



**WASTELINQ**

## WASTELINQ Enterprise

### **Set-up Tools**

*Administrator Guide*

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## SET-UP TOOLS

The WASTELINQ Set-Up Tools section is extremely important to the functionality of the application. The Set-Up Tools section contains the tables (default and configurable) that will populate the drop-down menus and other company specific information throughout the application. The Set-Up Tools section is specific to Administrator users only.

### ACCESSING THE SET-UP TOOLS

To access the Set-Up Tools, click on the arrow next to the username in the top right corner of the screen. Click on "Set Up Tools." The user will be redirected to the Set-Up Tools section.



**Generator Data**

Search:

Generator Name	Generator #	Mailing Address	Site Address	Customer/Bill To Name	Status
<a href="#">Generator ABC</a>	1006786	100 South Street, Channelview, TX, 77530		Company ABC	
<a href="#">Generator EFG</a>	1006787	2000 Main Street, Galveston, TX, 77554		Broker Company	Account Inactive
<a href="#">Generator HIJ</a>	1006788	1001 Waste Street, Houston, TX, 77537	1001 Waste Street, Houston, TX, 77537	Broker Company	
<a href="#">Generator LMN12345</a>	1006789	P. O. Box 123, Dallas, TX, 75165	101 Mechanic Way, Dallas, TX, 75165	Company LMN	

Showing 1 to 4 of 4 entries

The Set-Up Tools are organized into several categories. The categories are listed in tabs across the top of the page. Some tabs will have sub tabs listed in the green bar containing additional information. Click on the tab to access the tables for each category.



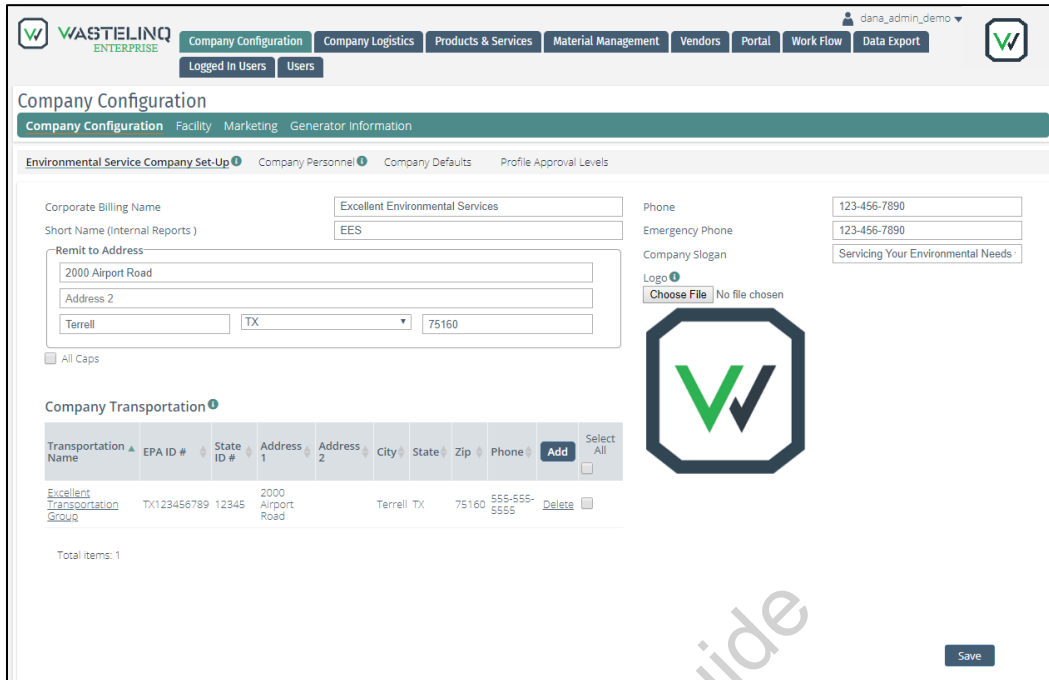
**Company Configuration**

Company Logistics | Products & Services | Material Management | Vendors | Portal | Work Flow | Data Export

Logged In Users | Users

### COMPANY CONFIGURATION

The Company Configuration tab contains basic information about the Environmental Service Company, including the company name, company address, company contact information, company logo, facilities and warehouses, company-specific marketing and customer service category information, and company specific generator category information.



**WASTELINQ ENTERPRISE** Company Configuration Company Logistics Products & Services Material Management Vendors Portal Work Flow Data Export

Logged In Users Users

**Company Configuration** Company Configuration Facility Marketing Generator Information

Environmental Service Company Set-Up Company Personnel Company Defaults Profile Approval Levels

Corporate Billing Name: Excellent Environmental Services Phone: 123-456-7890

Short Name (Internal Reports): EES Emergency Phone: 123-456-7890

Remit to Address: 2000 Airport Road Address 2: Address 1: Terrell TX 75160

☐ All Caps

Company Slogan: Servicing Your Environmental Needs

Logo: Choose File No file chosen

**Company Transportation**

Transportation Name	EPA ID #	State ID #	Address 1	Address 2	City	State	Zip	Phone	Add	Select All
Excellent Transportation Group	TX123456789	12345	2000 Airport Road		Terrell	TX	75160	555-555-5555	Delete	<input type="checkbox"/>

Total Items: 1

Save

## COMPANY CONFIGURATION

### Environmental Service Company Set-Up

This section houses all the information of the Environmental Service Company using WASTELINQ.

**Complete all fields described below. Click Save before moving on to the next section.**

- Corporate Billing Information – The name of the Environmental Service Company.
- Short Name – The Environmental Service Company's abbreviated name, if applicable. This name will appear on internal documents and reports.
- Remit to Address – The physical address to which payments will be sent. This address will appear on invoices.
- All Caps – Check this box if all capital letters are preferred. Any typed information will automatically convert to all capital letters.
- Phone – The main phone number of the Environmental Service Company.
- Emergency Phone Number – The phone number associated with the Environmental Service Company to be used for emergencies. This number will appear on all manifests (Section 3 of the Hazardous Waste Manifest) and paperwork as the Emergency Response Phone number.
- Company Slogan – Enter a Company Slogan. This will print on invoices and other documents.
- Logo – Add a logo by clicking "Choose File" and attaching a file. The logo will be used within the WASTELINQ application and will print on all paperwork (80x50 pixel image is highly recommended).

### Company Transportation

This box displays information about a Transportation Company is owned and/or operated by the Environmental Service Company. This information may be the same as the Environmental Service Company information. *Note: Do not enter information for 3<sup>rd</sup> Party Transportation vendors in this space.*

## Company Personnel

This section houses information about the personnel of the Environmental Service Company.

### *Company Personnel*

The Company Personnel Section lists all personnel for the Environmental Service Company except for drivers. *Driver information is managed in the Driver table under Company Logistics.* Information from the Company Personnel table will populate the drop-down menu in the Account Assignments Section of the Generator Data account page. This table will also populate the list of employees eligible for training in the Training module.

Company Personnel ⓘ

Show 25 entries

Initial	Name	Phone	Email	Status	Add	Select All
BB	<a href="#">Brad Beaker</a>	555-555-5555	brad@demo.com	Active	<a href="#">Delete</a>	<input type="checkbox"/>
CC	<a href="#">Cami Calls</a>	555-555-5555	caml@demo.com	Active	<a href="#">Delete</a>	<input type="checkbox"/>
MM	<a href="#">Molly Manager</a>	555-555-5555	molly@demo.com	Active	<a href="#">Delete</a>	<input type="checkbox"/>
PP	<a href="#">Pat Project</a>	555-555-5555	pat@demo.com	Active	<a href="#">Delete</a>	<input type="checkbox"/>
SS	<a href="#">Sam Sales</a>	555-555-5555	sam@demo.com	Active	<a href="#">Delete</a>	<input type="checkbox"/>

Total Items: 5

Previous 1 Next

To add Personnel, click “Add” on the right side of the table. Complete the information requested in the pop-up and click “Save.” Personnel can be labeled as “Active” (employee is an active employee for the company) or “Inactive” (employee is no longer employed by the company).

### Add/Edit Company Personnel

Initial:

Name:

Phone:

Email:

Status:

Active ▼

Cancel

Save

### Personnel Roles

The Personnel Roles table allows for the creation of custom roles that may be used in assigning personnel to generator accounts. For example, the Environmental Service Company may create a Personnel Role called Sales Representative. A maximum of six Personnel Roles can be added.

Role	Display Order		
<a href="#">Account Executive</a>	2	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Account Manager</a>	1	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Customer Service</a>	3	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Project Manager</a>	5	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Technical Rep</a>	4	<a href="#">Delete</a>	<input type="checkbox"/>
Total items: 5			
		Previous	1 Next

To add a Personnel Role, click “Add” in the right side of the table. Enter a Role title then choose the display order. The Display Order drop down allows the user to choose the order in which the Account Assignments will appear. Previously selected Display Orders will no longer be available for selection. The next available Display Order position will be listed. Click “Save” once all fields are populated. The Personnel Roles can be changed or updated at any time.

### Add/Edit Personnel Roles

Role:

Display Order: 

N/A
 N/A
 6

Example Account Assignments Table in Generator Account:

#### Account Assignments

Account Manager 

Molly Manager

 Account Executive 

Sam Sales

 Customer Service 

Cami Calls

Technical Rep 

Pat Project

 Project Manager 

Brad Beaker

## Training Curriculum

The Training Curriculum table establishes training plans that will be assigned to Company Personnel and Drivers in the Training module.

Training Curriculum

Training Curriculum

40 Hour HAZWOPER

8 Hour HAZWOPER Refresher

DOT

RCRA

Add

Delete

Delete

Delete

Delete

Select All

Total Items: 4

Previous

1

Next

To add a Training Curriculum, click “Add” on the right side of the table. Type in the name of the training curriculum, then click “Save.”

### Add/Edit Training Curriculum

Training Curriculum:

[Cancel](#) [Save](#)

To remove a training plan from the list, click “Delete.”

## Company Defaults

The Company Defaults section holds various default settings.

- Default Unit of Measure – Choose either Pounds or Gallons from the drop-down for the default shipping unit used on all orders. This will also print on all manifests where applicable.

Waste Material Pick-Up																<a href="#">View Documents</a>	<a href="#">Revisions</a>
Item #	Profile #	Material Description	Approval #	Disposal Site	Process Code	Manifest/Line #	Container Type/Size	Container Count	Actual Shipping Volume/Weight	Shipping Unit	Estimated Volume/Weight	Units	Price	Price Basis	Line Total/Status	Facility	Warehouse
1	50855	Paint and Solvent Waste - Universal	R123	Rineco	302	00205558JJK 1	DM 55 (G) 3		458.7	P	55.0	458.7	G	P	\$80.00 Per Container	\$80.00 Fully Shipped to Disposal	EES - Houston

- Profile Certification Language – Generators will certify that the information contained in the WASTELINQ generated profile is accurate. WASTELINQ populates default language to be printed on the profile (see below), but the language may be edited or replaced by the Environmental Service Company.



### 9. Certification

**Generator Representative Name** Sam Generator

**Generator Signature** Sam Generator

**Date** May 6, 2019

#### Certification

I hereby certify that to the best of my knowledge and belief, the information contained herein is a true, complete and accurate description of the material being offered for recycling or disposal and that all known or suspected hazards have been disclosed. All Analytical Results/Material Safety Data Sheets submitted are truthful and complete and are representative of the waste. Notification will be provided immediately if there is a change in the composition of, or process generating this material, prior to offering the material for shipment or management. If I am an agent acting on behalf of the generator, I also certify that I have permission to sign any and all material profile paperwork on the generator's behalf and that I can produce such certification in writing upon request.

- Requested Date Default Setting – This field defines the default number of days to be added to the Order Creation Date in generating the Requested Date.

Order #:	205638	Order Logistics Status:	Order Pending	Order Contact:	-----	Confirmation Date/Time:	
Date Created:	06-17-2019	Requested Date:	06-24-2019	Customer PO #:	PO is required	Delay Reason:	-----
Updated By:	DANA_ADMIN_DEMO	Source:	Customer Call	Project:			
Order Type:	-----			Phase:			

- Generator Custom Fields – The Environmental Service Company may create custom fields for use within a generator account. A maximum of four fields may be created. Click “Add” in the middle of the table. Enter a Label for the field in the pop-up and click “Save.” The fields will be available in the Generator Data page.

