



ArkOne

Starter plan · User Handbook

The full operations system. Everything in Light plus jobs and scaffolds on a map, dispatch and the driver app, inspections, crews, equipment, engineering documents, reports and the storm center.

\$399 / month · unlimited users

Version 1.0 · October 2026

Scaffolding rental, sales and installation software

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BEFORE YOU START

About this handbook

The full operations system

Starter is the complete operations system for a scaffolding company: from the first quote to the signed handover and the last invoice. It includes everything in Light. The 3D designer is the one thing it leaves out; it is part of Complete.

This handbook describes exactly what the **Starter** 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 Sales pipeline & tasks Advanced inventory

Dispatch, trucks & driver app Sites & scaffolds 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

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.

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.

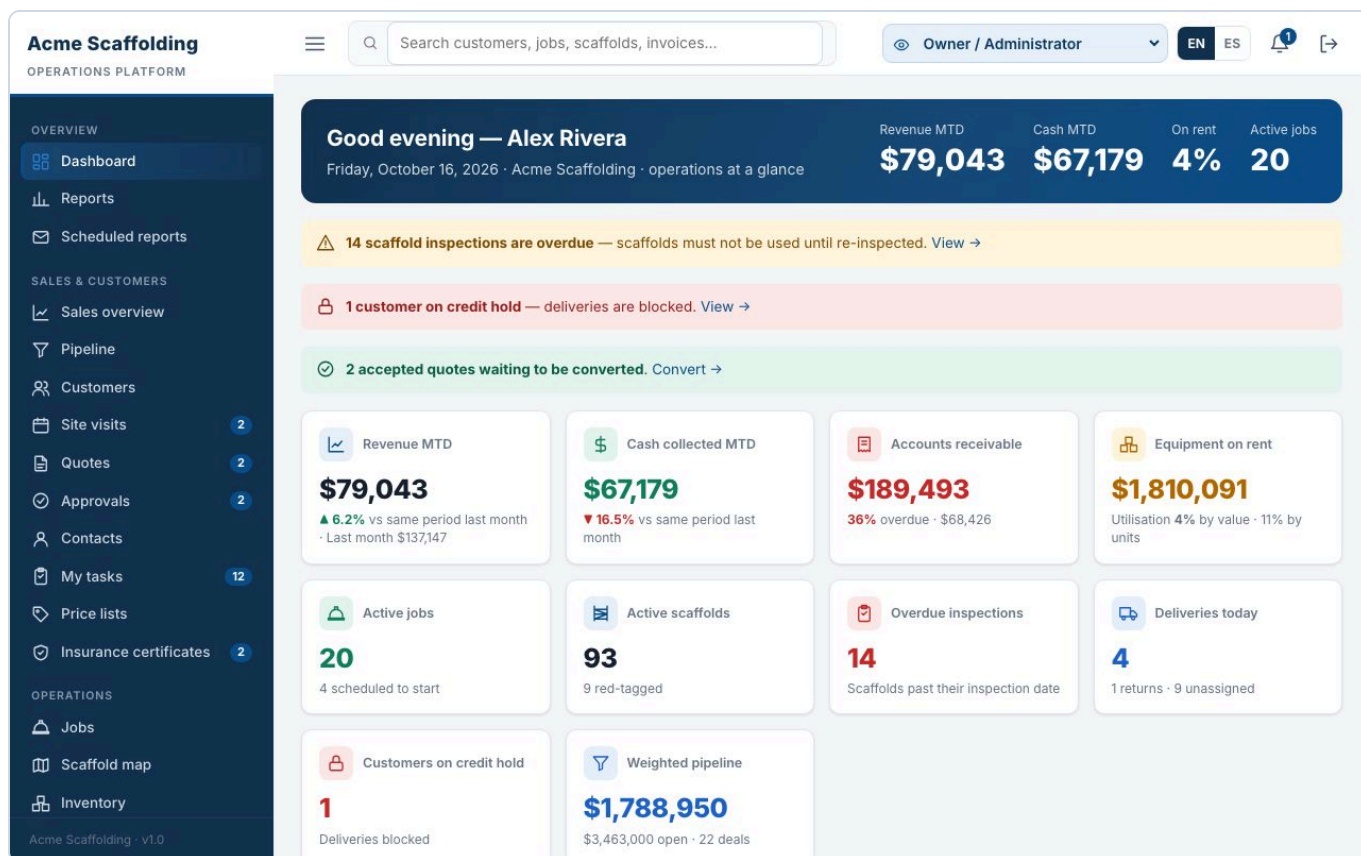
Note. Until you confirm your email the account stays closed. The link works once and for 48 hours; you can ask for a new one on the sign-up confirmation page.

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

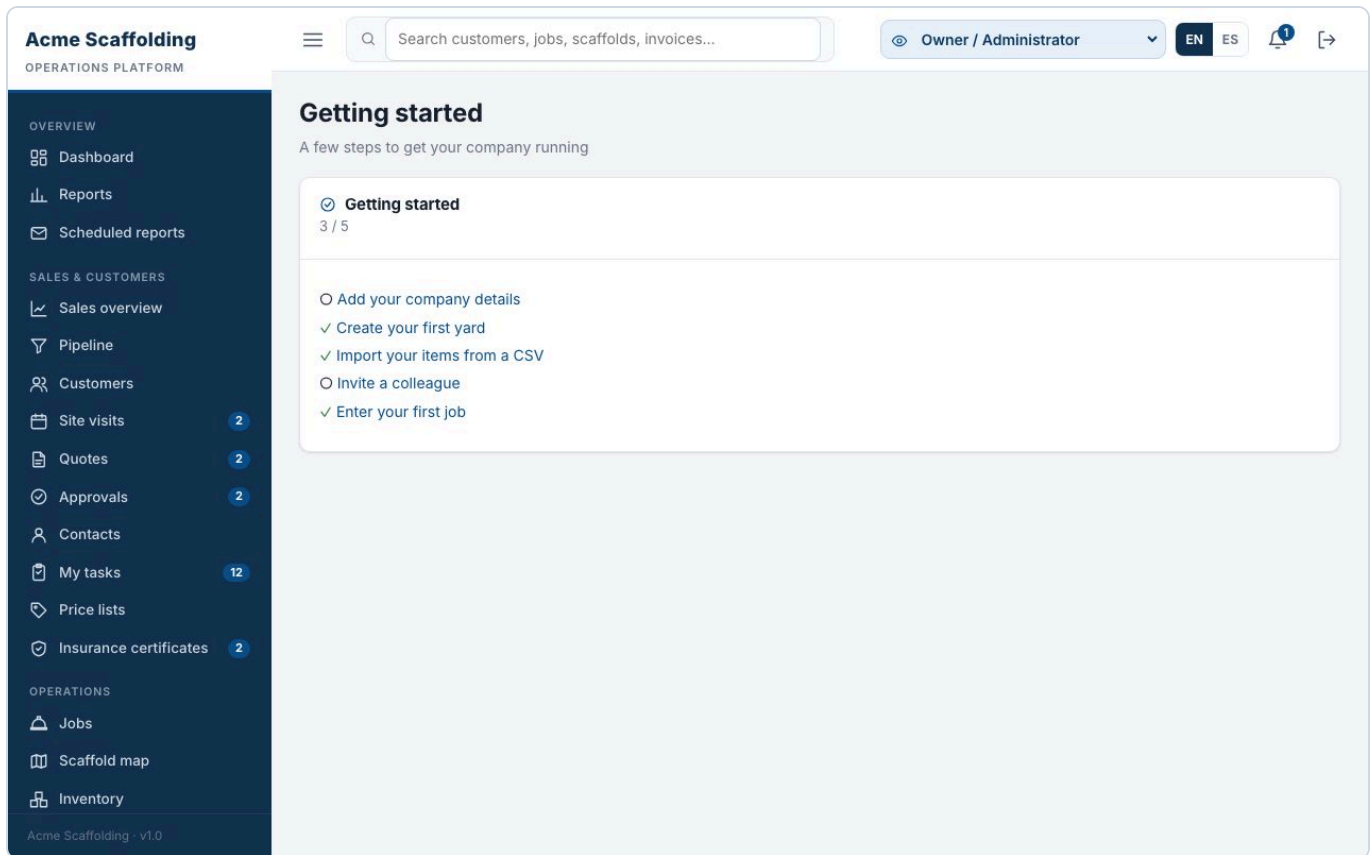
Your account opens with a realistic **fictional** scaffolding company already loaded: yards, trucks, crews, items, customers, jobs, scaffolds, inspections, quotes, invoices and example designs. It takes about a minute to prepare the first time; a banner tells you when it is ready. Click through anything: 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.

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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

Recent imports

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

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.

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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, 6:23 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

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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

