



ArkonoOne

Light plan · User Handbook

For the small contractor. Customers, quotes, inventory, deliveries, rental agreements and automatic invoicing: the core of a rental business, without the field-operations tools.

\$99 / month · unlimited users

Version 1.0 · October 2026

Scaffolding rental, sales and installation software

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BEFORE YOU START

About this handbook

For the small contractor

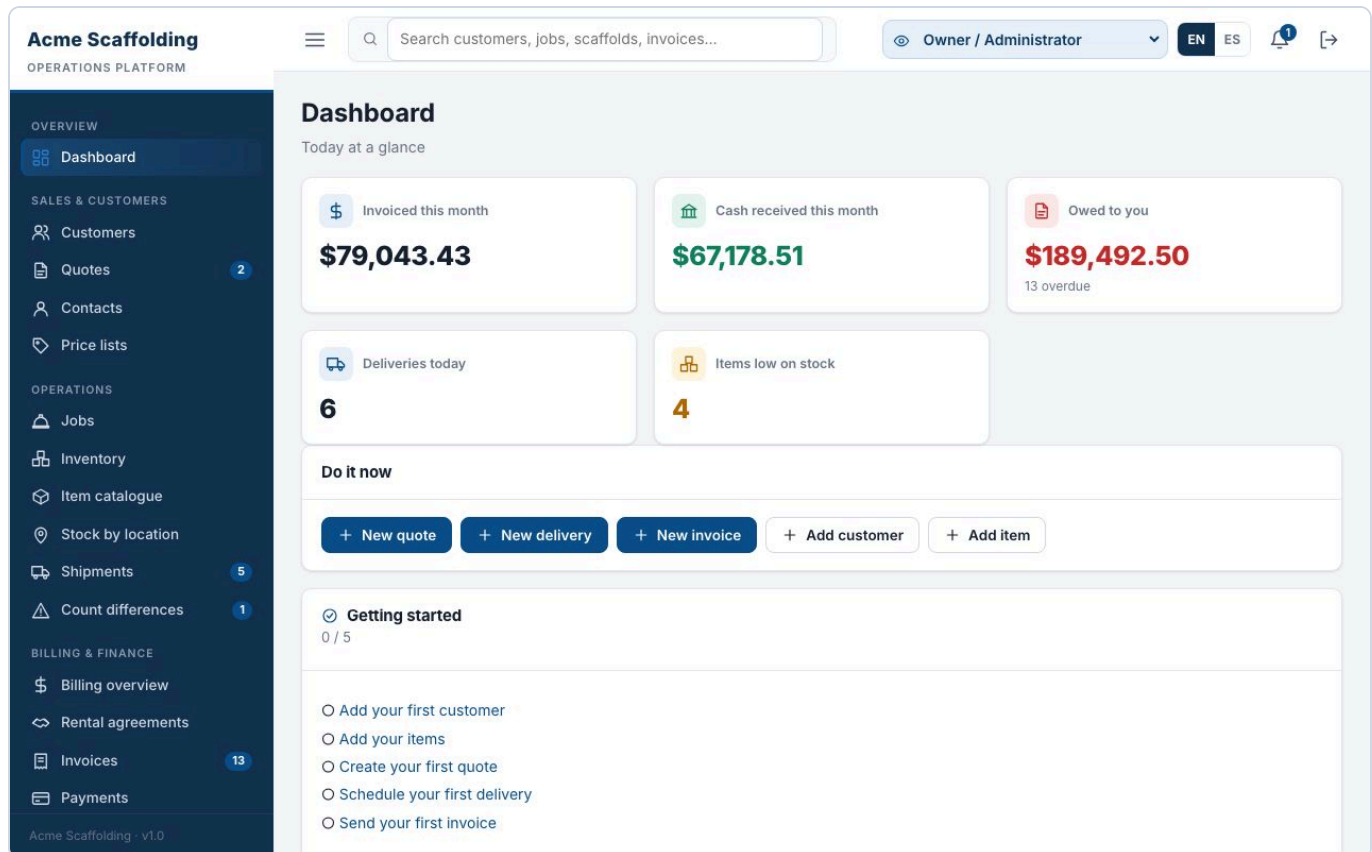
Light is built for a small contractor who rents or sells scaffolding and needs to quote, keep track of stock, deliver, and invoice without the full operations system. Everything here is also in Starter and Complete, so you can move up at any time without moving any data.

This handbook describes exactly what the **Light** plan contains. Each chapter explains who uses a screen, how the everyday tasks work and what the system does automatically. Screenshots are taken from a demonstration company with fictional data; your own screens will show your data.

What is in your plan

Customers & contacts Quotes & price lists Inventory Deliveries & returns Jobs Rental agreements Invoices, payments & recurring billing Customer portal

Plus: login and account screens, the dashboard, search, notifications, administration (settings, logins, data import, audit log, numbering), your subscription screen and the download of all your data. Every plan has unlimited users and works on phone, tablet and desktop, in English and Spanish.



The Light dashboard.

Getting started

From sign-up to your first day of work: the trial, the demo company, your own data and your team.

Sign up and open your account

- 1 Go to the ArkonOne website and choose **Start your free 7-day trial**.
- 2 Enter your company name, your name, work email, a password (at least 10 characters with letters and a number), your country and, if you like, a phone number. **No credit card is asked for**.
- 3 Check the **company address** shown under the form: this is where your team signs in. It is made from your company name and you can change it before you submit.
- 4 We email you a confirmation link. Your account opens, and the 7-day trial starts, when you click it.
- 5 Sign in at your company address with your email and password.

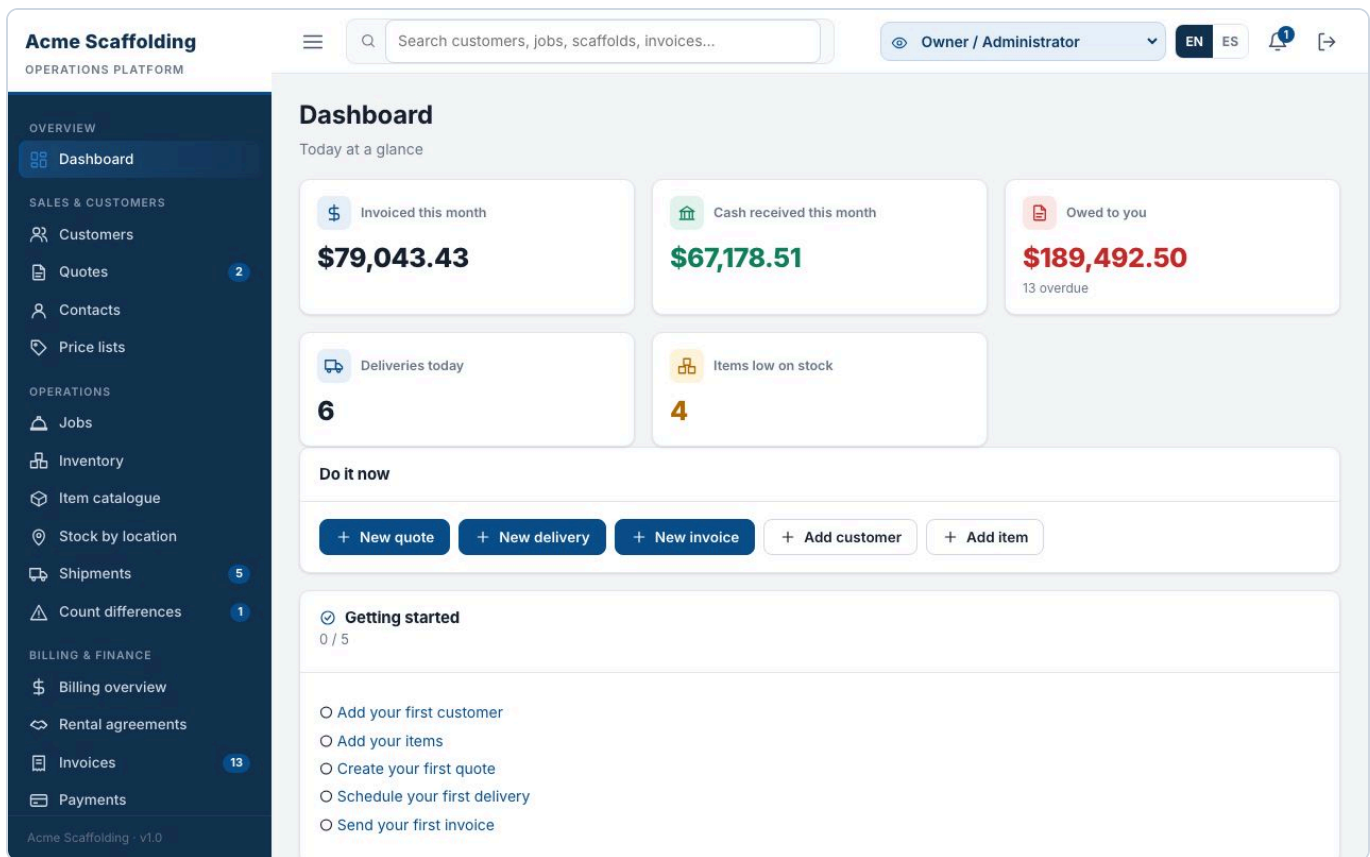
Note. Until you confirm your email the account stays closed. The link works once and for 48 hours; you can ask for a new one on the sign-up confirmation page.

The free trial

For 7 days you have **full access to everything, including the 3D designer**, whatever plan you later choose. A banner at the top shows the days left and a **Choose a plan** button. Nothing is charged during the trial and you do not need to enter a card.

