# Scale Setup

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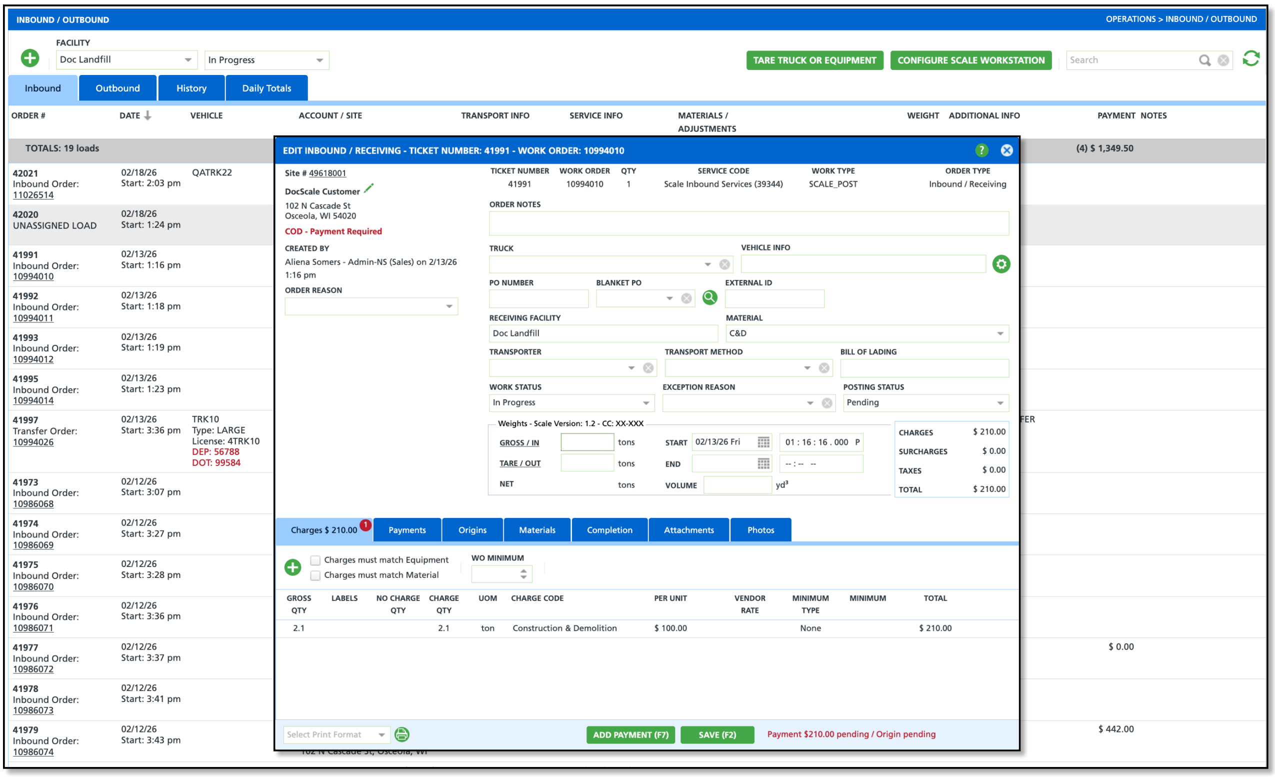
The following scale setup applies to the various customer types processed at a landfill or transfer facility. For guidance on creating tickets and processing scale customers, refer to the **Related Articles** section at the bottom of this page.




Expand All Sections

Collapse All Sections

Helpful Tip: To search all text using **CTRL**-F, you must first click on the Expand All Sections button.

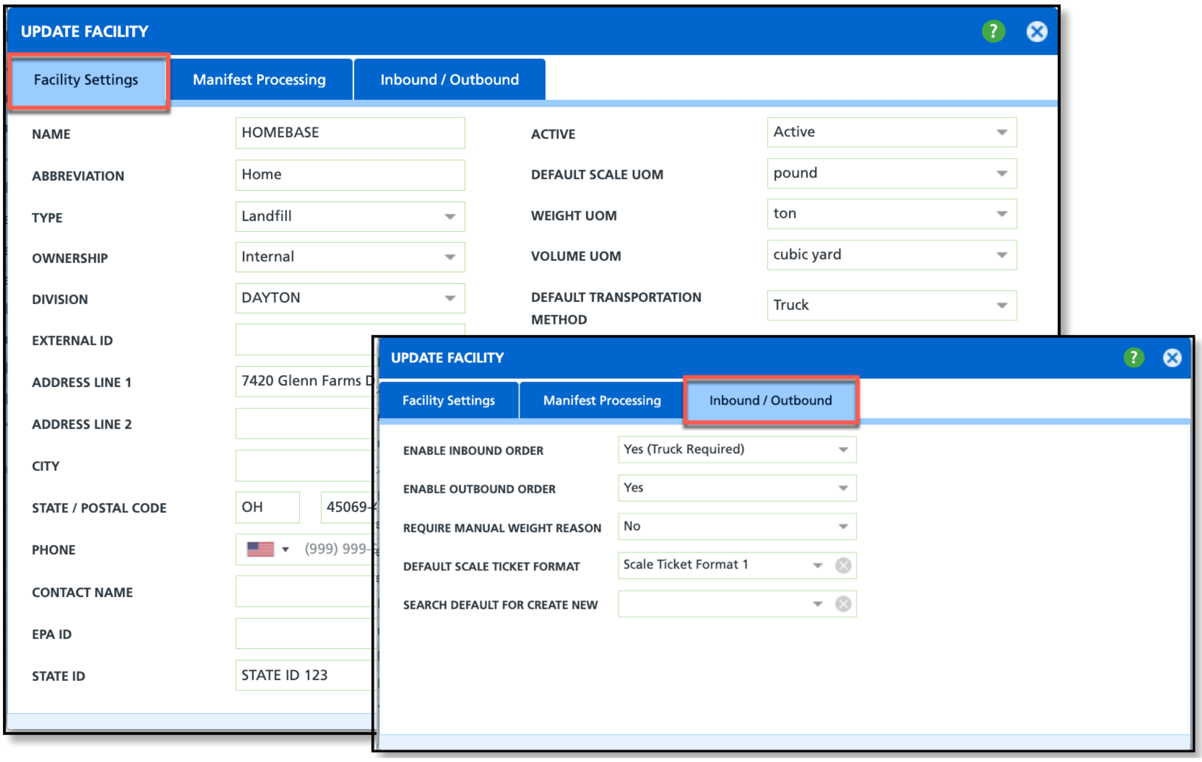
# Universal Setup Requirements

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 on 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 |
|---|---|
| **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 *Setup > System > Reason Code.* |
| **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 *Search Type* field on the **Create New Transaction** screen. Setting a default can help streamline the process and improve efficiency. |