Generator Custom Fields	
Custom Field 1	Custom Field 2
Custom Field 3	Custom Field 4

- Order Custom Fields – The Environmental Service company may create custom fields for use on the Order screen. A maximum of two fields may be created. Click “Add” in the middle of the table. Enter a Label for the field in the pop-up and click “Save.” The fields will now be available in the Order page.

Order #:	205555	Order Logistics Status:	Service Completed	Order Contact:	Sam Generator	Confirmation Date/Time:	
Date Created:	05-15-2019	Requested Date:	05-22-2019	Customer PO #:	PO is required	Delay Reason:	-----
Updated By:	VICKIDEMO1	Scheduled Date/Time:	05-22-2019 12:00	Project:		Custom Order Field 1	
Order Type:	Packaged	Source:	Customer Call	Phase:		Custom Order Field 2	

## Profile Approval Levels

The Profile Approvals section allows the Environmental Service Company to establish approval levels for profiles based on user role and/or individual users. Further, the defined users or roles can be given Write Access (the ability to edit the profile while in a particular status) or Profiles Status (the ability to move a profile to a particular status). The profile edits and status changes are restricted to only the users or roles defined in this section.

Roles

Role	User		Add		Select All
Admin	vickidemo1, tarademo1, seandemo2, mikademo, danademo2, huydemo2, mikademo2, josco_demo		Delete		
Customer Service	vickidemo1, tarademo1		Delete		

Total items: 2

Show

25

entries

1

Profile Approval Levels

Profile Status	User Role	Write Access	User Role	Profile Status		Add		Select All
Approved	Admin	User	Admin	User				
Cancelled	Admin		Admin					
Expired	Admin		Admin					
Pending Approval	Admin, Customer Service		Admin, Customer Service					
Rejected		seandemo2, danademo2, josco_demo		seandemo2, danademo2, josco_demo				

Show

25

entries

To create a role and associate users with a role, click the “Add” button on the right side of the Roles table. Enter the title of the role and add users to the role by selecting each user from the User drop down list. Once all users have been added to the role, click “Save.” Repeat this process for each role.

### Add/Edit Role

Role:

User:

UserGuide  
vickidemo1

Cancel Save

Three profile approval levels – Approved, Expired and Cancelled - are sacred and cannot be changed. Any additional levels are configurable by the user.

To add an approval level, click the “Add” button on the right side of the Profile Approval Levels table. Enter the title of the profile approval status in the text box. Give user roles or individual users Write Access for the profile approval level by selecting the role or user from the selection boxes. Click on the box next to user role or user then select each role or user to be added. To give a user or role the ability to move the profile status to this status select the role or user from the selection boxes. Once all users are roles have been assigned, click “Save.”

Add/Edit Approval Level ✕

Profile Status:

**Write Access**

User Role: Select Some Options

←

User: Select Some Options

**Profile Status**

User Role: Select Some Options

User: Select Some Options

Cancel
Save

To edit an existing Role or Profile Status, click on the Role or Status to edit. In the pop up, add or remove users and roles as needed. Click “Save” to save all updates.

To delete a Role or Profile Approval Level, click delete on the right side of the table on the row associated with the role or level.

**Note:** Profiles approval levels Approved, Cancelled, and Expired are sacred and cannot be deleted due to their relationship with other functionality.

## FACILITY

### Company Facility Locations

This section lists all the facilities owned or managed by the Environmental Service Company. The information provided here will print on order paperwork and reports.

Company Facility Location	EPA ID #	State ID #	Tax Rate(%)	Transportation Region	Address 1	Address 2	City	State	Zip	Phone	Add	Select All
<a href="#">EES - Dallas</a>	TXD980000001	56xxx	8.25	TD01	101 Waste Avenue		Dallas	TX	76001	123-789-4561	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">EES - Houston</a>	TXD980000000	55xxx	8.25	TH21	100 Houston Way		Houston	TX	77623	123-456-7891	<a href="#">Delete</a>	<input type="checkbox"/>

Total Items: 2
Previous 1 Next

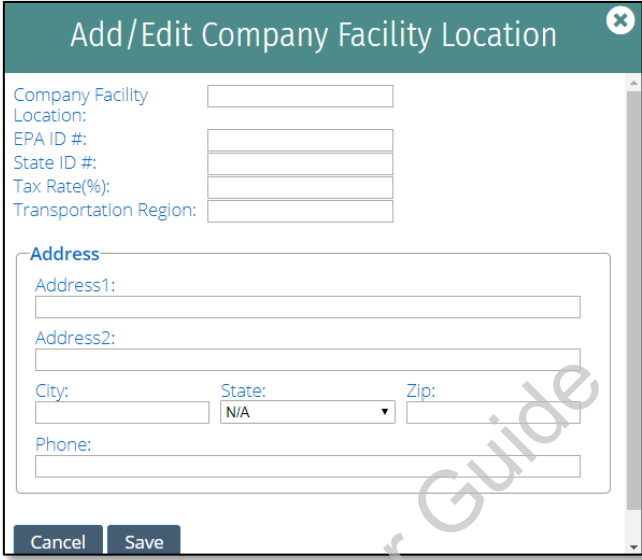
To add a facility, click “Add” on the right side of the table. Complete all information requested in the pop up and click “Save.”

Facilities are an important component in Scheduling, Inventory Management, Outbound Shipments, and Waste Tracking. Generator accounts should be assigned to the facility that is primarily responsible for servicing the Generator account. Order lines may be assigned to a facility upon reconciliation.

In the Schedules tab, orders are grouped according to the servicing Facility. Inventory management and Outbound shipments, including facility transfers, are also tied to the Facility assignments.

## Facility Warehouse

This table establishes Warehouses or specific areas within a facility to which a waste shipment can be



**Add/Edit Company Facility Location**

Company Facility Location:

EPA ID #:

State ID #:

Tax Rate(%):

Transportation Region:

**Address**

Address1:

Address2:

City:  State:  Zip:

Phone:

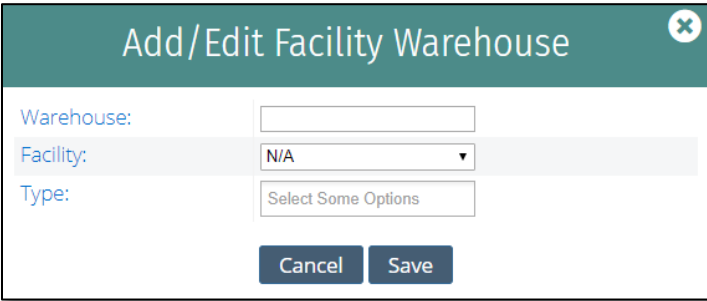
assigned. Warehouse locations play an important role in Inventory Management, Advanced Waste Tracking and Product Inventory functionality. Each line item on an order can be assigned to a Warehouse.

Warehouse	Facility	Type		
110	EES - Houston	10 Day	<a href="#">Delete</a>	<input type="checkbox"/>
204	EES - Dallas	10 Day, Permitted	<a href="#">Delete</a>	<input type="checkbox"/>

Total Items: 2

Previous **1** Next

To add a warehouse, click “Add” on the right side of the table. Complete all information requested in the pop up and click “Save.”



**Add/Edit Facility Warehouse**

Warehouse:

Facility:

Type:

## MARKETING

### Call Action Log Type

The Call Action Log Type table allows the Company to create a standard list of call types for use in documenting communication with a Generator. These types are used in the Generator Data Page under Communication.

Entry Date	Created By	Assigned To	Type	Action Date	Status	Action
May 7, 2019	Cami Calls	Cami Calls	Customer Service	May 7, 2019	Completed	Left message to schedule order

WASTELINQ's default settings include the following Call Action Log Types:

- Sales
- Collections
- Customer Service
- Scheduling

To add a Call Action Log Type, click "Add" on the right side of the table. Enter the title of the Call Action Log Type in the pop-up and click "Save."

To edit an existing Call Action Log Type, click on the Call Action Log Type title in the table. Make changes in the pop-up and click "Save."

### Add/Edit Call Log Action Type

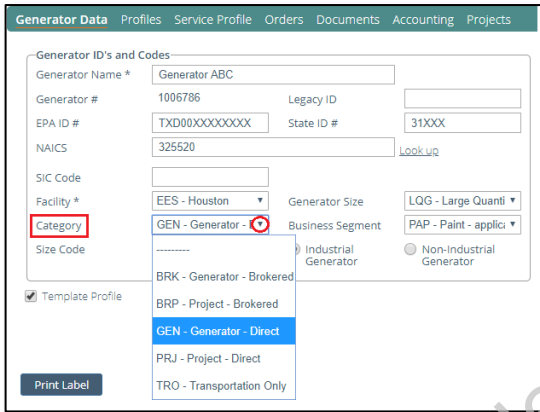
Call Log Action Type:

To delete a Call Action Log Type, click the "Delete" button associated with the entry to be deleted. To delete all entries, click "Select All" then click "Delete."

Call Log Action Type		Show 25 entries
Call Log Action Type		
<a href="#">Collections</a>	<input type="button" value="Delete"/>	<input type="checkbox"/>
<a href="#">Customer Service</a>	<input type="button" value="Delete"/>	<input type="checkbox"/>
<a href="#">Sales</a>	<input type="button" value="Delete"/>	<input type="checkbox"/>
<a href="#">Scheduling</a>	<input type="button" value="Delete"/>	<input type="checkbox"/>

## Customer Category

The Customer Category is designed to assign the Company's generator accounts into various categories based on the type of business. This function can help the Environmental Service Company analyze the overall business. The Customer Category is selected from a drop-down menu on the Generator Data page for each generator.



The screenshot shows the 'Generator Data' form with the 'Category' dropdown menu open. The dropdown lists several options: 'GEN - Generator - Direct' (highlighted in blue), 'BRK - Generator - Brokered', 'BRP - Project - Brokered', 'PRJ - Project - Direct', and 'TRO - Transportation Only'. Other fields visible include 'Generator Name', 'Generator #', 'EPA ID #', 'NAICS', 'SIC Code', 'Facility', 'Generator Size', 'Business Segment', and 'Size Code'.

WASTELINQ's default settings include the following Customer Category selections. The selections can be added, edited, or deleted.

Customer Category	Business Relationship Description
<a href="#">BRK</a>	Generator - Brokered
<a href="#">BRP</a>	Project - Brokered
<a href="#">GEN</a>	Generator - Direct
<a href="#">PRJ</a>	Project - Direct
<a href="#">TRO</a>	Transportation Only

To add a Customer Category, click "Add" on the right side of the table. Enter the title of the Customer Category and the Business Relationship Description then click "Save."

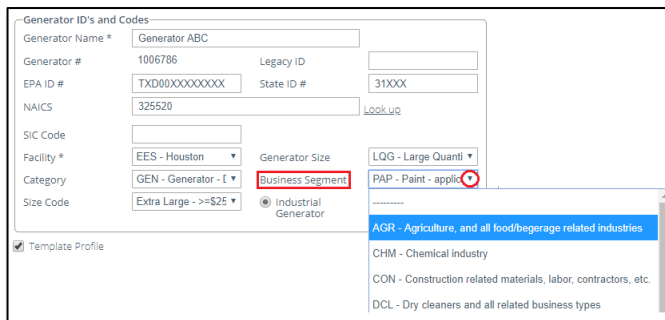
To edit an existing Customer Category, click on the Customer Category title in the table. A pop-up will appear where the change can be made. Click "Save." To delete a Customer Category, click the "Delete" button associated with the entry to be deleted. To delete all entries, click "Select All" then click "Delete."

Customer Category	Business Relationship Description		
<a href="#">BRK</a>	Generator - Brokered	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">BRP</a>	Project - Brokered	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">GEN</a>	Generator - Direct	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">PRJ</a>	Project - Direct	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">TRO</a>	Transportation Only	<a href="#">Delete</a>	<input type="checkbox"/>

Additional controls: Show 25 entries, Add, Select All

## Customer Business Segment

The Customer Business Segment is designed to assign the Company's generator accounts to various categories based on the type of business segment. This function can help the Environmental Service Company analyze the overall business. The Business Segment is selected from a drop-down menu on the Generator Data page for each generator.