The demo company

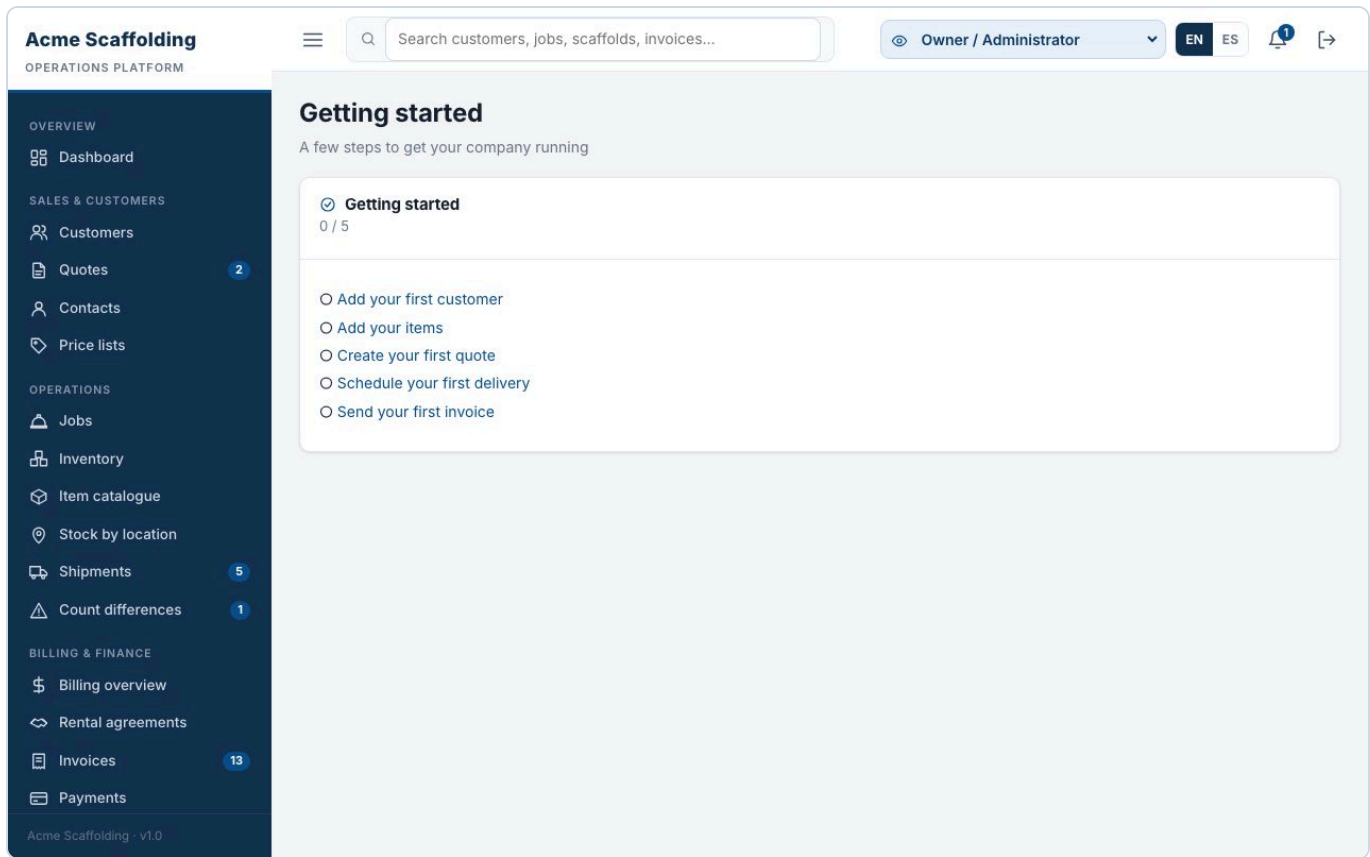
Your account opens with a realistic **fictional** scaffolding company already loaded: yards, trucks, crews, items, customers, jobs, scaffolds, inspections, quotes, invoices and example designs. It takes about a minute to prepare the first time; a banner tells you when it is ready. Click through anything: nothing you do to demo data can hurt your real business, because there is no real data yet.



The dashboard of the demo company on the first day.

Start with your own data

- 1 When you are ready, press **Clear demo data and start with my own** in the banner at the top. You are asked to confirm.
- 2 Every demo record is removed. Your company details, message templates, inspection templates, tax rates and your own logins are kept.
- 3 Open **Getting started** (it is on your dashboard until it is complete) and follow the checklist.



The getting-started checklist ticks itself as you add real records.

Bring your data in

Administration → **Data import** loads customers, contacts, items, employees, jobs and opening stock from CSV files. Choose what you are importing, upload the file, check that each column is matched to the right field, review the preview (rows with problems are highlighted) and import. Every imported record is recorded in the audit log. Save Excel files as **CSV** first.

Acme Scaffolding
OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

EN ES

Data import
Bring customers, contacts, items, employees, jobs and opening stock in from CSV — including Avontus exports

1. Upload CSV 2. Map columns 3. Preview & validate 4. Import

Upload a CSV file

Import into: Customers

Column preset: Auto-detect from headers

CSV file: Choose File No file chosen

Comma, semicolon or tab separated; first row must contain the column headers. UTF-8.

Upload & map columns

CSV templates

Download a template with the expected columns and sample rows.

Customers	Standard · Avontus
Contacts	Standard · Avontus
Catalogue items	Standard · Avontus
Employees	Standard · Avontus
Jobs	Standard · Avontus
Opening stock levels	Standard · Avontus
Open jobs with equipment on site (migration)	Standard · Avontus
Open invoices and balances (migration)	Standard · Avontus

Recent imports

The import wizard: choose the target, upload, map columns, preview, import.

Invite your team

Administration → **Logins** lists everyone who can sign in. Add a person with their name, email, role and either a password you choose or, if you leave the password empty, an emailed invitation link. Customer-portal logins are created the same way: choose the role **Customer (Portal)** and the customer they belong to. Logins can be disabled at any time without losing anything they entered.

Acme Scaffolding

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Search customers, jobs, scaffolds, invoices...

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Logins

People who can sign in. Each login has one role. Customer-portal logins see only their own customer.

Add a login

Name

Email or username

Role

Crew Member

Customer (portal logins only)

—

Password

at least 10 characters

Add login

Leave the password empty to email an invitation link instead.

All logins

NAME	ROLE	CUSTOMER	STATUS	LAST SIGN-IN
Alex Rivera alex@acme-scaffold.test	Owner / Administrator	Save	Active	Oct 16, 2026, 6:18 PM

New password

Reset

Logins: add people, change roles, reset passwords, disable or enable.

Roles

Each login has one role. A role decides which menu items and buttons a person sees. The administrator can use **View as** in the top bar to see the system as any other role, which is the easiest way to check what your staff will see.

Role	Typical person	Lands on
Owner / Administrator	Owner, office lead	Dashboard; sees everything
Office Manager	Runs jobs, crews and yard	Dashboard
Sales & Estimating	Sales manager, estimator	Sales / customers
Accounts & Billing	Billing clerk, accountant	Billing overview
Dispatcher	Schedules trucks and drivers	Dispatch board
Yard Manager	Stock, repairs, counts	Inventory
Engineer / Document Control	PE, document controller	Engineering register
Safety Inspector / Competent Person	Inspects scaffolds	Field app
Foreman	Leads a crew on site	Field app
Driver	Delivers and collects	Field app, My run

Role	Typical person	Lands on
Crew Member	Erector, labourer	Field app
Customer (Portal)	Your customer	Customer portal

Roles beyond Sales, Accounts and Yard are most useful on Starter and Complete, which include the field, dispatch and safety tools they work in.

Finding your way around

- **Menu (left).** Grouped by area. On a phone, tap ≡. You only see what your plan and your role include.
- **Search (top).** Finds customers, items, quotes, invoices and more by name or number.
- **EN / ES.** Switches every screen to English or Spanish for you only.
- **Bell.** In-app notifications.
- **Notes, Files and History** on records: a note thread, attached photos and PDFs, and a full audit trail of who changed what and when.
- **Export buttons** on lists and reports download CSV, Excel or PDF.

Security at a glance

- Every page, including the customer portal and pay links, sits behind a login; the site only runs over HTTPS.
- Passwords are stored as salted hashes. After 5 wrong passwords from one connection, sign-in pauses for 15 minutes. Use **Forgot your password?** on the sign-in page to get an email link.
- Your company's data is separate from every other company's, enforced by the database itself. Files are in private storage and open only through short-lived links.
- If our support team ever signs in to your account, a red banner is shown, a reason is required, and the entry appears in **Administration** → **Account activity**.

Your plan, billing and your data

Choosing and changing a plan, what happens when a trial ends, and how to take your data with you.

The three plans

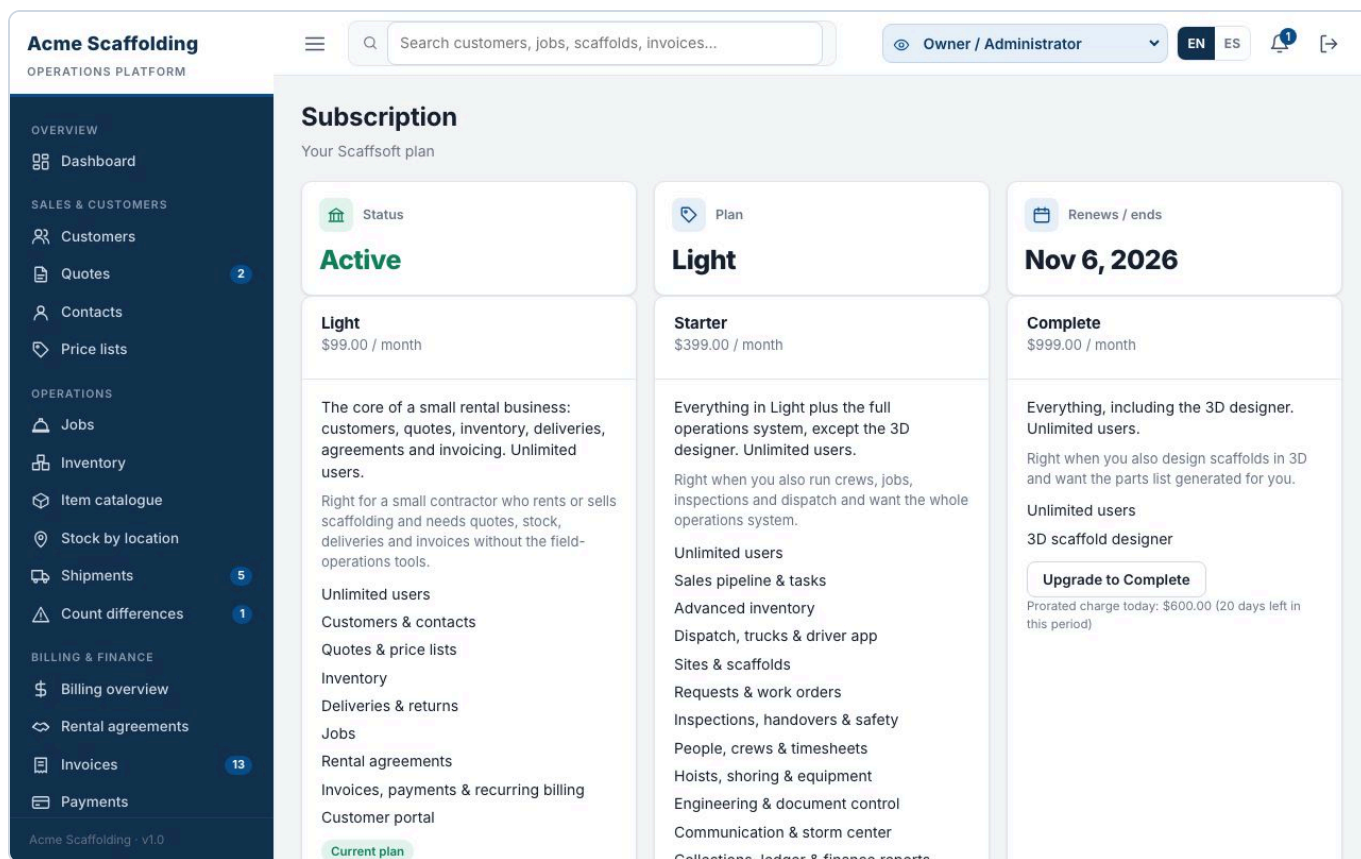
Every plan has **unlimited users** and is billed monthly in US dollars. A plan decides which modules are switched on. Prices below are the current list prices.