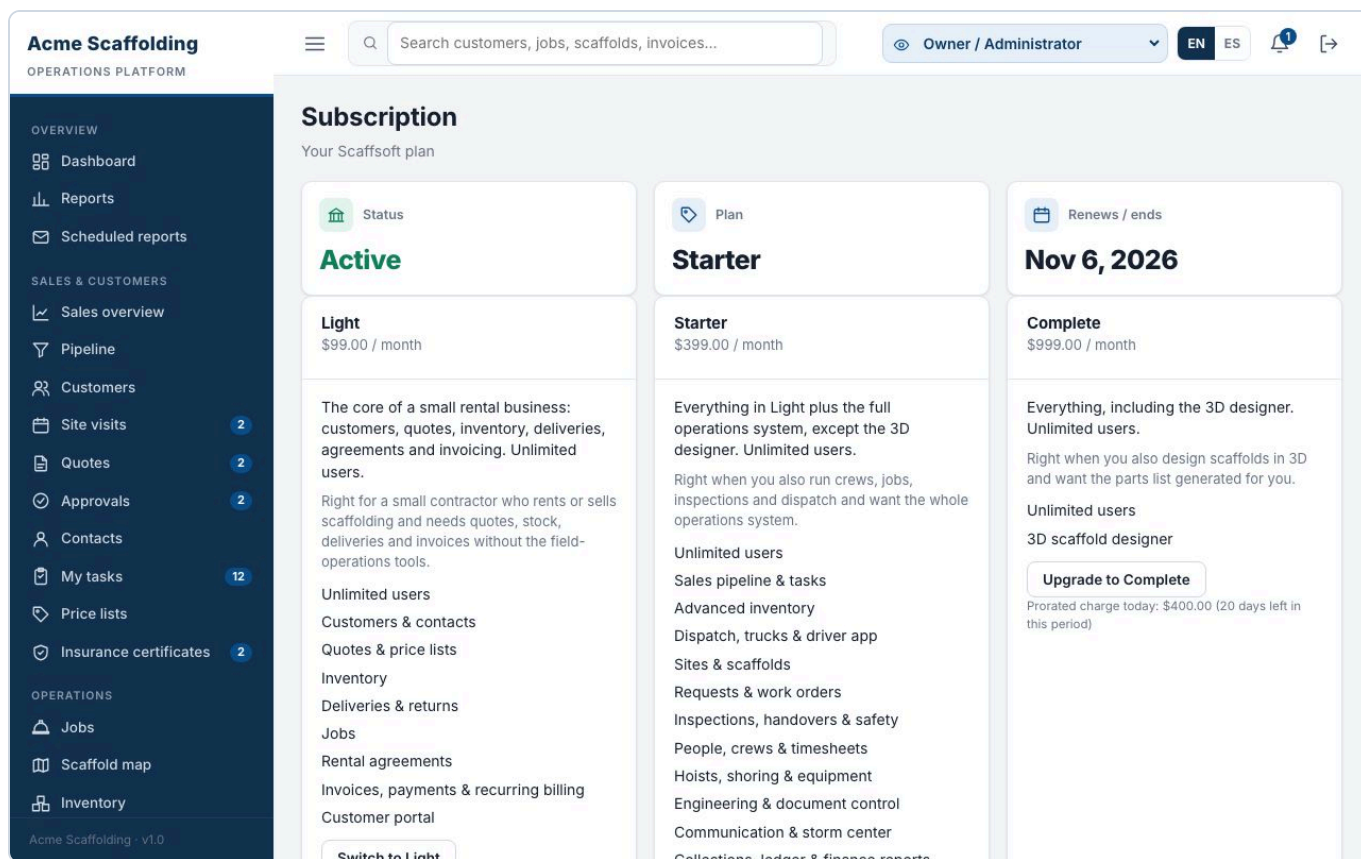
Every plan has **unlimited users** and is billed monthly in US dollars. A plan decides which modules are switched on. Prices below are the current list prices.

	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

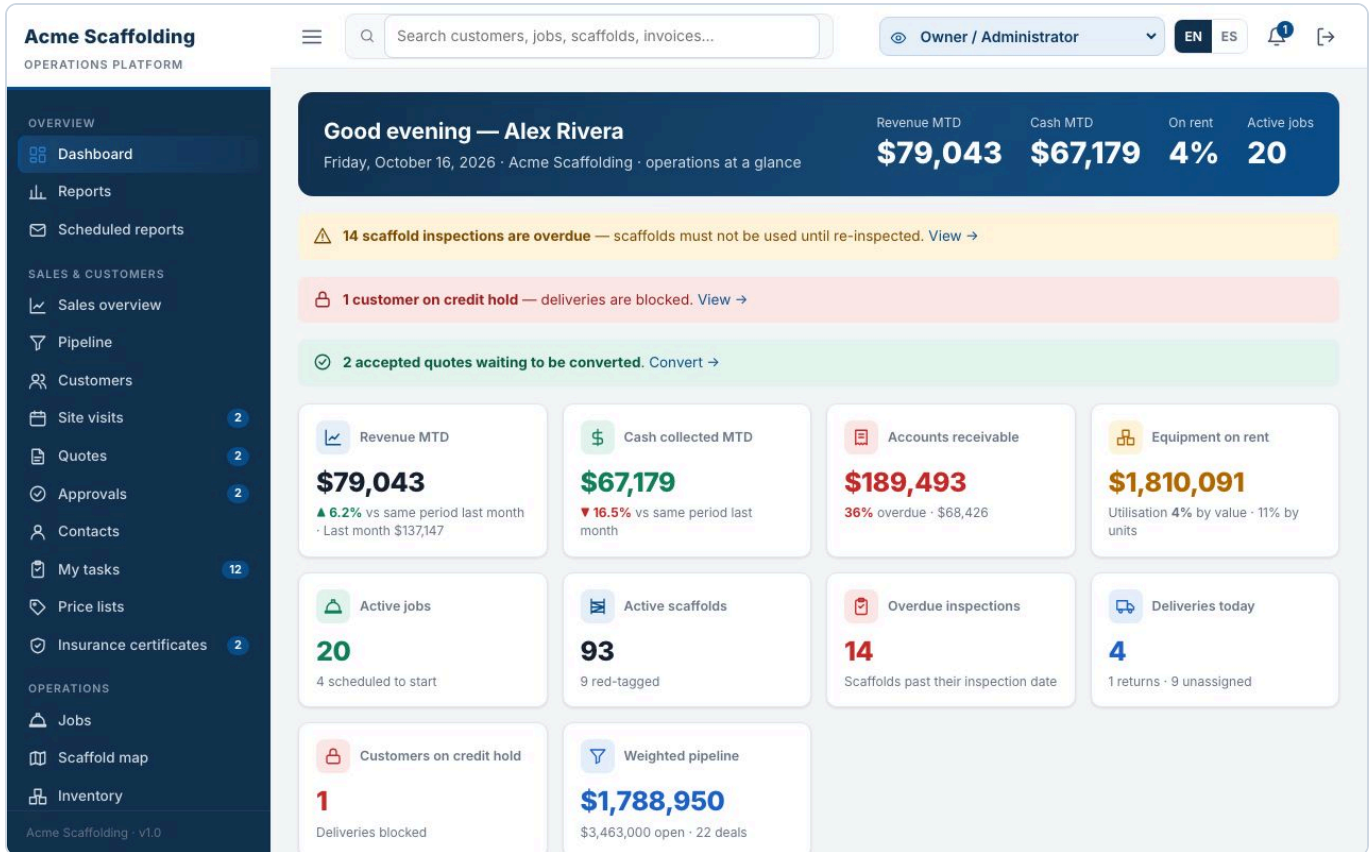
Administration → **Account activity** lists subscription changes and every time our support team signed in to your account, with the reason they gave.

CHAPTER 3

Dashboard

The first screen each morning.

Money, equipment, jobs and safety on one page, with alerts that link to whatever needs attention.



Dashboard header, live alerts (overdue inspections, credit holds, accepted quotes to convert) and KPI tiles.

Title	Meaning
Revenue MTD	Invoiced this month (pre-tax), with the change against the same days last month
Cash collected MTD	Successful payments received this month
Accounts receivable	Open invoice balances and the share that is past due
Equipment on rent	Replacement value of everything on rent, and fleet utilisation
Active jobs / scaffolds	Jobs in progress and scaffolds standing (including red-tagged)
Overdue inspections	Scaffolds past their 7-day competent-person inspection: they must not be used

Tile	Meaning
Deliveries today · Credit holds · Weighted pipeline	Today's truck work, customers blocked from deliveries, and the sales pipeline weighted by win probability

Further down are revenue by month, receivables ageing, a forecast and a widget from each module. Which widgets you see depends on your role.

Administrators also see the **Getting started** card until the checklist is complete.

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, Reports, Scheduled reports), SALES & CUSTOMERS (Sales overview, Pipeline, Customers, Site visits, Quotes, Approvals, Contacts, My tasks, Price lists, Insurance certificates), and OPERATIONS (Jobs, Scaffold map, Inventory). 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: 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. Jobs, opportunities and messages appear as well. Accounts and administrators can place or release a **credit hold** here.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

EN ES

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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.

Insurance certificates (Sales overview) track the customer's own insurance and the certificates you issue, with alerts before they expire.

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, 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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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

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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.

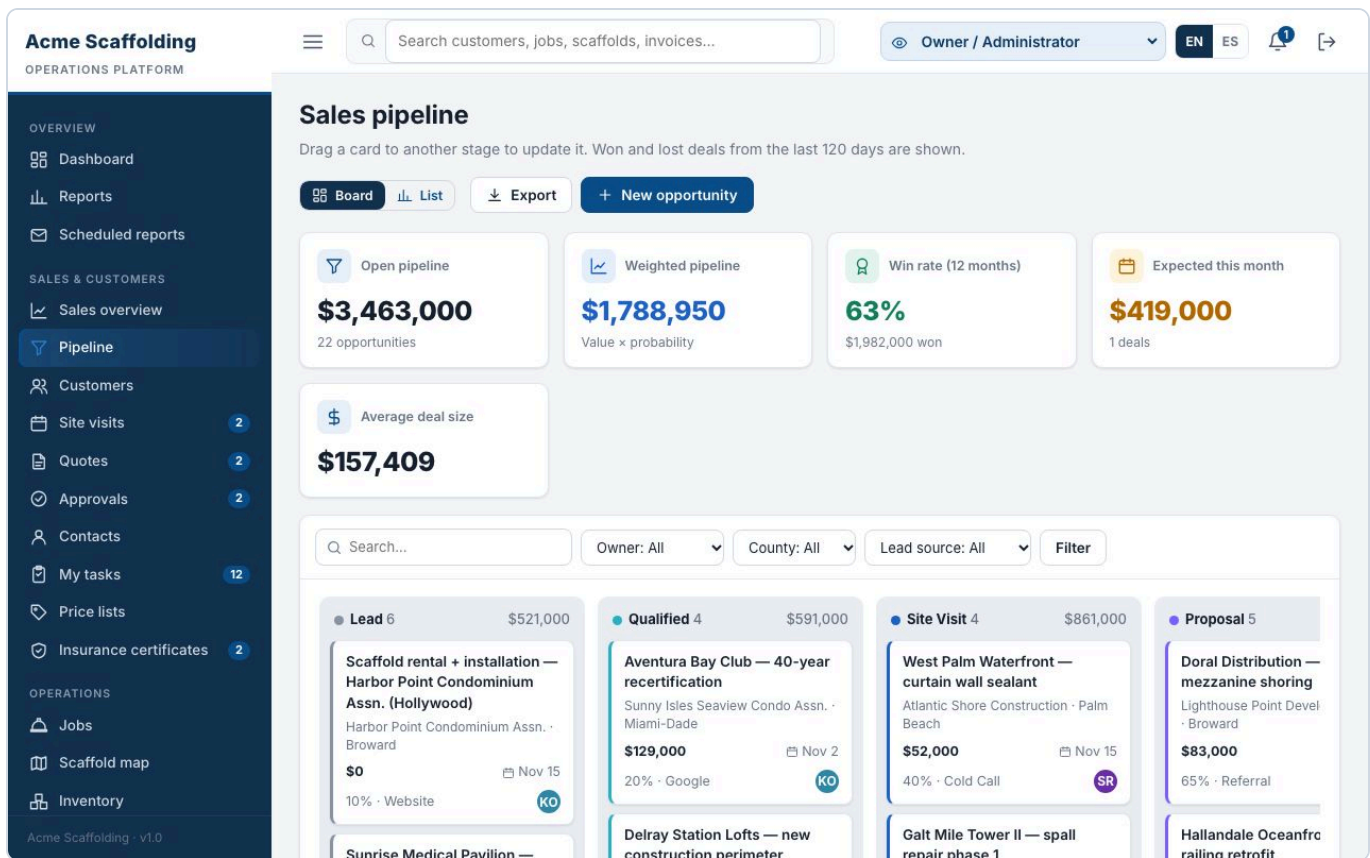
Tip. The quote list can be exported to CSV, Excel or PDF with the buttons at the top right.

