTIVITY UNIT NAME: (dropdown)
- ENABLE USED OIL COLLECTION: No
- ENABLE PROACTIVE ROUTE STATUS DRIVER CHECK: No
- ENABLE MANIFEST PROCESSING: No
- ENABLE MANIFEST GROUP WEIGHT ROUNDING: No
- ENABLE ACTIVE DISPATCH: No
- ENABLE CHARGE CODE WASTE CODES: No
- ENABLE WORK TYPE DEFAULT CHARGE CODES: No
- ENABLE BIC REPORTING: No
- ENABLE LABOR TRACKING: No
- ROUTE CUTOFF TIME: 09:00:00.000 PM

## 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	ROI/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"> <li>• No</li> <li>• Require Source Location</li> <li>• Require Material Origin</li> <li>• Optional Material Origin</li> </ul>

<b>Load Material Composition</b>	<p>Controls the display of the Materials tab on the service record.</p> <ul style="list-style-type: none"> <li>• Disabled <ul style="list-style-type: none"> <li>◦ Hides the Materials tab.</li> </ul> </li> <li>• Enable Multiple Materials <ul style="list-style-type: none"> <li>◦ Displays the <i>Material</i> tab, allowing you to record multiple materials along with their <i>Quantity</i> and <i>Percentage</i>.</li> </ul> </li> <li>• Enable Multiple Profiles and Materials <ul style="list-style-type: none"> <li>◦ Displays the <i>Material</i> tab, enabling you to record multiple profiles and materials within the record.</li> </ul> </li> </ul>
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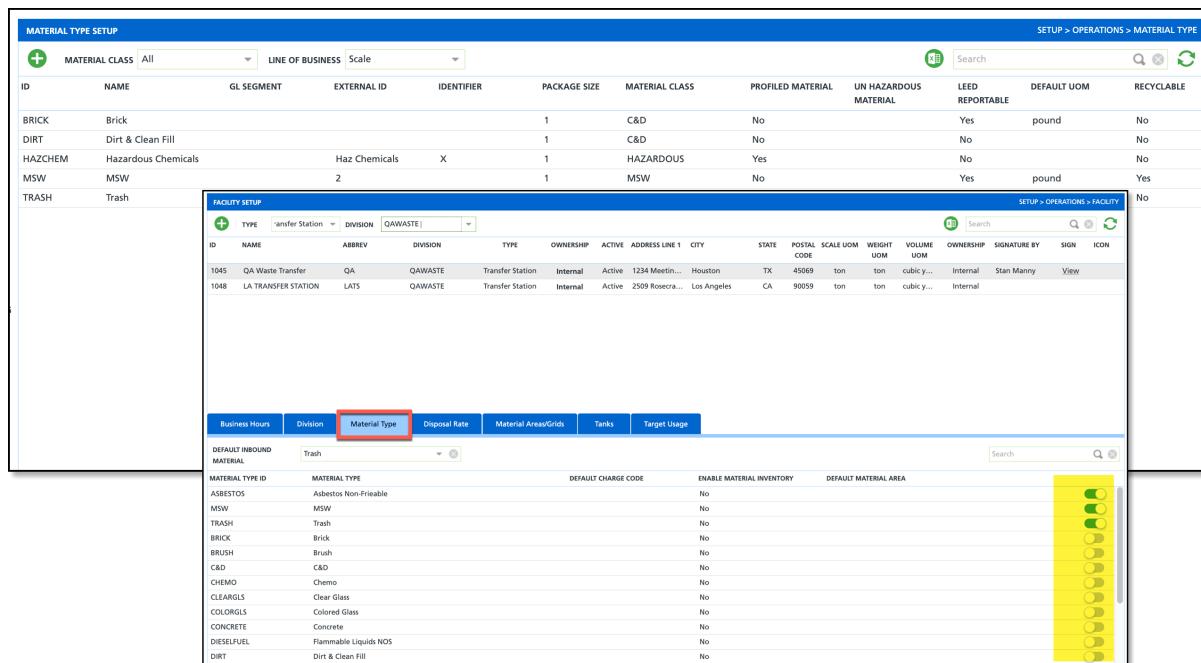
## Setup: Material Type

**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**. 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**

**Facility Setup**

**Material Type** (highlighted with a red box)

**Default Inbound Material**

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	No
HAZCHEM	Hazardous Chemicals		Haz Chemicals	X	1	HAZARDOUS	Yes		No	No	No
MSW	MSW				2	MSW	No		Yes	pound	Yes
TRASH	Trash										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	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

