

Scale-In Setup

Last Modified on 04/01/2025 2:13 pm PDT

The following scale-in setup applies to the various customer types that will process through at a landfill or transfer facility. For more details about the Inbound screen, please refer to the information provided here: [Inbound Screen Overview](#).

INBOUND / OUTBOUND OPERATIONS > INBOUND / OUTBOUND

FACILITY: QA Waste Transfer | In Progress CONFIGURE SCALE

EDIT SERVICE RECORD

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: Pending

Update History: Aliena Somers - Admin-NS (Sales) on

Weights:

| GROSS / IN | UOM | START | END | CHARGES |
|------------|------------|-----------------------------|-----|-----------------|
| 10000 tons | tons | 04/01/25 Tue 09:37:00.000 A | | \$ 210.00 |
| TARE / OUT | | | | |
| 8000 tons | tons | 04/01/25 Tue 11:26:00.000 A | | \$ 0.00 |
| NET | 2,000 tons | | | TOTAL \$ 226.28 |

Charges \$ 210.00 Payments | Materials | Completion | Attachments | Photos

Charges must match Equipment | Charges must match Material | WO MINIMUM: |

| GROSS QTY | LABELS | NO CHARGE QTY | CHARGE QTY | UOM | CHARGE CODE | PER UNIT | VENDOR RATE | MINIMUM TYPE | MINIMUM | TOTAL |
|-----------|--------|---------------|------------|-----|-----------------------------|-----------|-------------|--------------|---------|-----------|
| 0 | | 0 | 0 | ton | Construction and Demolition | \$ 0.00 | | None | | \$ 0.00 |
| 1 | | | 1 | ton | Trash | \$ 210.00 | | None | | \$ 210.00 |

Select Print Format SAVE (F2) | Payment \$226.28 pending

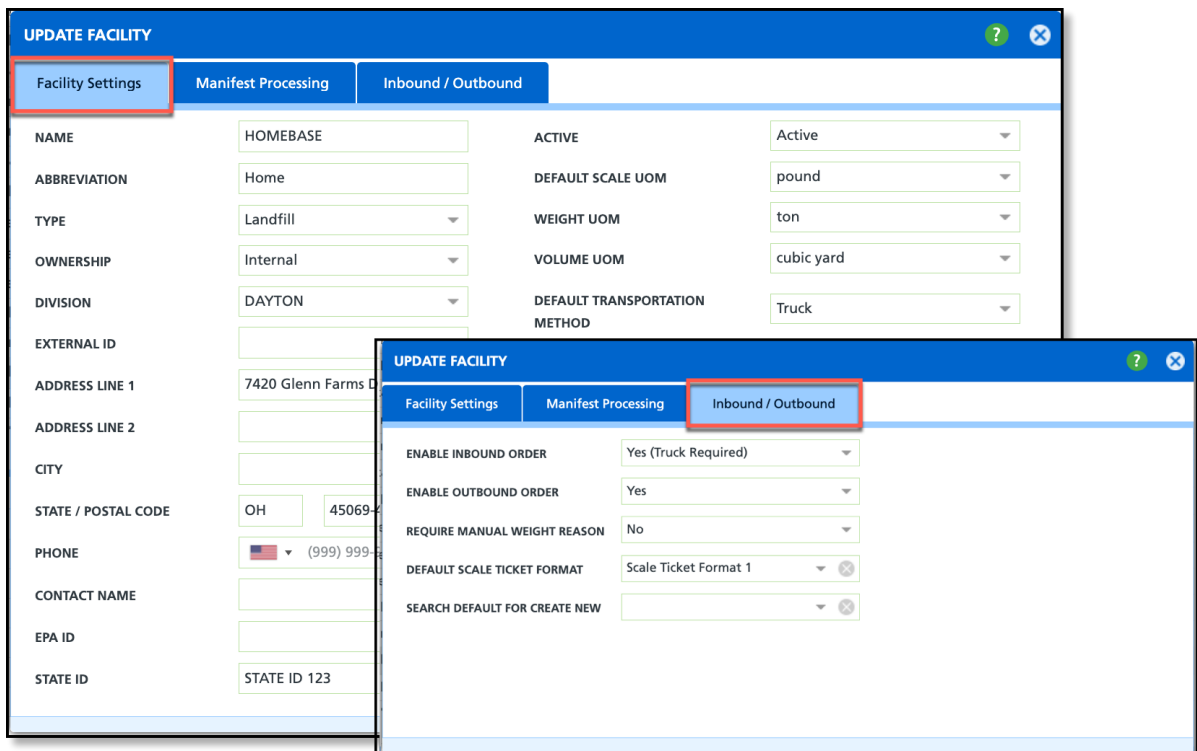
Universal Setup Requirements

Review each setup area to ensure proper processing of scale transactions for all customer types.