CHAPTER 6

Sales pipeline, tasks and visits

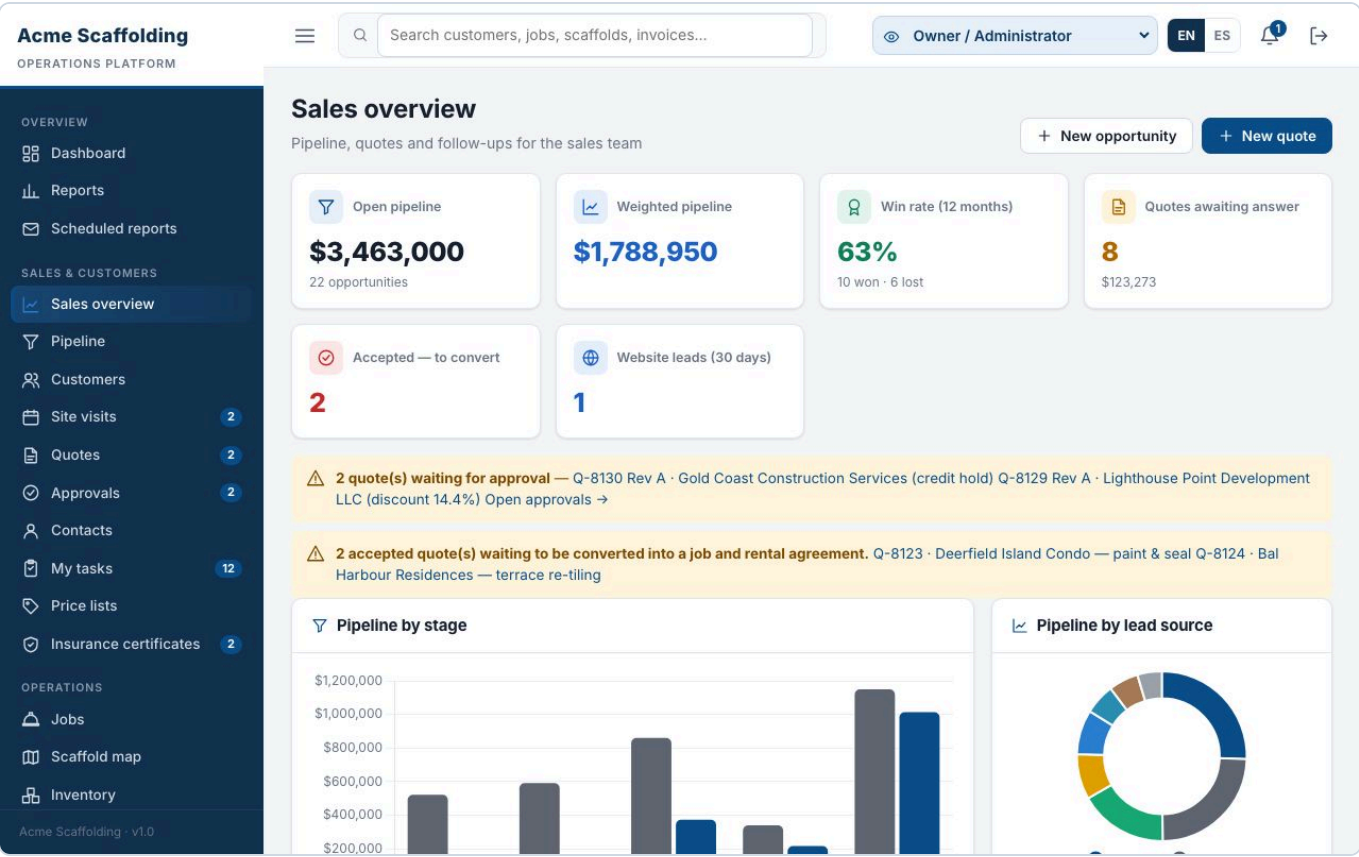
Follow every opportunity from lead to won.

Sales overview summarises your pipeline, quotes and win rate. **Pipeline** shows opportunities as cards in stages: Lead → Qualified → Site Visit → Proposal → Negotiation → Won / Lost. Drag a card to move it; column totals, the weighted pipeline and the win rate update at once, and the weighted pipeline feeds the revenue forecast.



The pipeline board.

- **My tasks** lists follow-ups (calls, visits) due today or overdue.
- **Site visits** schedules estimator visits and records the findings on the opportunity.
- **Approvals** is the queue of quotes that need a manager's approval because a discount is above the sender's limit (limits are in Administration → Settings).
- **Website leads** (Administration) receives enquiries from your website's contact form straight into the pipeline as new leads.

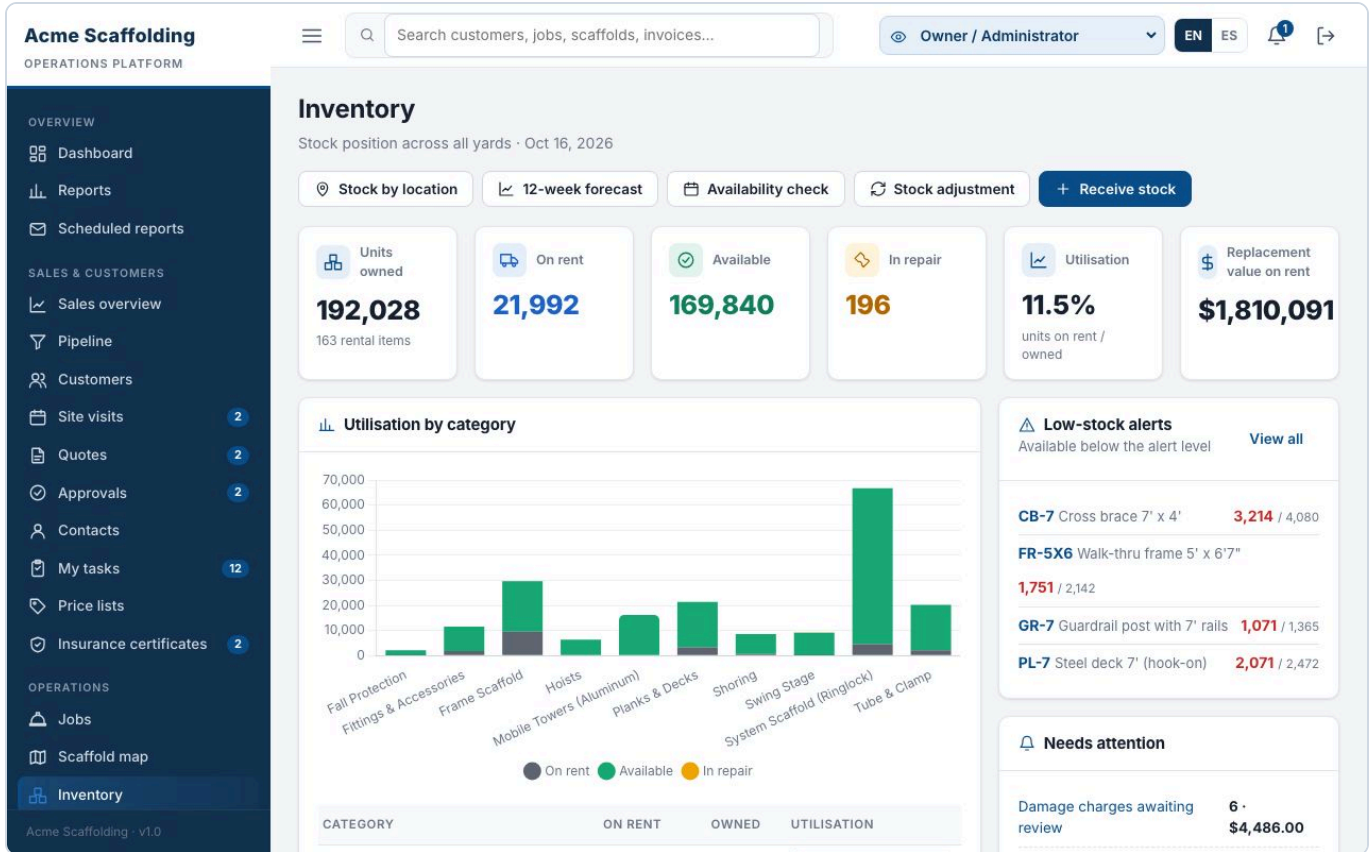


Sales overview.

CHAPTER 7

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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Scaffold map

Inventory

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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	32.5%

The item catalogue.

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Search customers, jobs, scaffolds, invoices...