Generator ID's and Codes

Generator Name \* Generator ABC

Generator # 1006786 Legacy ID

EPA ID # TXD00XXXXXXX State ID # 31XXX

NAICS 325520 Look up

SIC Code

Facility \* EES - Houston Generator Size LQG - Large Quantity

Category GEN - Generator - L Business Segment PAP - Paint - application

Size Code Extra Large - >=\$25 Industrial Generator

☒ Template Profile

AGR - Agriculture, and all food/beverage related industries

CHM - Chemical industry


CON - Construction related materials, labor, contractors, etc.

DCL - Dry cleaners and all related business types

WASTELINQ is prepopulated with the following business segments:

Customer Business Segment	Segment Description
AGR	Agriculture, and all food/beverage related industries
CHM	Chemical industry
CON	Construction related materials, labor, contractors, etc.
DCL	Dry cleaners and all related business types
ELF	Electronics, controls, computers, and related, etc.
GOV	All government related entities, schools, universities
IND	Industrial businesses (not otherwise stated)
MAC	Machining, grinding, refurbishing, etc.
MED	Medical related items ie clinic, hospitals, pharma, etc.
MEG	All manufacturing (not otherwise stated)
MIN	Mining and smelting related industries
OIL	Oil field related industry, pipe fab, drilling, etc.
OTH	All other industries (not otherwise stated)
PAP	Paint - application
PET	Petroleum refining, petrochemical, storage and retail
PLT	All plating related and metal finishing/polishing
PRM	Paint - manufacturers and retailers/wholesalers
PRT	All print related businesses, photo, signage, advertising
TFX	Textile related industry ie cloth, thread, clothing, etc.
TRN	Transportation related industry, hauling, storage, etc.
WSP	Waste Processor/Broker Company
UTL	All non-gvt utilities: gas, electricity, phone, cable, etc.
WCB	Wood working/finishing, cabinetry

To add a Customer Business Segment, click "Add" on the right side of the table. Enter the title of the Segment and the Segment Description then click "Save."

Customer Business Segment	Segment Description	
AGR	Agriculture, and all food/beverage related industries	<a href="#">Delete</a>
CHM	Chemical industry	<a href="#">Delete</a>
CON	Construction related materials, labor, contractors, etc.	<a href="#">Delete</a>
DCL	Dry cleaners and all related business types	<a href="#">Delete</a>
ELF	Electronics, controls, computers, and related, etc.	<a href="#">Delete</a>

To delete a Customer Business Segment, click the “Delete” button associated with the entry to be deleted. To delete all entries, click “Select All” then click “Delete.”

Customer Business Segment	Segment Description		Add	Select All
AGR	Agriculture, and all food/beverage related industries	Delete		<input type="checkbox"/>
CHM	Chemical industry	Delete		<input type="checkbox"/>
CON	Construction related materials, labor, contractors, etc.	Delete		<input type="checkbox"/>
DCL	Dry cleaners and all related business types	Delete		<input type="checkbox"/>
ELE	Electronics, controls, computers, and related, etc.	Delete		<input type="checkbox"/>
GVT	All government related entities, schools, universities	Delete		<input type="checkbox"/>
IND	Industrial businesses (not otherwise stated)	Delete		<input type="checkbox"/>
MAC	Machining, grinding, refurbishing, etc.	Delete		<input type="checkbox"/>
MED	Medical related items ie clinic, hospitals, pharma, etc.	Delete		<input type="checkbox"/>
MEG	All manufacturing (not otherwise stated)	Delete		<input type="checkbox"/>
MIN	Mining and smelting related industries	Delete		<input type="checkbox"/>
OIL	Oil field related industry, pipe fab, drilling, etc.	Delete		<input type="checkbox"/>
OTH	All other industries (not otherwise stated)	Delete		<input type="checkbox"/>
PAP	Paint - application	Delete		<input type="checkbox"/>
PET	Petroleum refining, petrochemical, storage and retail	Delete		<input type="checkbox"/>
PLT	All plating related and metal finishing/polishing	Delete		<input type="checkbox"/>
PLR	Paint - manufacturers and retailers/wholesalers	Delete		<input type="checkbox"/>
PRT	All print related businesses, photo, signage, advertising	Delete		<input type="checkbox"/>
TEX	Textile related industry ie cloth, thread, clothing, etc.	Delete		<input type="checkbox"/>
TRN	Transportation related industry, hauling, storage, etc.	Delete		<input type="checkbox"/>
WSP	Waste Processor/Broker Company	Delete		<input type="checkbox"/>
UTL	All non-gvt utilities: gas, electricity, phone, cable, etc.	Delete		<input type="checkbox"/>
WCR	Wood working/finishing, cabinetry	Delete		<input type="checkbox"/>

To edit an existing Customer Business Segment, click on the Customer Segment title in the table. A pop-up will appear where the change can be made. Click “Save.”

## Customer Size Code

The Customer Size Code is designed to assign the Environmental Service Company’s generator accounts into various categories based on the Generator’s financial value to the Company. This function can help the Environmental Service Company analyze the overall business and make strategic pricing or sales coverage decisions. The Customer Size Code is selected from a drop-down menu on the Generator Data page for each generator.

**Generator ID's and Codes**

Generator Name \*

Generator #  Legacy ID

EPA ID #  State ID #

NAICS  [Look up](#)

SIC Code

Facility \*

Generator Size

Category

Business Segment

Size Code

☒ Industrial Generator
☐ Non-Industrial Generator

☒ Template Profile

Extra Large - >=\$250K

Large - >=\$100K and <\$250K

Medium - >= \$25K and <\$100K

Micro - <\$10K

Small - >=\$10K and <\$25K



WASTELINQ is prepopulated with the following Customer Size Codes. Customer Size Codes can be added, deleted, or edited.

Customer Size Code <sup>1</sup>	
Customer Size Code	Business Financial Value to Company
<a href="#">Extra Large</a>	>=\$250K
<a href="#">Large</a>	>=\$100K and <\$250K
<a href="#">Medium</a>	>= \$25K and <\$100K
<a href="#">Micro</a>	<\$10K
<a href="#">Small</a>	>=\$10K and <\$25K

To add a Customer Size Code, click “Add” on the right side of the table. Enter the title of the Customer Size Code and the Business Financial Value to Company then click “Save.”

To edit an existing Customer Size Code, click on the Customer Size Code title in the table. A pop-up will appear where the change can be made. Click “Save.”

To delete a Customer Size Code, click the “Delete” button associated with the entry to be deleted. To delete all entries, click “Select All” then click “Delete.”

## Contact Type

The Contact Type allows the Environmental Service Company to indicate the function of the various account contacts associated with the Generator.

Add Contact

Select Contact:

To search, type and press Enter

Add New

Contact Type: \*

-----

Customer Primary
Site Secondary
Accounts Payable
Site Primary

First Name

Title

Phone

Email

WASTELINQ is populated with the following Contact Types. Contact types can be added, deleted, or edited.

**Contact Type** i

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**Contact Type**

[Accounts Payable](#)

[Customer Primary](#)

[Site Primary](#)

[Site Secondary](#)

To add a Contact Type, click “Add” on the right side of the table. Enter the title of the Contact Type then click “Save.”

To edit an existing Contact Type, click on the Contact Type title in the table. A pop-up will appear where the change can be made. Click “Save.”

To delete a Contact Type, click the “Delete” button associated with the entry to be deleted. To delete all entries, click “Select All” then click “Delete.”

## GENERATOR INFORMATION

The EPA Generator Status Category identifies the EPA Generator Status of each generator. If the generator is not an Industrial Generator, these categories do not apply. For non-industrial generators, click “N/A” as the Status Category.

**Generator ID's and Codes**

Generator Name \*

Generator #  Legacy ID

EPA ID #  State ID #

NAICS  [Look up](#)

SIC Code

Facility \*  **Generator Size**

Category  Business Segment

Size Code  ☒ Industrial Generator

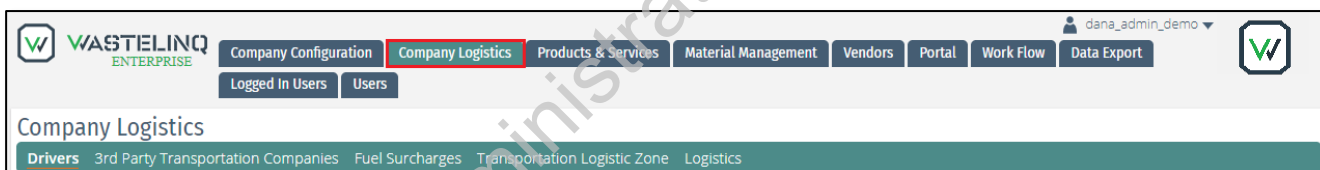
☒ Template Profile

WASTELINQ is prepopulated with the EPA Generator Status Categories. Because the categories are defined by EPA regulations, this section is not configurable.

EPA Generator Status Category <sup>i</sup>	
EPA Generator Status Category	Description
N/A	Not Applicable
LQG	Large Quantity Generator
SQG	Small Quantity Generator
VSQG	Very Small Quantity Generator
Total items: 4	

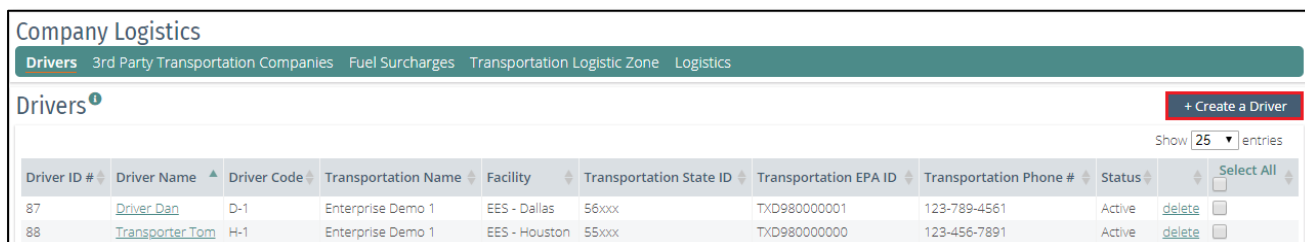
## COMPANY LOGISTICS

The Company Logistics tab contains all information related to the logistics function of the Environmental Service Company.



## DRIVERS

The Drivers tab houses information about the Company's employed drivers. The information in this tab is used in Scheduling to assign drivers to orders and to complete the transporter information on all shipping documents assigned to that driver. Each driver is assigned to one of the Environmental Service Company's facilities. Facility information (i.e. - EPA IDs) is populated on shipping documents when a driver is assigned to an order.



Driver ID #	Driver Name	Driver Code	Transportation Name	Facility	Transportation State ID	Transportation EPA ID	Transportation Phone #	Status	
87	Driver Dan	D-1	Enterprise Demo 1	EES - Dallas	56xxx	TXD980000001	123-789-4561	Active	<a href="#">delete</a>
88	Transporter Tom	H-1	Enterprise Demo 1	EES - Houston	55xxx	TXD980000000	123-456-7891	Active	<a href="#">delete</a>

To add a driver, click the “+Create a Driver” button on the right side of the page. Complete the required fields the click “Save.” The driver will now appear in the Drivers table.

### Add Driver

Driver Name:

Driver Code:

Company Transportation:

Status:

The Drivers table houses the following information:

- Driver ID – This is a WASTELINQ generated number assigned to the driver.
- Driver Name – Enter the first and last name of the driver.
- Driver Code – An internal company code to identify the driver. This is a required field.
- Transportation Name – This field assigns the Transportation Company to the driver. Transportation Company or Companies are added on the Company Configuration Page. All transporter information associated with this driver and his/her assigned Transportation Company will be automatically added to the manifests on the orders the driver is assigned to. *Note: This is not 3<sup>rd</sup> Party Transportation Companies.*
- Transportation State ID – This is automatically pulled from the Company Transportation set up in Company Configuration.
- Transportation EPA ID – This is automatically pulled from the Company Transportation set up in Company Configuration.
- Transportation Phone – This is automatically pulled from the Company Transportation set up in Company Configuration.
- Status – Choose a status of the driver. Current drivers will have an Active Status. Change the status to Inactive for all drivers who are either no longer with the company or have changed roles. This will prevent the driver from being chosen on an order.
- Delete – To delete a driver entry, click “delete” on the row associated with the driver. *Note: Deleting a driver that was assigned to a completed order will cause data integrity issues. It is recommended that a driver’s status be changed to “Inactive” if the driver is associated with any transactions.*

### 3<sup>rd</sup> PARTY TRANSPORTATION COMPANIES

The Third-Party Transportation Companies tab contains information about any third-party transporter employed by the Environmental Service Company. The information provided for each transporter will be used in the shipping documents associated with the orders to which the transporter is assigned.