### Facility Setup - Lower Grid tabs

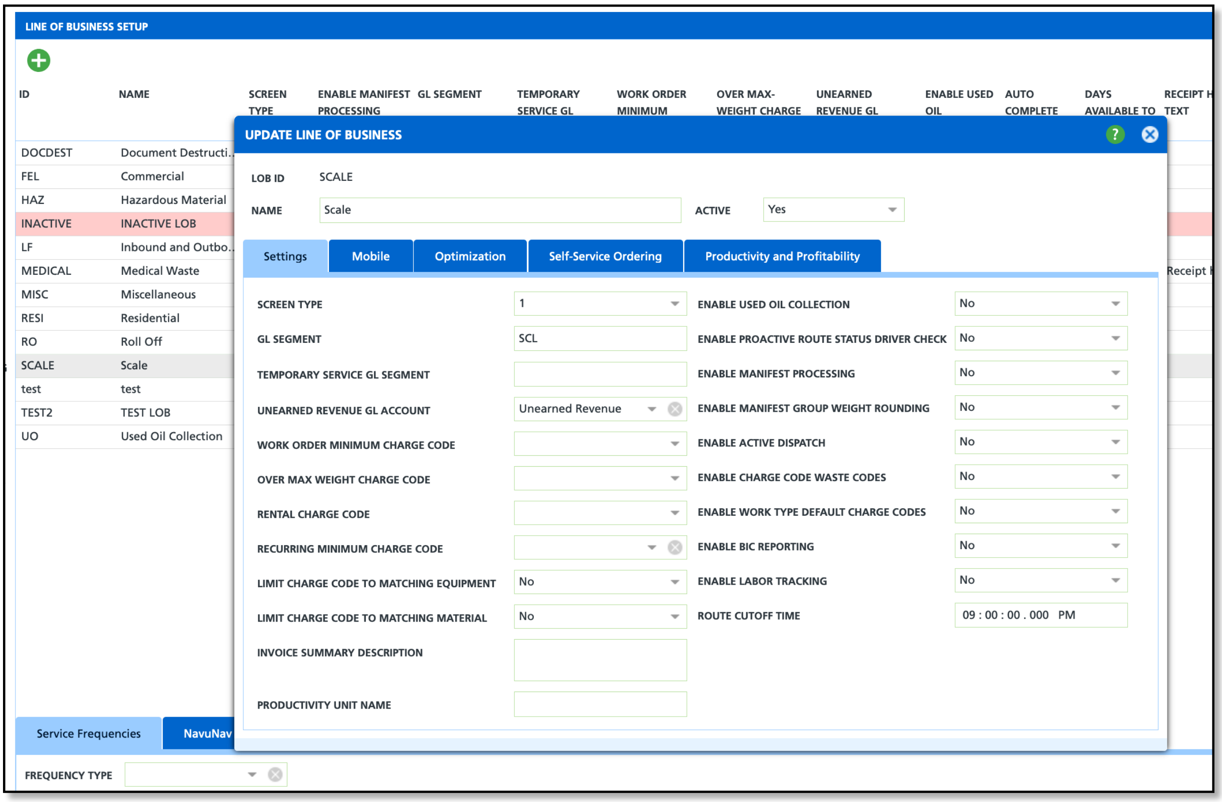
| Tab | Description |
|---|---|
| **Business Hours** | Enter the hours of operation for a facility in the **Business Hours** tab. |
| **Division** | Although this setting is not necessary for cash-pay customers, it may be necessary for third-party haulers to identify which divisions the facility is eligible 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.<br>** This field requires the configuration of material types in the the Material Type tab.* |
| **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.

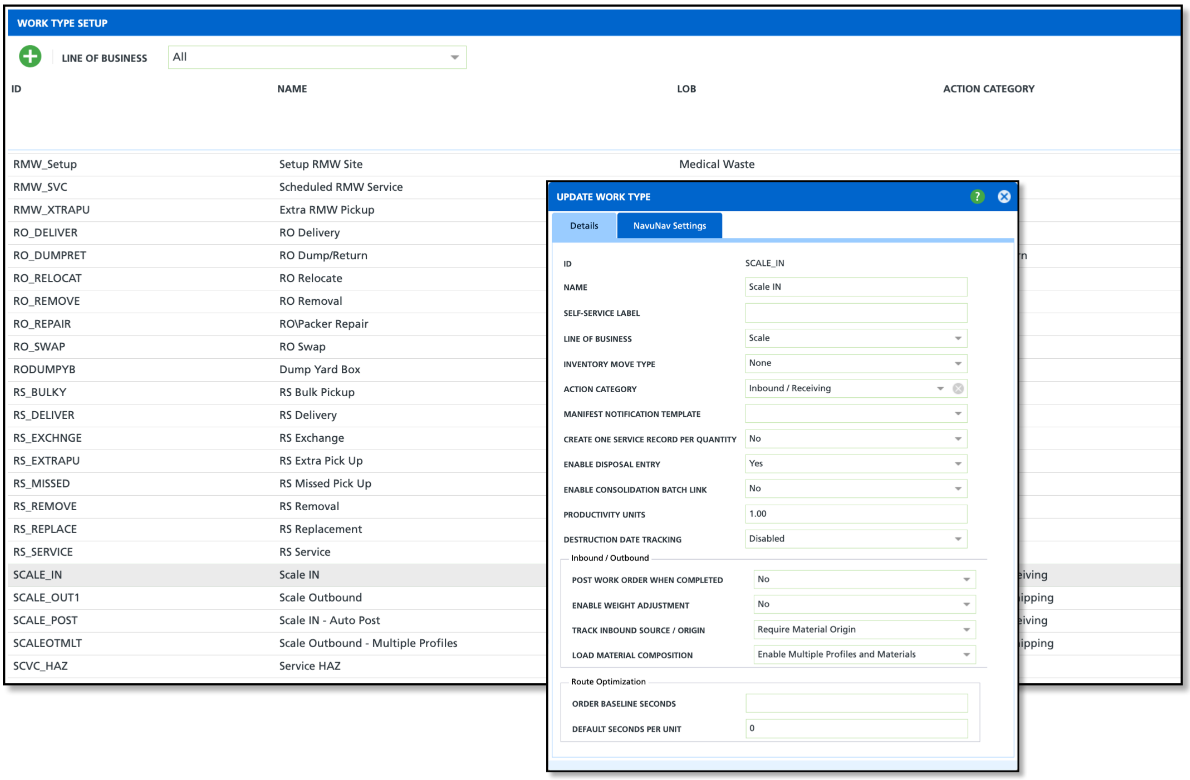



## Setup: Work Type

**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




## 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**<br>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:<br>• No<br>• Require Source Location<br>• Require Material Origin<br>• Optional Material Origin |