?
X

- Settings
- Notifications

ID	52	INVOICE EMAIL FROM	<input type="text"/>
ACTIVE	<input type="text" value="Yes"/>	PRINT SEQUENCE	<input type="text" value="Invoice Number"/>
NAME	<input type="text" value="SCALE CASH"/>	INVOICE LOGO	<input type="text" value="Select Image"/> <span style="border: 1px solid #0070C0; padding: 2px 5px; border-radius: 3px; color: #0070C0;">BROWSE...</span>
DIVISION	<input type="text"/>	UPLOADED INVOICE LOGO	<input type="text"/>
TYPE	<input type="text" value="Arrears"/>	INVOICE LOGO 2	<input type="text" value="Select Image"/> <span style="border: 1px solid #0070C0; padding: 2px 5px; border-radius: 3px; color: #0070C0;">BROWSE...</span>
FREQUENCY	<input type="text" value="Monthly"/>	UPLOADED INVOICE LOGO 2	<input type="text"/>
INVOICE FORMAT	<input type="text" value="Navu Base Product Format A"/>	WORK ORDER HEADER TEXT	<input type="text"/>
BILLING EXPORT FORMAT	<input type="text"/>	SURCHARGE HEADER TEXT	<input type="text"/>
CUSTOMER PORTAL URL	<input type="text"/>	FINANCE CHARGES TEXT	<input type="text" value="Finance Charges"/>
MESSAGE DUE IN PAST 1-30 DAYS	<input type="text"/>	BILLING AUTO PAY PROCESS DATE	<input type="text"/>
MESSAGE DUE IN PAST 30-60 DAYS	<input type="text"/>	SCHEDULED AUTO PAY TIME	<input type="text" value="03 : 00 : 00 . 000 PM"/>
MESSAGE DUE IN PAST 61-90 DAYS	<input type="text"/>	PAPER BILL FEE CHARGE CODE	<input type="text"/>
MESSAGE DUE IN PAST 91 DAYS	<input type="text"/>	PAPER BILL FEE (PER INVOICE)	<input type="text"/>
CUSTOM 1	<input type="text"/>	MINIMUM INVOICE AMOUNT TO BE NOTIFIED	<input type="text" value="0.00"/>
CUSTOM 2	<input type="text"/>	MINIMUM ACCOUNT BALANCE TO BE NOTIFIED	<input type="text" value="0.00"/>
		ONE INVOICE PER	<input type="text" value="Disabled"/>
		DISABLE AUTOMATIC BILLING BATCH CREATION	<input type="text" value="No"/>
		DISABLE EMAIL INVOICE AS AN ATTACHMENT	<input type="text" value="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](#)

## Key Fields

Field	Description
GL Segment	The GL Segment 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	SOURCE	ACCOUNT DIVISION	SITE DIVISION	ACCOUNT CLASS
Active	Existing Customer	QAWASTE	QAWASTE	SCALE2
Service Address			Billing Address	
NAME	CASH PAY		Same as service address	
NAME 2				
ADDRESS LINE 1	5555 Hermann Park Dr			
ADDRESS LINE 2				
CITY/STATE/POSTAL CODE	Houston	TX	77030	
PHONE	(999) 999-9999			
WEBSITE				
PO#				
EPA				
SIGNATURE REQUIRED	<input type="checkbox"/>			
CONTACT NAME	TITLE		CONTACT EMAIL	
CONTACT PHONE	(999) 999-9999	PHONE TYPE	BILLING CONTACT <input checked="" type="checkbox"/>	
Billing				
BILL GROUP	SCALE CASH		SURCHARGE GROUP	
INVOICE BY EMAIL	No		AUTO STATUS UPDATE <input type="checkbox"/>	EXCLUDE FROM PAST DUE <input type="checkbox"/>
TERM	COD		APPLY FINANCE CHARGES <input type="checkbox"/>	NOTIFICATION <input type="checkbox"/>
CREDIT LIMIT	0			
SALES REP	SITE CLASS	SERVICE REGION		TAX REGION
Aliena Somers	COM	QA Waste OPEN MARKET		RIS COUNTY-HOUSTON MTA
AP				
DEFAULT WALLET Account Payment Portal				
PAYEE 1099 <input type="checkbox"/>				
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 <b>active inbound service</b> 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](#).

The screenshot shows the 'TRUCK SETUP' screen. On the left, a table lists trucks with columns for Name, License Plate, Division, Line of Business, Truck Type, DOT, Fuel Type, Volume Capacity, Compaction Ratio, Weight Capacity, Tare Weight, Inspection Type, and Camera System. A modal window titled 'ADD TRUCK' is open in the center, containing fields for Name, Division, Line of Business, Ownership, Odometer UOM, Speed UOM, Truck Type, Fuel Type, Vehicle Inspection Type, License Plate, VIN, and External ID. The 'Capacity' tab is selected. At the bottom of the modal is a 'SAVE' button.