Company Logistics

Drivers3rd Party Transportation CompaniesFuel SurchargesTransportation Logistic ZoneLogistics

3rd Party Transportation Companies<sup>1</sup>

+ Create new 3rd Party Transportation Company

Show25entries

3rd Party Transportation Company #	3rd Party Transportation Company Name	Transportation State ID	Transportation EPA ID	Transportation Phone #	Status		<input type="checkbox"/> Select All
16124	<a href="#">1 CHEYENNE MANAGEMENT &amp; ENVIRONMENTAL SE</a>	TXR000068346	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16125	<a href="#">5A ENVIRONMENTAL SERVICES</a>	TXR000084106	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16126	<a href="#">A &amp; A TRUCKING</a>	TXR000077986	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16127	<a href="#">A &amp; G ENVIRONMENTAL SERVICES</a>	TXR000028522	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16128	<a href="#">A &amp; K RAILROAD MATERIALS INC</a>	TXR000076489	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16129	<a href="#">A 1 LEE OIL SERVICE INC</a>	TXD055133276	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16130	<a href="#">A AND E VACUUM SERVICES INC</a>	TXR000032946	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16131	<a href="#">A M F MATERIALS &amp; TRANSPORT</a>	TXD982756595	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16132	<a href="#">A S MANRIQUEZ TRUCKING INC</a>	TXR000034124	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>
16133	<a href="#">A USA WASTE SERVICES</a>	TXR000006460	0	0	Active	<a href="#">delete</a>	<input type="checkbox"/>

To add a 3rd Party Transporter, click the “+Create new 3rd Party Transportation Company” in the top right corner of the page.

Complete all information requested about the Transporter. Attach documents (i. e. - price lists or insurance documents) by clicking the “Choose Files” button.

#### Add 3rd Party Transportation Company

3rd Party Transportation Company Name:

☐ Portal Default

Transportation State ID:

Transportation EPA ID:

Transportation Phone #:

Status:

N/A

Attach supporting documents:

No fi... hosen

To edit an existing 3rd Party Transportation Company, click on the Transportation Company Name, make all necessary changes, then click “Save.”

To delete a 3rd Party Transportation Company, click the “Delete” button on the transporter’s line within the grid.

3rd Party Transportation Company #	3rd Party Transportation Company Name	Transportation State ID	Transportation EPA ID	Transportation Phone #	Status	<input type="checkbox"/> Select All
16124	<a href="#">1 CHEYENNE MANAGEMENT &amp; ENVIRONMENTAL SE</a>	TXR000068346	0	0	Active	<a href="#">delete</a> <input type="checkbox"/>
16125	<a href="#">5A ENVIRONMENTAL SERVICES</a>	TXR000084106	0	0	Active	<a href="#">delete</a> <input type="checkbox"/>
16126	<a href="#">A &amp; A TRUCKING</a>	TXR000077986	0	0	Active	<a href="#">delete</a> <input type="checkbox"/>

To set a 3rd Party Transporter to inactive, click on the Transportation Company's name and then change the status to Inactive. This will preserve any historical data associated with the Transportation Company but will restrict the use of the transporter on any future orders.

## FUEL SURCHARGE

The Fuel Surcharge table allows the Environmental Service Company to calculate a Fuel Surcharge based on variables whose values are set by the Environmental Service Company.

**Note:** The formula is displayed for informational purposes.

**Company Logistics**

Drivers
 3rd Party Transportation Companies
 **Fuel Surcharges**
 Transportation Logistic Zone
 Logistics

**Fuel Surcharges**

Formula: Fuel Surcharge Value = (((Diesel Rate - Fuel Surcharges Threshold Price)\*100)/Fuel Surcharges Fleet MPG)+Fuel Surcharges Adjustment Factor)/100)

Fuel Surcharges Threshold Price

Fuel Surcharges Fleet MPG

Fuel Surcharges Adjustment Factor

Entry Date	Diesel Rate	Fuel Surcharge Value
05/06/2019	3.171	0.12

Enter the following values to calculate a Fuel Surcharge and click "Save."

- Fuel Surcharge Threshold Price – This is the price of fuel threshold that activates a fuel surcharge. Once the price of fuel goes above this amount, the fuel surcharge rate will apply.
- Fuel Surcharge Fleet MPG – This is the average miles per gallon for the fleet.
- Fuel Surcharge Adjustment Factor – This is the amount by which the Environmental Service Company would like to adjust the Fuel Surcharge. The value used is generally a percentage.

The grid on the second half of the page holds the diesel rates for each week. The diesel rate can be obtained from the Department of Energy National Diesel Average, which is published weekly. Click “Add” to enter a value. The entry date is automatically populated. Enter the Diesel Rate obtained from the DOE website and click “Save.”

Add/Update Fuel Surcharge

Entry Date:

Diesel Rate:

Cancel
Save

Once a value is entered, the rate will automatically calculate using the formula. This value will be pulled into any orders, if designated.

## TRANSPORTATION LOGISTIC ZONE

The Transportation Logistics Zones section allows the Environmental Service Company to create and assign transportation zones for route efficiencies. This feature is generally used with less than truckload (LTL) schedules and routes.

**Transportation Logistic Zone**

Show 10 entries

Search:

Transportation Logistic Zone	Transportation Region	Zip Code	State	County	Add	Select All
<a href="#">AK01</a>	AK	99801	AK	JUNEAU	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">AL01</a>	AL	36104	AL	MONTGOMERY	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">AR01</a>	AR	72201	AR	PULASKI	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">AZ01</a>	AZ	85003	AZ	MARICOPA	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">CA01</a>	CA	95814	CA	SACRAMENTO	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">CO01</a>	CO	80227	CO	JEFFERSON	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">CT01</a>	CT	06103	CT	HARTFORD	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">DE01</a>	DE	19901	DE	KENT	<a href="#">Delete</a>	<input type="checkbox"/>

A transportation zone is assigned to a Generator based upon the zip code of the Generator’s site address. To add a Transportation Zone, click “Add” on the grid.

Add/Edit Zone

Zone:

Region:

Zip Code:

State:

County:

Cancel
Save

Enter the following information:

- Zone: A title or code for the Transportation Zone.
- Region: The Company Region the zone is in.
- Zip Code: The zip code associated with the Transportation Zone. Including a zip code helps with automatic zone assignment.
- State: Select State from the drop-down menu.
- County: Type in the County associated with the Transportation Zone.

To delete a Transportation Zone, click “Delete” on the row associated with the Transportation Zone. To quickly search for a Transportation Zone, begin typing key words associated with the Transportation Zone in the Search box at the top of the page.

## LOGISTICS

The Logistics tab houses logistical data for the servicing of the Customer and will be used in Orders and Service Profiles.

### *Transportation Equipment*

The Transportation Equipment table houses a list of the Environmental Service Company’s transportation equipment. This information will be used when assigning pieces of equipment to an order.

Company Logistics					
Drivers	3rd Party Transportation Companies	Fuel Surcharges	Transportation Logistic Zone	Logistics	
Transportation Equipment ⓘ					
Equipment Code	Equipment ID	Vendor	Type	Add	Select
<a href="#">48' Trailer</a>	4810		Trailer	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">48' Trailer</a>	4820		Trailer	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">48' Trailer</a>	4830		Trailer	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">53' Trailer</a>	5310		Trailer	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">53' Trailer</a>	5320		Trailer	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">53' Trailer</a>	5330		Trailer	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Box Truck</a>	2551		Truck	<a href="#">Delete</a>	<input type="checkbox"/>

To add a piece of equipment, click “Add” on the right side of the table. Enter an Equipment Code, which is typically the name of the equipment, then enter an Equipment ID for the piece of equipment. If a piece of equipment is on rent or lease, choose the leasing Vendor from the drop-down menu.

**Note:** The Vendor must be set up in the Vendors module. Choose the Type of equipment from the drop-down menu then click “Save.”



Add/Edit Truck/Trailer ✕

Equipment Code:

Equipment ID:

Vendor:

Type:

Cancel
Save

The information provided will then be available to be assigned to an order in the Schedules module or the Schedules/Transportation Tab within the order. To delete a Transportation Equipment entry in the set-up table, click “Delete” on the row associated with the piece of equipment.

Order #	Status	Type	Generator	City	State	Container Type/Count	55 Equivalent	Total Weight	Driver	Truck	Trailer
205538	Order Scheduled	Packaged	Generator HJJ	Houston	TX	N/A	6	2454	Driver Dan	Box Truck - 2551	48' Trailer - 4810
205614	Order Scheduled	Delivery Only	Generator ABC	Channelview	TX	N/A	1	456	Transporter Tom	Box Truck - 2551	48' Trailer - 4810
205603	Order Scheduled	Bulk	Generator ABC	Channelview	TX	N/A	74	33819	SPRINT TRANSP	N/A	N/A

### Transportation Equipment Code

The Transportation Equipment Code table lists equipment that will be used in the Service Profile to indicate which equipment can be used in providing service to a Generator. This equipment list may include any piece of equipment used to service generators, including equipment belonging to third parties.

Transportation Equipment Code ⓘ			Show 25 entries
Transportation Code	Add	Select All	
<a href="#">32' Trailer</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">48' Trailer</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">53' Trailer</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bob Tail Only</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Liquid Bob Tail</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Liquid Hose</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Liquid Stainless</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Liquid Stinger</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Liquid Trailer</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Liquid Vac</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Solid Bob Tail</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Bulk Solid Rolloff</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Dock</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Drum Dolly</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Forklift</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Lift Gate</a>	<a href="#">Delete</a>	<input type="checkbox"/>	
<a href="#">Pallet Jack</a>	<a href="#">Delete</a>	<input type="checkbox"/>	

To add a Transportation Equipment Code, click “Add” on the top right side of the table. Type in the name of the Equipment and click “Save.”

Add/Edit Generator Transportation Equipment Requirement
✕

Equipment:

Cancel
Save

To delete a Transportation Equipment Code, click “Delete” on the row associated with the equipment. This list is used to populate the equipment drop-down for the Generator Transportation Equipment Requirement Table in the Service Profile.

Generator Transportation Equipment Requirement		Description	Add
Lift Gate			<a href="#">Delete</a>
Drum Dolly			<a href="#">Delete</a>
32' Trailer			<a href="#">Delete</a>
Bulk Liquid Bob Tail			<a href="#">Delete</a>

### Order Logistics Status

The Order Logistic Status describes the stage of the order process. These statuses are not configurable.

Order Logistics Status ⓘ		Show 25 entries
StatCode	Order Logistics Status	
1	Order Pending	
2	Order Scheduled	
3	Service Completed	
4	Cancelled	

- Order Pending – An order record has been created but not yet scheduled.
- Order Scheduled – The order has been assigned a date and time of service and resources have been allocated.
- Service Complete – The order has been completed. Each line has been reconciled.
- Cancelled – The order has been cancelled.

### Order Line Status

The Order Line Status table describes the stage of each line item within an order. These statuses are not configurable.

Order Line Status <sup>1</sup>		Show <span>25</span> entries
StatCode	Order Line Status	
1	Profile Pending	
2	Reconciled	
3	Fully Scheduled Outbound	
4	Fully Shipped to Disposal	
5	Direct Bulk/Package Outbound	
6	Transferred	
8	Rejected	

- Profile Pending – Indicates a profile has a Pending status and is not fully approved.
- Reconciled – Indicates that waste has been received from the generator and that all quantities, weights, and other information agree to those listed on the order. Typically, this status is used when a manifest comes through a 10-day facility. Once a line has a status of Reconciled, the line is added to the Waste Tracking tab and can be selected for an outbound shipment.
- Fully Scheduled Outbound – Indicates that waste has been scheduled for shipment to a disposal facility.
- Fully Shipped to Disposal – Indicates that the waste has been shipped to a disposal facility.
- Direct Bulk/Package Outbound – Indicates waste that ships directly from the generator to the disposal facility. This waste does not enter the Environmental Service Company's inventory.
- Transferred – Indicates waste that is transferred from one location or facility to another location or facility within the Environmental Service Company.
- Rejected – Indicates waste that has been rejected at the facility or the disposal site.