| | |
|---|---|
| **Load Material Composition** | Controls the display of the Materials tab on the service record.<br>• Disabled<br>  ◦ Hides the Materials tab.<br>• Enable Multiple Materials<br>  ◦ Displays the *Material* tab, allowing you to record multiple materials along with their *Quantity* and *Percentage*.<br>• Enable Multiple Profiles and Materials<br>  ◦ Displays the *Material* tab, enabling you to record multiple profiles and materials within the record. |

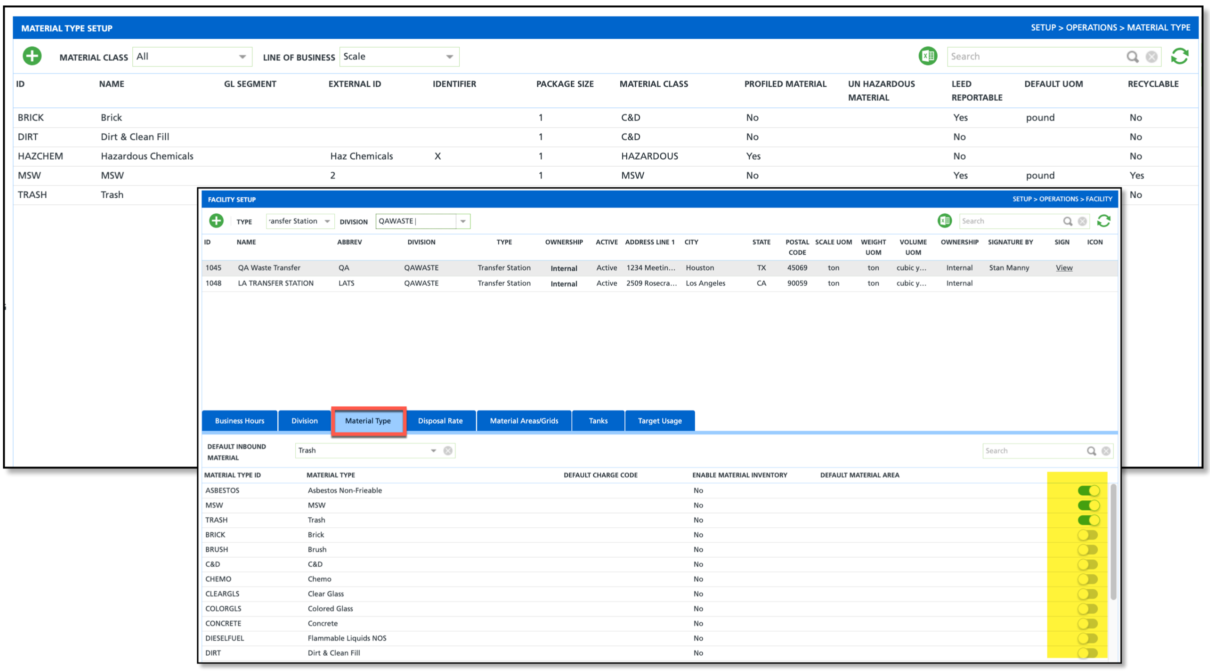
## Setup: Material Type

**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 an new inbound order for the facility.




## Setup: Service Code

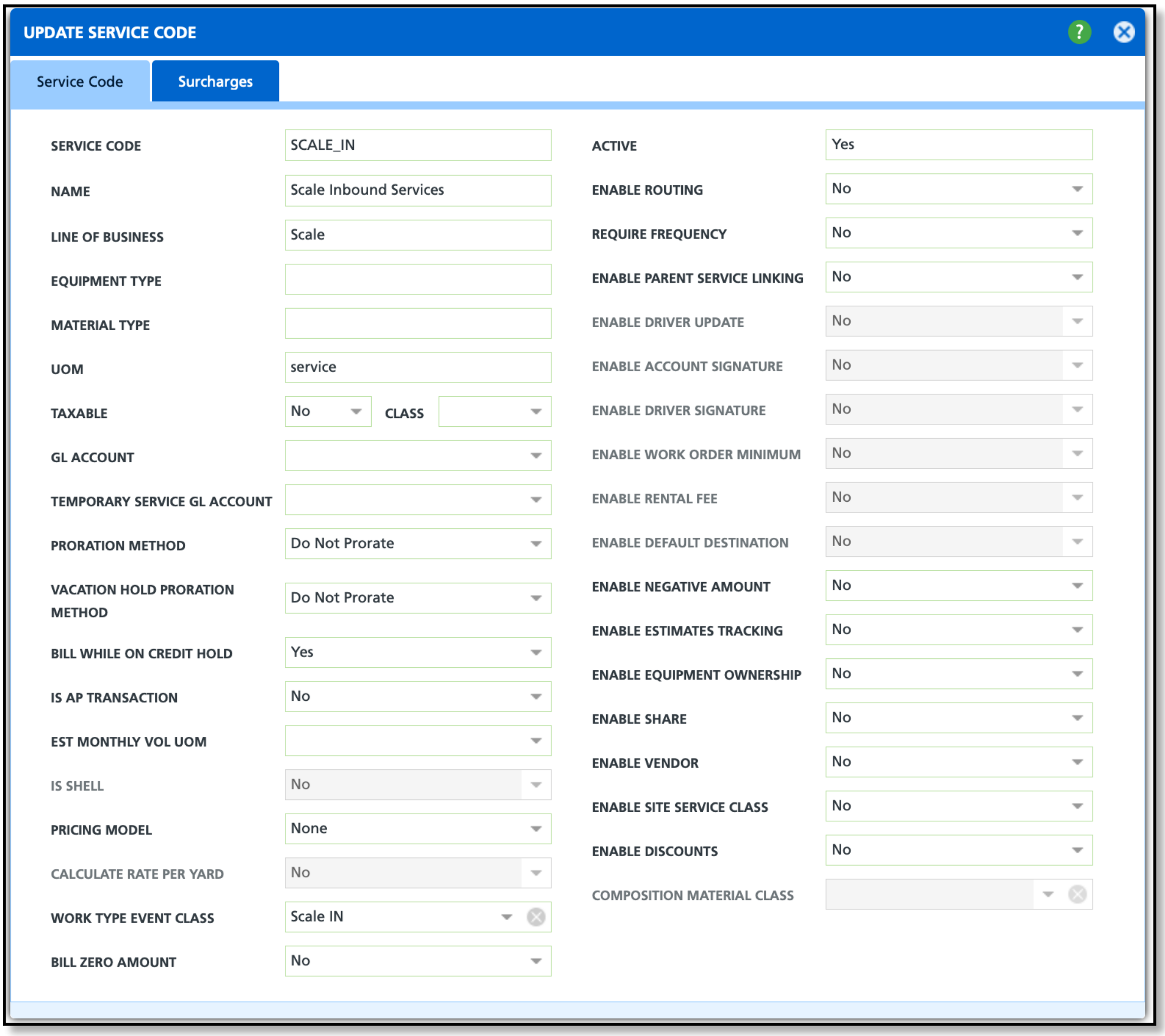
**Pathway:** *Setup > Services > Service Code*