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Inventory / Item catalogue /

CN-SILL · Mud sill 2x10 x 8' (sold)

Consumables

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

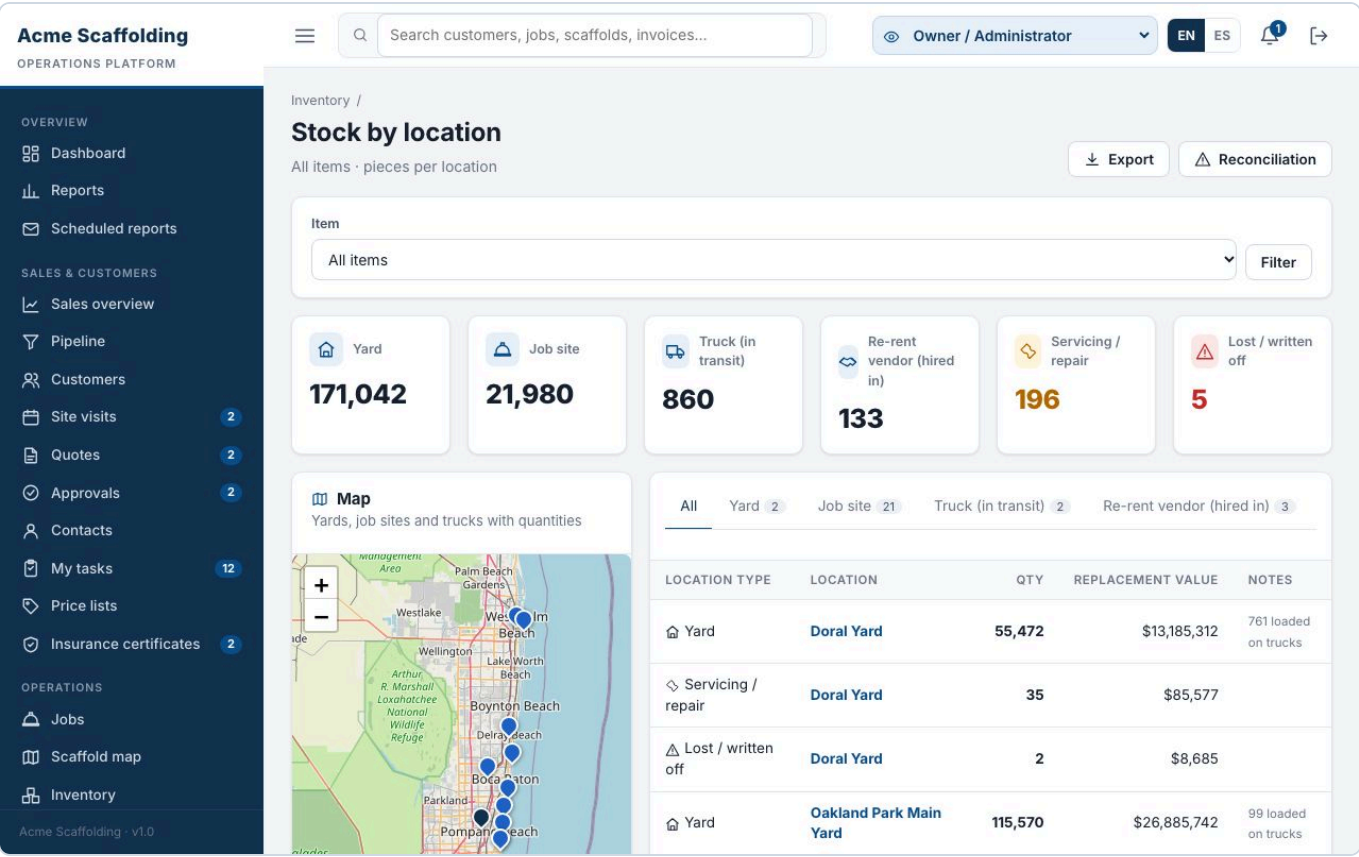
Lost / written off

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.

Advanced inventory

Serialized equipment, kits, counts, forecasts, servicing and damage.

- **Assets:** serial-numbered equipment (hoists, swing-stage motors, wire ropes, harnesses) with a printable QR tag, inspection and certification dates and status actions (send to repair, quarantine, retire, mark lost).
- **Kit templates:** a named bundle of parts (for example one frame bay) that expands into item lines on quotes and tickets.
- **Stock counts:** start a count for a yard, enter counted quantities, review the variances, then post the adjustments.
- **12-week forecast:** what is free now and what is due out or back on scheduled tickets.
- **Servicing queue:** everything in repair with **Repaired** → **available** and **Scrap** buttons.
- **Damage review:** lost and damaged charges raised at return check-in. Approve one and it is billed on the next invoice; reject it and nothing is charged.
- **Re-rent register:** equipment you hire in from other suppliers to cover a job, with return dates and cost.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

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Inventory /

Serialized assets

Hoists, swing stage motors, wire ropes and fall protection tracked by serial number

Export New asset

All 256 Available 145 Reserved 0 On Rent 91 In Repair 18 Quarantine 2 Lost 0 Retired 0

Q Serial #, model or item code... All items All yards

☐ Inspection due ≤ 14 days Filter

SERIAL #	ITEM	STATUS	YARD	CURRENT JOB	LAST INSPECTION	NEXT INSPECTION DUE	CERTIFICATION EXP
FP-HAR-0001	FP-HAR Full-body harness (ANSI Z359)	On Rent	Oakland Park Main Yard	J-2513	Aug 20, 2026	Feb 16, 2027	—
FP-HAR-0002	FP-HAR Full-body harness (ANSI Z359)	On Rent	Oakland Park Main Yard	J-2513	Sep 23, 2026	Mar 22, 2027	—
FP-HAR-0003	FP-HAR Full-body harness (ANSI Z359)	On Rent	Oakland Park Main Yard	J-2513	Oct 14, 2026	Apr 12, 2027	—
FP-HAR-0004	FP-HAR Full-body harness (ANSI Z359)	On Rent	Oakland Park Main Yard	J-2513	Aug 27, 2026	Feb 23, 2027	—

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Assets with status and tag.

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Search customers, jobs, scaffolds, invoices...

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Inventory / Kit templates /

Frame bay 5' x 7' x 20' high

Frame BayManual

Export

Use on a delivery

Edit

One bay of walk-thru frame scaffold, 3 lifts, fully planked with guardrails

Pieces

37

8 lines

Total weight

734 lbs

28-day rental value

\$122.50

Replacement value

\$2,206

Bill of materials

ITEM	CATEGORY	QTY	WEIGHT (LBS)	28-DAY VALUE	
FR-5X6 Walk-thru frame 5' x 6'7"	Frame Scaffold	6	252	\$39.00	Remove
CB-7 Cross brace 7' x 4'	Frame Scaffold	12	120	\$30.00	Remove
BP-6 Base plate 6" x 6"	Frame Scaffold	2	12	\$2.50	Remove
SJ-24 Adjustable screw jack 24"	Frame Scaffold	2	32	\$7.00	Remove
CP-1 Coupling pin	Frame Scaffold	4	8	\$2.00	Remove
PL-7 Steel deck 7' (hook-on)	Planks & Decks	6	240	\$27.00	Remove

A kit template with total weight and 28-day value.

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Inventory /

Stock counts

Cycle counts and full stock takes per yard

Counts

COUNT #	YARD	SCOPE	STATUS	COUNT DATE	PROGRESS	VARIAN
SC-1002	Doral Yard	Planks & Decks	In Progress	Oct 16, 2026	2/4	
SC-1001	Oakland Park Main Yard	Frame Scaffold	Posted	Oct 4, 2026	13/13	

+ Start a count

Yard *

Doral Yard

Scope

All items

Counted by

Name of counter(s)

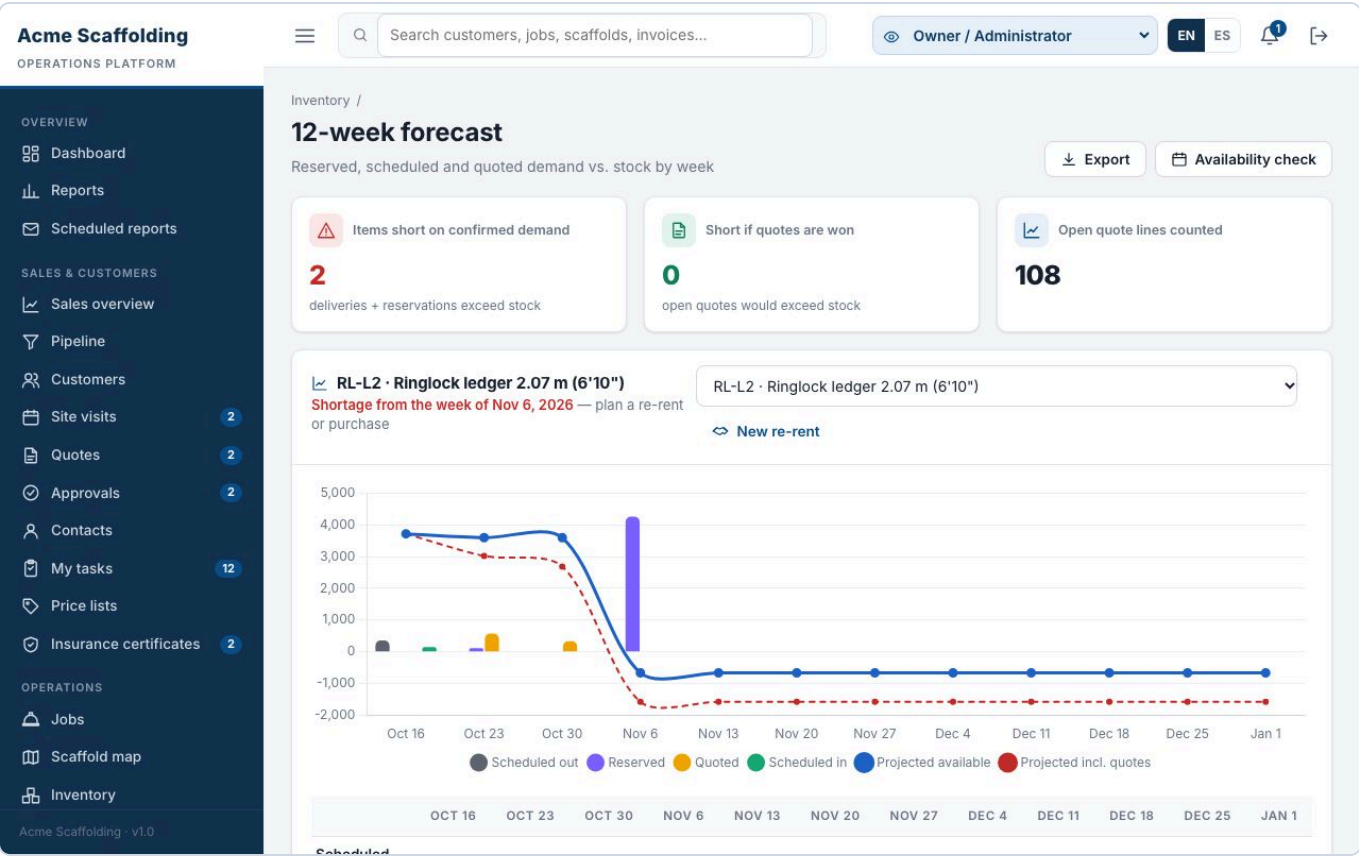
Count date

10/16/2026

Expected quantities are snapshotted from available stock when the count starts.