## PRODUCTS AND SERVICES

The Products and Services tab houses information regarding products and services provided by the Environmental Service Company and various billing functions.

### PRODUCT & SERVICES

The Products and Services table houses all products and services provided by the Company in servicing their customers. This list includes, but is not limited to, transportation, supplies, labor and fees.

Products & Services									
Products & Services <sup>1</sup>									
Search: <input type="text" value="All"/>									
Product #	Product Item	General Description	Type	Price	UM	General Ledger Revenue Code	General Ledger Cost Code	Select All	
1856	30300-005	Bulk Transportation (per load)	Transportation	\$0.00	Each	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1857	30300-004	Bulk Transportation (per hour)	Transportation	\$0.00	Per Hour	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1858	30300-002	Roll-Off Transportation (Per Load)	Transportation	\$0.00	Each	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1859	30300-001	Roll-Off Transportation (Per Hour)	Transportation	\$0.00	Per Hour	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1860	30200-012	Transportation / empty totes	Transportation	\$0.00	Each	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1861	30200-011	Transportation / empty drums	Transportation	\$0.00	Each	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1862	30200-010	Transportation / bulb boxes	Transportation	\$0.00	Each	None	None	<a href="#">delete</a>	<input type="checkbox"/>
1863	30200-009	Transportation / boxes/bags/pallets / 202 gallons	Transportation	\$0.00	Each	None	None	<a href="#">delete</a>	<input type="checkbox"/>

Each column of the table can be sorted by clicking the arrows in each column header. To delete an entry, click “Delete” in the row associated with that entry.

**Note:** If a Product or Service has been used on a transaction, the item should be set to “Disable” instead of deleted.

The list can be exported by clicking “Export to CSV.”

To add a Product or Service item, click “Add a New Product/Service.” Enter the following information:

- Product Item – This is typically an item code number.
- General Description – A description of the product or service.
- Type – The category that describes the type of product/service. This drop-down list is populated in the Set-up Tables under Product & Service – Billing – Billing Services – Product & Service Type.
- Price – The list price for the Product or Service.
- Unit of Measure – The unit of measure used in charging for the product or service.
- General Ledger Revenue Code – The GL code associated with the revenue of the Product or Service. This is used in exports to provide information to the General Ledger.
- General Ledger Cost Code – The GL code associated the cost of the Product or Service. This is used in exports to provide information to the General Ledger.
- Check Boxes:
  - HazMat – Indicates the product is a Hazardous Material and requires a DOT shipping name.
  - Non-Inventory Control Item – Inventory level will not be maintained on this item.
  - Sales Tax – Indicates the product or service is subject to Sales Tax.
  - Disable – The item is no longer an active Product or Service. It can still be referenced by an existing order but cannot be selected on a new order.
- DOT Description: If the product is a hazardous material, type in the proper DOT description.
- Volume: This is the estimated volume of the product for purposes of loading a truck. This is informational only.
- Weight: This is the estimated weight of the product for purposes of loading a truck. This is informational only.
- Vendor Table – The Vendor table houses the information regarding the vendors from which the Environmental Service Company purchases the product. Click “Add” to add vendor information. Choose a vendor from the drop-down menu and enter the cost per unit the Environmental Service Company pays for the product. Click “Save.”

Once all information is entered, click “Save” to complete the Product/Service entry.

## **Billing – Services**

### ***Product & Service Type***

This table describes the type of Product and Service.

WASTELINQ is prepopulated with the following types:

- Administrative
- Transportation
- Supplies
- Disposal
- Equipment
- Labor
- Fee

Product & Service Type ⓘ

Show 25 entries

Product & Service Type	Add	Select All
<a href="#">Administrative</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Disposal</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Equipment</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Fees</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Labor</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Supplies</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Transportation</a>	<a href="#">Delete</a>	<input type="checkbox"/>

To add a Product or Service type, click “Add” in the top right of the table. Enter the type in the text box, then click “Save.”

To delete a Product or Service Type, click “Delete” on the row of the type to be deleted.

### ***Product & Service Unit of Measure***

This table describes the unit of measure for Products and Services. WASTELINQ is prepopulated with the following units of measure:

- %
- Each
- Per Container
- Per Day
- Per Hour
- Per Load
- Per Pallet

Product & Service Units of Measure ⓘ

Show 25 entries

Product & Service Units of Measure	Add	Select All
<a href="#">%</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Each</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Per Container</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Per Day</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Per Hour</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Per Load</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Per Pallet</a>	<a href="#">Delete</a>	<input type="checkbox"/>

To add a Product or Service Unit of Measure, click “Add” in the top right of the table. Enter the unit of measure in the text box, then click “Save.”

To delete a Product or Service Unit of Measure, click “Delete” on the row of the unit of measure to be deleted.

### Customer Payment Terms

This table describes the payment terms for the customer. WASTELINQ is prepopulated with the following Customer Payment Terms:

- Net 15
- Net 30
- Net 45
- Net 75
- Net 90
- On Receipt
- Paid When Paid

Order ▲ Customer Payment Terms		Show 25 entries		Add	Select
					All
1	<a href="#">Net 15</a>			<a href="#">Delete</a>	<input type="checkbox"/>
2	<a href="#">Net 30</a>			<a href="#">Delete</a>	<input type="checkbox"/>
3	<a href="#">Net 45</a>			<a href="#">Delete</a>	<input type="checkbox"/>
4	<a href="#">Net 60</a>			<a href="#">Delete</a>	<input type="checkbox"/>
5	<a href="#">Net 75</a>			<a href="#">Delete</a>	<input type="checkbox"/>
6	<a href="#">Net 90</a>			<a href="#">Delete</a>	<input type="checkbox"/>
7	<a href="#">On Receipt</a>			<a href="#">Delete</a>	<input type="checkbox"/>
8	<a href="#">Paid When Paid</a>			<a href="#">Delete</a>	<input type="checkbox"/>

To add a Customer Payment Term, click “Add” in the top right of the table. Enter the payment term in the text box, then click “Save.”

To delete a Customer Payment Term, click “Delete” on the row of the Payment Term to be deleted.

### Order Type

Order types allows the company to group orders into different categories to help with order/revenue analysis.

Order #:	205542	Order Logistics Status:	Order Scheduled ▼
Date Created:	05-12-2019	Requested Date:	07-15-2019
Updated By:	NONE	Scheduled Date/Time:	07-15-2019 08:30
Order Type: *	Packaged ▼		
Source:	Customer Call ▼		

WASTELINQ is prepopulated with the following Order Types:

- Bulk
- Delivery Only
- Packaged
- Project
- Transportation Only

Order Type <sup>1</sup>			Show 25 entries
Order Type		Add	Select All
<a href="#">Bulk</a>		Delete	<input type="checkbox"/>
<a href="#">Delivery Only</a>		Delete	<input type="checkbox"/>
<a href="#">Packaged</a>		Delete	<input type="checkbox"/>
<a href="#">Project</a>		Delete	<input type="checkbox"/>
<a href="#">Transportation Only</a>		Delete	<input type="checkbox"/>

To add an Order Type, click “Add” in the top right of the table. Enter the payment term in the text box, then click “Save.”

To delete an Order Type, click “Delete” on the row of the Order Type to be deleted.

### Accounts Receivable Status

The Account Receivable Status describes the payment status of invoices.

Invoice

Invoice #: 10058

Customer Name: Company ABC

Status:

Amount: \$11787.22

Date:

Note:

Order Number

205531

Back

Bad Debt

Invoiced

Paid In Full

Partial Payment

Name

Billing Contact

WASTELINQ is prepopulated with the following Accounts Receivable Status:

- Bad Debt
- Invoiced
- Paid In Full
- Partial Payment

Accounts Receivable Status <sup>1</sup>			Show 25 entries
Accounts Receivable Status		Add	Select All
<a href="#">Bad Debt</a>		Delete	<input type="checkbox"/>
<a href="#">Invoiced</a>		Delete	<input type="checkbox"/>
<a href="#">Paid In Full</a>		Delete	<input type="checkbox"/>
<a href="#">Partial Payment</a>		Delete	<input type="checkbox"/>

Total Items: 4

Previous 1 Next

To add an Accounts Receivable Status, click “Add” in the top right of the table. Enter the status in the text box, then click “Save.”

To delete an Account Receivable Status, click “Delete” on the row of the status to be deleted.

### Accounts Payable Status

The Account Payable Status describes the payment status of a bill. *Note: This function is part of Advanced Accounting.*

WASTELINQ is prepopulated with the following Accounts Payable Status:

- Bill In Review
- Bill Received
- Paid
- Reconciled

Accounts Payable Status		Add	Select All
Bill In Review		Delete	<input type="checkbox"/>
Bill Received		Delete	<input type="checkbox"/>
Paid		Delete	<input type="checkbox"/>
Reconciled		Delete	<input type="checkbox"/>

To add an Accounts Payable Status, click “Add” in the top right of the table. Enter the status in the text box, then click “Save.”

To delete an Account Payable Status, click delete on the row of the status to be deleted.

### Order Delay Reason

The Order Delay Reason is used on an order to note the reason for a delay in completing the order.

Order #: 205655	Order Logistics Status: Service Completed ▼	Order Contact: Sam Generator ▼	Confirmation Date/Time: <div>Delay Reason: <input type="text"/></div>
Date Created: 08-01-2019	Requested Date: 08-08-2019	Customer PO #: 87687	<div> <input type="text"/> <input type="button" value="▼"/> </div> <div>Profile Pending</div>
Updated By: SEANDEMO2	Scheduled Date/Time: 08-01-2019	Project:	
Order Type: * Bulk ▼	Invoice Date: 08-01-2019	Phase:	
Source: Customer Call ▼			Custom Order Field 1

WASTELINQ is prepopulated with the following Delay Reasons:

- Profile Pending

Order Delay Reason		Add	Select All
Profile Pending		Delete	<input type="checkbox"/>

Total Items: 1

Previous 1 Next



To add an Order Delay Reason, click “Add” in the top right of the table. Enter the reason in the text box, then click “Save.”

To delete an Order Delay Reason, click “Delete” on the row of the reason to be deleted.

### ***Cost Category***

The Cost Category table describes the various categories to group cost. This is used in orders under the Costs tab to categorize the various costs against an order.

Order Detail	Status	Notes	Transportation/Schedule	Weight/Grade	Outbound	<b>Costs</b>	Invoice	Recurrence	System Information
<b>Post Costs</b>									
Cost Category	Line Item	Vendor	Description	Vendor Invoice #	Quantity	Standard Cost	Committed Cost	Actual Cost	
Transportation	30300-004 - Transportation - Bulk Transportation (per hour)	WASTELINQ		123546	12.0			\$750.00	<a href="#">Delete</a>

WASTELINQ is prepopulated with the following Cost Categories:

- Disposal
- Supplies
- Transportation

<b>Cost Category</b>		Show <b>25</b> entries
<b>Cost Category</b>	<b>Add</b>	<input type="checkbox"/> Select All
<a href="#">Disposal</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Supplies</a>	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Transportation</a>	<a href="#">Delete</a>	<input type="checkbox"/>

To add a Cost Category, click “Add” in the top right of the table. Enter the category in the text box, then click “Save.”

To delete a Cost Category, click “Delete” on the row of the category to be deleted.

### **Billing – Transportation**

The Billing – Transportation tab helps define most of the billing items relating to Transportation services.

#### ***Transportation Billing Rates***

The transportation billing rates table defines the various units used in billing transportation services. This is used in the Service Profile for Auto Generate functionality.