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 |
|-------------------------------|--|
| 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 work order using the UOM identified here. |
| Volume UOM | Select the volume unit of measure that will be used. When the volume is captured, it is reflected on the work order using the UOM identified here. |
| Inbound / Outbound | |
| Enable Inbound Order | Enable this field to process inbound scale transactions. If set to 'No', the facility will not display as a selection option in the facility drop down on the Inbound/Outbound screen. |
| Enable Outbound Order | Enable this field to process outbound scale transactions. This setup is required to capture the weight of a truck leaving the facility. |

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

Facility Setup - Lower Grid tabs

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

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](#).

| 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 TEXT | 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: ACTIVE:

Settings | **Mobile** | Optimization | Self-Service Ordering | Productivity and Profitability

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

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 a service record. For the **Inbound / Receiving** (scale-in) action category, additional Inbound/Outbound fields are displayed for scale configurations. To ensure accurate tracking, create a Work Type specifically for Scale-In 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' application. 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 configuration options for a selected work type. The dialog has tabs for 'Details' and 'Nav/Nav Settings'. Fields include ID, NAME, SELF-SERVICE LABEL, LINE OF BUSINESS, INVENTORY MOVE TYPE, ACTION CATEGORY (set to 'Inbound / Receiving'), 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, and Route Optimization settings like 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. |
| Enable Disposal Entry | |
| 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. |
| Enable Weight Adjustment | Controls the ability to adjust Gross / In and Tare / Out weights. |
| 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 type**. This will automatically populate the material type on new inbound tickets, saving time and ensuring consistency.

The screenshot displays two overlapping software screens. The top screen is titled 'MATERIAL TYPE SETUP' and shows a table of material types. The bottom screen is titled 'FACILITY SETUP' and shows the 'Material Type' tab selected, displaying a list of material types with columns for Material Type ID, Material Type, Default Charge Code, Enable Material Inventory, and Default Material Area.

| 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 | 2 | | | 1 | MSW | No | | Yes | pound | Yes |
| TRASH | Trash | | | | | | | | | | No |

| 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 Meetin... | Houston | TX | 45069 | ton | ton | cubic y... | Internal | Stan Manny | | |
| 1048 | LA TRANSFER STATION | LATS | QAWASTE | Transfer Station | Internal | Active | 2509 Rosecro... | Los Angeles | CA | 90059 | ton | ton | cubic y... | Internal | | | |

| 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. |

The screenshot shows the 'UPDATE SERVICE CODE' window with two tabs: 'Service Code' and 'Surcharges'. The 'Surcharges' tab is active. The form contains the following fields:

- SERVICE CODE:** SCALE_IN
- NAME:** Scale Inbound Services
- LINE OF BUSINESS:** Scale
- EQUIPMENT TYPE:** (Empty)
- MATERIAL TYPE:** (Empty)
- UOM:** service
- TAXABLE:** No (dropdown), **CLASS:** (dropdown)
- GL ACCOUNT:** (dropdown)
- TEMPORARY SERVICE GL ACCOUNT:** (dropdown)
- PRORATION METHOD:** Do Not Prorate (dropdown)
- VACATION HOLD PRORATION METHOD:** Do Not Prorate (dropdown)
- BILL WHILE ON CREDIT HOLD:** Yes (dropdown)
- IS AP TRANSACTION:** No (dropdown)
- EST MONTHLY VOL UOM:** (dropdown)
- IS SHELL:** No (dropdown)
- PRICING MODEL:** None (dropdown)
- CALCULATE RATE PER YARD:** No (dropdown)
- WORK TYPE EVENT CLASS:** Scale IN (dropdown)
- BILL ZERO AMOUNT:** No (dropdown)
- ACTIVE:** Yes (dropdown)
- ENABLE ROUTING:** No (dropdown)
- REQUIRE FREQUENCY:** No (dropdown)
- ENABLE PARENT SERVICE LINKING:** No (dropdown)
- ENABLE DRIVER UPDATE:** No (dropdown)
- ENABLE ACCOUNT SIGNATURE:** No (dropdown)
- ENABLE DRIVER SIGNATURE:** No (dropdown)
- ENABLE WORK ORDER MINIMUM:** No (dropdown)
- ENABLE RENTAL FEE:** No (dropdown)
- ENABLE DEFAULT DESTINATION:** No (dropdown)
- ENABLE NEGATIVE AMOUNT:** No (dropdown)
- ENABLE ESTIMATES TRACKING:** No (dropdown)
- ENABLE EQUIPMENT OWNERSHIP:** No (dropdown)
- ENABLE SHARE:** No (dropdown)
- ENABLE VENDOR:** No (dropdown)
- ENABLE SITE SERVICE CLASS:** No (dropdown)
- ENABLE DISCOUNTS:** No (dropdown)
- COMPOSITION MATERIAL CLASS:** (dropdown)

