

Scale Setup

Last Modified on 04/20/2026 11:25 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.

The screenshot displays the 'INBOUND / OUTBOUND' scale setup interface. The top navigation bar includes 'FACILITY' (Doc Landfill) and 'In Progress' status. A search bar and 'TARE TRUCK OR EQUIPMENT' and 'CONFIGURE SCALE WORKSTATION' buttons are visible. The main area is divided into a list of orders on the left and a detailed view of order 41991 on the right. The detailed view includes fields for 'Site # 49618001', 'Ticket Number 41991', 'Work Order 10994010', 'Service Code Scale Inbound Services (39344)', 'Work Type SCALE_POST', and 'Order Type Inbound / Receiving'. It also features sections for 'TRUCK', 'VEHICLE INFO', 'PO NUMBER', 'BLANKET PO', 'EXTERNAL ID', 'RECEIVING FACILITY', 'MATERIAL', 'TRANSPORTER', 'TRANSPORT METHOD', 'BILL OF LADING', 'WORK STATUS', 'EXCEPTION REASON', and 'POSTING STATUS'. A summary table at the bottom shows 'GROSS QTY' of 2.1, 'NO CHARGE QTY' of 0, and 'CHARGE QTY' of 2.1, with a 'TOTAL' of \$210.00. The interface also includes tabs for 'Payments', 'Origins', 'Materials', 'Completion', 'Attachments', and 'Photos'.

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.

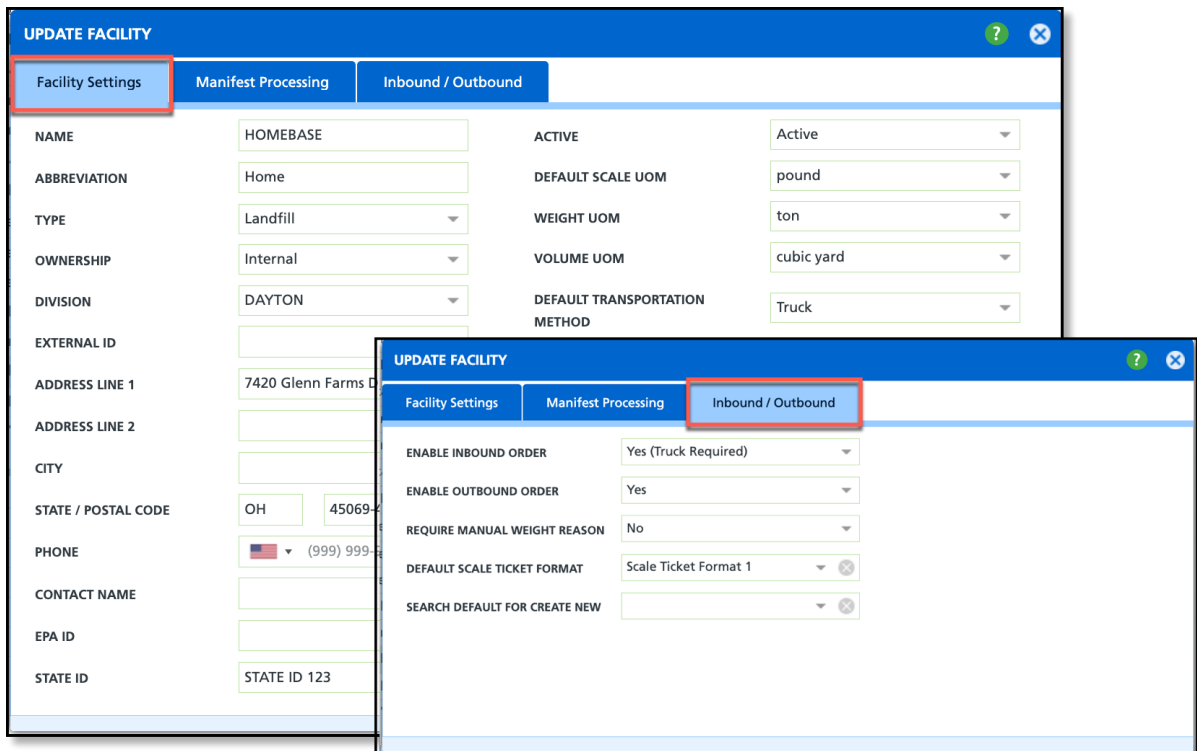
Universal Setup Requirements

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 <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](#).

