Process Cash Pay Customers

Last Modified on 08/15/2025 7:50 am PDT

Pathway: Operations > Inbound / Outbound > Inbound (tab)

For cash-pay customers, scale operators should consider using the following inbound scale process to ensure all transactions are captured and to enhance scale house efficiency. For more information on setup and scale ticket creation for non-cash-pay customers, refer to the Scale Setup and Inbound Ticket Creation articles.

INBOUND	/ OUTBOUND													OPE	RATIONS > INBC	
Inboun	FACILITY QA Waste Transfer d Outbound	 In Progress History Daily 	Totals									CONFIGUR	E SCALE	Search		۵.۵
ORDER #	DATE 🕇	VEHICLE	ACCOUNT / SITE	TRANSPORT IN	FO SERVICE	INFO	MATERI ADJUST	ALS / MENTS			WEIGH	IT ADDITION	AL INFO	PAYI	MENT NOTES	
TOTALS	: 2 loads										0.00 to	nc 0.0	0 ud ³			
				EDIT SERVICE RECOR	D										? 😣	
41601 Inbound C 9443128	04/01/25 Drder: Start: 9:37 av End: 11:26 a	Al's Trucks n Type: LARGE n License: 112233 Ext. Id: 123ABC	Al's Junk Hauling (49338) <u>Scale Site Example (493380</u> 2212 Glacier Dr, Saint Croix	Site # <u>49338001</u> Scale Site Example			TICKET NUMBER 41601 ORDER NOTES	WORK ORDER QT 9443128 1	Y	SE Scale Ir	RVICE CODE hbound Services	WORK SCALE_	TYPE POST	ORD Inbound	ER TYPE I / Receiving	
41604 Inbound 0 9443131	04/01/25 Drder: Start: 1:34 p	LARRY1 License: TEST123 DEP: dep123 DOT: abc122	Larry's Junk Removal (4907 Larry's Junk Removal (4907 8100 Washington Ave, Hou	Saint Croix Falls, WI 5 COD - Payment Requi PHONE +1 715-4	4024-8347 red 83-1399		TRUCK		VEHIC	CLE INFO		PO NUMB	ER	EXTERNAL ID		
		DOI: abci25		CREATED BY			Al's Trucks	- 0	9							
				Aliena Somers - Admi	n-NS (Sales) on 4/1/2	25	RECEIVING FACILI	TY			MATERIAL					
				ORDER REASON			QA Waste Tran	sfer			Trash				Ŧ	
						Ŧ	TRANSPORTER		1	TRANSPORT	METHOD	-	BILL OF LADIN	łG		
									• (3)	Truck		▼ (⊗)				
							WORK STATUS		E	EXCEPTION	REASON		POSTING STA	itus		
							In Progress Jodate History Ali	ana Somers - Admin-NS (S	Sales) on			÷ ⊚	Pending		· ·	
								Weights						-		
							GROSS / IN	10000 ton	is i	START 04	01/25 Tue	09:37:00.0	00 A	CHARGES	\$ 210.00	
							TARE / OUT	8000 ton	15 I	END 04	01/25 Tue IIII	11:26:00.0	00 A	SURCHARGES	\$ 0.00	
							NFT	2.000 top						TAXES	\$ 16.28	
								2,000 1011						TOTAL	\$ 226.28	
				Charges \$ 210.00	Source Locatio	in Pa	iyments	Materials ² Cor	mpletion	At	tachments	Photos				
				Charges mu	st match Equipmen st match Material	two	¢									
				GROSS LABELS QTY	NO CHARGE CHA	RGE UO IY	M CHARGE CO	DE	PER	RUNIT	VENDOR RATE	TYPE	MINIMUM	TOTAL		
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				1	1	to	n Trash		\$ 2	210.00		None		\$ 210.00	•	
				Select Print Format	- 8				SAVE (F	F2) I	Payment \$226.28 p	pending				
			I			_		_	_				_			

Search for the Designated Cash Pay Site

- 1. Select a **Facility** from the Inbound/Outbound screen.
- 2. Click on the green 'Add' icon and select 'Create Inbound Order (F5).' This will open the Create New Transaction screen.
- 3. Select 'Site' as the search type, enter the name of the cash pay account, and press Enter or Return. A list of matching accounts or sites will be displayed.