	Light	Starter	Complete
Monthly price	\$99	\$399	\$999
For	A small contractor: customers, quotes, inventory, deliveries, agreements, invoicing	Light plus the full operations system	Starter plus the 3D scaffold designer
Users	Unlimited	Unlimited	Unlimited

The full list of what each plan includes is in the last chapter of this handbook.

Subscription screen

Administration → **Subscription** (administrators only) shows your status, plan and renewal date, the three plans side by side, and buttons for cards, invoices and cancelling.



The subscription screen with the three plans.

- 1 **Choose a plan** (during the trial or after it): press the plan's button and pay on the secure checkout page. Your account is active the moment payment succeeds.
- 2 **Change plan** at any time with one click. The change is **prorated**: the unused part of the old plan is credited against the new one. Moving up switches more modules on; moving down hides the modules your new plan does not include.
- 3 **Cards, invoices and receipts** opens the customer portal of our payment provider (Stripe), where you update your card, download invoices and cancel.
- 4 **Cancel subscription** keeps full access to the end of the period you paid for.

Tip. Changing plans never moves or deletes data. If you move to a smaller plan, what you entered in the hidden modules is kept and is back the moment you move up again.

If a locked module appears

When a link leads to a module that your plan does not include, you see a short explanation and an **Upgrade** button instead of the screen. Administrators can press it to move up one click; other people are asked to speak to their administrator.

When the trial ends, or a payment fails

Situation	What happens
Trial ends without a plan	The account is paused : you can still sign in, see the Subscription screen and download all your data, but nothing else. Nothing is deleted . Choose a plan and everything comes back instantly.
A payment fails	We email you and retry. For 7 days your account stays fully open. If it is still failing the account is paused (not deleted) until you update the card.
You cancel	You keep access until the end of the paid period; then the account is paused.
A paused account is not reactivated	After 30 days the account, its data and files are permanently deleted. We email you 7 days before and again the day before.

Download all my data

The Subscription screen has a **Download all my data** button. It produces one ZIP with a CSV file for every kind of record and every uploaded file. It works at any time, including while the account is paused, and is never limited by your plan.

Account activity

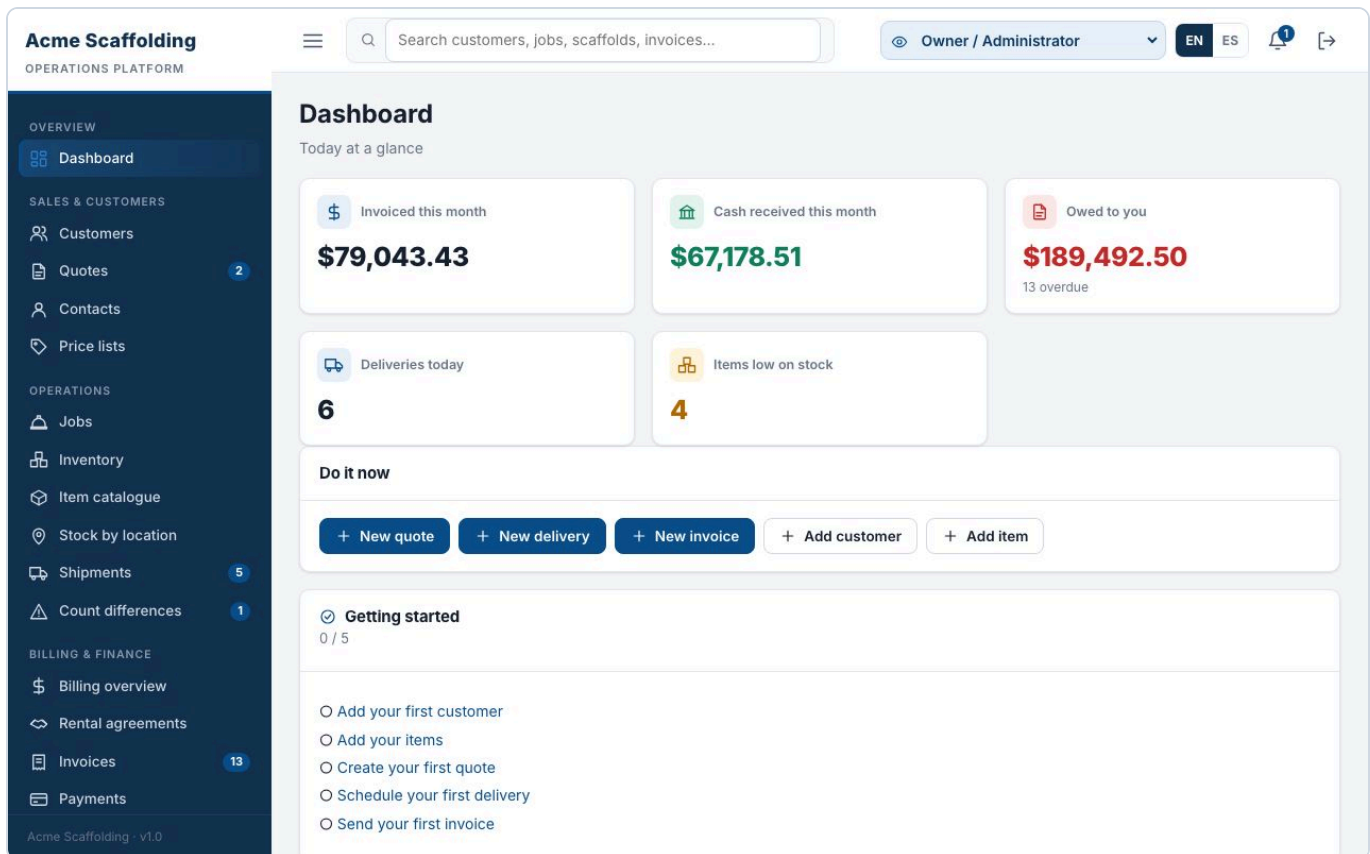
Administration → **Account activity** lists subscription changes and every time our support team signed in to your account, with the reason they gave.

CHAPTER 3

Dashboard

The first screen each morning.

The Light dashboard is deliberately short: the numbers a small contractor actually uses, five one-click actions, and your getting-started checklist.



The Light dashboard.

Tile	Meaning
Invoiced this month	Invoices issued this month, before tax
Cash received this month	Payments received this month
Owed to you	The open balance of invoices, and how many are overdue
Deliveries today	Tickets scheduled for today that are not finished
Items low on stock	Items whose available stock is below their alert level

- **Do it now** buttons: **New quote**, **New delivery**, **New invoice**, **Add customer**, **Add item**.
- The two lists show your latest quotes and invoices; click a row to open it.

- The **Getting started** card tracks the five first jobs: add a customer, add your items, create a quote, schedule a delivery, send an invoice. It disappears when all five are done.

CHAPTER 4

Customers and contacts

Every account in one place: who they are, what they owe, and how to reach them.

Sales & Customers → **Customers** lists every account with filters for type, county, status and credit hold. Press **New** to add one: name, type, address, county, payment terms, credit limit, preferred language and tax-exempt status.

The screenshot displays the 'Acme Scaffolding OPERATIONS PLATFORM' interface. On the left is a dark sidebar with navigation links: OVERVIEW (Dashboard), SALES & CUSTOMERS (Customers, Quotes, Contacts, Price lists), OPERATIONS (Jobs, Inventory, Item catalogue, Stock by location, Shipments, Count differences), and BILLING & FINANCE (Billing overview, Rental agreements, Invoices, Payments). The main area is titled 'Customers' and shows '26 customers · 1 on credit hold'. It includes a search bar, filters for Customer type, County, Status, and Credit hold, and buttons for 'Export' and 'New customer'. A table lists customer details with columns for Account #, Company Name, Customer Type, County, Status, Terms, Active Jobs, Balance, and Overdue.

ACCOUNT #	COMPANY NAME	CUSTOMER TYPE	COUNTY	STATUS	TERMS	ACTIVE JOBS	BALANCE	OVERDUE
C-1002	Atlantic Shore Construction Boca Raton · Sofia Ramirez	General Contractor	Palm Beach	Active	Net 30	1	\$19,049.37	\$8,856.39
C-1003	Biscayne Bay Contractors Miami · Kevin O'Brien	General Contractor	Miami-Dade	Active	Net 30	1	\$0.00	\$0.00
C-1009	Blue Wave Building Corp Miami Beach · Kevin O'Brien	General Contractor	Miami-Dade	Active	Net 30	2	\$2,137.60	\$0.00
C-1014	Boca Pointe Towers Condo Assn. Boca Raton · Sofia Ramirez	Condo Association	Palm Beach	Active	Net 30	1	\$6,031.75	\$0.00
C-1016	Brickell Bay Residences Assn. Miami · Sofia Ramirez	Condo Association	Miami-Dade	Active	Net 30	1	\$3,581.29	\$0.00
C-1023	Broward County Facilities Management Fort Lauderdale · Kevin O'Brien	Government	Broward	Active	Net 45	1	\$5,546.25	\$0.00

The customer list.

Customer 360

Open a customer to see its balance, past-due amount, lifetime revenue and the tabs that matter: contacts, quotes, invoices, payments, statement, tax certificates, notes, files and history. Accounts and administrators can place or release a **credit hold** here.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

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Customers /

Atlantic Shore Construction

Active General Contractor · Palm Beach County · Net 30 · Credit limit \$200,000

Edit

New quote

Statement

Hold reason

Place hold

\$ Balance

\$19,049.37

10% of credit limit

Overdue

\$8,856.39

Past due date

Lifetime revenue

\$37,435

Active jobs

1

Open quotes

3

\$51,949

Overview

Contacts 2

Jobs & sites 1

Quotes 3

Opportunities 5

Invoices 5

Payments 2

Tax-exempt certifica

ACCOUNT #

C-1002

PHONE

(561) 794-3361

CUSTOMER TYPE

General Contractor

ACCOUNTS EMAIL

ap@atlanticshorecon.com

STATUS

Active

WEBSITE

www.atlanticshorecon.com

COUNTY

Palm Beach

BILLING ADDRESS

6059 NW 80th St, Suite 699, Boca Raton, FL, 33354

Customer 360.

Contacts

Each customer has contacts with a role (project manager, accounts payable, site superintendent), a preferred channel (email, SMS or WhatsApp) and a language. Invoices go to contacts marked **Receives invoices**; operational messages go to the primary contact. A contact who also has a portal login can sign in to the customer portal.

Tax certificates

For tax-exempt customers, record the certificate and its expiry on the customer. While a valid certificate is on file, tax is not charged and the certificate number prints on the invoice.

Quotes and price lists

From a first enquiry to a signed rental agreement without retyping.