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. |



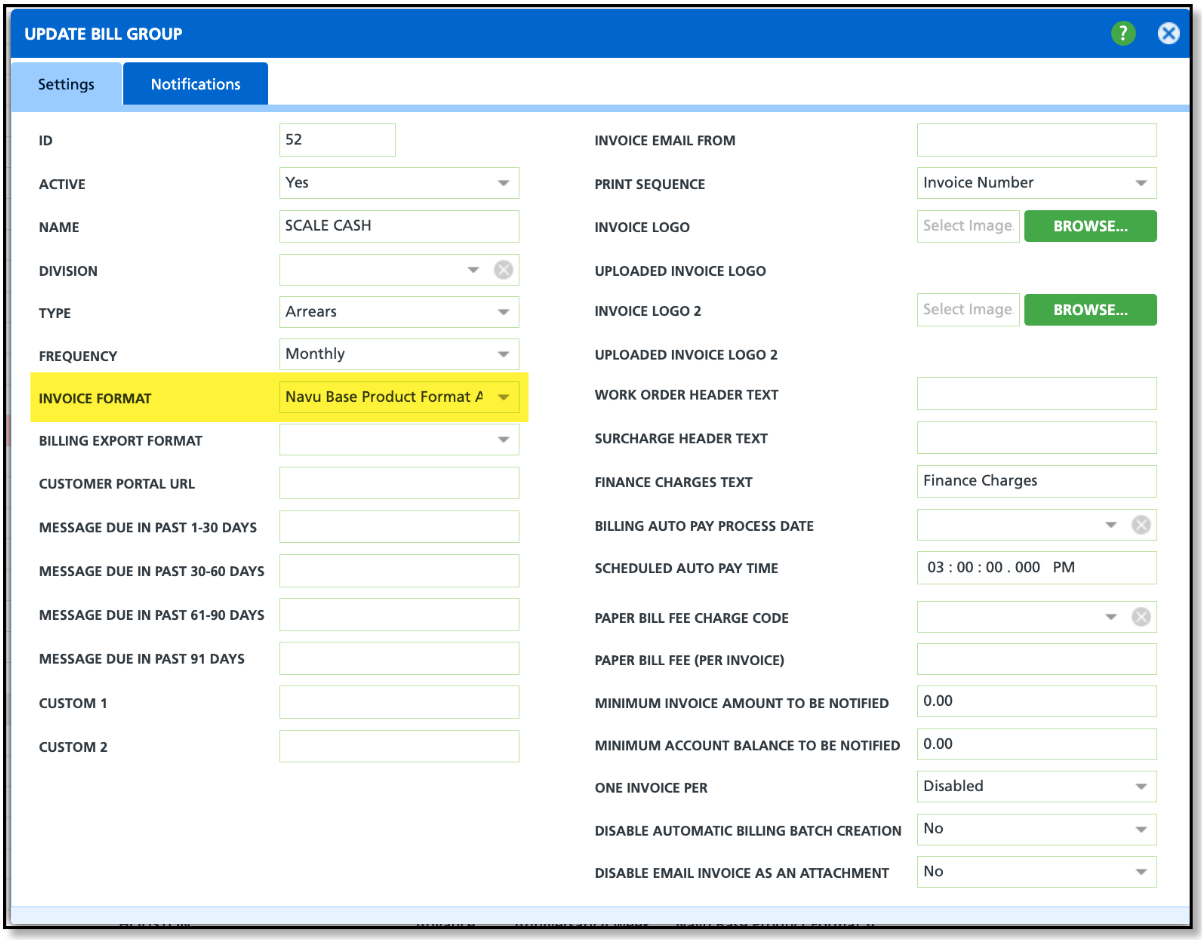

# Setup Specific to Cash-Pay Customers

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.