Waste Material Pricing and Transportation Requirements								
Profile #	Customer Waste Description	Container Type	Size	Unit	Process Code	Cost Basis	Price	Transportation Type
50854	Non-Regulated IDW Soil Cuttings	DM	55	P	726	Per Container	\$0.00	Package - Container
50854	Non-Regulated IDW Soil Cuttings	BA	202	P	712	Per Container	\$0.00	None
50855	Paint and Solvent Waste - Universal	DM	55	P	302	Per Container	\$80.00	Empty Tote
50855	Paint and Solvent Waste - Universal	DM	55	P	301	Per Container	\$65.00	Empty Drum
50855	Paint and Solvent Waste - Universal	DM	55	P	227	Per LBS	\$0.32	Package - Pallet (202)
50856	Diesel Filters for Recycle	DF	55	P	681	Per Container	\$75.00	Package - Flat Rate
50857	RCRA Empty Poly Tote	DM	55	P	692	Per Container	\$0.00	Package - Container

WASTELINQ is prepopulated with the following Transportation Billing Rates:

- Bulk-Hour (CM)
- Bulk-Hour VacTrk (TT)
- Bulk-Trip (CM)
- Bulk-Trip (DT)
- Bulk-Trip (TT)
- Bulk-Trip VacTrk (TT)
- Empty Drum
- Empty Tote
- Package - Container
- Package - Flat Rate
- Package - Pallet (202)

Transportation Billing Rates 1

Show 25 entries

Transportation Type Description	Product Service Code	Bulk Only	Package Only	Inactive	Add	Select
<a href="#">Bulk-Hour (CM)</a>	30300-004	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Bulk-Hour (TT)</a>	30300-004	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Bulk-Hour VacTrk (TT)</a>	30300-004	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Bulk-Trip (CM)</a>	30300-005	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Bulk-Trip (DT)</a>	30300-005	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Bulk-Trip (TT)</a>	30300-005	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Bulk-Trip VacTrk (TT)</a>	30300-005	Yes	No	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Empty Drum</a>	30200-011	No	Yes	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Empty Tote</a>	30200-012	No	Yes	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Package - Container</a>	30100-003	No	Yes	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Package - Flat Rate</a>	30100-003	No	Yes	No	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">Package - Pallet (202)</a>	30200-009	No	Yes	No	<a href="#">Delete</a>	<input type="checkbox"/>

To add a Transportation Billing Rate, click “Add” in the top right of the table. Enter the following in the popup:

- Transportation Type Description – The name or description of the type of transportation.
- Product Service Code – Products and Services code that is associated with type of transportation.
- Bulk Only – Click Yes or No if the transportation type is bulk only.
- Package Only - Click Yes or No if the transportation type is packaged only.
- Inactive – Click Yes, if the rate is inactive, or No, if the rate is active.

To edit an existing Transportation Billing Rate, click on the Transportation Type Description and complete the questions listed above.

To delete a Transportation Billing Rate, click “Delete” on the row of the rate to be deleted.

**Note** – If a Transportation Billing Rate has been used in an order, it is best to make the Transportation Billing Rate inactive to preserve data integrity.

### *Transportation – Container Size Conversion*

The Transportation Container Size Conversion table defines the billing conversion rates of containers based on a 55-gallon drum.

WASTELINQ is prepopulated with the following conversion table:

Transportation Product Code	Container Size	55 Base Conversion	Type	Add	Select All
<a href="#">30200-001 - (Transportation / 14 gallon drums)</a>	14	0.7	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-002 - (Transportation / 20 gallon drums)</a>	20	0.8	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-003 - (Transportation / 250/275 gallon totes)</a>	275	5.0	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-004 - (Transportation / 30 gallon drums)</a>	30	1.0	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-005 - (Transportation / 330/350/385 gallon totes)</a>	330	7.0	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-006 - (Transportation / 5 gallon pails)</a>	5	0.5	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-007 - (Transportation / 55 gallon drums)</a>	55	1.0	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-008 - (Transportation / 85 gallon drums)</a>	85	1.5	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-009 - (Transportation / boxes/bags/pallets / 202 gallons)</a>	202	4.0	By Container	<a href="#">Delete</a>	<input type="checkbox"/>
<a href="#">30200-009 - (Transportation / boxes/bags/pallets / 202 gallons)</a>	202	4.0	By Container	<a href="#">Delete</a>	<input type="checkbox"/>

To add a Container Size Conversion, click “Add” in the top right of the table. Enter the following in the popup:


- Transportation Product Codes – Products and Services code that is associated with type of transportation.
- Container Size – Size of the container.
- 55 Base Conversion – The rate of conversion based on 55-gallon drum.
- Type – The type of transportation rate.

To edit an existing Container Size Conversation, click on the Transportation Product code and complete the questions listed above.

To delete a Container Size Conversion, click “Delete” on the row of the conversion to be deleted.

### *Washout Type*

The Washout Type table defines the types of washouts that can be added to an order. This Washout type is assigned to a profile in the Service Profile and is part of the Auto Generate functionality.

Wash Out Type <sup>1</sup>				Show 25 entries
Wash Out Type Description	Product Service Code	Inactive	<b>Add</b>	<input type="checkbox"/> Select All
<a href="#">Cost Plus</a>	20100-006	No	 <a href="#">Delete</a>	<input type="checkbox"/>

To add a Washout Type, click “Add” in the top right of the table. Enter the following in the popup:

- Washout Type Description – Description of the type of Washout.
- Product Service Code – Products and Services code that is associated with type of transportation.
- Inactive – Click Yes, if the rate, is inactive or No, if the rate is active.

To edit an existing Washout Type, click on the type and complete the questions listed above. To delete a Washout Type, click “Delete” on the row of the type to be deleted.

### Billing – Service Profile

The Billing - Service Profile associates an item from the Service Profile to a product and service code. This plays a key role in the Auto Generator function on orders and the service profile.

**Products & Services**

Products & Services **Billing**

Billing - Services    Billing - Transportation    Billing - Services Profile <sup>1</sup>    Billing - Financials <sup>1</sup>

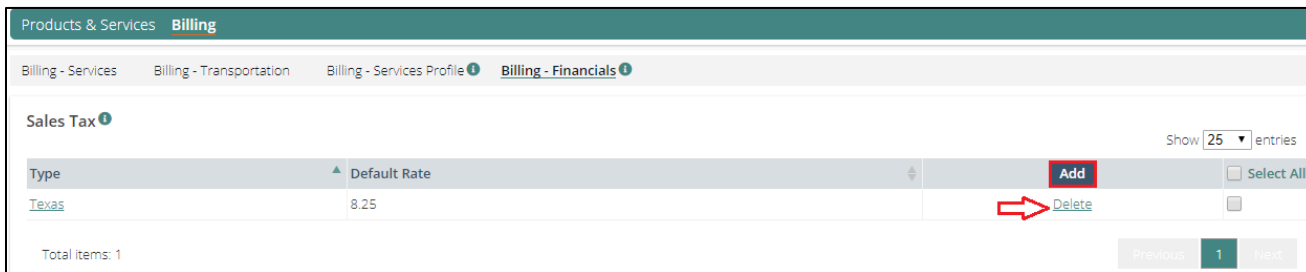
Waste Fee Service Item	20100-003 - [EIS (Environmental Insurance Security) Fee]	Empty Drum Transportation Service Item	30200-011 - [Transportation / empty drums]
Fuel Surcharges Service Item	30100-001 - [Fuel Surcharge]	Empty Tote Transportation Service Item	30200-012 - [Transportation / empty totes]
Fuel Surcharges Tax Service Item	30100-001 - [Fuel Surcharge]	Flat Rate Service ID	30100-003 - [Transportation]
Minimum Stop Service Item	30100-002 - [Minimum Transportation Stop Fee]	Document Fee Service Item	20100-002 - [Document Preparation (Label/W
Per Pallet Transportation Service Item	30200-009 - [Transportation / boxes/bags/pallets / 202 c	Wash Out Service Item	20100-006 - [Washout - Cost Plus]

**Save**

In each category, choose the appropriate product and service from the drop-down menu. Once all are populated, click “Save.”

## Billing – Financials

The Billing – Financials tab establishes sales tax categories.

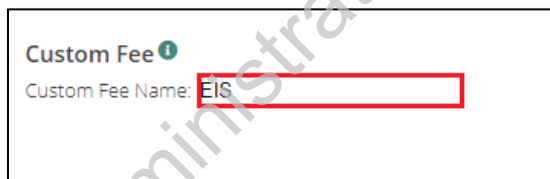


To add a Sales Tax item, click the “Add” button on the right. Enter the Type and Default rate, then click “Save.”

To edit an existing Sales Tax Item, click on the Name/Type of the item to be edited. Make the appropriate changes, then click “Save.”

To delete a Sales Tax Item, click the “Delete” button associated with that item.

The Custom Fee box allows the Company to add a custom fee to be applied to the entire invoice or only on disposal. Type the name of the Custom Fee in the text box.



The rate for the Custom Fee is established in the service profile within the Generator account under Service Profile. Here the rate is entered along with the choice of applying the fee to the entire invoice or only to the disposal cost. A generator can also be exempted from the fee by clicking the “Exempt” check box. The fee will now show up on an order and invoice.



Fee	Rate (%)	Amount
EIS	10.0	\$95.00
<b>Total</b>		\$95.00

Tax Type	Tax Rate (%)	Amount
Texas	8.25	\$0.00
<b>Total</b>		\$0.00

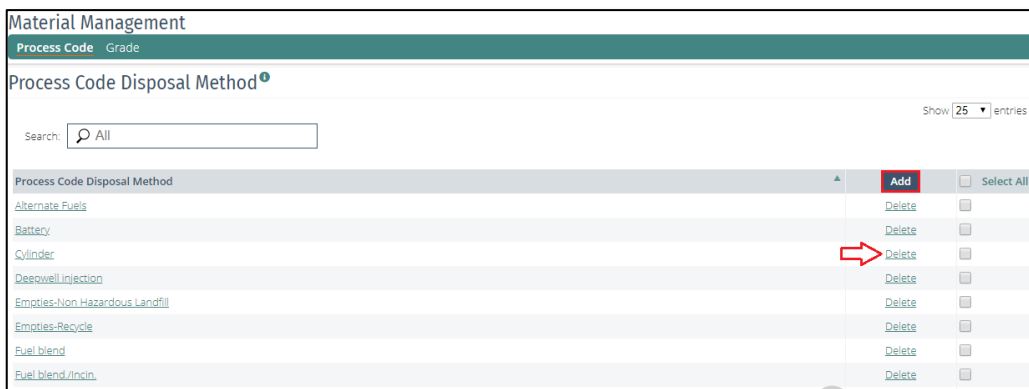
**Total: \$1515.00**

## **MATERIAL MANAGEMENT**

The Material Management tab is a critical part of the WASTELINQ application functionality.

### **PROCESS CODE**

This section houses all the process codes that define how and where waste is managed.



Material Management

Process Code Grade

Process Code Disposal Method ⓘ

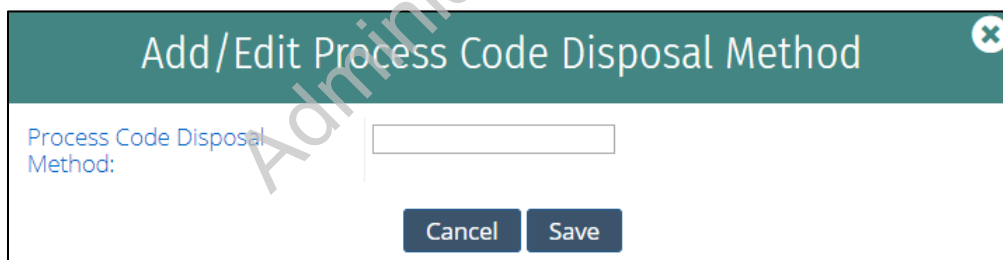
Search:  Show 25 entries

Process Code Disposal Method	Add	Select All
Alternate Fuels	Delete	<input type="checkbox"/>
Battery	Delete	<input type="checkbox"/>
Cylinder	Delete	<input type="checkbox"/>
Deerwell Injection	Delete	<input type="checkbox"/>
Empties-Non Hazardous Landfill	Delete	<input type="checkbox"/>
Empties-Recycle	Delete	<input type="checkbox"/>
Fuel blend	Delete	<input type="checkbox"/>
Fuel blend/Incin.	Delete	<input type="checkbox"/>

### **Process Code Disposal Method**

The Disposal Method Lookup List defines various methods of waste disposal or material management for final disposition and processing of waste and recycle materials. WASTELINQ provides a prepopulated list of common disposal methods, but the list is fully configurable by the user.

To add a disposal method, click the “Add” button on the right side of the table. Enter the disposal method in the text box, then click “Save.”