Price lists

Sales & Customers → **Price lists** holds named lists of rental rates and sale prices per item. Give a customer a price list and every quote for them starts from those rates; negotiated rates can be set per line.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

EN ES

Price lists
Customer-group and customer-specific pricing used by the quote builder

+ New price list

Price lists: 3, Customer groups: 5, Customers without a group: 1

NAME	APPLIES TO	DISCOUNT OFF CATALOGUE %	ITEM PRICES	CUSTOMERS	VALID UNTIL
Condo associations 2026	Customer group: Condo associations	3.0%	5	8	—
General contractors 2026	Customer group: General contractors	5.0%	6	9	Dec 31, 2026
Coastal Ridge Builders — contract pricing	Customer-specific: Coastal Ridge Builders	10.0%	13	1	Mar 30, 2027

How prices are chosen: a price list linked on the customer record, then a customer-specific list, then the list for the customer's group, otherwise the catalogue. Item prices on a list override its discount. Discounts below these prices count against the role discount limit.

Price lists.

Building and sending a quote

- 1 Quotes** → **New quote**. Choose the customer, site address, county (it sets the tax estimate), rate cycle and billing timing.
- 2** Add lines: rental items from the catalogue (the price fills in from the rate), **kit templates** that expand into their parts (kits are in Starter; you can still add items one by one), plus labour, transport and sale lines.
- 3** Save. The system recalculates the totals and a sales tax estimate from your tax rates.
- 4 PDF** produces a branded proposal. **Send to customer** emails it and sets the status to Sent.

- 5 Need changes? **Revise** creates version 2 and keeps version 1.
- 6 The customer accepts with an e-signature, in the office or in their portal.
- 7 **Convert to job + agreement** creates the job, the rental agreement and the negotiated rates in one click.

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Quotes /

Quote Q-8131 · Rev A

Draft · Coastal Ridge Builders · Las Olas Riverfront — facade & balcony repair

PDF proposal

Edit

Send to customer

Open job

Rental agreement

Total (estimate)

\$8,465.02

Recurring rental per period

\$1,660.14

28-day (4-week)

Valid until

Nov 15, 2026

Discount vs price list

0.0%

Coastal Ridge Builders — contract pricing

Lines

28

25 rental · 3 other

Equipment rental

DESCRIPTION	QTY	RATE PER 28-DAY (4-WEEK)	PERIODS	AMOUNT
SJ-24 · Adjustable screw jack 24" (DSN-1001)	30	\$3.15	3	\$283.50
RL-SC · Ringlock starter collar (DSN-1001)	26	\$0.90	3	\$70.20
FR-5X6 · Walk-thru frame 5' x 6'7" (DSN-1001)	4	\$5.85	3	\$70.20

Totals

Rental	\$4,980.42
Sale	\$499.50
Labour	\$1,852.50
Transport	\$700.00
Subtotal	\$8,032.42

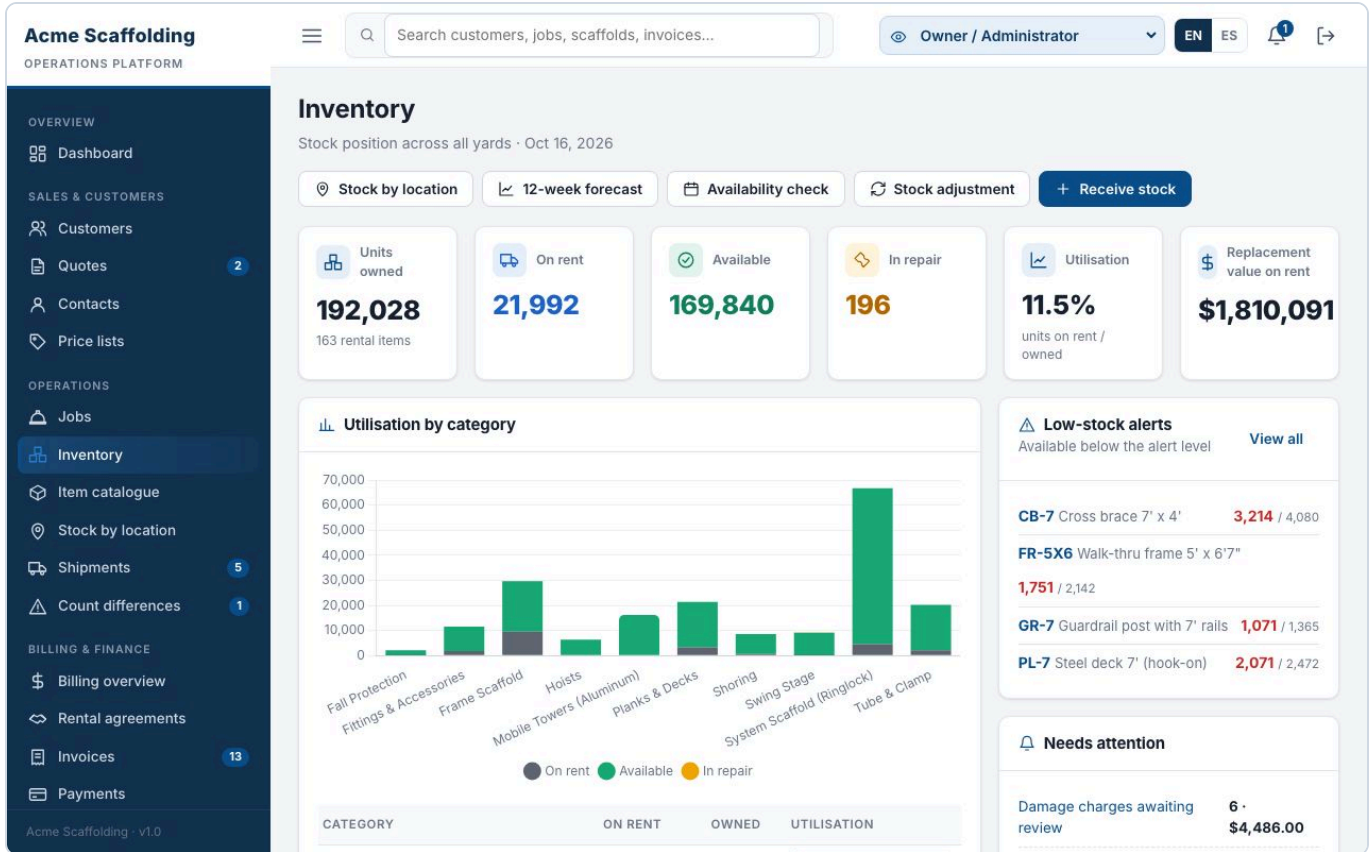
A quote with rental, labour and transport lines and its tax estimate.

Tip. The quote list can be exported to CSV, Excel or PDF with the buttons at the top right.

CHAPTER 6

Inventory

Know what you own, where it is and what is free to rent.



Inventory overview: units owned, on rent, available, utilisation and low-stock alerts.

How stock moves

Stock is tracked per item and per yard in buckets: **available**, **on rent**, **in repair** and **lost**. You rarely adjust it by hand: completing a delivery ticket moves items from available to on rent, and checking in a return moves good items back to available, damaged ones to repair and missing ones to lost.

Item catalogue

Inventory → **Item catalogue** holds every item: code, name, category, rates (daily, weekly, 28-day, monthly), sale price, replacement cost, weight, dimensions, load rating and an alert level. Add items one by one or import them from CSV.

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Inventory /

Item catalogue

169 items

Export

Bin labels

New item

Search code or description...

All categories

All yards

Low stock only

Serialized only

Filter

ITEM CODE	DESCRIPTION	CATEGORY	WEIGHT (LBS)	28-DAY RATE	AVAILABLE	ON RENT	IN REPAIR	UTILISATION
CN-SILL	Mud sill 2×10 × 8' (sold)	Consumables	22.0	Sale \$18.50	566	0	0	—
CN-TAG	Scaffold status tags (pack of 25)	Consumables	1.0	Sale \$32.00	280	0	0	—
CN-WIRE	Tie wire 9 ga coil	Consumables	50.0	Sale \$54.00	160	0	0	—
CN-WRAP	Scaffold shrink wrap 20' x 100' roll	Consumables	70.0	Sale \$245.00	345	0	0	—
CN-ZIP	Heavy-duty zip ties 24" (box of 100)	Consumables	3.0	Sale \$28.00	520	0	0	—
FP-ANC	Roof anchor sling (lifeline anchorage, 5,000 lb)	Fall Protection	3.0	\$9.00	900	0	0	0.0%
FP-HAR	Full-body harness (ANSI Z359) Serialized	Fall Protection	4.0	\$18.00	50	26	4	32.5%
FP-RO	Rope grab with 3'	Fall	2.0	\$12.00	54	26	0	

The item catalogue.

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Inventory / Item catalogue /

CN-SILL · Mud sill 2x10 x 8' (sold)

Availability

Forecast

Adjust stock

Edit

Available

566

Alert level 96

On rent

0

0 jobs

In repair

0

Lost

0

Utilisation

0.0%

566 owned

Rates & specifications

DAILY RATE

—

WEEKLY RATE

—

28-DAY RATE

—

MONTHLY RATE

—

SALE PRICE

\$18.50

REPLACEMENT COST

\$18.50

STANDARD DAMAGE CHARGE

—

WEIGHT (LBS)

22.0

Photo

No photo yet

Choose File

No file chosen

Upload photo

Balances by location type

Stock by location

Yard (2)

566

Job site

0

Truck (in transit)

0

Re-rent vendor (hired in)