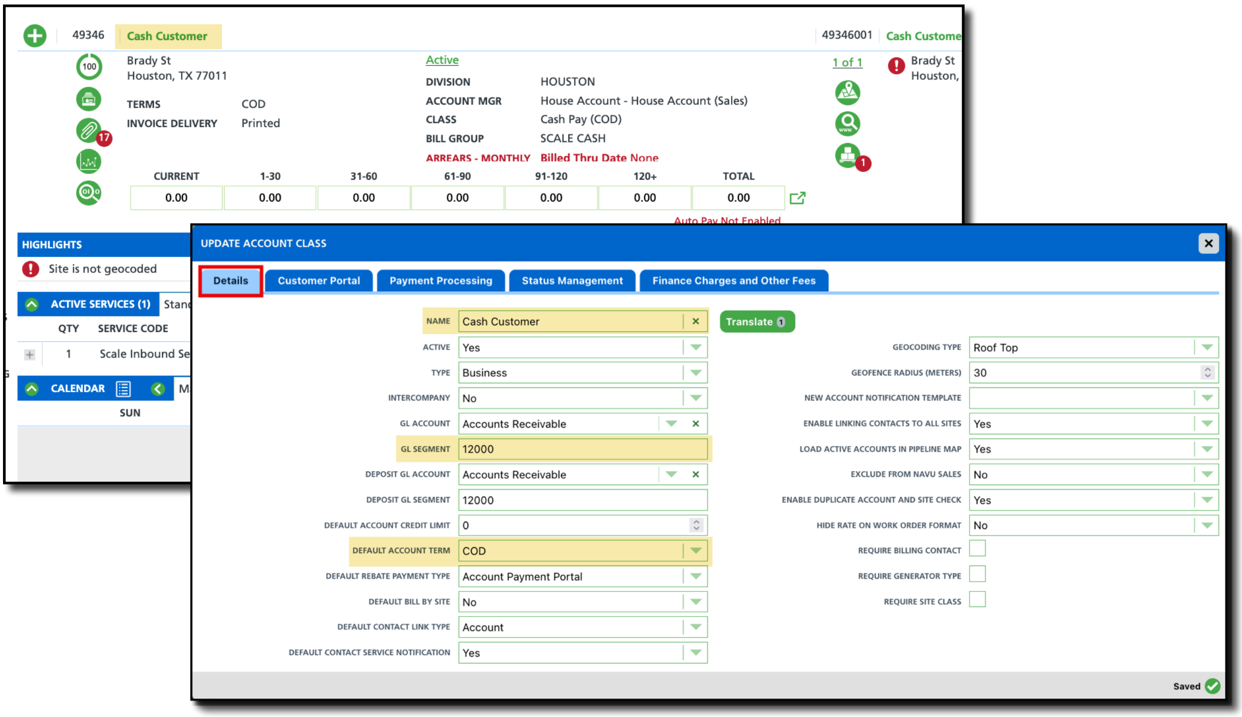

### Key Fields

| 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.




### Key Configuration 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 |

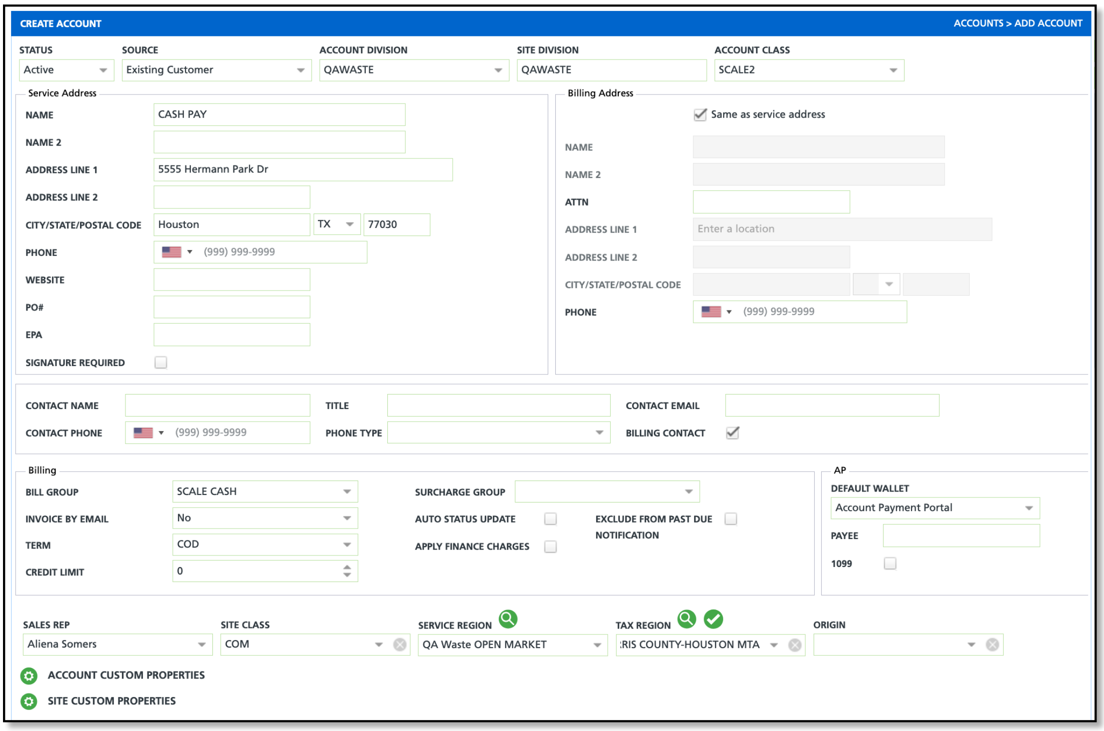
You can find more details on how to set up a dedicated Scale account class in the Account Class Setup article.