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 | <input type="text" value="52"/> | INVOICE EMAIL FROM | <input type="text"/> |
| ACTIVE | <input checked="checked" type="checkbox"/> | PRINT SEQUENCE | <input type="text" value="Invoice Number"/> |
| NAME | <input type="text" value="SCALE CASH"/> | INVOICE LOGO | <input type="text" value="Select Image"/> BROWSE... |
| 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"/> BROWSE... |
| 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](#)

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: [icon]

Example Account (48988) | 48988001

1234 San Gabriel Blvd
 Rosemead, CA 91770-3642
 US
 (O) +1 555-555-0501

Active | 1 of 1

DIVISION: QA Waste Services
 ACCOUNT MGR: House Account
 CLASS: Scale
 BILL GROUP: DAY-Q2-FEB-MAY-AUG-NOV
 ADVANCE - Billed Thru Date None

| CURRENT | 1-30 | 31-60 | 61-90 | 91-120 | 120+ | TOTAL |
|---------|------|-------|-------|--------|------|-------|
| 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

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: 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

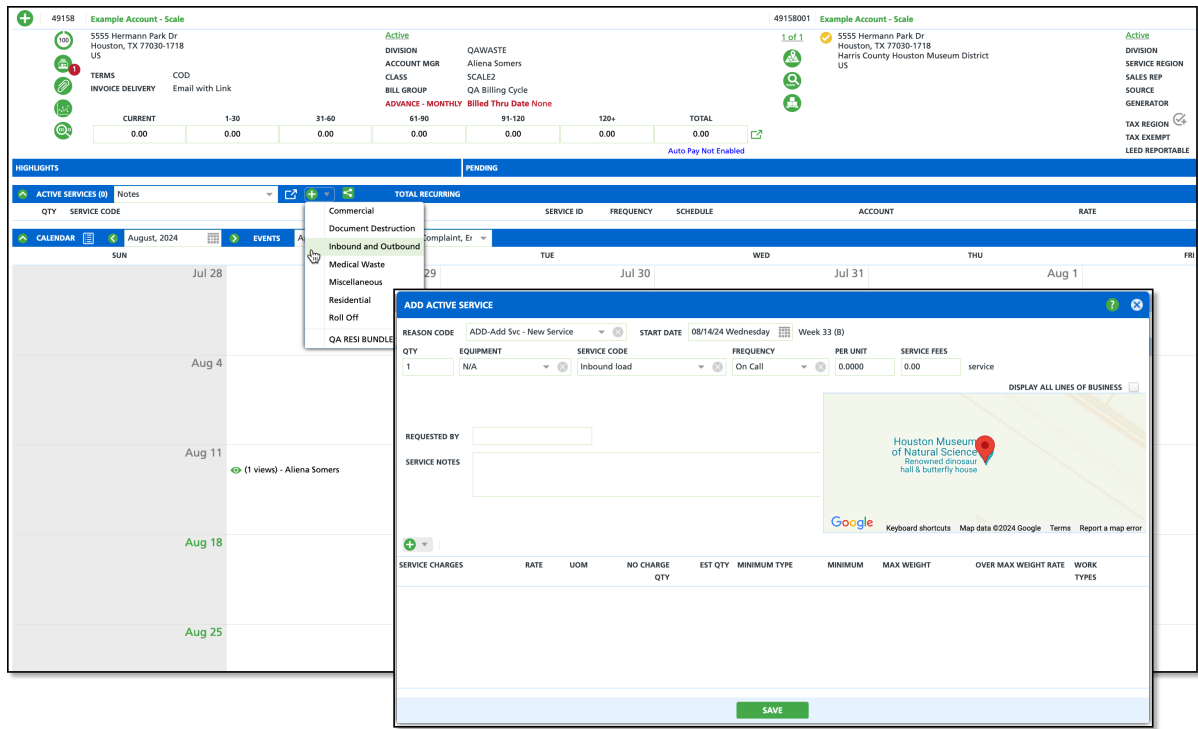
Key Fields:

| 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). |
| 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 haulers.