0

Servicing / repair

0

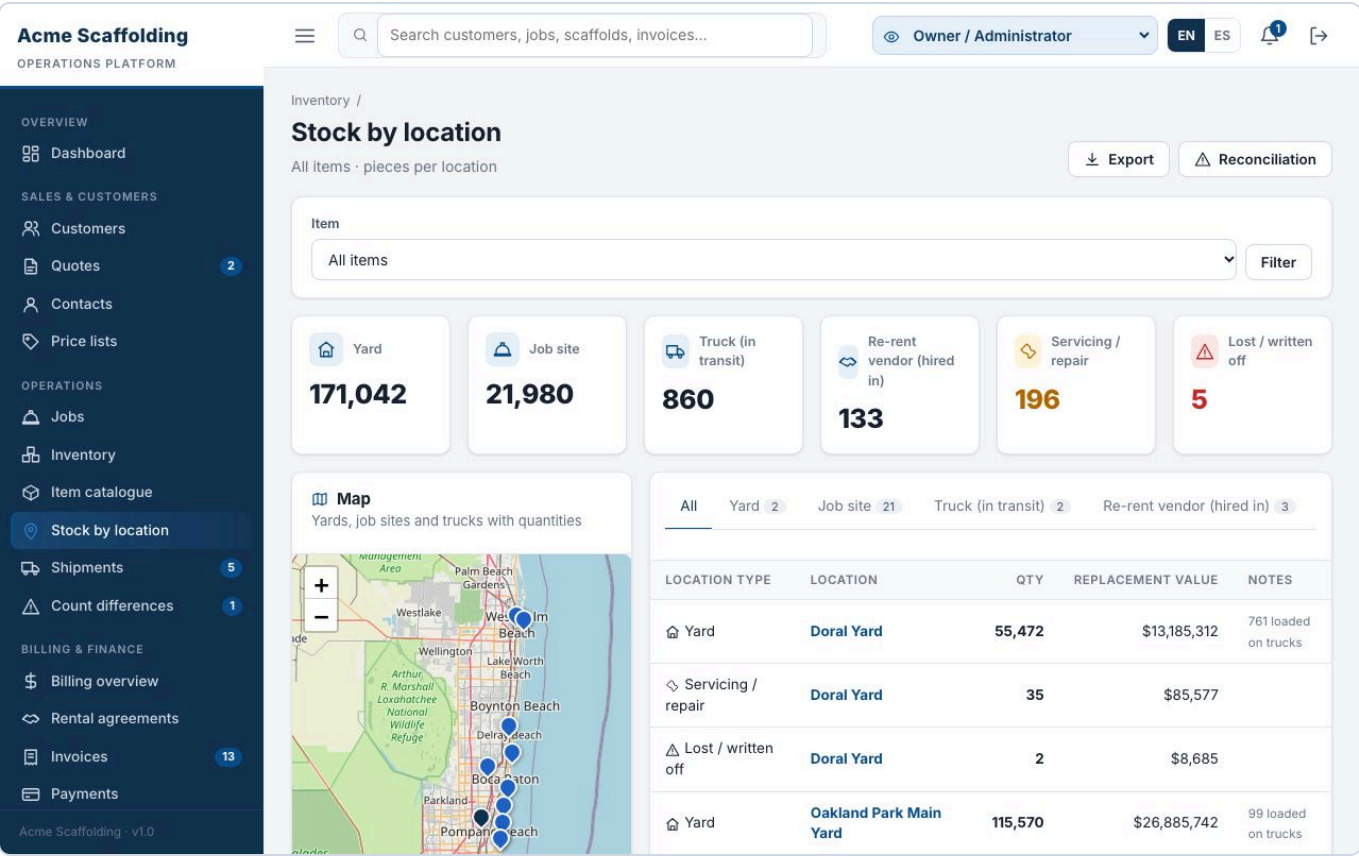
Lost / written off

0

An item page: rates, stock per yard, where it is on rent and its movement history.

Yards and stock by location

Create your yards in **Administration** → **Lists** (or from the record screens). **Stock by location** shows quantities per yard and bin.



Stock by location.

Adjusting stock

Use **Adjust stock** to receive new purchases, write off scrap or move quantities between buckets. A reason is always required and is kept in the item's history.

Serialized assets with QR tags, kits, stock counts, the 12-week forecast, servicing, damage review and re-rents are part of Starter.

CHAPTER 7

Jobs

The job is the site a delivery or a rental belongs to.

Operations → **Jobs** lists every job with its customer, county, status and dates. Create a job by hand or by converting an accepted quote. The job's county sets its tax rate and its address is used for deliveries.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

EN ES

Jobs
Every site, its scaffolds and their safety status

List Map + New job

Active jobs: 20 (4 scheduled)

Standing scaffolds: 93

Red tags: 9

Overdue inspections: 14

Search jobs, sites, customers... Status: All Customer: All County: All Filter

JOB #	JOB NAME	CUSTOMER	COUNTY	STATUS	SCAFFOLDS	START DATE	PROJECT MANAGER
J-2520	Broward County Courthouse annex — envelope repairs 115 S Andrews Ave, Fort Lauderdale	Broward County Facilities Management	Broward	Active	5 2 overdue	Aug 29, 2026	Kevin O'Brien
J-2517	Port Everglades Terminal 2 — steel repairs 1850 Eller Dr (Port Everglades), Dania Beach	Port Everglades Industrial Services	Broward	Active	4	Sep 12, 2026	Maria Delgado
J-2516	Doral Logistics Center — tilt-wall bracing 8300 NW 53rd St, Doral	Sunline Builders Group	Miami-Dade	Active	5 2 red	Sep 6, 2026	Kevin O'Brien
J-2515	Deerfield Beach Condo — spill repair 200 NE 21st Ave, Deerfield Beach	Tri-County Concrete Restoration	Broward	Active	5 1 red	Aug 22, 2026	Maria Delgado

Harbour Isle — 30-year Harbour Isle at

The job list.

A job page brings together everything about one site: overview, the agreement, tickets (deliveries and returns), invoices, documents, notes and history. Quick actions: **New delivery**, **New return**.

Acme Scaffolding

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Search customers, jobs, scaffolds, invoices...

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Jobs /

J-2520 · Broward County Courthouse annex — envelope repairs

Quick actions

ActiveStorm: Normal

Broward County Facilities Management

115 S Andrews Ave, Fort Lauderdale FL 33314 · Broward County

Customer > Job > 5 areas > 5 scaffolds

502

ScaffoldsRed tagsOverdue

OverviewScaffolds5On-rent equipment11Tickets4Work orders2FinancialsInspections15Handovers5

Overview

JOB TYPE

Rental + installation

START DATE

Aug 29, 2026

ESTIMATED END

Jan 1, 2027

ACME SCAFFOLDING PROJECT MANAGER

Kevin O'Brien

FOREMAN

Mike Sullivan

SERVICING YARD

Oakland Park Main Yard

CUSTOMER SITE CONTACT

Isabel Johnson
(954) 886-3109 ·
ijohnson@browardcountyfac.com

CUSTOMER PO #

—

BUILDING PERMIT #

BLD-24-18763

ESTIMATED CONTRACT VALUE

\$124,000.00

At a glance

Areas5

Standing scaffolds5

Requested / scheduled0

Awaiting new handover0

Red tags0

Overdue inspections2

Open defects2

Pieces on rent1,061

Fort Lauderdale

SR 842

LeafletOpenStreetMap contributors

A job page.

ARKONONE · Light plan · User Handbook

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Deliveries and returns

Every load is a ticket. Tickets move stock, drive the rental clock and give proof of delivery.

Ticket type	What it does
Delivery	Equipment goes to a job. Rent starts on the completion date.
Return	Equipment comes back. Rent stops on the completion date (that day is not charged). You check in good, damaged and lost quantities.
Transfer	A job-to-job move without returning to the yard: rent stops on one agreement and starts on the other the same day.
Yard transfer	Moves stock between two of your yards.

Creating a delivery

- 1 **Shipments** → **New**, or **New delivery** on a job. The customer, rental agreement and yard fill in from the job.
- 2 Pick the date and time window and add item lines, or insert a kit. For a return, the lines prefill with everything currently on rent.
- 3 Save. If the customer is on **credit hold** the ticket is blocked with a red message; administrators, office managers and accounts can override it with a written reason, which is recorded.
- 4 Print the **picking list** and the **load list**; assign serial numbers where needed.
- 5 When the load is delivered, complete the ticket: the receiver signs on the screen, add a photo and notes.

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Shipments

Delivery, return and transfer tickets

Export

Load lists

Count differences

New reservation

Off-rent call

New return

New delivery

Today50 completed

Upcoming8

Overdue0

No truck assigned4

Pickup requests23 open reservations

All18

Delivery10

Return3

Transfer0

Yard Transfer0

Sale0

Reservation3

Pre-return2

Ticket #, job or customer...

All open

Any status

All yards

All trucks

Filter

TICKET #	TYPE	STATUS	SCHEDULED	JOB / CUSTOMER	TRUCK	DRIVER	WEIGHT (LBS)
DEL-30049	Delivery	Scheduled	Oct 16, 2026 7-9 AM	J-2501 Ocean Club Towers — 40-year recertification & concrete restoration Ocean Club Towers Condominium Assn.	T-101 #1	Jamal Washington	1,530
DEL-30050	Delivery	In Transit	Oct 16, 2026 9-11 AM	J-2502 Las Olas Riverfront — facade & balcony repair Coastal Ridge Builders	T-102 #1	Carlos Mejia	1,863

The ticket list.

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Shipments /

Delivery ticket DEL-30049

Delivery

Scheduled

Fri, Oct 16, 2026 · 7-9 AM

PDF ticket

Track

Send "delivery scheduled"

Edit

Cancel ticket

Scheduled

Picking

Loaded

In Transit

Completed

→ Mark as Picking

Picking list

3 lines · 79 pieces · 1,530 lbs

	ITEM	QTY	UNIT WT	LINE WT	SERIAL NUMBERS
☐	FR-5X6 Walk-thru frame 5' x 6'7"	24	42.0	1,008	—
☐	CB-7 Cross brace 7' x 4'	48	10.0	480	—
☐	BP-6 Base plate 6" x 6"	7	6.0	42	—

✓ Save picking

Receiving count & completion

ITEM	SHIPPED	RECEIVED
------	---------	----------

Ticket details

CUSTOMER

Ocean Club Towers Condominium Assn.

JOB

J-2501 · Ocean Club Towers — 40-year recertification & concrete restoration

SITE ADDRESS

3800 Galt Ocean Dr, Fort Lauderdale · Directions

RENTAL AGREEMENT

RA-5001

YARD

Oakland Park Main Yard

SCHEDULED DATE

Oct 16, 2026

TIME WINDOW

7-9 AM

A delivery ticket with lines, weights and proof of delivery.

Note. Scheduled and in-transit tickets never bill. Rent starts only when a ticket is **completed**.

A signed ticket is available as a PDF to the office and, in the customer portal, to the customer.

CHAPTER 9

Rental agreements

The contract that tells the billing engine what to charge and when.

Each rental job has an agreement. Create it by converting a quote or from the job.

Setting	Options
Rate basis / billing cycle	Daily (billed weekly), Weekly (7 days), 28-day (4 weeks, the industry norm), Monthly (calendar month from the start day)
Billing timing	In advance (each cycle billed on its first day), in arrears (billed after the cycle ends), or first cycle in advance then arrears
Minimum hire	Days charged even if equipment comes back sooner (default 28)
Rates	Catalogue or price-list rates unless a negotiated rate is set; rate changes take effect from a chosen date
Other	Rental discount %, delivery / return charge per load, labour rate per hour, payment terms, PO number, e-signature

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Rental agreements /

RA-5029 · Blue Wave Building Corp

J-2529 — Bal Harbour Shops — facade lighting install · Bal Harbour, Miami-Dade County

PDF agreement

Edit terms

Close agreement

Status

Active

28-day (4-week) · In arrears

Items on rent

0

0 item types

Rental per cycle

\$0.00

28-day (4-week)

Billed through

Invoiced to date

\$0

0 invoices

Billing schedule

On rent now 0

Rates

Invoices 0

Tickets 2

Versions 1

Terms

Notes & activity

Files

Hist

Nothing due on tonight's billing run for this agreement.

PERIOD	STATUS	INVOICE TIMING	BILLED
Nov 22, 2026 – Dec 19, 2026	Upcoming	Billed on Dec 20, 2026 (in arrears)	\$0.00
Oct 25, 2026 – Nov 21, 2026	Upcoming	Billed on Nov 22, 2026 (in arrears)	\$0.00

An agreement: billing schedule, equipment on rent, rates and history, invoices, tickets and signed terms.

Any change to rates or billing terms creates a new **version**. The customer signs online in their portal; new rates bill from their effective date whether or not the signature has arrived.