The screenshot displays the 'LINE OF BUSINESS SETUP' interface. A modal window titled 'UPDATE LINE OF BUSINESS' is open, showing configuration for the 'SCALE' Line of Business. The main window has a table with columns: 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, and RECEIPT H. The table lists various Line of Business types such as DOCDEST, FEL, HAZ, INACTIVE, LF, MEDICAL, MISC, RESI, RO, SCALE, test, TEST2, and UO. The 'SCALE' row is selected. The modal window contains the following fields and options:

- LOB ID: SCALE
- NAME: Scale
- ACTIVE: Yes
- Settings: Mobile, Optimization, Self-Service Ordering, Productivity and Profitability
- SCREEN TYPE: 1
- GL SEGMENT: SCL
- TEMPORARY SERVICE GL SEGMENT: (empty)
- UNEARNED REVENUE GL ACCOUNT: Unearned Revenue
- WORK ORDER MINIMUM CHARGE CODE: (empty)
- OVER MAX WEIGHT CHARGE CODE: (empty)
- RENTAL CHARGE CODE: (empty)
- RECURRING MINIMUM CHARGE CODE: (empty)
- LIMIT CHARGE CODE TO MATCHING EQUIPMENT: No
- LIMIT CHARGE CODE TO MATCHING MATERIAL: No
- INVOICE SUMMARY DESCRIPTION: (empty)
- PRODUCTIVITY UNIT NAME: (empty)
- 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](#)

The screenshot displays the 'WORK TYPE SETUP' interface. At the top, there is a 'LINE OF BUSINESS' dropdown menu set to 'All'. Below this is a table with columns for ID, NAME, LOB, and ACTION CATEGORY. The table lists various work types such as RMW_Setup, RO_DELIVER, RS_BULKY, and SCALE_IN. An 'UPDATE WORK TYPE' dialog box is open, showing fields for ID, NAME, SELF-SERVICE LABEL, LINE OF BUSINESS, INVENTORY MOVE TYPE, ACTION CATEGORY, MANIFEST NOTIFICATION TEMPLATE, CREATE ONE SERVICE RECORD PER QUANTITY, ENABLE DISPOSAL ENTRY, ENABLE CONSOLIDATION BATCH LINK, PRODUCTIVITY UNITS, DESTRUCTION DATE TRACKING, POST WORK ORDER WHEN COMPLETED, ENABLE WEIGHT ADJUSTMENT, TRACK INBOUND SOURCE / ORIGIN, LOAD MATERIAL COMPOSITION, ORDER BASELINE SECONDS, and DEFAULT SECONDS PER UNIT.

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.

The screenshot displays two overlapping software windows. The top window is titled 'MATERIAL TYPE SETUP' and contains a table with the following data:

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

The bottom window is titled 'FACILITY SETUP' and shows the 'Material Type' tab selected. It displays a table of material types for a facility, with a 'Material Type' button highlighted in red. Below this, a 'DEFAULT INBOUND MATERIAL' dropdown is set to 'Trash'. A table at the bottom lists material types and their status:

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	
DIRELFUELE	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	<input type="text" value="SCALE_IN"/>	ACTIVE	<input type="text" value="Yes"/>
NAME	<input type="text" value="Scale Inbound Services"/>	ENABLE ROUTING	<input type="text" value="No"/>
LINE OF BUSINESS	<input type="text" value="Scale"/>	REQUIRE FREQUENCY	<input type="text" value="No"/>
EQUIPMENT TYPE	<input type="text"/>	ENABLE PARENT SERVICE LINKING	<input type="text" value="No"/>
MATERIAL TYPE	<input type="text"/>	ENABLE DRIVER UPDATE	<input type="text" value="No"/>
UOM	<input type="text" value="service"/>	ENABLE ACCOUNT SIGNATURE	<input type="text" value="No"/>
TAXABLE	<input type="text" value="No"/> CLASS <input type="text"/>	ENABLE DRIVER SIGNATURE	<input type="text" value="No"/>
GL ACCOUNT	<input type="text"/>	ENABLE WORK ORDER MINIMUM	<input type="text" value="No"/>
TEMPORARY SERVICE GL ACCOUNT	<input type="text"/>	ENABLE RENTAL FEE	<input type="text" value="No"/>
PRORATION METHOD	<input type="text" value="Do Not Prorate"/>	ENABLE DEFAULT DESTINATION	<input type="text" value="No"/>
VACATION HOLD PRORATION METHOD	<input type="text" value="Do Not Prorate"/>	ENABLE NEGATIVE AMOUNT	<input type="text" value="No"/>
BILL WHILE ON CREDIT HOLD	<input type="text" value="Yes"/>	ENABLE ESTIMATES TRACKING	<input type="text" value="No"/>
IS AP TRANSACTION	<input type="text" value="No"/>	ENABLE EQUIPMENT OWNERSHIP	<input type="text" value="No"/>
EST MONTHLY VOL UOM	<input type="text"/>	ENABLE SHARE	<input type="text" value="No"/>
IS SHELL	<input type="text" value="No"/>	ENABLE VENDOR	<input type="text" value="No"/>
PRICING MODEL	<input type="text" value="None"/>	ENABLE SITE SERVICE CLASS	<input type="text" value="No"/>
CALCULATE RATE PER YARD	<input type="text" value="No"/>	ENABLE DISCOUNTS	<input type="text" value="No"/>
WORK TYPE EVENT CLASS	<input type="text" value="Scale IN"/>	COMPOSITION MATERIAL CLASS	<input type="text"/>
BILL ZERO AMOUNT	<input type="text" value="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.

The screenshot shows the 'UPDATE BILL GROUP' interface with two tabs: 'Settings' and 'Notifications'. The 'Settings' tab is active. The interface is divided into two columns of settings. The 'INVOICE FORMAT' field is highlighted in yellow.

Field	Value	Field	Value
ID	52	INVOICE EMAIL FROM	
ACTIVE	Yes	PRINT SEQUENCE	Invoice Number
NAME	SCALE CASH	INVOICE LOGO	Select Image BROWSE...
DIVISION		UPLOADED INVOICE LOGO	Select Image BROWSE...
TYPE	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