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 an inbound work order. | N/A |
| Site Inventory - Trucks | Assigns trucks to each site, 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](#).

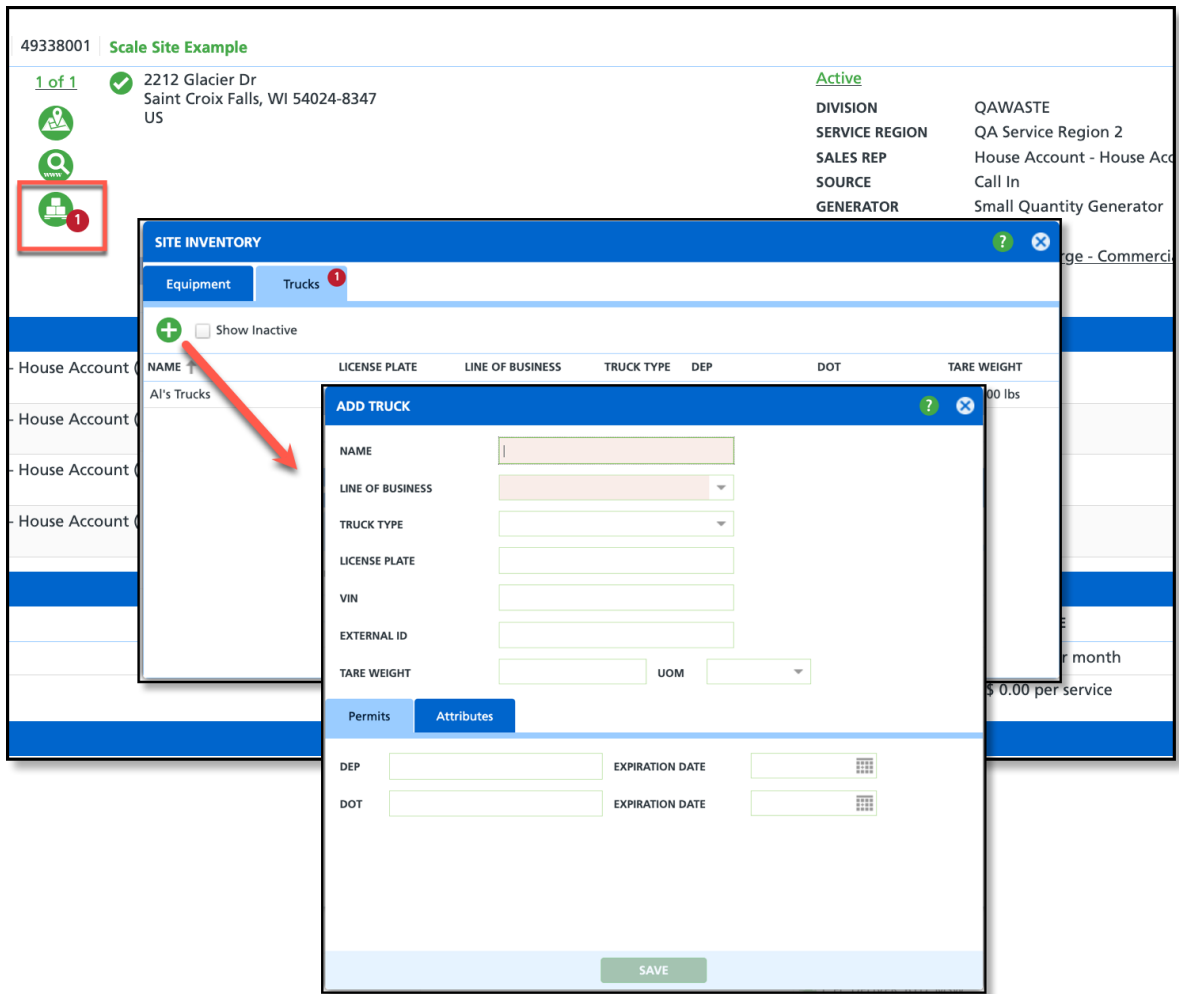
The screenshot displays the 'TRUCK SETUP' interface. At the top, there are filters for 'DIVISION' (QAWASTE) and 'LINE OF BUSINESS' (All), along with a 'Show Inactive' checkbox. Below this is a table listing trucks with columns for NAME, LICENSE PLATE, DIVISION, LINE OF BUSINESS, TRUCK TYPE, DEP, DOT, FUEL TYPE, VOLUME CAPACITY, COMPACTION RATIO, WEIGHT CAPACITY, TARE WEIGHT, INSPE... TYPE, and CAMERA SYSTEM. A modal window titled 'ADD TRUCK' is open, showing a form with fields for NAME, TRUCK TYPE, DIVISION, FUEL TYPE, LINE OF BUSINESS, VEHICLE INSPECTION TYPE, OWNERSHIP, LICENSE PLATE, ODOMETER UOM, VIN, SPEED UOM, and EXTERNAL ID. Below the form are tabs for 'Capacity', 'Onboard', 'Permits', and 'Attributes', and a 'SAVE' button at the bottom.