Start count

Stock counts and variances.



The 12-week availability forecast.

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Damage review

Lost and damaged equipment charges from return check-ins. Approved charges are billed automatically on the next invoice.

ExportNew charge

Pending Review6Approved3Billed4Rejected0All

6 charges · \$4,486.00 pending

Approve selectedReject selected

	CUSTOMER / JOB	ITEM	KIND	QTY	AMOUNT	SOURCE	STATUS			
☐	Atlantic Shore Construction J-2507 · Boca Ocean Residences — concrete restoration · RA-5007	FP-HAR Full-body harness (ANSI Z359) Harness webbing cut — removed from service	Damaged	2	\$144.00	Manual	Pending Review	Approve	Reject	Edit
☐	Palmetto Restoration Co. J-2504 · Oakland Park Pier Hotel — stucco & paint · RA-5004	SS-WR Wire rope 5/16" x 300' Wire rope not returned after stage relocation	Lost	1	\$1,530.00	Manual	Pending Review	Approve	Reject	Edit
		SS-MTR Swing stage								

Damage review.

CHAPTER 9

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

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

The job list.

A job page brings together everything about one site: overview, the agreement, tickets (deliveries and returns), invoices, documents, notes and history. With Starter it also has the scaffolds on a site map, work orders, inspections and handovers. Quick actions: **New delivery**, **New return**, **New scaffold**, **New work order**, **Request inspection**, **Print all tags**.

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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

OverviewScaffolds 5On-rent equipment 11Tickets 4Work orders 2FinancialsInspections 15Handovers 5

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

Areas

5

Standing scaffolds

5

Requested / scheduled

0

Awaiting new handover

0

Red tags

0

Overdue inspections

2

Open defects

2

Pieces on rent

1,061

Map

Fort Lauderdale

SR 842

LeafletOpenStreetMap contributors

A job page.

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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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Search customers, jobs, scaffolds, invoices...

Owner / Administrator

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Shipments

Delivery, return and transfer tickets

ExportLoad listsCount differencesNew reservationOff-rent callNew return

New delivery

Today

5

0 completed

Upcoming

8

Overdue

0

No truck assigned

4

Pickup requests

2

3 open reservations

All 18Delivery 10Return 3Transfer 0Yard Transfer 0Sale 0Reservation 3Pre-return 2

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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Search customers, jobs, scaffolds, invoices...

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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. The same tickets are what dispatch plans onto trucks and what drivers complete on their phones (next chapter).

Dispatch, trucks and the driver app

Plan the trucks; give each driver a phone screen for the day.

Dispatch board

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

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Dispatch board
Friday, Oct 16, 2026

Day Week 10/16/2026 Route map Load lists + New ticket

Tickets
5
4 deliveries · 1 returns

Assigned to trucks
4/5

Completed
0

Outbound weight
6,453 lbs

Credit hold
0

Drag tickets between columns to assign a truck, or use "Assign" on a card.

Unassigned 1

DEL-30052 Delivery
J-2505 · Collins Ave Art Deco hotel — restoration
Blue Wave Building Corp · Miami Beach
1-3 PM 1,530 lbs
Scheduled
→ Mark as Picking
Assign truck / driver / stop

T-101 Flatbed 2
Jamal Washington · 22,000 lbs
3,060 / 22,000 lbs (14%)

#1 DEL-30049 Delivery
J-2501 · Ocean Club Towers — 40-year recertification & concrete restoration
Ocean Club Towers Condominium Assn. · Fort Lauderdale
7-9 AM 1,530 lbs
Scheduled Jamal Washington
→ Mark as Picking
Assign truck / driver / stop

#2 DEL-30051 Delivery
J-2504 · Oakland Park Pier Hotel — stucco & paint
Palmetto Restoration Co. · Oakland

T-102 Boom Truck 1
Carlos Mejia · 18,000 lbs
1,863 / 18,000 lbs (10%)

#1 DEL-30050 Delivery
J-2502 · Las Olas Riverfront — facade & balcony repair
Coastal Ridge Builders · Fort Lauderdale
9-11 AM 1,863 lbs
In Transit Carlos Mejia
Assign truck / driver / stop

T-103 Flatbed
Dwayne Roberts · 20,000 lbs
0 / 20,000 lbs (0%)

#1 RET-30022 Re
J-2503 · Brickell Bay Tower - window replacement
Biscayne Bay Contractors · M
7-9 AM 2,470
Scheduled Dwayne Roberts
→ Mark as Picking
Assign truck / driver / stop

One column per truck plus Unassigned.

- Drag tickets between trucks; the bar shows load weight against truck capacity.
- Set the driver and stop order; use the date arrows to plan tomorrow.
- Tickets for a customer on credit hold show a red badge and cannot move to Loaded or In transit.
- **Route map** plots each truck's stops in order and each truck's last position shared by the driver app, refreshed every 30 seconds.
- **Load list** prints what goes on each truck.

Trucks

Service, registration, insurance and DOT expiry warnings, a maintenance log and pre-trip inspections (DVIR).

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4 vehicles

+ New truck

T-101 — Service due due in 24 days (Nov 9, 2026)

T-102 — Service due due in 4 days (Oct 20, 2026)

T-103 — Service due due in 27 days (Nov 12, 2026)

T-103 — DOT inspection due in 12 days (Oct 28, 2026)

T-101 · Freightliner M2 flatbed 26'

Flatbed · FL-ST101 · Oakland Park Main Yard

In Service

Open

DEFAULT DRIVER

Jamal Washington

Today's run: 2 stops

3,060 / 22,000 lbs (14%)

PAYLOAD CAPACITY (LBS)

22,000

Last pre-trip inspection: Oct 16, 2026

Pass

ODOMETER

139,784

Service due

NEXT SERVICE

Nov 9, 2026

T-102 · International boom truck (17-ton)

Boom Truck · FL-ST102 · Oakland Park Main Yard

In Service

Open

DEFAULT DRIVER

Carlos Mejia

Today's run: 1 stops

1,863 / 18,000 lbs (10%)

PAYLOAD CAPACITY (LBS)

18,000

Last pre-trip inspection: Oct 15, 2026

Pass

ODOMETER

157,398

Service due

NEXT SERVICE

Oct 20, 2026

T-103 · Kenworth T370 flatbed 24'

Flatbed · FL-ST103 · Doral Yard

In Service

Open

T-104 · Isuzu NRR stake bed 16'

Stake Bed · FL-ST104 · Oakland Park Main

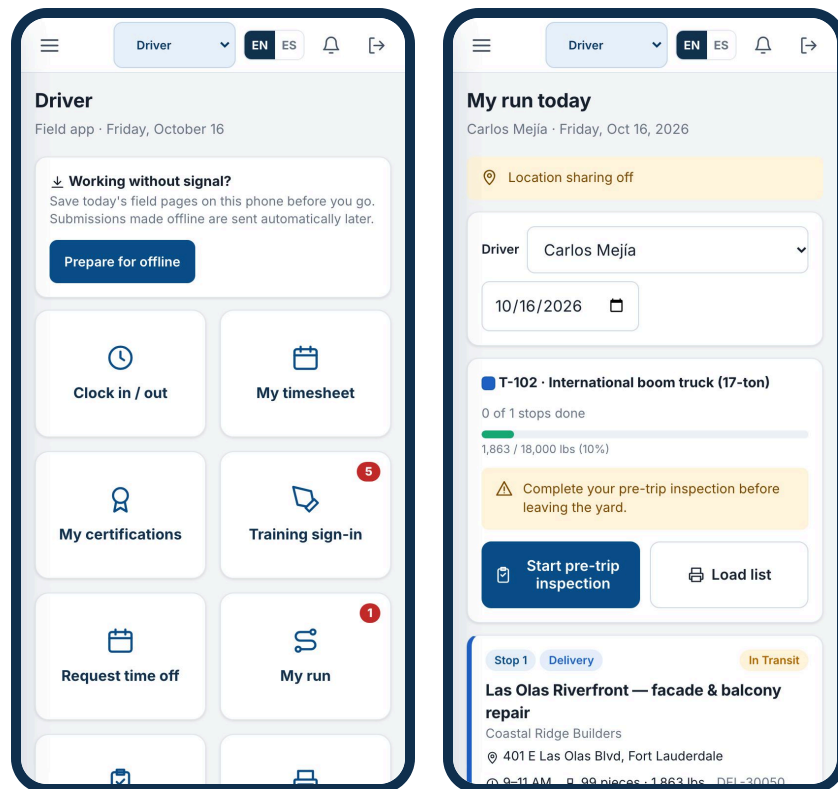
In Service

The truck register.

The driver app (phone)

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The driver's home screen.

My run today: stops in order.