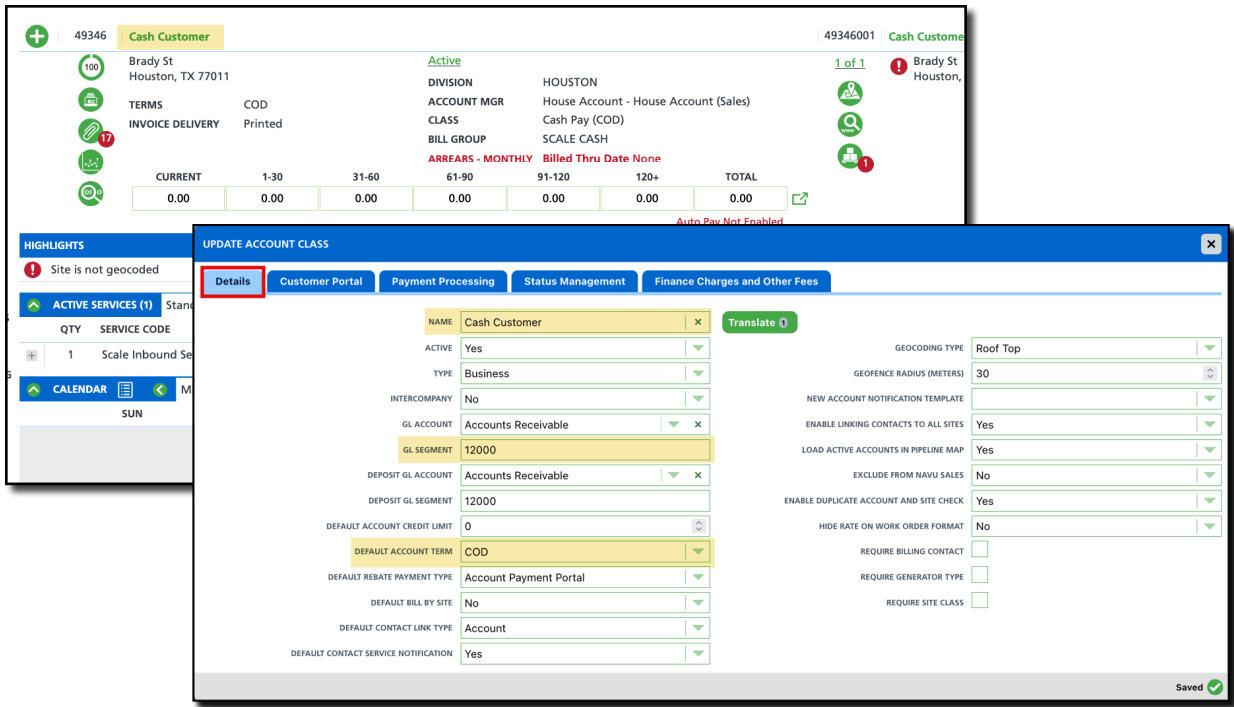
Key Fields

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.



Key Configuration 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

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](#).

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: Houston TX 77030
 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 | SURCHARGE GROUP:
 INVOICE BY EMAIL: No | AUTO STATUS UPDATE: | EXCLUDE FROM PAST DUE NOTIFICATION:
 TERM: COD | APPLY FINANCE CHARGES:
 CREDIT LIMIT: 0

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

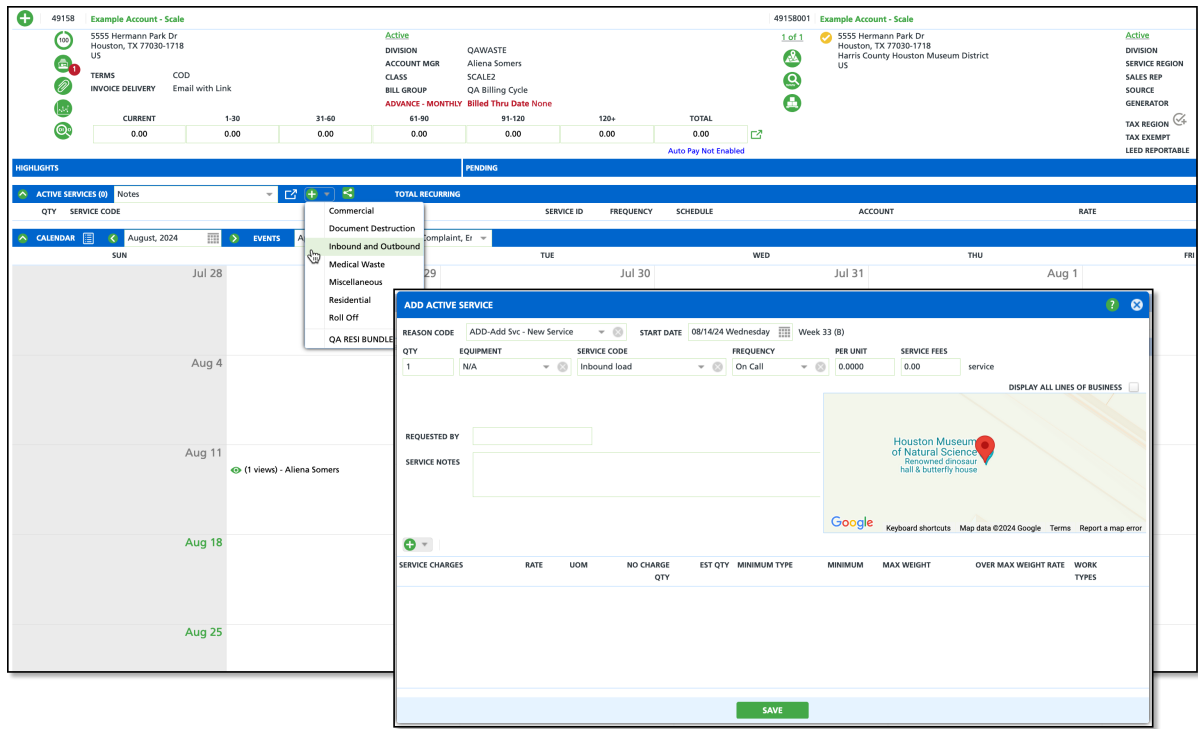
Key Fields:

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.

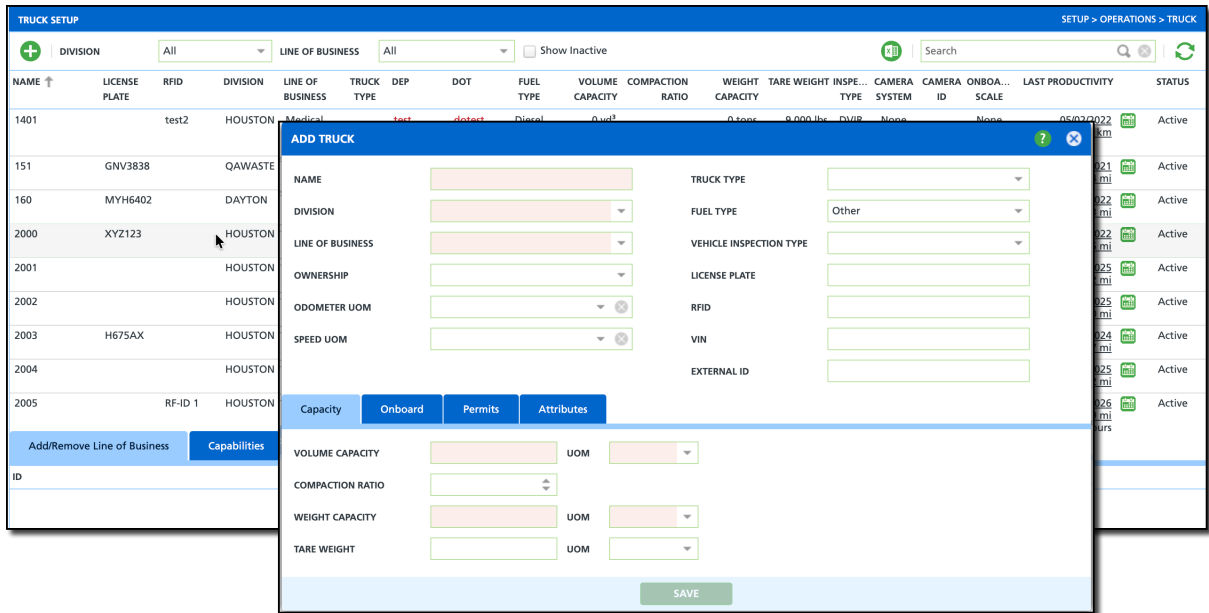
Truck Setup

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](#).