INBOUND / OUTBOUND						
FACILITY HOMEBASE Create Inbound Order (F5	✓ In 5)	Progress	als	47022001 Scale Boxes		
O Create Unidentified Inbo Create Outbound Order (und Order for In F6)	ternal Vehicle	IICLE	ACCOUNT / S	SITE	TRANSPORT INFO
TOTALS: 19 loads	CREATE NEW	/ TRANSACT	ION			? ⊗
Inbound Order: <u>7757788</u>	SEARCH TYPE	Site	Ŧ	Cash	Q, (8)	
41411 Inbound Order: 8327035	ТҮРЕ	VEHICLE	†	SITE / ACCOUNT 🕇	SERVICE INFO	ADDITIONAL INFO
41412 Inbound Order: <u>8327036</u>	Inbound			Cash Customer (49346001) Cash Customer (49346) Brady St, Houston, TX COD- Payment Required	Scale Inbound Services Scale IN - Auto Post	
41413 Inbound Order: <u>8327037</u>						
41420 Inbound Order: <u>8434456</u>						
Payment \$ 112.00 pending, Or 41424 Inbound Order: <u>8467219</u>						
41428 Inbound Order: <u>8467890</u>						

Create an Inbound Order

From the 'Create New Transaction' screen, select the account the transaction applies. This will open the 'Create Inbound Order' screen. Enter all necessary information for the inbound order and click 'Create' to generate the work order.

CREATE NE	W TRANSACTION						? 😣			
SEARCH TYPE	Site 💌	Cash			Q, 🛞					
ТҮРЕ	VEHICLE 🕇	SITE / ACCOU	тиц 🕇		SERVICE INFO		ADDITIONAL INFO			
Inbound	\sim	Cash Custo Cash Custo Brady St, H COD- Paym	<u>mer (49346001)</u> mer (49346) ouston, TX e nt Required		Scale Inbound Services Scale IN - Auto Post					
	CREATE INBOUND ORDER						3	8		
	Cash Customer		SCHEDULE DATE	SERVICE CODE Scale Inbound Services		ORDER TYPE				
	Brady St		03/26/25 Wednesday			- Inbo	Inbound / Receiving - Scale IN - Auto Pos			
	Houston, TX 77011		TRUCK		VEHICLE INFO		MATERIAL			
	COD - Payment Required	•						-		
			TRANSPORTER		TRANSPORT METHOD		BILL OF LADING			
				- 🛛	Truck	- 🛞				
				CREATI						

Add Charges and Process a Payment

After an inbound order is created, a Service Record (work order) is generated. To process a payment, select the **Payments** tab on the service record and enter the payment type and amount and click Save. After processing the payment transaction, update the service record's Work Status to 'Completed'. Future retrieval of completed service records are available in the History tab of the Inbound/Outbound screen, organized by date.

Add Charges

Click the Charges tab to add charges to the service record. Once the charges are applied, payment will be required to complete the work order.

e # 45546001	TICKET NUMBER	WORK ORDER QTY	SERVI	CE CODE	WORK	TYPE	ORDER TYPE			
sh Customer 🖍 ady St puston, TX 77011	41598 ORDER NOTES	41598 9410197 1 Scale Inbound Services SCALE_POST ORDER NOTES								
DD - Payment Required	TRUCK		VEHICLE INFO		PO NUMB	ER	EXTERNAL ID			
iena Somers - Admin-NS (Sales) on 3/26/25		- 🛛								
14 am	RECEIVING FACILIT	Y		MATERIAL						
DER REASON	HOMEBASE			MSW						
*	TRANSPORTER		TRANSPORT M	ETHOD		BILL OF LADIN	G			
		~	Truck		- ®					
	WORK STATUS		EXCEPTION REA	SON		POSTING STAT	rus			
	In Progress		-		- ®	Pending				
	Weights							¢ 50		
	GROSS / IN	lbs	START 03/26/2	5 Wed	09:44:40.00	A 0	CHARGES	\$ 50.		
	TARE / OUT	lbs	END		:		SURCHARGES	\$ 0.		
	NET	lbr	Adjust				TAXES	\$ 3.		
		IDS	Aujust				TOTAL	\$ 53.		
Charges \$ 50.00 Payments Origin	ns Materials	Completion	Attachments	Photos						
Charges must match Equipment Charges must match Material	VO MINIMUM	DE	PER UNIT	VENDOR	MINIMUM	MINIMUM	TOTAL			
	oach Tiroc		\$ 20.00	RATE	TYPE		¢ 0.00			
0	ton Construction	and Demolition	\$ 17 28		None		\$ 0.00			
1 1	ton Trash		\$ 50.00		None		\$ 50.00			

Process a Payment

To process a payment for a cash pay customer, go to the Payments tab and choose the payment type from the drop down menu. The Payment Amount will auto-populate based on the applied charges. Complete the payment and click Save.