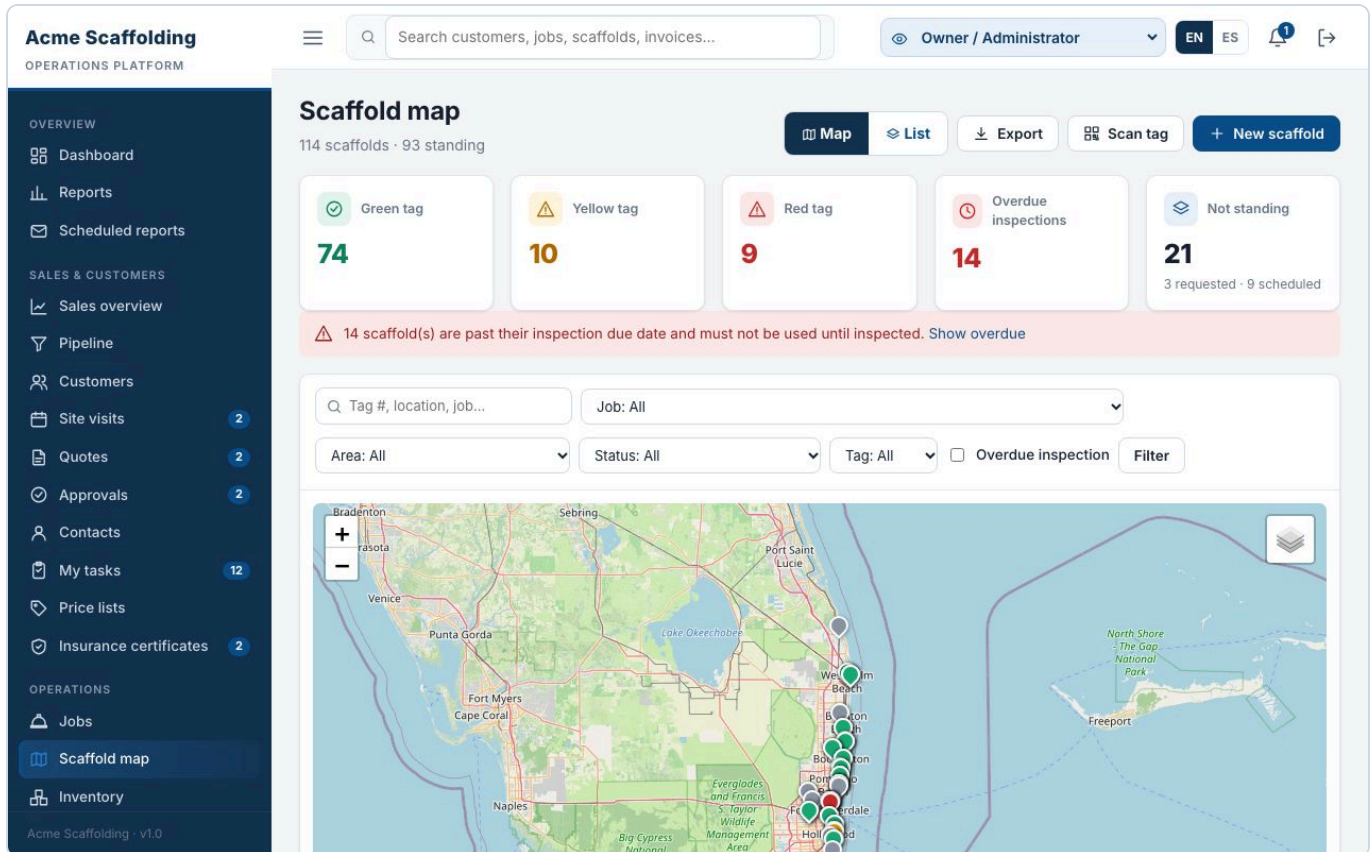
- 1 Open **My run**. Allow location access: while the app is open the truck's position is shared with dispatch.
- 2 Do the **pre-trip inspection** before leaving the yard.
- 3 Mark **Loaded**, then **Depart** (the customer gets an on-the-way message).
- 4 **Navigate** opens your maps app; **Call site** rings the site contact.
- 5 **Arrived**, then **Complete**: the receiver signs on the screen, add a photo and notes.

Working without signal

On the field home screen, **Prepare for offline** saves today's field pages on the phone. Anything you capture offline is sent automatically when the phone is back online.

Sites and scaffolds

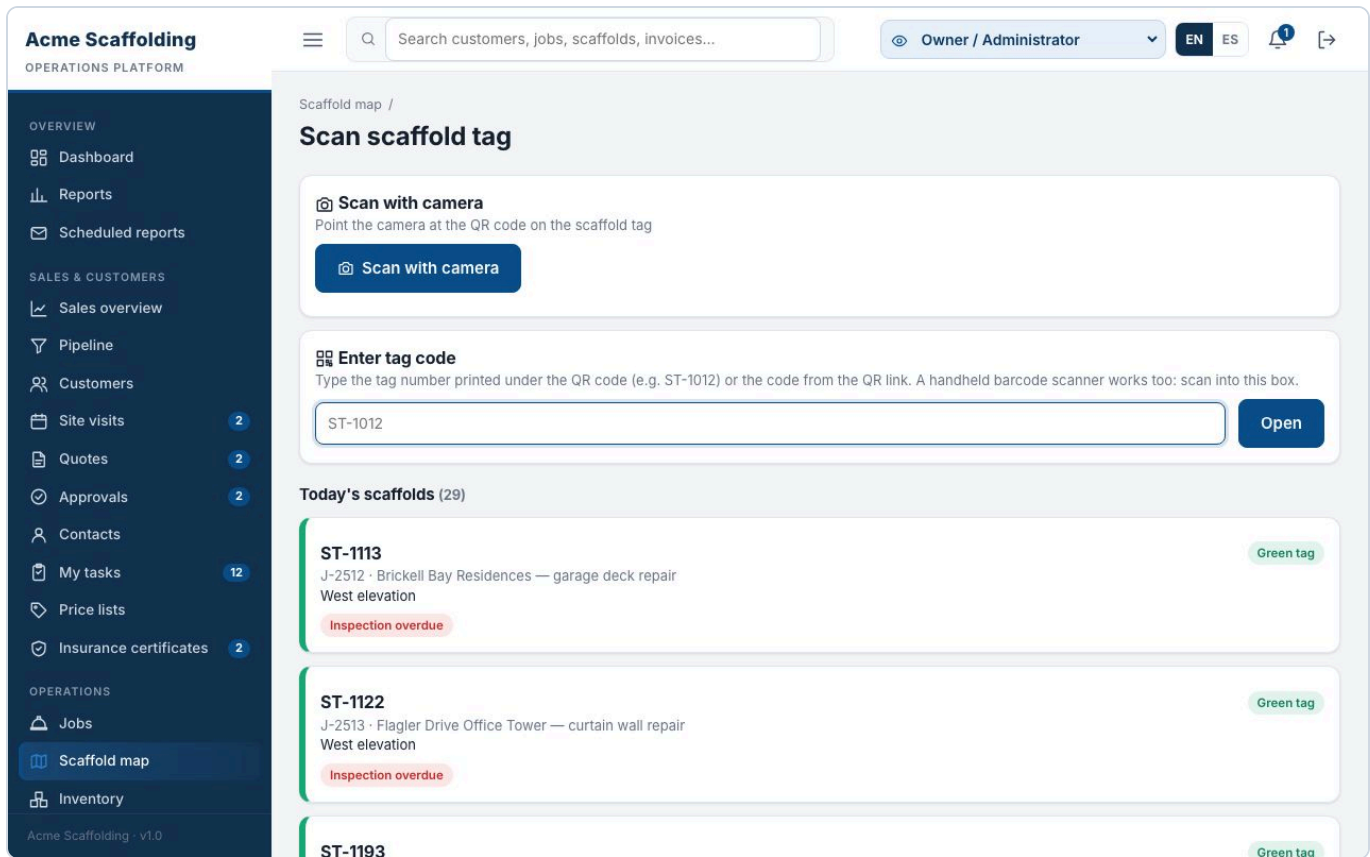
Every scaffold on every site, on a map, with its safety status a phone-scan away.



Scaffold map: pins coloured by tag (green safe, yellow restricted, red do not use, grey planned or dismantled).

Scaffold records

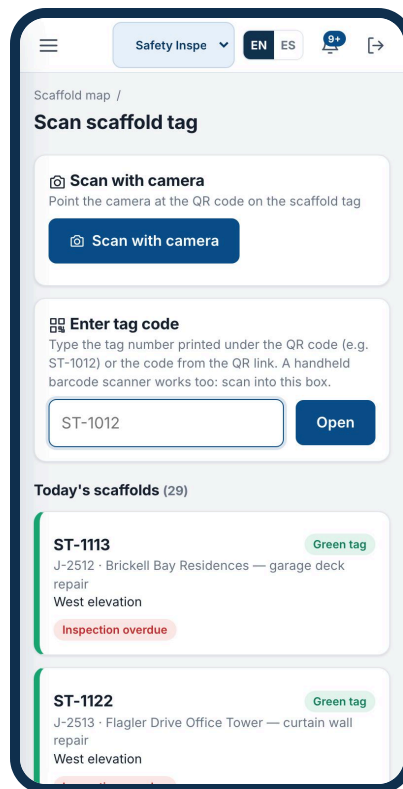
Each scaffold has a page with its status, tag, duty rating, inspection due date, defects and modification history. Create scaffolds from a job. Record modifications, erected and dismantled dates; each becomes an entry in the history.



A scaffold page.

QR tags

Print a tag for each scaffold or all tags for a job. Scan it with the **Scan scaffold tag** button in the field app, or with any phone camera, to open the scaffold's live status: green, yellow or red, open defects, and buttons to inspect or report a defect. No signal for the camera? Type the tag number.



Scanning a scaffold tag on a phone.

- **Change tag** (green, yellow, red) always asks for a reason, which is logged.
- A red tag cannot be cleared while any **Critical** defect is still open.
- Areas and site plans let you split a large site and keep the plans with the job.

Requests and work orders

Customer asks become scheduled crew work, and labour flows straight into billing.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

EN ES

Service requests
Erect, modify, dismantle, delivery and inspection requests from customers and the field

Board List Lead times Approval steps + New request

New 8 Awaiting approval 5 Scheduled 5 In Progress 3

Search requests... Type: All Source: All Approval: All Customer: All Filter

New	Triaged	Scheduled	In Progress
SR-1001 · Other Galt Ocean Mile Condominium Assn. J-2506 Inspector Oct 26	SR-1008 · Repair Sunny Isles Seaview Condo Assn. J-2509 Portal Oct 18	SR-1015 · Repair Ocean Club Towers Condominium Assn. J-2501 · ST-1003 Phone Oct 15	SR-1017 · Repair Broward County Facility Management J-2520 Foreman
SR-1005 · Other Galt Ocean Mile Condominium Assn. J-2506 Email Oct 20	SR-1009 · Modify Brickell Bay Residences Assn. J-2512 · ST-1111 Awaiting: Final approval Foreman Oct 18	SR-1013 · Other Gold Coast Construction Services J-2508 · ST-1075 Foreman Oct 16	SR-1018 · Repair Brickell Bay Residences J-2512 · ST-1111 Portal
SR-1054 · Erect	SR-1010 · Repair	SR-1011 · Repair Palmetto Restoration Co.	SR-1016 · Dismantle Seahreeze Property Ma.