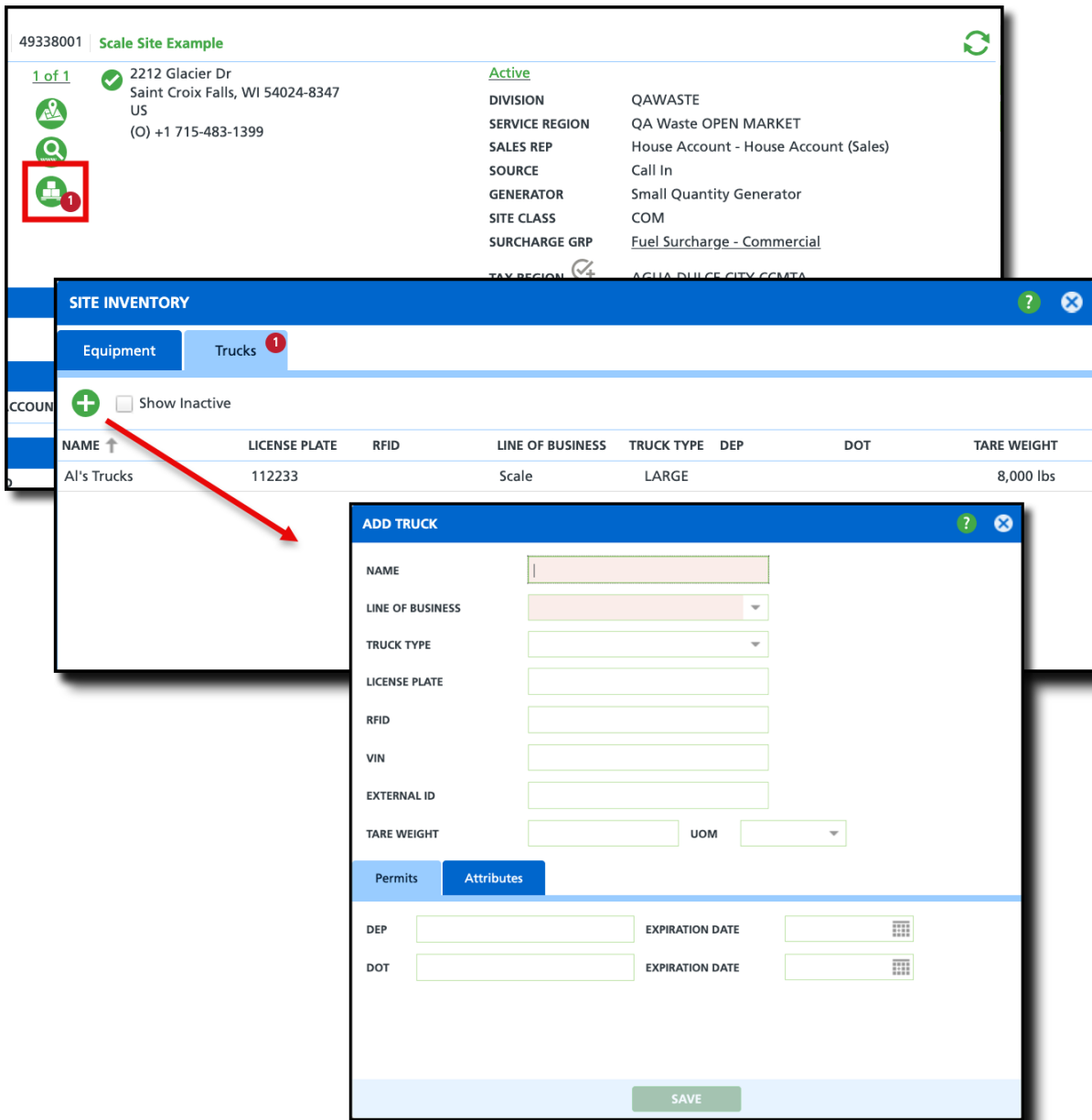


Site Inventory - Trucks

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%.