## 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** QA WASTE  
**SERVICE REGION** QA Service Region 2  
**SALES REP** House Account - House Ac...  
**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**

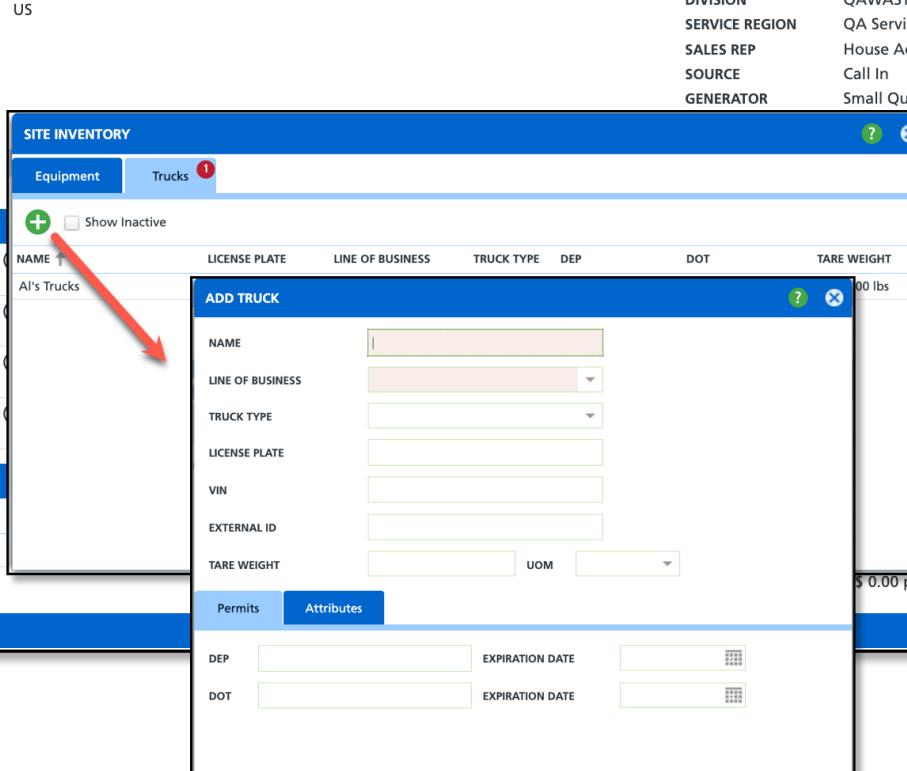
**TARE WEIGHT**  UOM

**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%.

**MATERIAL ORIGIN SETUP** SETUP > OPERATIONS > MATERIAL ORIGIN

ID	NAME	EXTERNAL ID	DIVISION	ACTIVE
1000	Midtown	Test		Active
1001	Downtown			Active
1002	Baytown (TX)		HOUSTON	Active
1003	test 2	test	CORPUS	Active
1004	DTLA			

**EDIT SERVICE RECORD**

Site # 49338001	TICKET NUMBER	WORK ORDER	QTY	SERVICE CODE	WORK TYPE	ORDER TYPE
Scale Site Example	41601	9443128	1	Scale Inbound Services	SCALE_POST	Inbound / Receiving
ORDER NOTES						
2212 Glacier Dr Saint Croix Falls, WI 54024-8347 <b>COD - Payment Required</b> PHONE +1 715-483-1399 CREATED BY Alena Somers - Admin-NS (Sales) on 4/1/25 9:37 am ORDER REASON						
TRUCK	VEHICLE INFO	PO NUMBER	EXTERNAL ID			
AI's Trucks						
RECEIVING FACILITY	MATERIAL					
QA Waste Transfer	Trash					
TRANSPORTER	TRANSPORT METHOD					
	Truck					
WORK STATUS	EXCEPTION REASON					
In Progress						
Weights						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 Origins Materials Completion Attachments Photos

ORIGIN ↑	PERCENTAGE
Downtown	
DTLA	
Midtown	

Select Print Format Print SAVE (F2) Origin pending

## 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

**1**

TYPE	LINE OF BUSINESS	REASON CODE	NAME	EXTERN. ID	SALES RESULTS	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	No	No	No	No	Yes	
Manual Weight	MW....	Scale Down	Temp ...	No	No	No	No	No	No	No	No	No	No	No	Yes	

UPDATE FACILITY

Facility Settings Manifest Processing Inbound / Outbound

**2**

ENABLE INBOUND ORDER	Yes (Truck Required)
ENABLE OUTBOUND ORDER	Yes
REQUIRE MANUAL WEIGHT REASON	Yes
DEFAULT SCALE TICKET FORMAT	Temp ...
SEARCH DEFAULT FOR CREATE NEW	Truck
<b>EDIT SERVICE RECORD</b> Site # 49338001 Scale Site Example 2212 Glacier Dr Saint Croix Falls, WI 54024-8347 <b>COD - Payment Required</b> PHONE +1 715-483-1399 CREATED BY Alena Somers - Admin-NS (Sales) on 4/1/25 9:37 am ORDER REASON TRUCK RECEIVING FACILITY MATERIAL TRANSPORTER WORK STATUS EXCEPTION REASON BILL OF LADING WEIGHTS GROSS / IN tons TARE / OUT 8000 tons NET tons <b>ENTER MANUAL WEIGHT REASON</b> REASON CODE Override by User SCALE Scale Down Please provide reason to update weight DONE CHARGES LOCATION ID NAME ADDRESS ADDRESS2 CITY, STATE, ZIP PHONE STATE ID NOTE LINKED CHARGES Source Location E... 2669 Vilebloc Dr Oconto, WI 54020-4042 +16512387026 123 This is a source location... 0 of 2 Select Print Format SAVE (F2)	

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