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Rental agreements

Export

New agreement

All

Active

Off Hire

Draft

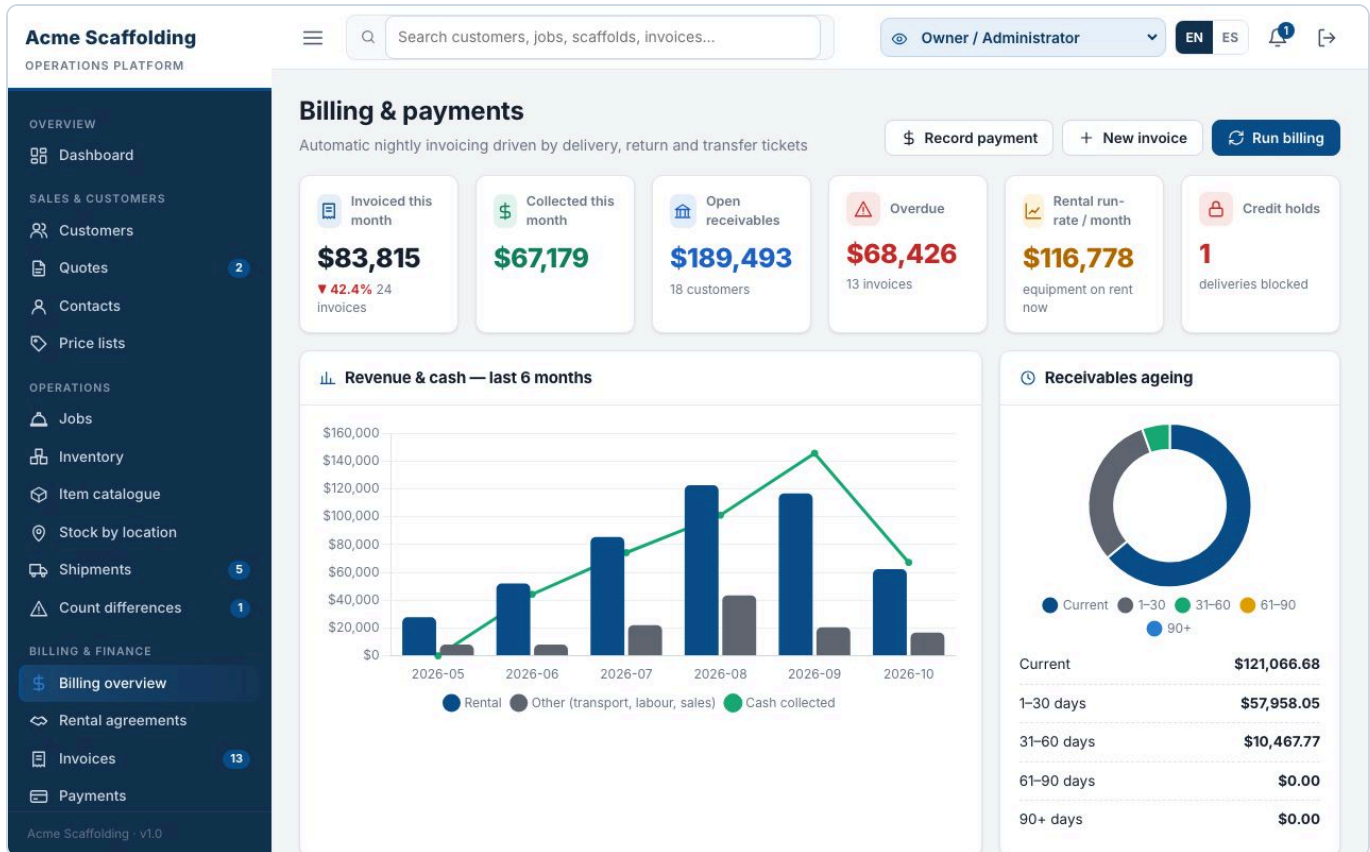
Closed

AGREEMENT #	CUSTOMER	JOB	STATUS	CYCLE	TIMING	START DATE	BILLED THROUGH	ON-RENT PER CYCL
RA-5029	Blue Wave Building Corp	J-2529 Bai Harbour Shops — facade lighting install	Active	28-day (4-week)	In arrears	Oct 25, 2026	—	\$0.0
RA-5028	Royal Palm Property Services	J-2528 Jupiter Harbour club — painting	Active	28-day (4-week)	First period in advance, then arrears	Oct 22, 2026	—	\$0.0
RA-5027	Key Biscayne Village Condo Assn.	J-2527 Key Biscayne Village Condo — exterior restoration	Active	28-day (4-week)	In arrears	Oct 18, 2026	—	\$0.0
RA-5017	Port Everglades Industrial Services	J-2517 Port Everglades Terminal 2 — steel repairs	Active	28-day (4-week)	In arrears	Sep 12, 2026	Oct 9, 2026	\$2,023.5
RA-5016	Sunline Builders Group	J-2516 Doral Logistics Center — tilt-wall bracing	Active	28-day (4-week)	In arrears	Sep 6, 2026	Oct 3, 2026	\$1,972.8

The agreement list.

Invoices, payments and recurring billing

Rental invoices are produced automatically every night from what was actually delivered and returned. Nobody keys in rental charges.



Billing overview.

How the nightly billing works

Every night the system looks at every agreement and works out, item by item and day by day, what was on rent. It compares that with what has already been billed and invoices only the difference. It is safe to run any number of times and never double-bills.

Rule	How it is applied
Rent start / stop	Starts on the delivery ticket's completion date; stops on the return date. The delivery day is charged, the return day is not.
Daily rate	Cycle rate ÷ cycle length (28 days, 7 days, or the actual days in that month).
Partial returns	Prorated by the day: the returned quantity stops costing from its return date.

Rule	How it is applied
Extra deliveries mid-cycle	Charged from their delivery date to the end of the cycle.
Rate change mid-cycle	Old rate before the effective date, new rate after.
In-advance agreements	Full cycle on day 1; the next invoice carries a credit (returns) or debit (additions) adjustment.
Minimum hire	If a delivered batch comes back early, the missing days are added as a "minimum hire top-up" line.
Everything returned	The final partial cycle is billed the next night and the agreement moves to Off hire.

Worked example (28-day cycle, arrears): 100 frames at \$6.50 per 28 days = \$0.232 per frame-day. 40 frames are returned on day 15. Invoice after day 28: $100 \times 14 \text{ days} + 60 \times 14 \text{ days} = 2,240 \text{ frame-days} \times \$0.232 = \$520.00$ instead of \$650 for the full quantity.

Added automatically to the next invoice

- **Transport:** each completed delivery, return or transfer ticket at the agreement's per-load charge.
- **Labour:** completed billable work orders (hours × rate).
- **Consumables:** sale items on tickets and materials used on work orders.
- **Lost and damaged:** charges once approved.

Sales tax

Tax is the base rate plus the local rate for the job site's county, from **Administration** → **Tax rates** (rates can have effective dates). The demonstration data loads Florida rates; **enter and confirm the rates and which line types are taxable with your accountant before relying on them**. A valid tax-exempt certificate on the customer removes tax and prints its number on the invoice.

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County tax rates

ExportNew county tax rate

Search...Filter

COUNTY	STATE RATE	DISCRETIONARY SURTAX	EFFECTIVE FROM	NOTES
Hillsborough	0.06	0.02	Jan 1, 2025	—
Orange	0.06	0.01	Jan 1, 2025	—
Lee	0.06	0.01	Jan 1, 2025	—
Collier	0.06	0	Jan 1, 2025	—
Hendry	0.06	0.01	Jan 1, 2025	—
St. Lucie	0.06	0.01	Jan 1, 2025	—
Martin	0.06	0.01	Jan 1, 2025	—
Monroe	0.06	0.02	Jan 1, 2025	—
Palm Beach	0.06	0.01	Jan 1, 2025	Infrastructure surtax
Miami-Dade	0.06	0.01	Jan 1, 2025	Transit 0.5% + school/infrastructure 0.5%
Broward	0.06	0.01	Jan 1, 2025	Transportation surtax

11 records

Tax rates.

Invoices

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→

Invoices

Export

New invoice

All

Open

Overdue

Paid

Draft

Void

Invoice # or customer

Type: All

mm/dd/yyyy

mm/dd/yyyy

Filter

The invoice list.

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Invoices /

Invoice INV-24130

Tri-County Concrete Restoration · J-2515 — Deerfield Beach Condo — spill repair

PDF

Resend

Record payment

Void

Invoice

Open

INVOICE DATE	TYPE	AGREEMENT
Oct 16, 2026	Late Fee	—
DUE DATE	SOURCE	RENTAL PERIOD
Nov 15, 2026	Late fee engine	—
TERMS	PO #	TAX COUNTY
Net 30	PO-91027	Broward

DESCRIPTION	QTY	ITEM-DAYS	RATE	AMOUNT
Late payment charge on INV-24075 (1.5% of \$1471.67 past due) Late fee · non-taxable	1		\$25.00	\$25.00
Late fee for INV-24075				
	Subtotal			\$25.00
	Florida sales tax (6%) on \$0.00			\$0.00
	Broward County surtax			\$0.00
	Total			\$25.00
	Balance due			\$25.00

Collect payment

Balance due \$25.00

No saved payment method on file.

Pay-now link (send to customer)

/pay/a6a21345450f0424df1d7f0fa0552

Open pay page

Manage cards

Customer

ACCOUNT

C-1008 · Tri-County Concrete Restoration

TOTAL BALANCE

\$26,431.29

CREDIT LIMIT

\$140,000.00

An invoice: item-day lines, tax shown separately, payments, the pay-now link and actions.

Open an invoice to send it, record a payment, issue a **credit note**, **void** it or download the PDF. A negative invoice becomes a credit that is applied automatically to open invoices. Invoices go out automatically; turn on **Invoice review** in **Administration** → **Billing settings** if you want to approve them first.

Billing runs

Billing runs previews what tonight's run will invoice (or any past date) and can run it on demand. The history lists every run with its invoice count and total.

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Automatic billing runs

Every night at 1:00 AM ET the system invoices all agreements from ticket activity, adds transport, labour, consumables and approved lost/damaged charges, then runs autopay, late fees, dunning and credit holds.

Preview for Oct 16, 2026

10/16/2026

Preview

AGREEMENT	CUSTOMER	LINES	PRE-TAX
RA-5020	Broward County Facilities Management	RL-S2 Ringlock standard 2.0 m (6'7") — rental Aug 29, 2026 – Sep 25, 2026 — \$1.93	\$1.93

Total pre-tax: \$1.93

Run billing for Oct 16, 2026 now

Last nightly cycle

No nightly cycle recorded

Run history

RUN DATE	STARTED	TRIGGER	INVOICES	TOTAL BILLED	ERRORS
Oct 16, 2026	Oct 16, 2026, 9:36 AM	seed	1	\$6,209.04	0
Oct 15, 2026	Oct 16, 2026, 9:36 AM	seed	0	\$0.00	0
Oct 14, 2026	Oct 16, 2026, 9:36 AM	seed	0	\$0.00	0
Oct 13, 2026	Oct 16, 2026, 9:36 AM	seed	0	\$0.00	0
Oct 12, 2026	Oct 16, 2026, 9:36 AM	seed	3	\$20,238.83	0

Billing runs.

