

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.

The screenshot displays the 'EDIT SERVICE RECORD' window for order 41601. The window is divided into several sections:

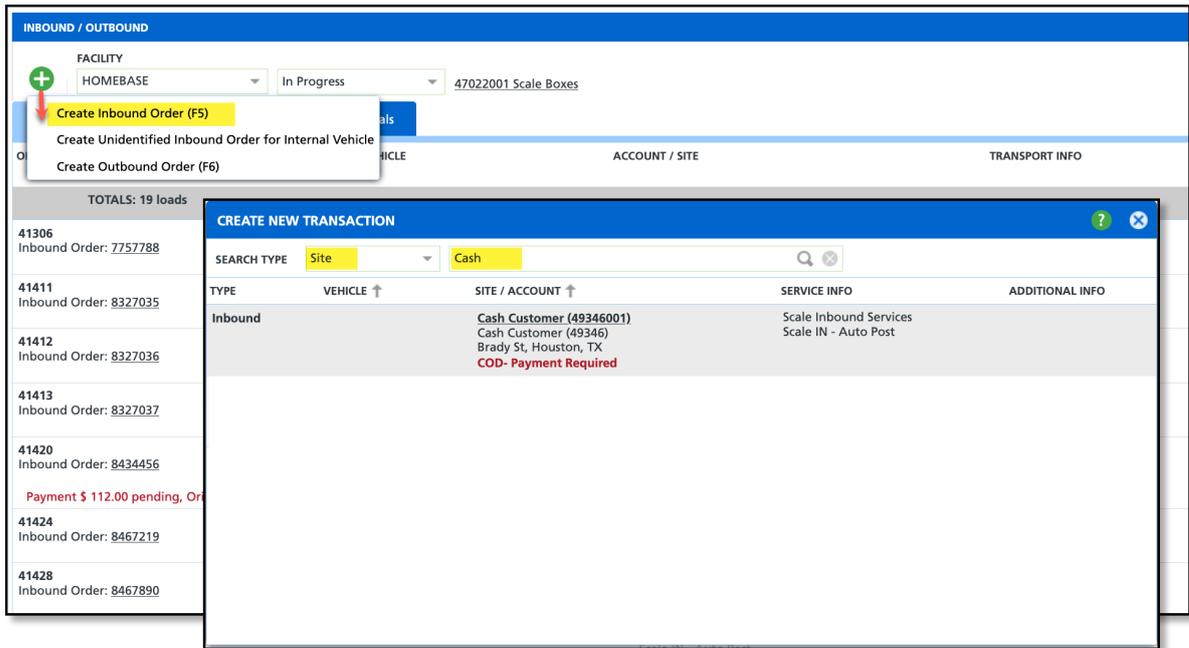
- Header:** Site # 4933800, Scale Site Example, 2212 Glacier Dr, Saint Croix Falls, WI 54024-8347. Includes phone number +1 715-483-1399 and a 'COD - Payment Required' status.
- ORDER NOTES:** A section for adding notes to the order.
- TRUCK:** Al's Trucks, with fields for VEHICLE INFO, PO NUMBER, and EXTERNAL ID.
- RECEIVING FACILITY:** QA Waste Transfer, with a dropdown for MATERIAL (Trash).
- TRANSPORTER:** Truck, with a dropdown for TRANSPORT METHOD (Truck) and a field for BILL OF LADING.
- WORK STATUS:** In Progress, with a dropdown for EXCEPTION REASON (Pending) and a field for POSTING STATUS.
- Weights:**

WEIGHTS	START	END
GROSS / JIN	09 : 37 : 00 : 000 A	04/01/25 Tue
TARE / OUT	11 : 26 : 00 : 000 A	04/01/25 Tue
NET		
- Summary:** CHARGES \$ 210.00, SURCHARGES \$ 0.00, TAXES \$ 16.28, TOTAL \$ 226.28.
- Buttons:** Source Location, Payments, Materials, Completion, Attachments, Photos.
- Form Elements:** Checkboxes for 'Charges must match Equipment' and 'Charges must match Material', and a 'WO MINIMUM' field.
- Table:**

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	1	ton	Trash	\$ 210.00		None		\$ 210.00
- Footer:** Select Print Format, SAVE (F2), Payment \$226.28 pending.