Add/Edit Process Code Disposal Method

Process Code Disposal Method:

Cancel Save

To delete a disposal method, click the “Delete” button on the row of the disposal method. To delete all disposal methods in the table, click the “Select All” check box, then click “Delete.”

### **Waste Types**

The Waste Types define the various types of waste and are associated with the Process Codes. WASTELINQ is prepopulated with a list of common Waste Types.

**Waste Types**

Search:

Show 25 entries

Waste Type	Add	Select All
<a href="#">Acid Labpack for Treatment, must be packed with compatible material, cushioning material.</a>	Delete	<input type="checkbox"/>
<a href="#">Acid or Alkaline liquids &gt;5,000 btu's &lt;1 sludge</a>	Delete	<input type="checkbox"/>
<a href="#">Acid waste water (non chromic, D002-D011) &gt;25% HF, for treatment</a>	Delete	<input type="checkbox"/>
<a href="#">Acid waste water (non chromic, D002-D011) &gt;25% Nitric Acid, for treatment</a>	Delete	<input type="checkbox"/>
<a href="#">Acid waste water (non chromic, D002-D011) &gt;26% HF, for treatment</a>	Delete	<input type="checkbox"/>
<a href="#">Acid waste water (non chromic, D002-D011) &gt;26% Nitric Acid, for treatment</a>	Delete	<input type="checkbox"/>
<a href="#">Acid waste water (non chromic, D002-D011) 10-25% Nitric Acid, for treatment</a>	Delete	<input type="checkbox"/>

To add a waste type, click the “Add” button on the right side of the table. Enter the waste type in the text box, then click “Save.”

Add/Edit Waste Types

Waste Type:

Cancel

Save

To delete a waste type, click the “Delete” button on the row of the waste type. To delete all waste types in the table, click the “Select All” check box, then click “Delete.”

### Process Codes

Process Codes Look Up List provides for the association of Waste Types and Disposal Methods, the designation of TSDF's and allowable packaging (Container Type & Size) for a given material. TSDF Processing Cost and List Pricing data is also provided for in the Process Code for each method of shipment and unit of measure. Process Codes are ultimately used in Material Profiles to define the Disposal Requirements, Shipment Methods and Pricing Information.

WASTELINQ provides a prepopulated list of common Process Codes, but the list is fully configurable by the user. The Screen Displays below illustrates each of the elements that go into defining a Process Code and how they are ultimately used in the Material Profile. To Search the process code table, type in the process code or key words into the Search box at the top of the table.

**Process Codes**

Search:

Export to CSV  
+ Add a Process Code  
Show 25 entries

Process Code	Waste Type	Disposal Method	Specific Gravity	Status	Select All
223	Shreddable debris	Fuel blend./incin.	0	Active	
225	Solids and sludges for incineration	Incineration	0	Active	delete
226	Processable solid	Fuel blend./incin.	0	Active	delete
227	Loose pack paints, coatings, etc...	Fuel blend./incin.	0	Active	
241	Flammable aerosols	Fuel blend./incin.	0	Active	
283	Reactive labpacks	Incineration	0	Active	delete
284	Non-reactive labpacks	Incineration	0	Active	delete
301	High BTU Liquid <3 sludge	Fuel blend./incin.	0	Active	
302	High BTU Liquid <1/3 sludge	Fuel blend./incin.	0	Active	

To add a process code, click the +Add a Process Code in the top right corner of the table. Add a process code by filling in the following fields:

- Process Code – Typically a process code is combination of numbers and/or letters that have some significance to the type of waste and disposal method.
- Waste Type – Choose the Waste Type from the drop-down menu. This drop-down is populated from the Waste Type table.
- Waste Category/Examples – Enter examples of the waste or material.
- Disposal Method – Choose a Disposal Method from the drop-down menu. This drop-down is

**Add Process Code**

Process Code:

Waste Type:

Waste Category/Examples:

Disposal Method:

Specific Gravity:

General Ledger Cost Code:

General Ledger Revenue Code:

Grade:

Status:

☐ Sales Tax

populated from the Disposal Method table.

- Specific Gravity – Enter an average Specific Gravity for this type of waste.
- General Ledger Cost Code – Enter the GL Code for this waste material.
- General Ledger Revenue Code – Enter the GL revenue code for this waste material.
- Grade – If applicable, a Grading Criteria Definition can be associated with a Process Code to allow for the grading of each container that is assigned a given Process Code in an Order. The Grading Process allows for the assignment different disposal pricing/cost to a container based on Grade (e.g., Sludge in Fuel). Grading criteria is established in the Grades section under the Material Management section.



- Status – Choose a status of the Process Code from the drop-down – Active or Inactive. A process code must be Active in order to be added to a Profile. If a process code is no longer needed, it is recommended to change the status to “Inactive” to preserve any historical data associated with the Process Code. An inactive process code cannot be used in a profile or order.
- Sales Tax – Click the Sales Tax check box if the type of waste is subject to Sales Tax.

### Process Code and Pricing Information

The Process Code and Pricing information table within each process code associates all the approved TSDF that this type of waste can ship to and defines the acceptable container types and sizes.

It also houses cost information for that waste type to each TSDF and allows the Company to establish a list price. The information within this table is used in Profiles and Orders.

Final TSDF	Vendor Process Code	Container Type	Container Size	Cost Basis	Cost	Min Cost	Price Basis	List Price	List Min	Add
Allied Waste Services of Beaumont	None	TT	5500 (G)	Per GAL	\$ .55	\$250.00	Per GAL	\$ .75	\$350.00	Delete
American Environmental Landfill, Inc.		DM	55 (G)	Per Container	\$60.00	\$ .00	Per Container	\$105.00	\$ .00	Delete
American Environmental Landfill, Inc.		TT	5000 (G)	Per GAL	\$ .75	\$275.00	Per GAL	\$ .98	\$450.00	Delete

To add a TSDF, click the “Add” button on the right side of the table. Enter the following information for each field:

### Add Process Code Cost & Pricing Information

Final TSDF: Allied Waste Services of Beaumont, , Beaumont, TX

Vendor Process Code: None

Container Type: TT - Tank Truck

Container Size: 5500 G

Cost Basis: Per GAL

Cost: 0.55

Min Cost: 250

Price Basis: Per GAL

List Price: .75

List Min: 350

- Final TSDF - Choose the TSDF from the drop-down menu. The drop-down menu is populated from the Disposal Facility table under the Vendors tab in the Set-Up Tools. If a TSDF is not in the drop-down menu, return to the Vendors tab to enter the Disposal Facility information.
- Vendor Process Code – Link the process code from the final TSDF to this Process Code by entering it into this field.
- Container Type – Choose the container type from the drop-down menu. *\*Note – One container type and size per TSDF line.*
- Container Size – Choose the container size and units from the drop-down menus. The choices for container size are determined by the Container Type.

- Cost Basis – From the drop-down menu, choose the cost basis by which the TSDF will bill this waste/material.
- Cost – Enter the cost charged by the TSDF for this container type and size.
- Min Cost – If applicable, enter the minimum cost the TSDF charges for this container type and size.
- Price Basis – From the drop-down menu, choose the price basis by which the Environmental Service Company will bill its customers for this waste/material.
- List Price – Enter a List Price to charge customers for this waste/material.
- List Minimum – If applicable, enter the minimum price to charge customers for this waste/material in this container type and size.
- Click “Save.”

Repeat this process for every container type and size for each TSDF.

After changes are made to the process code page/table, click “Save” at the bottom of the page.

**Process Code Cost & Pricing Information**

Show 25 entries

Final TSDF	Vendor Process Code	Container Type	Container Size	Cost Basis	Cost	Min Cost	Price Basis	List Price	List Min	Add
<a href="#">Allied Waste Services of Beaumont</a>	None	TT	5500 (G)	Per GAL	\$ .55	\$250.00	Per GAL	\$ .75	\$350.00	<a href="#">Delete</a>
<a href="#">American Environmental Landfill, Inc.</a>	None	DM	55 (G)	Per Container	\$60.00	\$ .00	Per Container	\$105.00	\$ .00	<a href="#">Delete</a>
<a href="#">American Environmental Landfill, Inc.</a>	None	TT	5000 (G)	Per GAL	\$175	\$275.00	Per GAL	\$ .98	\$450.00	<a href="#">Delete</a>
<a href="#">Clean Harbors Deer Park, L.P.</a>		DF	55 (G)	Per Container	\$ .00	\$ .00	Per Container	\$ .00	\$ .00	<a href="#">Delete</a>
<a href="#">US Ecology Texas</a>	None	DF	55 (G)	Per Container	\$55.00	\$ .00	Per Container	\$95.00	\$ .00	<a href="#">Delete</a>
<a href="#">US Ecology Texas</a>		DM	55 (G)	Per Container	\$ .00	\$ .00	Per Container	\$ .00	\$ .00	<a href="#">Delete</a>
<a href="#">US Ecology Texas</a>		TP	275 (G)	Per Container	\$ .00	\$ .00	Per Container	\$ .00	\$ .00	<a href="#">Delete</a>

Total items: 7

Previous 1 Next

Back Save Exit

## GRADE

Grading Criteria Definition can be associated with a Process Code to allow for the grading of each container that is assigned a given Process Code in an Order. The Grading Process allows for the assignment different disposal pricing/cost to a container based on Grade (e.g.. Sludge in Fuel).

**Material Management**

Process Code: **Grade**

Waste Sample & Process Grade

Show 25 entries

Grade	Add	Select All
A	<a href="#">Delete</a>	<input type="checkbox"/>
B	<a href="#">Delete</a>	<input type="checkbox"/>
C	<a href="#">Delete</a>	<input type="checkbox"/>
D	<a href="#">Delete</a>	<input type="checkbox"/>

To add grading criteria, click the “Add” button at the top of the table. Enter the Grade name in the text box and click Save. Repeat this process for each Grade.

**Note** – Grading criteria can be established for different materials such as used oil and paint waste.

Add/Edit Grade ✕

Grade:

Cancel
Save

Once the grade categories have been established, a series of qualifying questions can be added for each grade. To add a question, click “+Add New Question” at the bottom of the screen. Double click the text box and enter the question. Click out of the text box to save the question. To add answer choices, click “+Add Choice” under the question. Double Click the text box to enter the answer choice. Click X to remove any entries not needed. Continue this process until all questions and answers have been entered. Click “Save” to save all changes.

Add/Edit Grade ✕

Grade:

Cancel
Save

Does the container contain >3 inches of sludge

☒ Yes
☒ No

✕

+ Add Choice

Does the material have greater than 10,000 btu?

☒ Yes
☒ No

✕

+ Add Choice

+ Add New Question

The Grading Criteria will now be available within an order under the Weight/Grade section for that order. This section allows for a manual entry of the grades. In addition, Grading functionality is included in Advanced Waste Tracking scanner functionality.

Order: Detail

Status

Notes

Transportation Schedule

Weight/Grade

Outbound

Costs

Invoicing

System Information

Material Classification and Weight Requirement Summary

Order #: 205656

Schedule Date: 08/02/2019

Generator: Generator ABC

Truck: Driver Dan

Weight/Grade Required

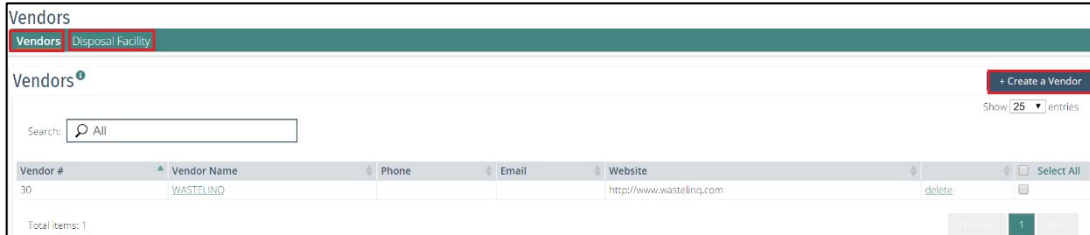
Order #	Process Code	Material	Container Type	Container Size	Container ID #	Weight	Grade	
205656	301	Paint and Solvent Waste - Universal	DM	55	231234123-1-1			Delete
205656	301	Paint and Solvent Waste - Universal	DM	55	231234123-1-2			Delete
205656	726	Non-Regulated IDW Soil Cuttings	DM	55	234234334-1-1			Delete
205656	726	Non-Regulated IDW Soil Cuttings	DM	55	234234334-1-2			Delete
205656	726	Non-Regulated IDW Soil Cuttings	DM	55	234234334-1-3			Delete
205656	726	Non-Regulated IDW Soil Cuttings	DM	55	234234334-1-4			Delete

## VENDORS

The Vendors Tab houses information about vendors, including disposal facilities, transporters, suppliers, etc.