## 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.



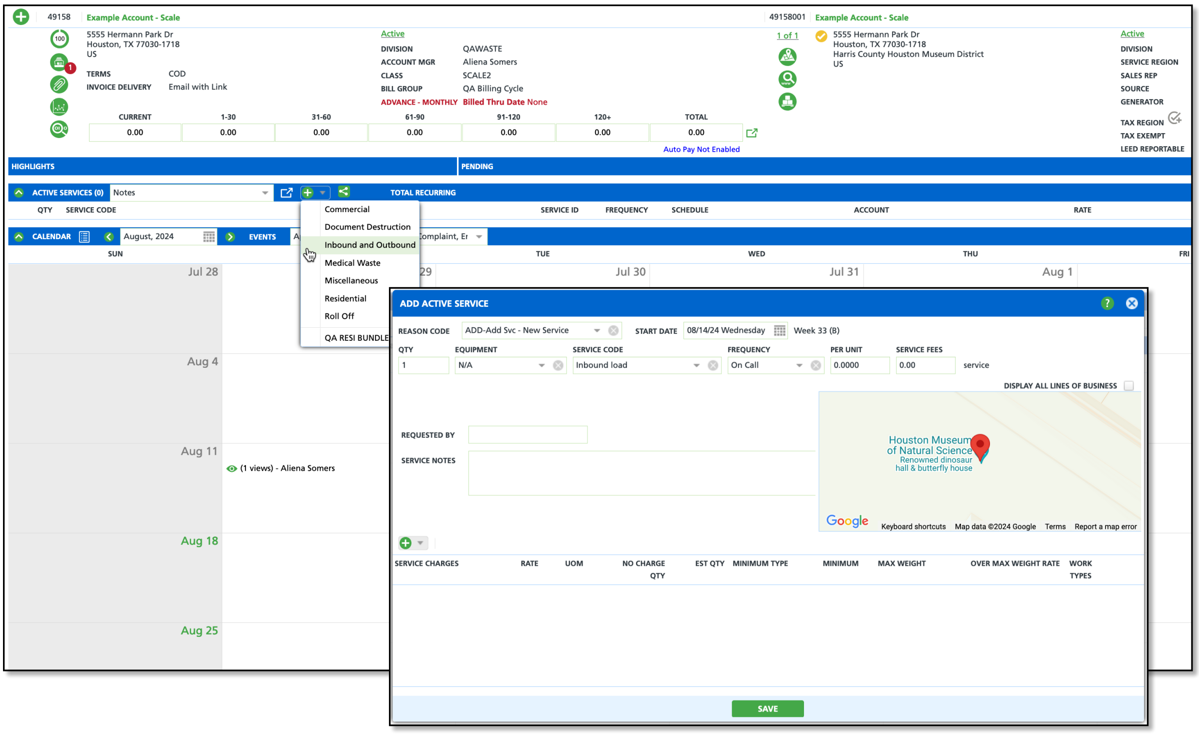

## Key Fields:

| 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. |

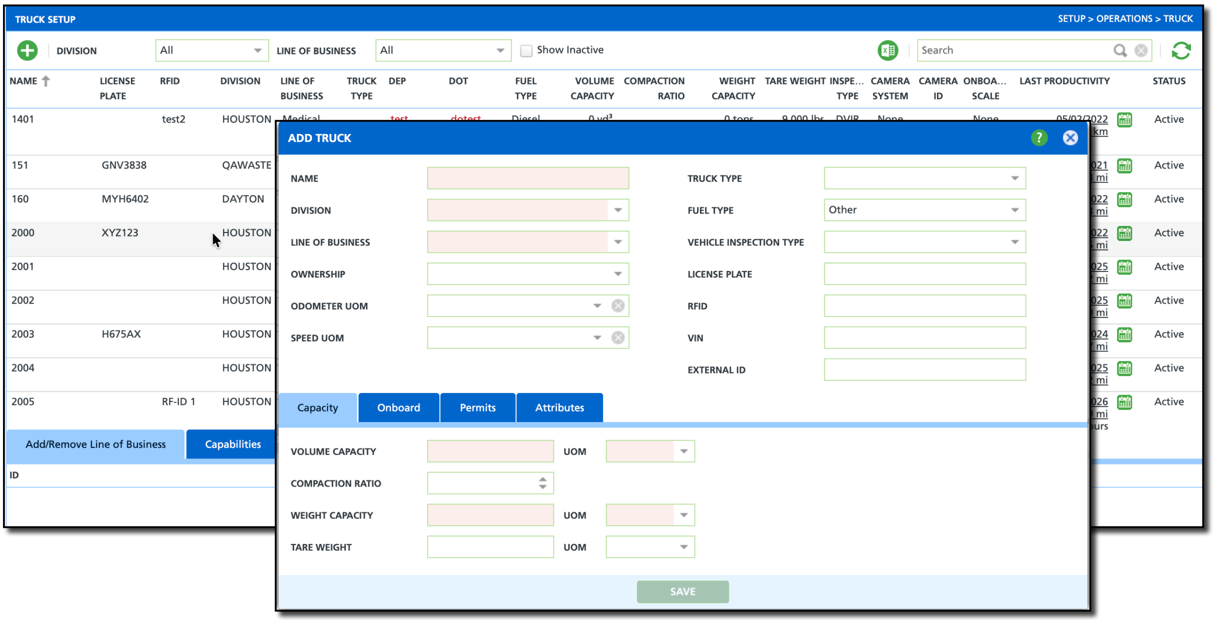
### Truck Setup

*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.