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Requests board: New → Triaged → Scheduled → In progress → Completed (or Rejected).

Triage a request

Requests arrive from the customer portal, phone, email, foremen or inspectors. Open one and choose **Convert to work order** (erect, modify, dismantle, repair), **Create delivery / return ticket**, or **Reject** with a reason. The customer is told automatically when a request is received and when it is scheduled.

Work orders

A work order holds the scope, the scaffold, the crew, estimated against actual hours, materials used (priced from the catalogue), photos and the customer's sign-off. Work orders can be viewed as a list, a week schedule (days × foremen) or a kanban board. When a billable work order is completed, its labour and materials are added to the customer's next invoice automatically.

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Search customers, jobs, scaffolds, invoices...

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Work orders

Erection, modification, dismantle and repair work — scheduled, tracked and billed

List

Week

Board

Export

New work order

Today

12

In Progress

6

Open & scheduled

31

Labour hours this month

191.0

Search work orders...

Status: All

Type: All

Foreman: All

Job: All

mm/dd/yyyy

mm/dd/yyyy

Filter

WO #	TYPE	JOB	SCAFFOLD	STATUS	PRIORITY	SCHEDULED	FOREMAN	EST. / ACTUAL H	BILLING
WO-7106	Dismantle	J-2518 Seabreeze Property Management	ST-1173	In Progress	Normal	Oct 22, 2026	Mike Sullivan	28.0 / —	
WO-7107	Repair	J-2520 Broward County Facilities Management	ST-1195	In Progress	Normal	Oct 20, 2026	Mike Sullivan	11.0 / —	
WO-7108	Repair	J-2512 Brickell Bay Residences Assn.	ST-1111	In Progress	Normal	Oct 20, 2026	Rafael Ortiz	13.0 / —	

Work orders.

Foreman

EN ES

1

My work orders

Today · Friday, October 16, 2026

Jorge Castillo

WO-7076 · Inspection

Scheduled

Oakland Park Pier Hotel — stucco & paint

Scaffold: ST-1031 ·

Post-modification inspection and tag update at the west elevation.

Est. 3.0 h · Jorge Castillo

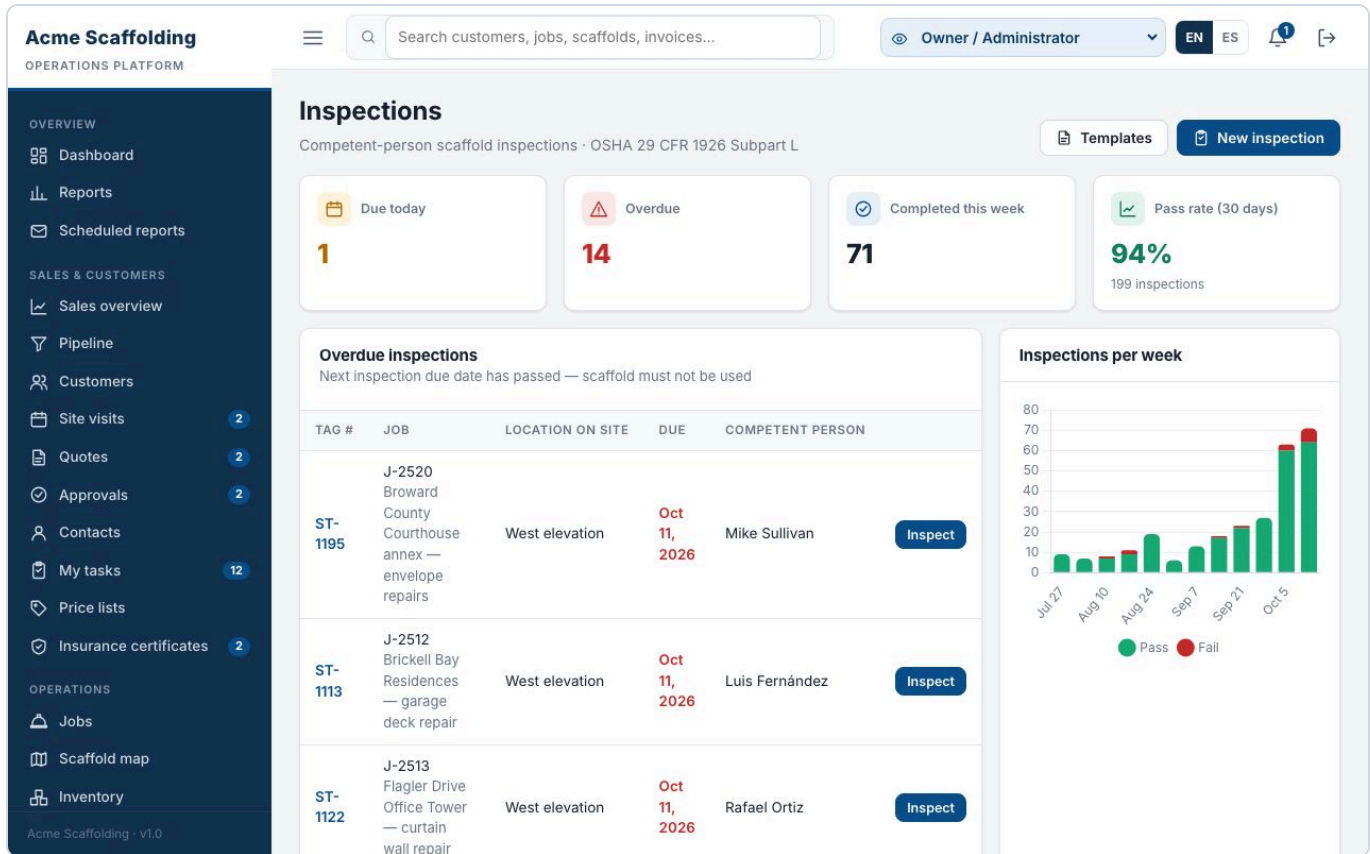
Start

Open

A foreman's My work on a phone.

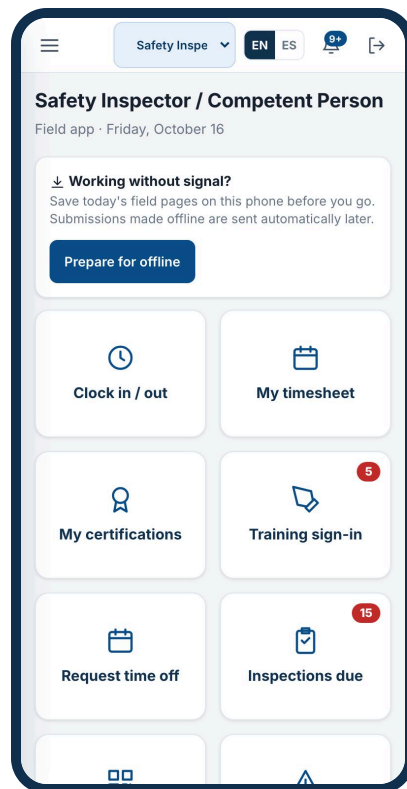
Inspections, handovers and safety documents

OSHA-style inspections on a phone, with automatic red-tagging and defect follow-up.

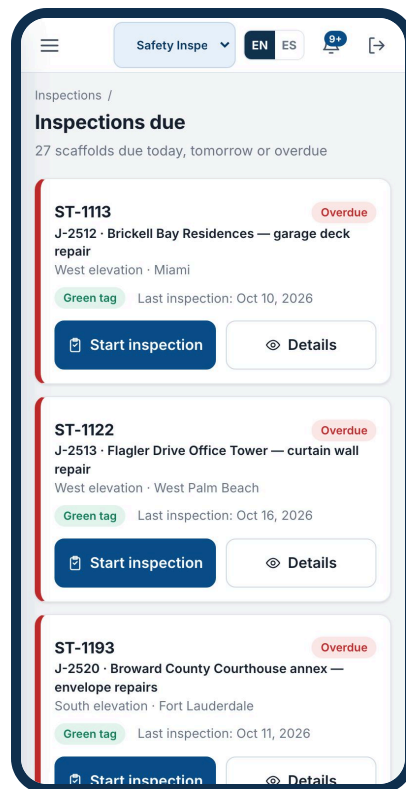


Inspections dashboard: due today, overdue, completed this week, pass rate, schedule and history.

Running an inspection



The inspector's home screen.



Inspections due.

- 1 Open **Inspections due**, or tap **Scan scaffold tag** and point the camera at the QR code.
- 2 Choose the template (daily pre-shift, erection handover, swing stage, post-storm, mobile tower, fall protection).
- 3 Tap **Pass / Fail / N/A** per item and add notes or photos.
- 4 Capture GPS, sign and submit.
- 5 A **Fail** red-tags the scaffold, creates defects and alerts operations and the customer. A **Pass** schedules the next inspection (7 days by default).

Form builder

Inspection templates lets your safety manager edit checklists: sections, question order, answer types (pass/fail/N-A, yes/no, text, number, photo, signature), the OSHA reference, Spanish wording, and whether a failure creates a defect and at what severity. **Inspection rules** schedule extra inspections, for example after bad weather.

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Inspections /

Inspection templates

Form builder for OSHA Subpart L checklists (English & Spanish)

+ New template

NAME	CATEGORY	APPLIES TO SCAFFOLD TYPE	FREQUENCY (DAYS)	QUESTIONS	INSPECTIONS	ACTIVE
Daily / pre-shift competent-person scaffold inspection Pre-shift visual inspection by a competent person for visible defects, as required by 29 CFR 1926.451(f)(3) be	Daily	All supported scaffolds	7	22	167	Active Duplicate
Fall protection & guardrail check Focused check of guardrail systems and personal fall arrest for work more than 10 ft above a lower level. 29 C	Fall protection	All scaffolds	7	15	4	Active Duplicate

Inspection templates.

Note. The included checklists are a starting point. Your safety manager should review the wording and references against your own procedures before relying on them.

Defects

Each defect has a severity (Low → Critical), an owner, a due date and before/after photos, and moves Open → In progress → Resolved → Verified. Only inspectors and managers can verify.