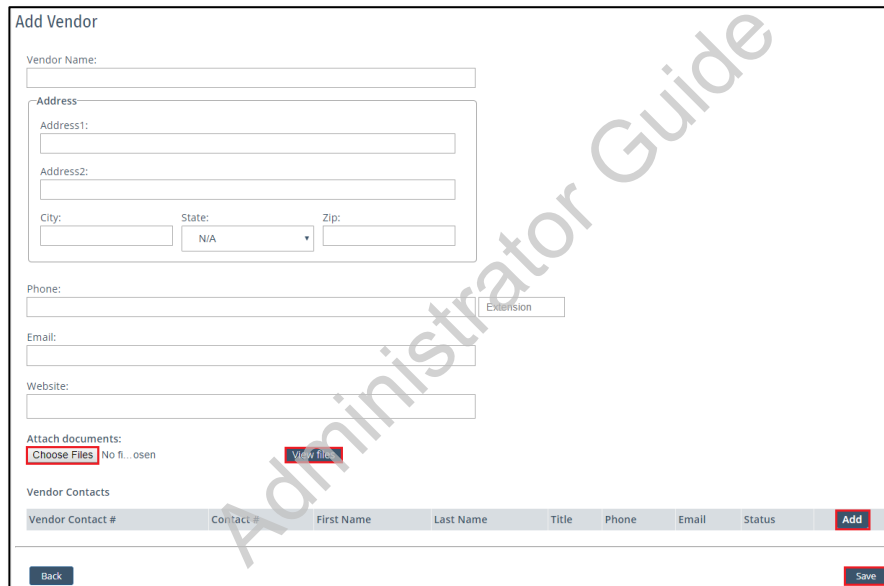
The tab is divided into two lists, Vendors and Disposal Facilities.

- Disposal Facilities – all disposal/recycling facilities to which the company sends waste/material.
- Vendors- all non-disposal facility vendors.



## VENDORS

The Vendors list houses all non-disposal facility vendors.



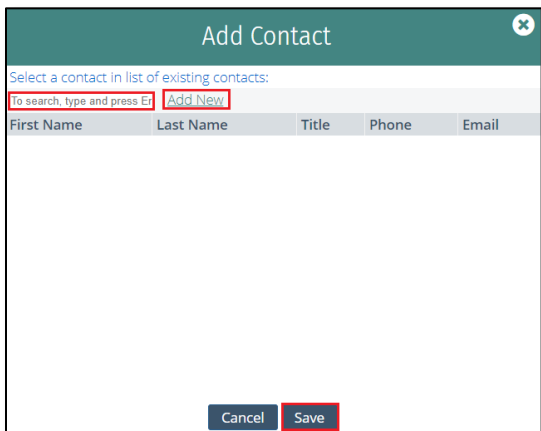
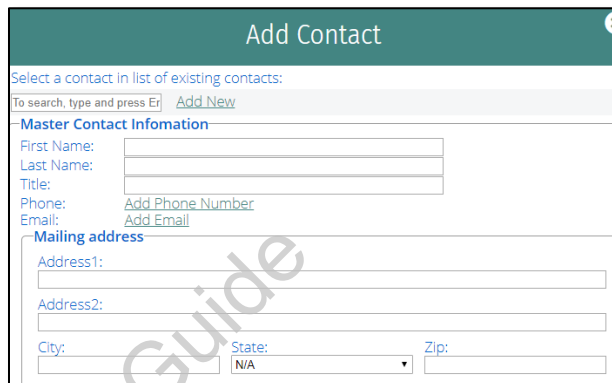
To add a Vendor, click the **+Create a Vendor** button on the right side of the page. Complete the Add Vendor form fields:

- Vendor Name
- Address
- Phone
- Email
- Website
- Attach Documents
- Vendor Contacts

Documents - This function allows for documents such as vendor contracts, price sheets, etc. to be uploaded. The documents will be housed in the Documents module in a file for that Vendor.

To attach a document, click the “Choose Files” button. Choose the file from the appropriate documents folder, then click “Upload.” To view the uploaded document, click View Files or go to the Documents module folder for that Vendor.

Add Vendor Contacts by clicking “Add” in the right side of the Vendor Contacts grid. To add a contact that already exists in WASTELINQ, search for the name in the Search box and click on the name. To add a new contact, click “Add New” and complete the information requested. Click save once all contact information has been entered.

Once all Vendor information is added, click “Save.” To view or edit information for an existing vendor, click the underlined Vendor Name.

## DISPOSAL FACILITIES

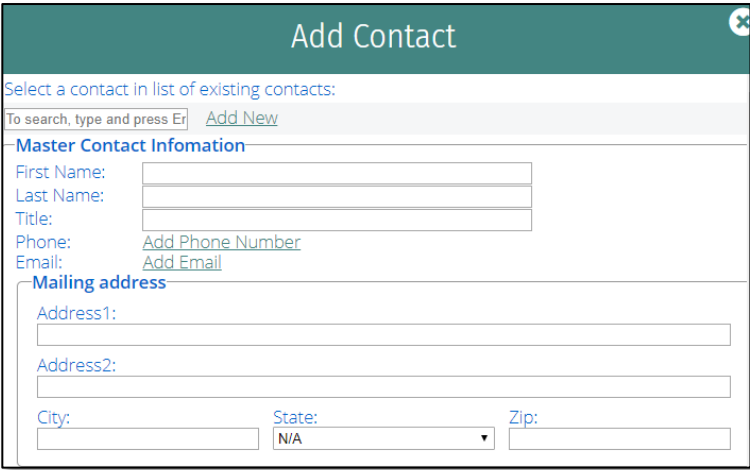
The Disposal Facilities tab lists all disposal facilities to which the Environmental Service Company sends waste. The information provided here will carry over into process codes, profiles, and order paperwork.

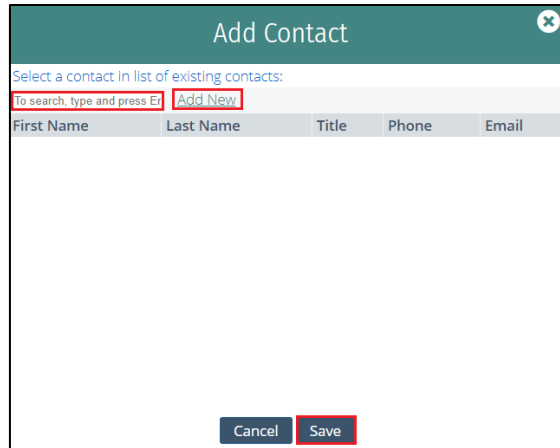
Vendors										
Vendors Disposal Facility										
Disposal Facility <sup>o</sup>										
Search: <input type="text" value="All"/>										+ Create a Disposal Facility
										Show 25 entries
Facility #	Facility Name	State ID	EPA ID	Phone	Status	Approval Status	Date Last Audited			Select All
2703	<a href="#">Abilene Environmental Landfill, Inc.</a>				Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2704	<a href="#">Clean Harbors Services, Inc. - Chicago</a>		ILD000608471		Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2705	<a href="#">Giant Resource Recovery - Attalla</a>		ALD070513767		Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2706	<a href="#">Pine Ridge Landfill (WM)</a>				Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2707	<a href="#">Stinky's Scrap Metal</a>				Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2708	<a href="#">Stolthaven Houston Inc.</a>		TXD980748461		Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2709	<a href="#">Allied Waste Services of Beaumont</a>				Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>
2710	<a href="#">ALPHA OMEGA RECYCLING</a>		TXD981514383		Active	Yes	01-01-2019	<a href="#">delete</a>		<input type="checkbox"/>

To add a disposal facility, click “+Create a Disposal Facility” on the right side of the table.

### Complete the following information:

- Facility Name
- Profile Approver – The profile approver box identifies the user that can approve the profile. This is for WASTELINQ approvals only. This is not a required field, but it can be used to restrict who can move a profile designated for this disposal facility to Approved Status.
- Portal Default – For Portal users only. Check this box to add the disposal facility to the approved disposal facility lists within the Customer Portal.
- Address
- State ID (if applicable)
- EPA ID
- Phone/Fax/Email
- Status – The status box allows for a disposal facility to be marked as
  - Active – The facility is approved to ship waste to.
  - Inactive – The facility is not approved to ship waste to. This facility will not be able to be added to Process Codes or profiles.
  - Pending – The facility is in the process of being approved. This facility will not be able to be added to Process Codes or profiles until the status becomes Active.
- Audit Approved – Choose the person who approved the audit from the drop-down menu. This person must be listed in the Company Personnel table to be available in the drop-down.
- Attach Supporting Approval Documents - Attach any documentation (i.e. - approvals and price lists) by clicking “Choose File” and selecting the document from the files. The files will be stored in the Documents module in a folder for this Disposal Facility.
- Additional Information Form – If applicable, choose the disposal facility from the drop-down menu. This will add additional profile questions needed to complete that disposal facility’s profile.
- Contacts – Add any contacts associated with the disposal facility by clicking “Add” in the right side of the Contacts table. To add a contact that already exists in WASTELINQ, search for the name in the Search box and click on the name. To add a new contact, click “Add New” and complete the information requested. Click save once all contact information has been entered.





Once all Disposal Facility information is entered, click “Save.” To view or edit information on an existing disposal facility, click the underlined Vendor Name.

Once a Disposal Facility has been used in a profile/order, it can no longer be deleted. Instead, change the status of the disposal facility to “Inactive” to preserve data integrity of all orders shipped to the disposal facility.

## **PORTAL**

The Portal tab is available if the Environmental Service Company purchased the Portal/Workflow Modules. See the Portal User Guide for more details.

## **WORKFLOW**

Coming Soon!


## **DATA EXPORT**

The Data Export Tab houses various files to export for review. To download a file, click on “Download XLSX file” and save the document. Once downloaded the document can be edited to show the desired data.



## **LOGGED IN USERS**

The Logged-In Users tab shows all users currently logged into the system. The system allows the administrator to “Force Logout” of the users in the system in the case the user forgot to log out.

Wash Out Type <sup>1</sup>				Show 25 entries	
Wash Out Type Description	Product Service Code	Inactive		Add	Select All
<a href="#">Cost Plus</a>	20100-006	No		 Delete	

## **USERS**

The Users Tab is a function of the Super Administrator log in. See the Super Administrator User guide.

## **PRINT OPTION**

The Print Option tab allows the user to adjust the printing margins for the Hazardous Waste Manifest. WASTELINQ has preset margins but allows for editing.

To change a setting, type in the adjust the pixels listed for the x coordinate (left/right) and the y coordinate (top/bottom) as needed until the alignment is correct for the document and printer. More information on printer configuration can be found on our Support Site at [www.wastelinq.com](http://www.wastelinq.com).

Manifest Page 1

		Order Number
		515
		25
Generator ID Number	Page Number	Emergency Response Phone
125	280	330
63	63	63



## Thank you for choosing WASTELINQ Enterprise!

For additional help, please visit us at [www.wasteling.com](http://www.wasteling.com) and click Support from the menu or go directly to <https://wasteling.com/support>.

### Resources include:

- Full user guides for all WASTELINQ products
- The WASTELINQ Knowledge Base: A forum for asking questions, receiving answers, and reviewing the accumulated experiences of the WASTELINQ user community
- Access to the WASTELINQ Help Desk support system
- Training videos and information about future releases

To view the Professional Services offered by WASTELINQ, please visit:

<https://wasteling.com/professional-services/>

To review the WASTELINQ Privacy Policy, please visit:

<https://wasteling.com/privacy-policy/>

To review WASTELINQ's standard Service Level Agreement, please visit:

<https://wasteling.com/legal/>

To contact WASTELINQ directly, please use one of the following routes:

- E-mail us at [info@wasteling.com](mailto:info@wasteling.com)
- Call us at [1-888-962-7799](tel:1-888-962-7799)
- Use the contact form at <https://wasteling.com/contact/>