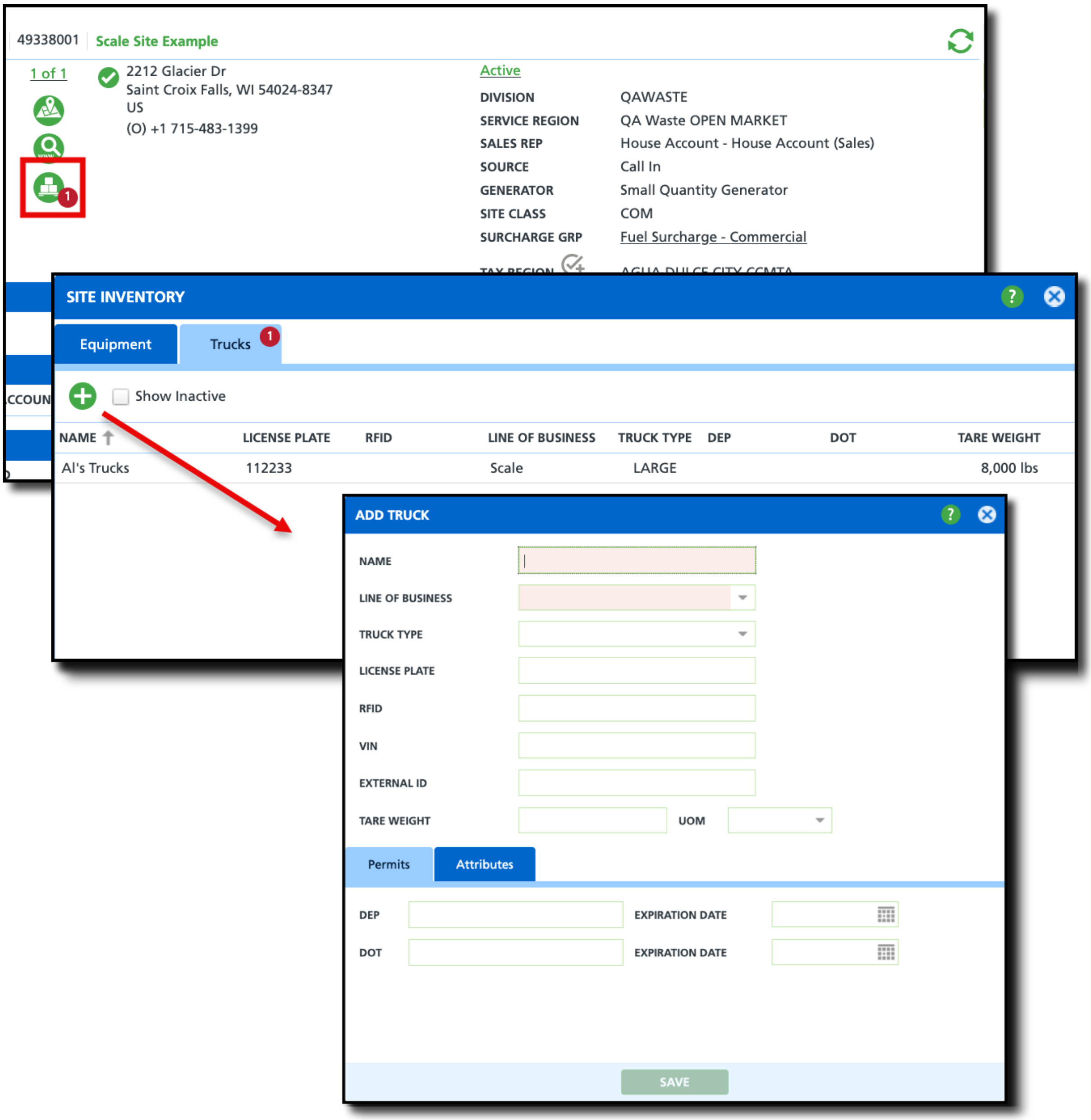



## Site Inventory - Trucks

**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)




# Optional Setup

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

## Material Origin Setup

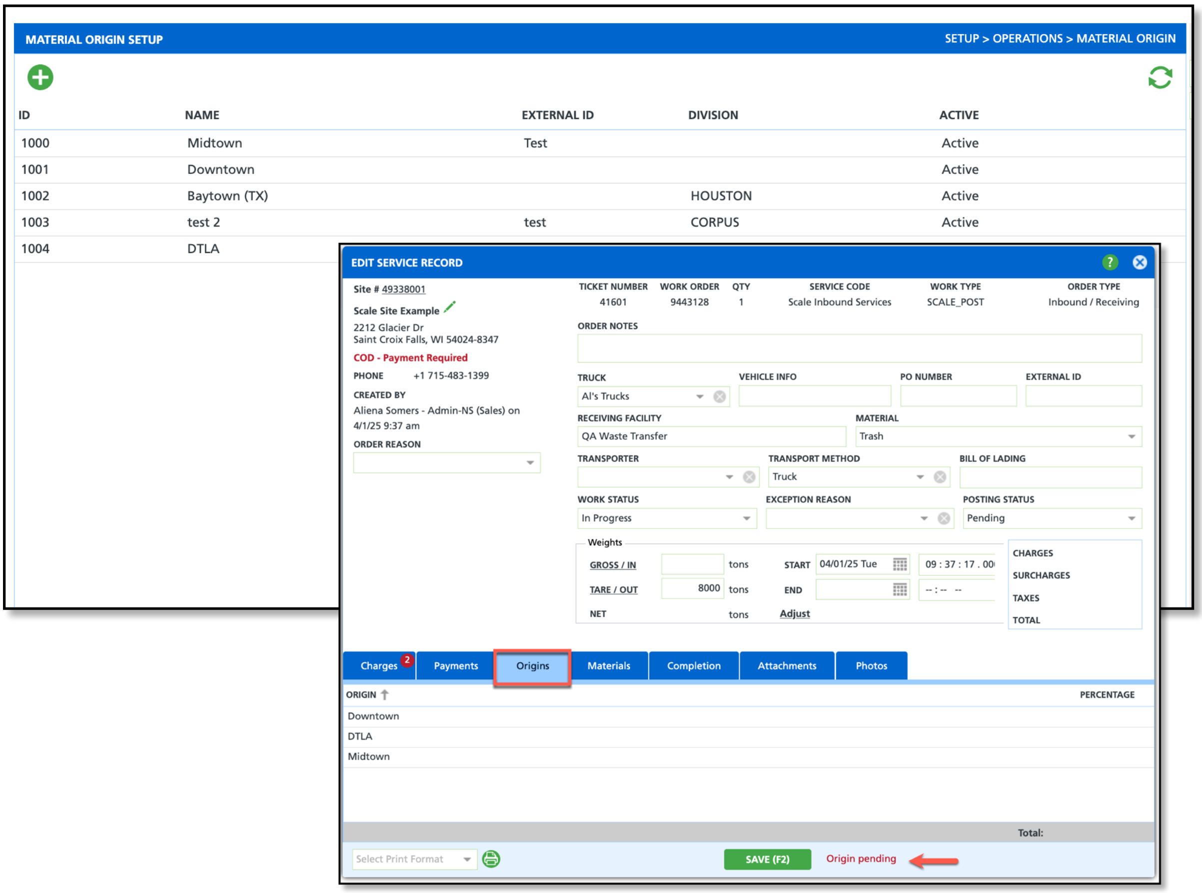
**Pathway:** *Setup > Operations > Material Origin*

