

# Build a New Article

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## Titling Conventions

### New Screens

When a new screen is released, the overview article must use the exact same name as the screen.

### Process/Workflow Articles

This is ultimately up to the author and how they prefer to name the article. As a best practice, use the action being performed as the title. For example, in AR History there are several actions users can take, such as generating an invoice or applying a payment. In those cases, the article title could be “**Apply a Payment**” or “**Apply a Payment in AR History.**”

### Release Notes

To ensure release notes can be attached to support tickets indicating an issue has been resolved, each release note should be created as a separate, standalone article. Release note titling conventions differ from other article types. The title should begin with the screen name, followed by the module in parentheses, then a brief description, and finally the JIRA number so internal staff can easily reference it in Jira.

**Example:** AR History (Accounts) - Anniversary Billing Date Calculation Updated on Preview Invoice Screen (20385)

## Body of Article

For most overview articles that simply capture the functions and purpose of a screen, the template is very basic. This specific style is most commonly used when documenting screens in the Setup module. For screens outside of Setup, there may be multiple ways to complete a task depending on configuration, or an “if this, then that” process. The [Inbound Ticket Creation](#) document is a good example of this approach.

### Main Components

The body of the article should follow a similar template as shown here.

1. The **pathway** is displayed at the top. Bold the word Pathway and then italicize the pathway.
2. A **brief description** capturing the purpose of the screen.
3. An **image**. This can be a single image of the screen, or something similar to below.
4. **Permissions** table.
5. **Fields and Descriptions** table. While this section may start out basic, it allows for logic and hyperlinks to be added over time. In many cases, a screen is built and released before all functionality is complete. We do our best to document what’s available, but sometimes the foundation is created first, with plans to expand and fill in the details later.
6. **Setup Steps** or process outline. Here again, it may start out basic, but many times we refer back and expand on these with new logic and call-outs.
7. **Related Articles:** Most articles include a Related Articles section, which is a great way to link related content and processes together. One benefit is that you can customize the title as it appears in the Related Articles list. This is especially helpful when creating process documentation and guiding readers to the next step in the workflow.

Pathway: Setup > Operations > Truck Type

Truck Type Setup establishes and defines the distinct types of trucks utilized within the system and assists in turn-by-turn navigation by restricting the road options available to a specific truck type. This setup process further involves assigning specific truck types to individual trucks within Setup > Operations > Truck.

| ID   | NAME   | EXTERNAL ID | TRANSPORT METHOD | ENABLE EQUIPMENT | REQUIRE EQUIPMENT | TARE FREQUENCY | HEIGHT | WIDTH | SIZE UOM | ROAD WEIGHT | MAXIMUM WEIGHT | WEIGHT UOM | ACTIVE |
|------|--------|-------------|------------------|------------------|-------------------|----------------|--------|-------|----------|-------------|----------------|------------|--------|
| 1000 | LARGE  |             | Railcart         | No               | 0                 | 1 Days         | 68     | 34    | foot     | 14,000      | 80,000         | pound      | Yes    |
| 1001 | SUV    |             |                  |                  |                   | 2 Days         |        |       |          |             |                |            | Yes    |
| 1002 | PICKUP |             |                  |                  |                   | 1 Days         |        |       |          |             | 7,000          | pound      | Yes    |
| 1003 | SEDAN  |             |                  |                  |                   | 0 Days         |        |       |          |             |                |            | Yes    |
| 1004 | TEST   |             |                  |                  |                   | 0 Days         |        |       |          |             |                |            | No     |

### Permissions

The following permission is required to access and work within the Truck Type Setup screen:  
[Read More](#)

### Truck Type Setup Field Descriptions

[Read More](#)

### Truck Type Setup Steps

[Read More](#)

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### Related Articles

[Truck Setup](#)

## Other Items

Referencing the [Inbound Ticket Creation](#) article, there are not only permissions that control what a user can do, but also setup requirements. In that case, add a **Setup Requirements** sections below the permissions table to capture what prior setup is needed to operate within the screen.