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
 Scale Site Example
 2212 Glacier Dr
 Saint Croix Falls, WI 54024-8347
 PHONE +1 715-483-1399
 CREATED BY Aliena 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 Al'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 Pending

Weights
 GROSS / IN tons START 04/01/25 Tue 09:37:17.00
 TARE / OUT 8000 tons END
 NET tons Adjust

CHARGES
 SURCHARGES
 TAXES
 TOTAL

Charges Payments **Origins** Materials Completion Attachments Photos

ORIGIN ↑ PERCENTAGE
 Downtown
 DTLA
 Midtown

Total:

Select Print Format 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)

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	No			Yes
Manual Weight	MW...	Scale Down			Temp ...	No	No	No	No	No	No	No	No			Yes

UPDATE FACILITY (Inbound / Outbound)

- ENABLE INBOUND ORDER: Yes (Truck Required)
- ENABLE OUTBOUND ORDER: Yes
- REQUIRE MANUAL WEIGHT REASON: Yes** (highlighted with red circle 2)
- DEFAULT SCALE TICKET FORMAT: [Dropdown]
- SEARCH DEFAULT FOR CREATE NEW: Truck

EDIT SERVICE RECORD

Site # 49338001
 Scale Site Example
 2212 Glacier Dr
 Saint Croix Falls, WI 54024-8347
 COD - Payment Required
 PHONE +1 715-483-1399
 CREATED BY Aliena Somers - Admin-NS (Sales) on 4/1/25 9:37 am
 ORDER REASON [Dropdown]

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

ENTER MANUAL WEIGHT REASON

REASON CODE: [Dropdown] (highlighted with red circle 1)
 SCALE: Override by User
 Scale Down
 Please provide reason to update weight
 DONE

Charges | Source Location | Payments | Materials | Completion

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 loca...	0 of 2

Select Print Format | SAVE (F2)

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.

UPDATE DIVISION - 1001

Details | Integrations | Addresses | **Credit Card / ACH Processing** | Cost / Target Pricing | Intercompany

Card Not Present
 ENABLE: Yes (Credit Card & ACH)
 PROCESSOR: CardPointe

Card Present
 PROCESSOR: CardPointe
 MERCHANT ID: 55500000001
 WAIT FOR TERMINAL TIMEOUT (SEC): 120
 ENABLE NON-INTEGRATED CREDIT CARD TERMINAL: No
 ENABLE PIN-BASED DEBIT: Yes
 ENABLE CARD-NOT-PRESENT ON SCALE: Yes
 ENABLE CC NUMBER ENTRY ON TERMINAL: No
 ENABLE POSTAL CODE PROMPT: No
 REQUIRE SIGNATURE: All Scale Transactions
 MIN. AMOUNT DUE FOR SIGNATURE REQUIRED: 0.00

EDIT INBOUND / RECEIVING - TICKET NUMBER: 42143 - WORK ORDER: 11201778

Site # 49334001
 Scale Test QA
 421 W Las Tunas Dr
 San Gabriel, CA 91776-1217

CREATED BY: Allens Somers - Admin-NS (Sales) on 3/26/26
 12:12 pm

TICKET NUMBER: 42143 | WORK ORDER: 11201778 | QTY: 1 | SERVICE CODE: Scale Multiple Profiles (38797) | WORK TYPE: INBOUND/MLT | ORDER TYPE: Inbound / Receiving

ORDER NOTES

TRUCK: DocTruck | VEHICLE INFO

PO NUMBER | EXTERNAL ID

RECEIVING FACILITY: LALANDFILL
 TRANSPORTER

WORK STATUS: Completed

Weights - Scale Version: 1.2 - CC X
 GROSS / IN: 8500
 TARE / OUT: 6500
 NET: 2,000

Charges \$ 100.00 | Payments | Materials | Completion | ATTACHMENTS

START [Click to Set](#) Stop was never set to IN PROGRESS

No Driver Signature / No Customer Signature
 COMPLETION/EXCEPTION NOTES

Scale Ticket Format 1 | ADD PAYMENT (F7) | SAVE (F2)

CAPTURE SIGNATURE
 TERMINAL: No Default Terminal Set
 CHANGE TERMINAL

SKIP SIGNATURE | CAPTURE & SAVE

Related Articles

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