**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%.



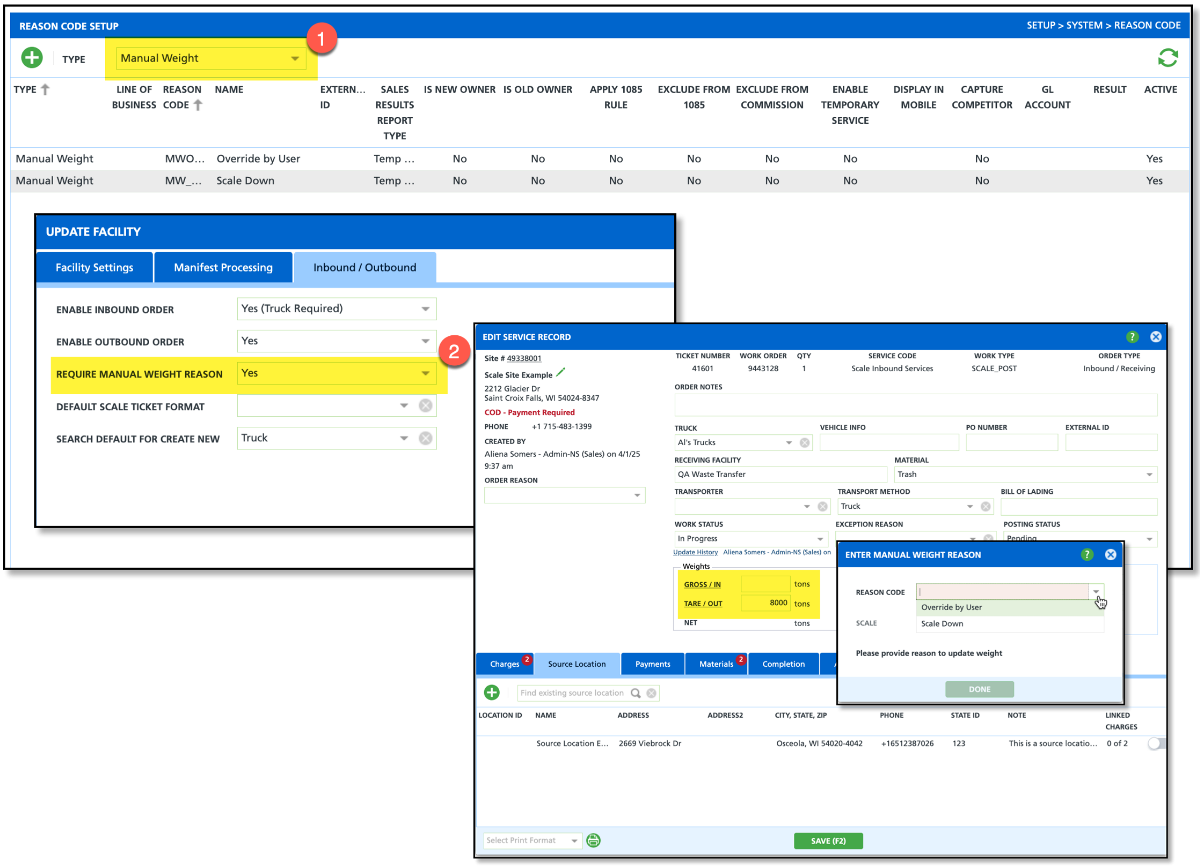
## Manual Weight Reason Codes

**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.



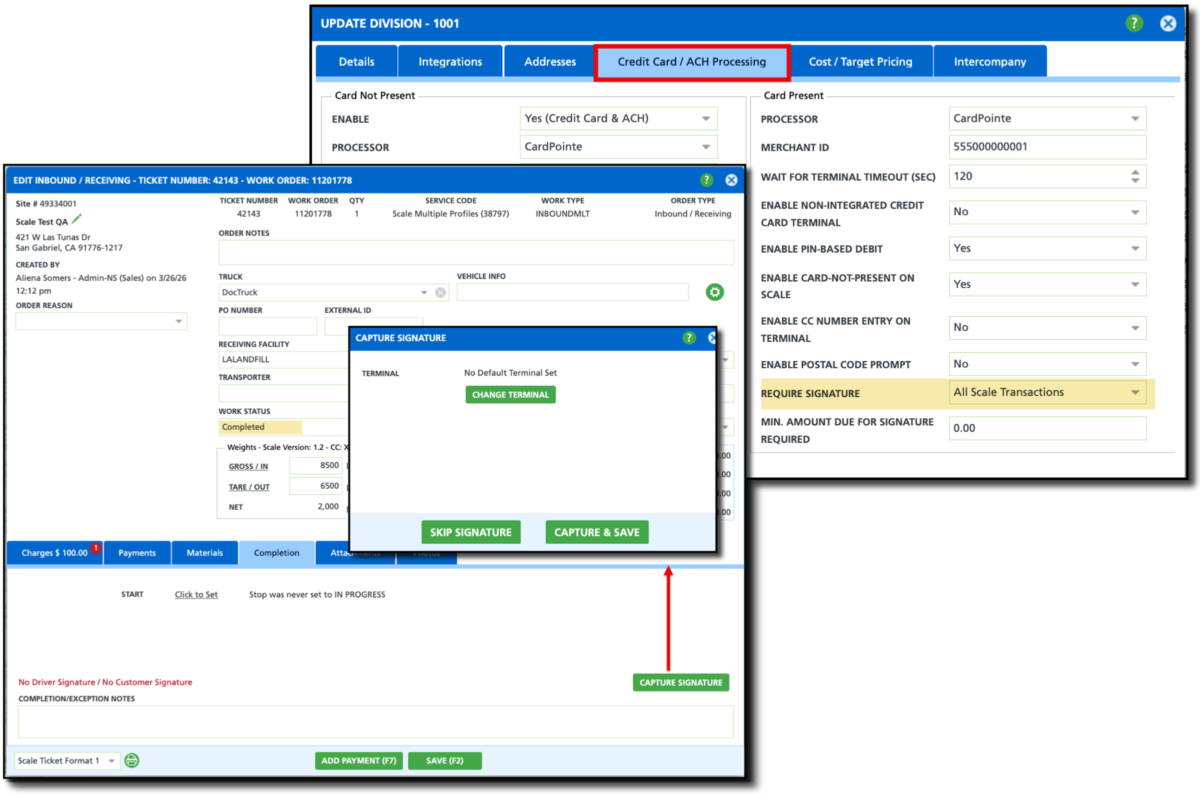

# Capture a Signature without a Payment

**Pathway:** *Setup > System > Division > Credit Card / ACH Processing*

The option to capture a signature for all scale transactions, including those without a payment, is configured at the Division level. It applies only to work orders with an Inbound or Outbound event type that are marked as Complete. For facilities with this setting enabled and receiving payment, a signature should not be captured during the credit card payment. The signature is required only once at the completion of the transaction.

## Division Setup

In Division Setup, set the **Require Signature** setting to **All Scale Transactions** to allow for signature capture on Edit Work Order when a payment does not exist.




## Related Articles

Inbound Ticket Creation

Process Cash-Pay Customers

Scale Photos Application (NavuNav)

Material Origin Setup

Truck Setup

Site Inventory (Trucks)