Getting paid

Method	How
Card or bank (ACH) on file	Charge from the invoice (Charge now), or turn on Autopay so the default method is charged on the due date. Failed autopay is retried after 3, 5 and 7 days, then Accounts is alerted.
Pay-now link	Every invoice has a secure link the customer can open to pay by card or bank account.
Customer portal	Customers pay one invoice or their whole balance.
Check, wire, cash	Record the payment and allocate it across invoices.

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Payments

Card & ACH via Built-in mock processor (demo) · checks, wires and cash recorded by the office

Export

Record payment

All

Succeeded

Failed

Pending

Refunded

07/18/2026

10/16/2026

Filter

PAYMENT #	DATE	CUSTOMER	METHOD	SOURCE	STATUS	REFERENCE	AMOUNT
PAY-70086	Oct 15, 2026	Sea Ranch Lakes Condominium Assn.	Check	Office	Succeeded	Chk #13552	\$1,560.00
PAY-70085	Oct 14, 2026	Biscayne Bay Contractors	ACH	Office	Succeeded	Ref 13367	\$14,048.63
PAY-70084	Oct 13, 2026	Lighthouse Point Development LLC	ACH	Office	Succeeded	Ref 13589	\$8,962.96
PAY-70083	Oct 13, 2026	Brickell Bay Residences Assn.	ACH	Office	Succeeded	Ref 12368	\$6,705.05
PAY-70082	Oct 12, 2026	Tri-County Concrete Restoration	Check	Office	Succeeded	Chk #13071	\$1,471.67
PAY-70081	Oct 12, 2026	Tropic Isle Management Group	Check	Office	Succeeded	Chk #12479	\$1,076.12
PAY-70080	Oct 12, 2026	Meridian Structural Group	Card	Retry	Failed	ch_mock_861f531ab8abfd5d	\$14,340.92
PAY-70079	Oct 10, 2026	Ocean Club Towers Condominium Assn.	ACH	Office	Succeeded	Ref 13182	\$6,412.89

Payments.

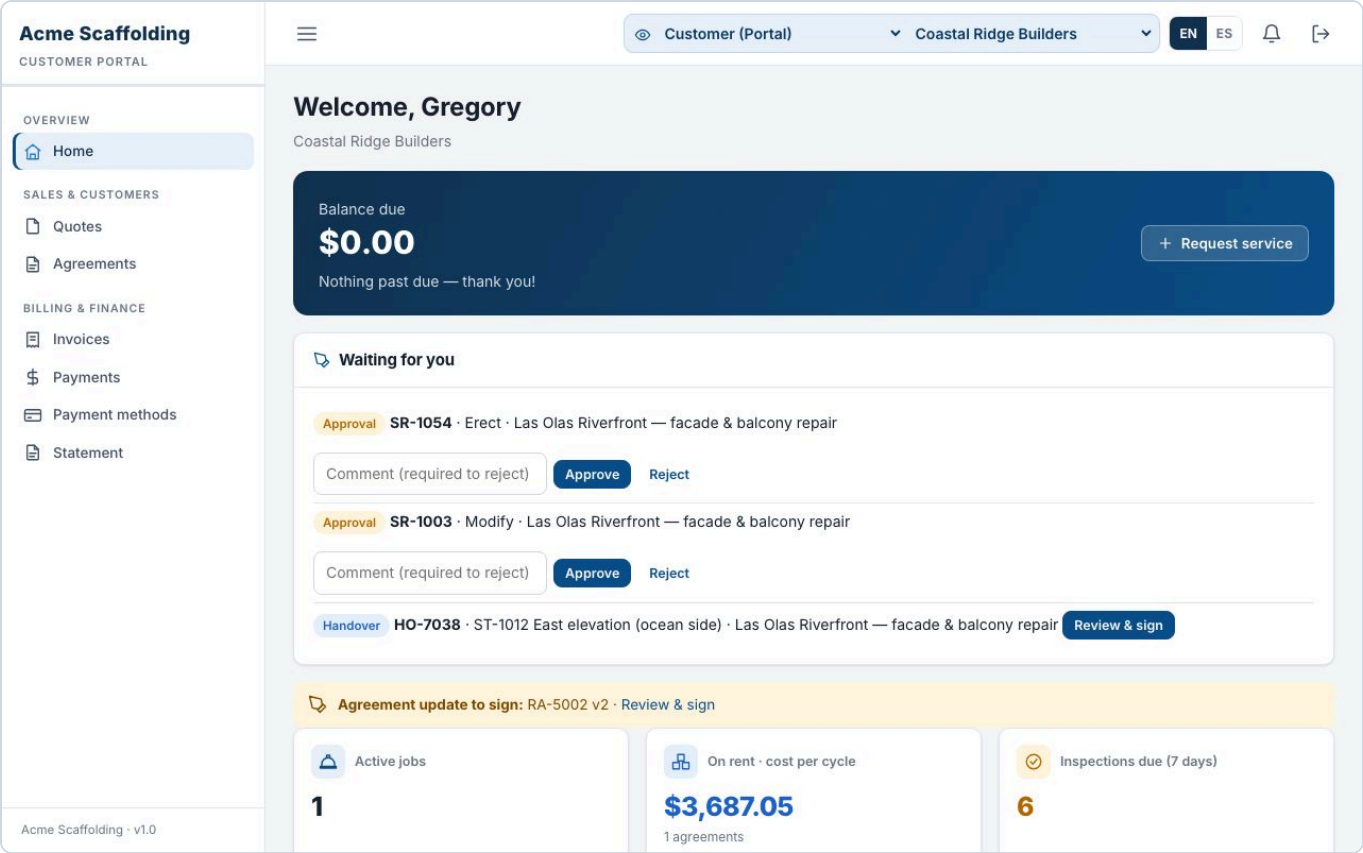
Note. Until you connect your own payment account, customer payments use the built-in test processor: only published test card numbers work (4242 4242 4242 4242 succeeds; 4000 0000 0000 0002 is declined) and nothing is charged.

Reminders and late fees

Reminders go out 3 days before an invoice is due, then 1, 10 and 20 days after. After a grace period a late fee (default 1.5% a month, minimum \$25) is raised as a separate invoice, and a customer more than 30 days overdue, or over their credit limit, is placed on **credit hold**: new deliveries are blocked until it is paid (an automatic hold lifts by itself). All timings are adjustable in **Administration** → **Billing settings**.

The customer portal

Your customers see their account and act on it without calling the office.



The portal home page.

Customers can...	Where
View and download invoices; pay one or all by card or bank account	Invoices · Pay balance
Save cards and bank accounts; switch on autopay	Payment methods
See their statement and payment history	Statement · Payments
Review and e-sign quotes	Quotes
Review and sign agreement updates	Agreements
Follow a delivery that is on its way	Track link in the delivery message

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Customer (Portal)

Coastal Ridge Builders

ENES

Invoices

AllOpenPast duePaid

INVOICE	DATE	DUE	JOB	STATUS	TOTAL	BALANCE	
INV-24095	Sep 21, 2026	Oct 21, 2026	Las Olas Riverfront — facade & balcony repair	Paid	\$4,691.07	\$0.00	✓
INV-24084	Sep 12, 2026	Oct 12, 2026	Plantation office park — re-roof access	Paid	\$395.31	\$0.00	✓
INV-24081	Sep 11, 2026	Oct 11, 2026	Plantation office park — re-roof access	Paid	\$2,729.74	\$0.00	✓
INV-24062	Aug 24, 2026	Sep 23, 2026	Las Olas Riverfront — facade & balcony repair	Paid	\$8,131.92	\$0.00	✓
INV-24051	Aug 14, 2026	Sep 13, 2026	Plantation office park — re-roof access	Paid	\$8,091.92	\$0.00	✓
INV-24037	Jul 27, 2026	Aug 26, 2026	Las Olas Riverfront — facade & balcony repair	Paid	\$4,556.92	\$0.00	✓
INV-24028	Jul 17, 2026	Aug 16, 2026	Plantation office park — re-roof access	Paid	\$5,420.47	\$0.00	✓
INV-24019	Jun 29, 2026	Jul 29, 2026	Las Olas Riverfront — facade & balcony repair	Paid	\$5,661.92	\$0.00	✓
INV-24013	Jun 19, 2026	Jul 19, 2026	Plantation office park — re-roof access	Paid	\$5,420.47	\$0.00	✓
INV-24008	Jun 1, 2026	Jul 1, 2026	Las Olas Riverfront — facade & balcony repair	Paid	\$4,812.93	\$0.00	✓
INV-24003	May 22, 2026	Jun 21, 2026	Plantation office park — re-roof access	Paid	\$5,286.25	\$0.00	✓
Total					\$55,198.92	\$0.00	

Portal invoices.

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Coastal Ridge Builders

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Payment methods

Save a card or bank account and turn on autopay so invoices are paid automatically on the due date.

Saved payment methods

Mastercard •••• 0005 exp 11/2026DefaultRemove

ACH • Test Bank •••• 6789Make defaultRemove

☐ Autopay: charge the default method automatically on each due date

+ Add a payment method

CardBank account (ACH)

Name on card

Card number

4242 4242 4242 4242

Exp. monthExp. year

122030

Save card

► Test numbers (demo — nothing real is charged)

Saved payment methods and autopay.

Every customer contact can have a portal role: **Customer admin** (can pay, sign and submit requests) or **Viewer** (read only). A portal login is locked to one customer and cannot reach anything else. Staff can preview the portal with **View as** → **Customer (Portal)**.

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Administration

Settings, logins, imports and the audit trail.

Screen	Use it to...
Settings	Company details shown on documents, logo, colours, default terms, default labour rate, units, working days and holidays
Billing settings	Dunning schedule, late fees, credit-hold rules, invoice review queue, add-on timing, taxable line types
Tax rates	Local rates with effective dates
Logins	Add people, roles, reset passwords, disable, customer-portal logins
Templates & numbering	Next numbers for invoices, tickets, jobs and other documents
Data import	CSV import of customers, contacts, items, employees, jobs and opening stock
Audit log	Search every change by record, person, role, action and date, with before and after values
Lists	Pick-lists such as yards and categories
Account activity	Subscription changes and support sign-ins
Subscription	Plan, billing and data download

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Company settings

Company profile, defaults, calendar, units, PDF branding and sales rules

Sample PDF

Company profile

Company name

Legal name

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Address

Phone

Email

alex@acme-scaffold.test

Website

Contractor license

FL CGC #1529877

FEIN

65-1234567

Defaults

Default payment terms

Default labour rate (\$/h)

Net 30

65

Time zone

Quote validity (days)

America/New_York

30

Default credit limit

Storm hotline

50000

(555) 010-0142

Units

Imperial (ft, lbs)

Imperial is the default for US jobs.

Default quote terms

Company settings.