Before using the **Inbound / Outbound** screen, specific scale-related setup requirements must be completed. Refer to the [Scale-In Setup](#) article for necessary setup information.

| INBOUND / OUTBOUND       |                |   |                              |                                     |                                    |                            |  |                             |                 | OPERATIONS - INBOUND / OUTBOUND |  |
|--------------------------|----------------|---|------------------------------|-------------------------------------|------------------------------------|----------------------------|--|-----------------------------|-----------------|---------------------------------|--|
| FACILITY                 |                | Doc Landfill  |                              | In Progress                         |                                    | TARE TRUCK OR EQUIPMENT    |  | CONFIGURE SCALE WORKSTATION |                 | Search                          |  |
| ORDER #                  | DATE ↓         | VEHICLE   | ACCOUNT / SITE               | TRANSPORT INFO                      | SERVICE INFO                       | MATERIALS / ADJUSTMENTS    | WEIGHT   | ADDITIONAL INFO             | PAYMENT NOTES   |                                 |  |
| TOTALS: 18 loads         |                |   |                              |                                     |                                    |                            | 4,000.00 lbs                                   | 23.00 yd <sup>3</sup>       | (\$15 1,349.50) |                                 |  |
| 42020                    | 02/18/26       |   |                              | Method: Truck                       |                                    | C&D                        | Gross*: 4 tons<br>Tare*: 2 tons<br>Net: 2 tons |                             |                 |                                 |  |
| UNASSIGNED LOAD          | Start: 1:24 pm |   |                              |                                     |                                    |                            |  |                             |                 |                                 |  |
| 41991                    | 02/13/26       |   | DocScale Customer (49618)    |                                     | Scale Inbound Services             | C&D                        |  |                             |                 |                                 |  |
| Inbound Order: 10994010  | Start: 1:16 pm |   | DocScale Customer (49618001) | 102 N Cascade St, Ocoee, WI         | Scale IN - Auto Post               |                            |  |                             |                 |                                 |  |
| 41992                    | 02/13/26       |   | DocScale Customer (49618)    |                                     | Scale Inbound Services             | C&D                        |  |                             |                 |                                 |  |
| Inbound Order: 10994011  | Start: 1:18 pm |   | DocScale Customer (49618001) | 102 N Cascade St, Ocoee, WI         | Scale IN - Auto Post               | Downtown (50%)             |  |                             |                 |                                 |  |
| 41993                    | 02/13/26       |   | DocScale Customer (49618)    |                                     | Scale Inbound Services             | C&D                        |  |                             |                 |                                 |  |
| Inbound Order: 10994012  | Start: 1:19 pm |   | DocScale Customer (49618001) | 102 N Cascade St, Ocoee, WI         | Scale IN - Auto Post               |                            |  |                             |                 |                                 |  |
| 41995                    | 02/13/26       |   | DocScale Customer (49618)    |                                     | Scale Inbound Services             | C&D                        |  |                             |                 |                                 |  |
| Inbound Order: 10994016  | Start: 1:23 pm |   | DocScale Customer (49618001) | 102 N Cascade St, Ocoee, WI         | Scale IN - Auto Post               | Downtown (30%), DTLA (70%) |  |                             |                 |                                 |  |
| 41997                    | 02/13/26       | TRK10   | Scale Test QA (49334)        |                                     | Scale Outbound Multiple            | MSW                        | From LA TRANSFER STATION                       |                             |                 |                                 |  |
| Transfer Order: 10994028 | Start: 9:38 pm | Type: LARGE<br>Licensor: 4TRK10<br>DEP: 95788<br>DOT: 99584 | Scale Test QA (49334001)     | 421 W Las Tunas Dr, San Gabriel, CA | Scale Outbound - Multiple Profiles |                            |  |                             |                 |                                 |  |
| 41973                    | 02/12/26       |   | DocScale Customer (49618)    |                                     | Scale Inbound Services             | MSW                        |  |                             |                 |                                 |  |
| Inbound Order: 10986068  | Start: 3:07 pm |   | DocScale Customer (49618001) | 102 N Cascade St, Ocoee, WI         | Scale IN - Auto Post               |                            |  |                             |                 |                                 |  |

### Permissions

The following permissions are required to use the Inbound screen:

[Read More](#) +

### Setup Requirements

This setup is the standard requirement across all scale scenarios, including Roll-off, Cash, and Third-Party customers. Review the setup documentation here: [Scale-In Setup](#) to process scale tickets on the Inbound/Outbound screen.

## Inbound Screen Field Descriptions

The following descriptions apply to the fields displayed on the Inbound/Outbound screen.

## Related Articles

[Versioning Existing Articles](#)

[Snagit](#)

[Best Practices \(Includes how to link articles\)](#)