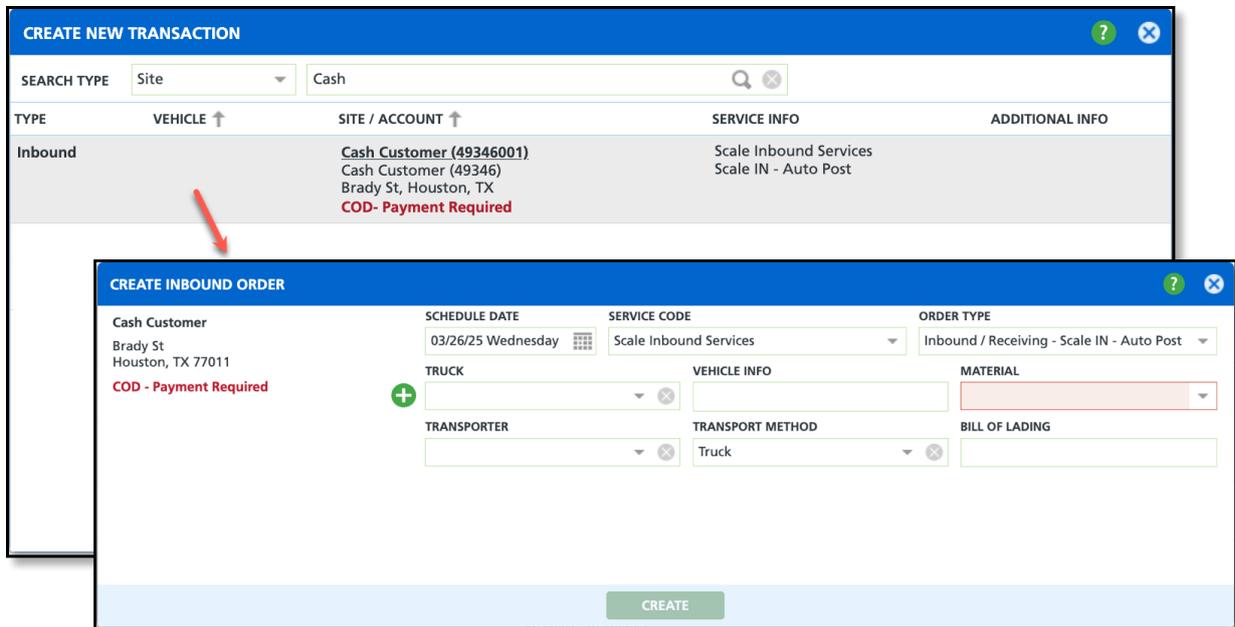
Search for the Designated Cash Pay Site

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.



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.



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.

EDIT SERVICE RECORD
?
✕

Site # 49346001
Cash Customer ✓
Brady St
Houston, TX 77011
COD - Payment Required
CREATED BY
Aliena Somers - Admin-NS (Sales) on 3/26/25
9:44 am
ORDER REASON

TICKET NUMBER	WORK ORDER	QTY	SERVICE CODE	WORK TYPE	ORDER TYPE
41598	9410197	1	Scale Inbound Services	SCALE_POST	Inbound / Receiving

ORDER NOTES

TRUCK	VEHICLE INFO	PO NUMBER	EXTERNAL ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

RECEIVING FACILITY	MATERIAL
HOMEBASE	MSW

TRANSPORTER	TRANSPORT METHOD	BILL OF LADING
<input type="text"/>	Truck	<input type="text"/>

WORK STATUS	EXCEPTION REASON	POSTING STATUS
In Progress	<input type="text"/>	Pending

Weights

GROSS / IN	<input type="text"/>	lbs	START	03/26/25 Wed	09:44:40.000 A
TARE / OUT	<input type="text"/>	lbs	END	<input type="text"/>	--:--:--
NET	<input type="text"/>	lbs	Adjust		

CHARGES	\$ 50.00
SURCHARGES	\$ 0.00
TAXES	\$ 3.88
TOTAL	\$ 53.88

Charges \$ 50.00 3

Payments

Origins

Materials

Completion

Attachments

Photos

+
 Charges must match Equipment
 WO MINIMUM

Charges must match Material

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL	
0			0	each	Tires	\$ 30.00		None		\$ 0.00	-
0			0	ton	Construction and Demolition	\$ 17.28		None		\$ 0.00	-
1			1	ton	Trash	\$ 50.00		None		\$ 50.00	-

Scale Ticket Format 1 ⊞

SAVE (F2)

Payment \$53.88 pending / Origin pending

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
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✕

Site # 49346001
Cash Customer
Brady St
Houston, TX 77011
COD - Payment Required
CREATED BY
Aliena Somers - Admin-NS (Sales) on 3/26/25
9:44 am
ORDER REASON

TICKET NUMBER	WORK ORDER	QTY	SERVICE CODE	WORK TYPE	ORDER TYPE
41598	9410197	1	Scale Inbound Services	SCALE_POST	Inbound / Receiving