Acme Scaffolding

OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

EN

ES

OVERVIEW

Dashboard

SALES & CUSTOMERS

Customers

Quotes

2

Contacts

Price lists

OPERATIONS

Jobs

Inventory

Item catalogue

Stock by location

Shipments

5

Count differences

1

BILLING & FINANCE

Billing overview

Rental agreements

Invoices

13

Payments

Audit log

Every create, update and archive across the platform, with field-level changes

Export CSV

Matching entries

0

Changes in the last 7 days

0

Users / processes

0

Search changes...

Record type: All

Actor: All

Role: All

Action: All

mm/dd/yyyy

mm/dd/yyyy

Filter

No audit entries match these filters

0 records

The audit log.

Acme Scaffolding

OPERATIONS PLATFORM

OVERVIEW

Dashboard

SALES & CUSTOMERS

Customers

Quotes2

Contacts

Price lists

OPERATIONS

Jobs

Inventory

Item catalogue

Stock by location

Shipments5

Count differences1

BILLING & FINANCE

Billing overview

Rental agreements

Invoices13

Payments

Acme Scaffolding · v1.0

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

ENES

1

Templates & numbering

Document templates and number sequences

Inspection templates9

Checklists for scaffold, hoist and swing-stage inspections

Message templates30

Bilingual email / SMS / WhatsApp templates

Kit templates6

Standard bays, towers and packages used in quotes and picking

Notification rules

Which events send which messages

Handover & safety documents

Scaffold handover certificates, toolbox talks and safety forms

Engineering documents

Drawings, calculations and document control

Numbering sequences

The next document created uses the next number shown. Numbers can only move forward to avoid duplicates.

PREFIX	DOCUMENT	LAST ISSUED	NEXT NUMBER	SET NEXT NUMBER
CR	Credit notes	CR-5007	CR-5008	5008 Save
DEF	DEF	DEF-3045	DEF-3046	3046 Save
DEL	Delivery tickets	DEL-30056	DEL-30057	30057 Save
DSN	DSN	DSN-1002	DSN-1003	1003 Save
HO	HO	HO-7038	HO-7039	7039 Save

Templates and numbering.

Document branding

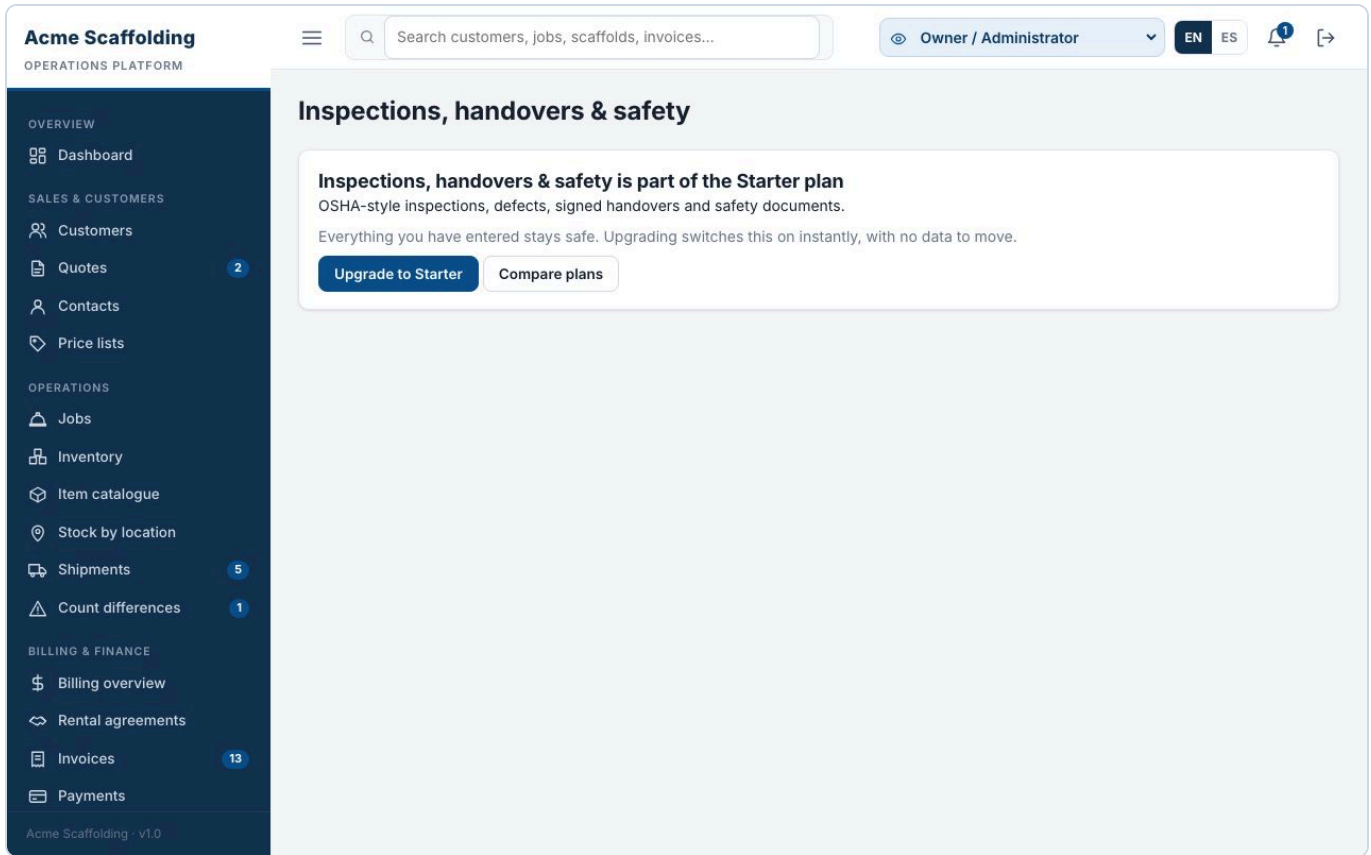
Upload your logo, choose the header and accent colours and the footer line in **Settings** → **PDF branding**. They apply to every quote, invoice, ticket and certificate. Press **Sample PDF** to preview.

Beyond your plan

Modules that belong to a bigger plan, and how moving up works.

Your plan does not include the modules below. They do not appear in your menu; if you open a link to one you see a short explanation and an **Upgrade** button. **Moving up is one click, is prorated, and does not move any data.** Moving down later hides these modules again and keeps whatever you entered.

Module	What it does	Starts in
Sales pipeline & tasks	Pipeline board, sales overview, follow-up tasks, site visits, approvals, website leads and insurance certificates.	Starter
Advanced inventory	Serialized assets with QR tags, kits, stock counts, forecast, servicing, damage review and re-rents.	Starter
Dispatch, trucks & driver app	Dispatch board, route map, trucks, mileage and the driver app.	Starter
Sites & scaffolds	Scaffold records on a live map with QR tags, areas and site plans.	Starter
Requests & work orders	Service requests, work orders and crew assignments.	Starter
Inspections, handovers & safety	OSHA-style inspections, defects, signed handovers and safety documents.	Starter
People, crews & timesheets	Employees, crews, certifications, training, timesheets and time off.	Starter
Hoists, shoring & equipment	Hoist and swing-stage installs, inspections, shoring layouts and wind watch.	Starter
Engineering & document control	Document register, review queue, transmittals, permits and drawing checks.	Starter
Communication & storm center	Message templates, outbox, broadcasts, notification rules, storm center and job-site weather.	Starter
Collections, ledger & finance reports	Collections and credit holds, deposits, general ledger, sales tax report and finance reports.	Starter
Advanced customer portal	Customers also see jobs and scaffolds, raise requests, sign handovers and message you.	Starter
Reports & scheduled reports	Report hub with filters, exports and scheduled email reports.	Starter
3D scaffold designer	Draw a scaffold from measurements and get the exact parts list, drawings and labour estimate.	Complete



A module outside your plan: a short explanation and an Upgrade button.

All three plans side by side

Module	Light \$99	Starter \$399	Complete \$999
Customers & contacts	✓	✓	✓
Quotes & price lists	✓	✓	✓
Inventory	✓	✓	✓
Deliveries & returns	✓	✓	✓
Jobs	✓	✓	✓
Rental agreements	✓	✓	✓
Invoices, payments & recurring billing	✓	✓	✓
Customer portal	✓	✓	✓
Sales pipeline & tasks	—	✓	✓
Advanced inventory	—	✓	✓
Dispatch, trucks & driver app	—	✓	✓
Sites & scaffolds	—	✓	✓

Module	Light \$99	Starter \$399	Complete \$999
Requests & work orders	—	✓	✓
Inspections, handovers & safety	—	✓	✓
People, crews & timesheets	—	✓	✓
Hoists, shoring & equipment	—	✓	✓
Engineering & document control	—	✓	✓
Communication & storm center	—	✓	✓
Collections, ledger & finance reports	—	✓	✓
Advanced customer portal	—	✓	✓
Reports & scheduled reports	—	✓	✓
3D scaffold designer	—	—	✓

Glossary and frequently asked questions

Terms used in the system, and short answers to common questions.

Glossary

Agreement	The rental contract for a job that sets the rates, billing cycle and timing
Arrears / Advance	Billing after a cycle ends / at the start of a cycle
Billed through	The last day already invoiced for an agreement
Competent person	The qualified person who inspects scaffolds
Credit hold	A block on new deliveries for a customer with overdue or over-limit balances
Dunning	The schedule of reminder and overdue notices
DVIR	Driver vehicle inspection report (pre-trip check)
Item-days	Quantity × days on rent; the basis for prorated rent
Kit template	A named bundle of parts that expands into item lines
Minimum hire	The least number of days charged for a delivered batch
Off hire	Everything returned; rental billing finished
Tag (green / yellow / red)	Scaffold status: safe / restricted use / do not use
Ticket	A delivery, return or transfer document. It moves stock and starts or stops rent

Frequently asked questions

Why did a delivery not start billing?

Rent starts only when the ticket is completed. Scheduled and in-transit tickets never bill.

A customer returned equipment early. Why are they still charged?

Minimum hire applies. The invoice shows a separate "minimum hire top-up" line so it is transparent.

Can we stop an invoice going out automatically?

Yes. Turn on Invoice review in Administration → Billing settings; nightly invoices then wait as drafts for approval.

How do I release a credit hold?

Record the payment: an automatic hold lifts by itself. Accounts can also release it manually from the customer page.

Where did a menu item go?

Menus show only what your plan and your role include. If a link takes you to an upgrade page, that module belongs to a bigger plan.

Can I switch plans?

Any time, with one click; changes are prorated and no data is moved or lost.

What happens to my data if I leave?

Download all of it from the Subscription screen at any time. A paused account is kept for 30 days and then permanently deleted.

Are PDFs and Excel exports available in Spanish?

Yes. They follow your EN/ES setting, and documents sent to a customer use that customer's preferred language.

Can a driver work without signal?

Yes, for the field pages saved with "Prepare for offline"; what they capture is sent when the phone is online again.

Is the demo data real?

No. The demo company is fictional. Clear it with one button when you are ready.

Support: use the contact details on the ArkonOne website or on your invoices. This handbook is updated with the product; the latest version is always available on the website.