EDIT SERVICE RECORD					<mark>?</mark> 8					
Site # 49346001 Cash Customer / Brady St Houston, TX 77011	TICKET NUMBER WOR 41598 94 ORDER NOTES	RK ORDER QTY 110197 1	SERVICE CODE Scale Inbound Services	WORK TYPE SCALE_POST	ORDER TYPE Inbound / Receiving					
CREATED BY	TRUCK	v	EHICLE INFO	PO NUMBER	EXTERNAL ID					
Aliena Somers - Admin-NS (Sales) on 3/26/25 9:44 am	RECEIVING FACILITY									
ORDER REASON	HOMEBASE		MSW		-					
	TRANSPORTER	- 0	TRANSPORT METHOD	BILL OF LAD	NG					
	WORK STATUS		EXCEPTION REASON	POSTING ST	ATUS					
		r			? 8					
				-	\$ 50.00					
	I				\$ 0.00					
	PAYMENT AMO	UNT 53.88			\$ 3.88					
	NOTE									
Charges \$ 50.00 B Payments Origin	ns									
0										
DESCRIPTION BATCH	#									
			SAVE							
Scale Ticket Format 1 🔻 🖨		SAV	E (F2) Payment \$53.88 per	nding / Origin pending						

Issue a Receipt

To issue a receipt, select the desired option from the "Select Print Format" drop down menu. Click the print icon to generate the receipt in a new window, where you can choose to save and email it externally or print a copy to hand to the customer. Default the receipt option in the **Default Scale Ticket Format** field in *Facility Setup > Update Facility > Inbound / Outbound [tab]*.

EDIT SERVICE RECORD							?	⊗		
Site # 49346001 Cash Customer // Brady St Houston, TX 77011	TICKET NUMBER 41598 ORDER NOTES	WORK ORDER 9410197	QTY 1	SERVICE CODE Scale Inbound Services	WOR SCAL	K TYPE E_POST	ORDER TYP Inbound / Rece	E tiving		
COD - Payment Required								-1		
CREATED BY Aliena Somers - Admin-NS (Sales) on 3/26/25	TRUCK	,		VEHICLE INFO	PO NUM	MBER	EXTERNAL ID	-1		
9:44 am	RECEIVING FACILI	тү		MATERIAL						
ORDER REASON	HOMEBASE			MSW				-		
*	TRANSPORTER			TRANSPORT METHOD		BILL OF LADIN	G			
			Ŧ	Truck						
	WORK STATUS Completed			\	VEHICLE				SCALE TICKET DATE	41598 Mar 26, 2025
	Weights		Ĩ		NSPORTER				SITE ID	49346001
	GROSS / IN		OA Wast	Dayton	ORIGIN	Midtown 100%			TIME IN TIME OUT	9:44 AM
	TARE / OUT		PO BOX Houston,	260311 TX 78426 BEO	PO #				MATERIAL	MSW
	NET		State ID: (936) 258	-9035	NOTES				WEIGHT IN	lbs
			DAT_DIV	@navuson.com	NOTES				WEIGHT OUT	lbs
Charges \$ 50.00 ³ Payments \$ 53.88 ¹	Origins ¹ N	laterials	Cash Cu: Brady St Houston,	tomer TX 77011						
0			Descript	on	Gross Qty	No Charge Qty	Charge Qty	Unit Rate	Minimum	Total
•			Trash		1	0	1 tons	\$ 50.00	\$ 0.00	\$ 50.00
DESCRIPTION BATCI	H # BATCH DA	ITE S						CHAP	RGES	\$ 50.00 \$ 0.00
Cash 1152	0 03/26/202	25						TAXE	S	\$ 3.88
								TOTA	NL.	\$ 53.88
			Payme	nts		Defe		•		
				Cash		1234	ence	\$ 53.0	88	
							Total Payment	\$ 53.8	88	
			Delve	- C lass L			Welchmenter Olevetore			
Scale Ticket Format 1 👻 🖨			Drive	Signature			weignmaster Signature _			_
			4 00 -							
			viar 26, 2	U25 TU:UT AM Aliena Somers						

Related Article

Scale Setup Inbound Ticket Creation Scale Photos Application (NavuNav)