ORDER NOTES

TRUCK <input style="width: 100%;" type="text"/>	VEHICLE INFO <input style="width: 100%;" type="text"/>	PO NUMBER <input style="width: 100%;" type="text"/>	EXTERNAL ID <input style="width: 100%;" type="text"/>
RECEIVING FACILITY HOMEBASE	MATERIAL MSW		
TRANSPORTER <input style="width: 100%;" type="text"/>	TRANSPORT METHOD Truck	BILL OF LADING <input style="width: 100%;" type="text"/>	
WORK STATUS In	EXCEPTION REASON	POSTING STATUS <input style="width: 100%;" type="text"/>	

Charges \$ 50.00 3
Payments
Origins

+

→

DESCRIPTION	BATCH #

Scale Ticket Format 1

SAVE (F2)

Payment \$53.88 pending / Origin pending

ADD PAYMENT
?
✕

TYPE	<input style="width: 90%;" type="text"/>	\$ 50.00
PAYMENT AMOUNT	<input style="width: 90%;" type="text" value="53.88"/>	\$ 0.00
NOTE	<input style="width: 100%; height: 40px;" type="text"/>	

SAVE

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
?
✕

<p>Site # 49346001 Cash Customer ✓ Brady St Houston, TX 77011 COD - Payment Required</p> <p>CREATED BY Aliena Somers - Admin-NS (Sales) on 3/26/25 9:44 am</p> <p>ORDER REASON [Dropdown]</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>TICKET NUMBER</th> <th>WORK ORDER</th> <th>QTY</th> <th>SERVICE CODE</th> <th>WORK TYPE</th> <th>ORDER TYPE</th> </tr> <tr> <td>41598</td> <td>9410197</td> <td>1</td> <td>Scale Inbound Services</td> <td>SCALE_POST</td> <td>Inbound / Receiving</td> </tr> </table> <p>ORDER NOTES [Text Area]</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>TRUCK</th> <th>VEHICLE INFO</th> <th>PO NUMBER</th> <th>EXTERNAL ID</th> </tr> <tr> <td>[Dropdown]</td> <td>[Text]</td> <td>[Text]</td> <td>[Text]</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>RECEIVING FACILITY</th> <th>MATERIAL</th> </tr> <tr> <td>HOMEBASE</td> <td>MSW</td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>TRANSPORTER</th> <th>TRANSPORT METHOD</th> <th>BILL OF LADING</th> </tr> <tr> <td>[Dropdown]</td> <td>Truck</td> <td>[Text]</td> </tr> </table> <p>WORK STATUS Completed</p> <p>Weights GROSS / IN [Text] TARE / OUT [Text] NET [Text]</p>	TICKET NUMBER	WORK ORDER	QTY	SERVICE CODE	WORK TYPE	ORDER TYPE	41598	9410197	1	Scale Inbound Services	SCALE_POST	Inbound / Receiving	TRUCK	VEHICLE INFO	PO NUMBER	EXTERNAL ID	[Dropdown]	[Text]	[Text]	[Text]	RECEIVING FACILITY	MATERIAL	HOMEBASE	MSW	TRANSPORTER	TRANSPORT METHOD	BILL OF LADING	[Dropdown]	Truck	[Text]
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[Dropdown]	Truck	[Text]																													

Charges \$ 50.00 3
Payments \$ 53.88 1
Origins 1
Materials

DESCRIPTION	BATCH #	BATCH DATE
Cash	11520	03/26/2025

Scale Ticket Format 1
➡

QA
Dayton

QA Waste Services
PO BOX 260311
Houston, TX 78426
State ID: STATE ID 123
(936) 258-9035
DAY_Div@navusoft.com

Cash Customer
Brady St
Houston, TX 77011

VEHICLE

TRANSPORTER

ORIGIN Midtown 100%

PO #

REQUESTED BY

NOTES

SCALE TICKET 41598
DATE Mar 26, 2025

SITE ID 49346001

TIME IN 9:44 AM

TIME OUT

MATERIAL MSW

WEIGHT IN lbs

WEIGHT OUT lbs

NET lbs

Description	Gross Qty	No Charge Qty	Charge Qty	Unit Rate	Minimum	Total
Trash	1	0	1 tons	\$ 50.00	\$ 0.00	\$ 50.00
						CHARGES \$ 50.00
						SURCHARGES \$ 0.00
						TAXES \$ 3.88
						TOTAL \$ 53.88

Payments	Description	Reference	Amount	Notes
	Cash	1234	\$ 53.88	
			Total Payment \$ 53.88	

Driver Signature _____
Weighmaster Signature _____

Mar 26, 2025 10:01 AM Aliena Somers

Related Article

[Scale Setup](#)

[Inbound Ticket Creation](#)

[Scale Photos Application \(NavuNav\)](#)