Site Inventory - Trucks

Pathway: [Customer Service Details](#) > [Site Inventory](#) > [Trucks \[tab\]](#)

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

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



Optional Setup

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

Material Origin Setup

Pathway: Setup > Operations > Material Origin

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

Origins [Tab]

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

MATERIAL ORIGIN SETUP
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
?

| | | | | | | | | | | | | | | | | | |
|---|---|------------|--------------|-------------|---|-------------|---|------------|-----------|-----|--|----------|-----|------|--------|--|--|
| <p>Site # 49338001</p> <p>Scale Site Example ✓</p> <p>2212 Glacier Dr Saint Croix Falls, WI 54024-8347</p> <p>COD - Payment Required</p> <p>PHONE +1 715-483-1399</p> <p>CREATED BY Allena Somers - Admin-NS (Sales) on 4/1/25 9:37 am</p> <p>ORDER REASON</p> | <p>TICKET NUMBER 41601 WORK ORDER 9443128 QTY 1 SERVICE CODE Scale Inbound Services WORK TYPE SCALE_POST ORDER TYPE Inbound / Receiving</p> <p>ORDER NOTES</p> <p>TRUCK Al's Trucks VEHICLE INFO PO NUMBER EXTERNAL ID</p> <p>RECEIVING FACILITY QA Waste Transfer MATERIAL Trash</p> <p>TRANSPORTER TRANSPORT METHOD Truck BILL OF LADING</p> <p>WORK STATUS In Progress EXCEPTION REASON POSTING STATUS Pending</p> <p>Weights</p> <table style="width: 100%; border: none;"> <tr> <td>GROSS / IN</td> <td>tons</td> <td>START</td> <td>04/01/25 Tue</td> <td>09:37:17.00</td> <td rowspan="3" style="border: 1px solid #ccc; padding: 2px;"> CHARGES SURCHARGES TAXES TOTAL </td> </tr> <tr> <td>TARE / OUT</td> <td>8000 tons</td> <td>END</td> <td></td> <td>--:--:--</td> </tr> <tr> <td>NET</td> <td>tons</td> <td>Adjust</td> <td></td> <td></td> </tr> </table> | GROSS / IN | tons | START | 04/01/25 Tue | 09:37:17.00 | CHARGES SURCHARGES TAXES TOTAL | TARE / OUT | 8000 tons | END | | --:--:-- | NET | tons | Adjust | | |
| GROSS / IN | tons | START | 04/01/25 Tue | 09:37:17.00 | CHARGES SURCHARGES TAXES TOTAL | | | | | | | | | | | | |
| TARE / OUT | 8000 tons | END | | --:--:-- | | | | | | | | | | | | | |
| NET | tons | Adjust | | | | | | | | | | | | | | | |

| | | | | | | |
|-----------|----------|---------|-----------|------------|-------------|--------|
| Charges 2 | Payments | Origins | Materials | Completion | Attachments | Photos |
|-----------|----------|---------|-----------|------------|-------------|--------|

| | |
|---|------------|
| ORIGIN ↑ Downtown DTLA Midtown | PERCENTAGE |
|---|------------|

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: Manual 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

REQUIRE MANUAL WEIGHT REASON: Yes 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

ORDER NOTES

TRUCK: Al's Trucks | VEHICLE INFO: [Dropdown] | PO NUMBER: [Dropdown] | EXTERNAL ID: [Dropdown]

RECEIVING FACILITY: QA Waste Transfer | MATERIAL: Trash

TRANSPORTER: [Dropdown] | TRANSPORT METHOD: Truck | BILL OF LADING: [Dropdown]

WORK STATUS: In Progress | EXCEPTION REASON: [Dropdown] | POSTING STATUS: Pending

Weights: GROSS / IN: [Dropdown] tons, TARE / OUT: 8000 tons, NET: [Dropdown] tons

Charges 2 | Source Location | Payments | Materials 2 | Completion

Find existing source location [Search Icon]

| 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 [Dropdown] SAVE (F2)

ENTER MANUAL WEIGHT REASON

REASON CODE: [Dropdown] (Override by User selected)

SCALE: Scale Down

Please provide reason to update weight

DONE