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Defects

Scaffold defects from inspections and field reports

List

Board

Report defect

Open

In Progress

Critical open

Past due

20

9

9

17

Open & in progress

Severity: All

Job: All

Assigned to: All

Filter

DEFECT #	SCAFFOLD	DESCRIPTION	SEVERITY	STATUS	ASSIGNED TO	DUE
DEF-3038	ST-1252 J-2526	All cross braces, coupling pins and uplift pins installed and secure — Bent frame leg on the second lift — rem	Critical	Open	Mike Sullivan	Oct 12, 2026
DEF-3020	ST-1134 J-2514	Tie-ins installed at max 26 ft vertical / 30 ft horizontal (4:1 height-to-base rule) — No tie within 26 ft abo	Critical	Open	Mike Sullivan	Oct 13, 2026
DEF-3024	ST-1145 J-2515	Tie-ins installed at max 26 ft vertical / 30 ft horizontal (4:1 height-to-base rule) — No tie within 26 ft abo	Critical	Open	Rafael Ortiz	Oct 14, 2026
DEF-3009	ST-1044 J-2505	Working platforms fully planked or decked, gaps not more than 1 inch — Gap over 1 in between planks at bay 6	Critical	Open	Mike Sullivan	Oct 14, 2026
DEF-3011	ST-1053 J-2506	Top rails 38–45 in above the platform on all open sides and ends — Toeboard missing along the street side	Critical	Open	Rafael Ortiz	Oct 14, 2026
DEF-3026	ST-1152 J-2516	Base plates and mud sills in place on firm, level ground; no unstable objects (blocks, bricks) used as support	Critical	Open	Jorge Castillo	Oct 15, 2026

Defects.

Handovers and safety documents

- **Handover certificates** (initial, modification, dismantle notice, handback) record the duty rating, maximum load, intended use and restrictions with both signatures, and produce a PDF certificate that can be emailed and is visible in the customer portal.
- **Safety documents:** JHA/JSA, toolbox talks, site safety and fall-protection plans, SDS, permits. Expiry warnings, plus crew acknowledgement with a signature on a phone.

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Handovers

Scaffold handover certificates signed by Acme Scaffolding and the customer

Signed25

Awaiting signature3
1 waiting for the customer

Signed this month4

Standing without handover61

New handover required: ST-1012 (J-2502 · Oct 15, 2026), ST-1013 (J-2502 · Oct 14, 2026) — modified scaffolds cannot return to standing – safe until a new handover is signed.

Handover #, tag, customer rep...

Status: All

Type: All

Job: All

Filter

Handover #	Type	Scaffold	Job	Date	Duty Rating	Customer Representative	Status	Email
HO-7038	Modification handover	ST-1012	J-2502 Las Olas Riverfront — facade & balcony repair	Oct 16, 2026	Medium duty (50 psf)	Gregory Herrera	Draft waiting for the customer	
HO-7037	Modification handover	ST-1164	J-2517 Port Everglades Terminal 2 — steel repairs	Oct 16, 2026	Medium duty (50 psf)	Marisol Anderson	Draft	
HO-7036	Modification	ST-1162	J-2517 Port Everglades	Oct 16,	Light duty	Marisol Anderson	Draft	

Handover certificates.

ARKONONE · Starter plan · User Handbook

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Safety documents

JHAs, toolbox talks, safety plans, SDS and permits — English & Spanish

Toolbox talk sign-in

Upload document

Active documents

25

Expiring in 30 days

3

Expired

1

Sign-offs this week

17

New revisions issued: 6 crew sign-off(s) need to be redone on the current revision. JHA — Frame scaffold erection and dismantle (Rev 5)

Expired: SDS — Zinc-rich cold galvanizing compound (spray) (Oct 10, 2026)

Expiring soon: FDOT Right-of-way / MOT permit (Oct 25, 2026), JHA — Shoring tower installation (parking garage) (Oct 28, 2026), Site Safety Plan — Ocean Club Towers — 40-year recertification & concrete restoration (Nov 6, 2026)

Search documents...

Type: All

Language: All

Status: All

Job: All

Filter

TITLE	DOCUMENT TYPE	LANGUAGE	JOB	REVISION	EFFECTIVE DATE	EXPIRY DATE	STATUS	SIGN-OFFS
Acme Scaffolding Fall Protection Plan	Fall Protection Plan	English	Company-wide	Rev 2	Feb 14, 2026	Feb 14, 2027	Current	4
Hurricane Preparedness Plan 2025	Hurricane Plan	Bilingual	Company-wide	Rev 3	Jun 3, 2025	Jun 3, 2026	Superseded	0

The safety document library.

People, crews, certifications and timesheets

Your employees, who is on which crew, what they are certified for, and the hours they work.

- **Employees:** directory with role, yard, language and contact details. **Users & roles** (Administration) assigns each employee a system role.
- **Crews:** members, today's assignments and the weekly crew schedule.

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Crews
Crew line-up, today's assignments and the weekly schedule board

Crew clock-in Clock in/out + New crew

Active crews: 5
Crew members: 19
Work orders today: 12
Conflicts this week: 6 (14 on the clock now)

Alpha Frame Crew (Active)
Frame - Oakland Park Main Yard
Foreman: JC Jorge Castillo (Certs valid)
Members (5): EH Eddie Hernández, JL José Luis Rivera, JP Juan Pérez, PM Pedro Martínez, WJ Wilson Joseph
Today's assignments: WO-7076 - Inspection (J-2504 - Oakland Park Pier Hotel — stucco & paint)

Bravo Ringlock Crew (Active)
Ringlock - Oakland Park Main Yard
Foreman: MS Mike Sullivan (Certs expiring)
Members (4): JL Jean-Baptiste Louis, MA Miguel Ángel Santos, OM Oscar Morales, RG Ricardo Gómez
Today's assignments: WO-7074 - Modify (J-2502 - Las Olas Riverfront — facade & balcony repair), WO-7093 - Repair (J-2502 - Las Olas Riverfront — facade & balcony repair)

Charlie Suspended Access Crew (Active)
Suspended - Doral Yard
Foreman: RO Rafael Ortiz (Certs valid)
Members (4): AV Alexis Vega, BM Brandon Mitchell, FD Frank Diaz, YP Yordan Pupo
Today's assignments: WO-7075 - Modify (J-2503 - Brickell Bay Tower — window replacement)

Crews with members and the weekly schedule.

Certifications and training

Certifications shows a matrix of employees × certificate types (for example OSHA 10/30, Scaffold Competent Person, Fall Protection, Swing Stage, CDL, First Aid/CPR) coloured valid, expiring or expired. Managers are notified 30 days before expiry and again on expiry. **Training** records toolbox talks and classes with attendees; crew sign in on a phone with a signature, and a compliance report shows who is missing what.

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Certifications

Safety certifications and cards for field staff

+ Add certification

Certifications on file

137

123 valid

Expiring in 60 days

10

6 within 30 days

Expired

4

Compliance

97%

Matrix

Expiring (60 days) 10

Expired 4

All certifications 137

All crews

All roles

Filter

Valid

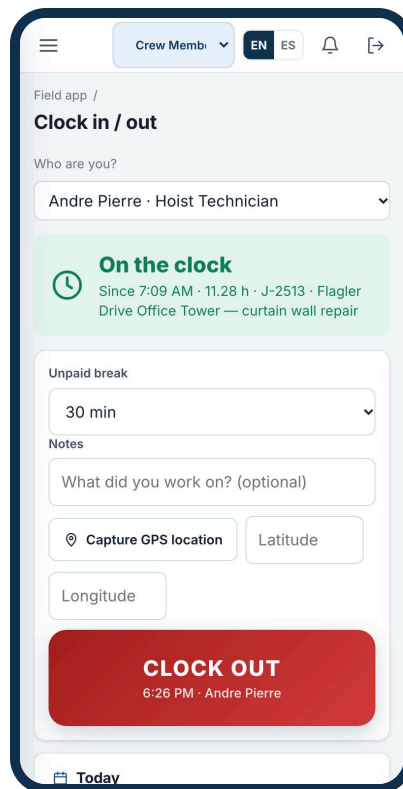
Expiring ≤ 60 days

Expired

EMPLOYEE	CREW	OSHA 10	OSHA 30	COMP. PERSON	ERECTOR	FALL PROT.	SWING STAGE
Adrián Ruiz Laborer	Delta Shoring Crew	07/30			08/29	04/27	
Alexis Vega Laborer	Charlie Suspended Access Crew	05/27			06/27	07/27	06/29
Andre Pierre Hoist Technician	Hoist & Mast Climber Crew	02/27			05/29	11/27	
Brandon Mitchell Scaffold Erector	Charlie Suspended Access Crew	09/28			06/28	01/28	06/29
Carlos Mejía Driver	—	04/30					
Dwayne Roberts Driver	—	10/30			05/29		
Eddie Hernández	Alpha Frame Crew	08/31			08/29	10/26	

The certification matrix.

Timesheets



Clock in / out with job and GPS.

- Crew **clock in and out** on a phone, choosing the job and work order. GPS location is captured.
- **Timesheets** shows a weekly grid per person; hours over 40 per week are flagged as overtime.
- Managers approve in bulk from the approval queue. Approved hours roll up into the work order's labour hours.
- The payroll export (CSV, Excel or PDF) splits regular and overtime hours.

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Timesheets

Weekly hours, approvals, payroll and labour cost

Crew clock-in

Clock in/out

Add timesheet

Hours this week

823.57

Oct 12, 2026 – Oct 18, 2026

Awaiting approval

131

1108.26 h

Over 40 h

6

employees this week

On the clock now

14

Weekly grid

Approval queue

131

Payroll export

Labour cost

Prev week

Oct 12, 2026 – Oct 18, 2026

Next week

6 employees over 40 h

EMPLOYEE	MON, 10/12	TUE, 10/13	WED, 10/14	THU, 10/15	FRI, 10/16	SAT, 10/17	SUN, 10/18	TOTAL	OVERTIME
Adrián Ruiz Laborer	7.92	7.98	7.93	8.15	8.37			40.35	0.35
Alexis Vega Laborer	9.38	9.12	8.30		8.32			35.12	—
Andre Pierre Hoist Technician	7.90		8.10	8.20				24.20	—
Brandon Mitchell Scaffold Erector	8.33	8.18	8.17	9.62				34.30	—
Eddie Hernández Scaffold Erector	8.32	8.08	7.88	8.30				32.58	—
Esteban Navarro Scaffold Erector	8.22	8.30	8.03	9.60				34.15	—

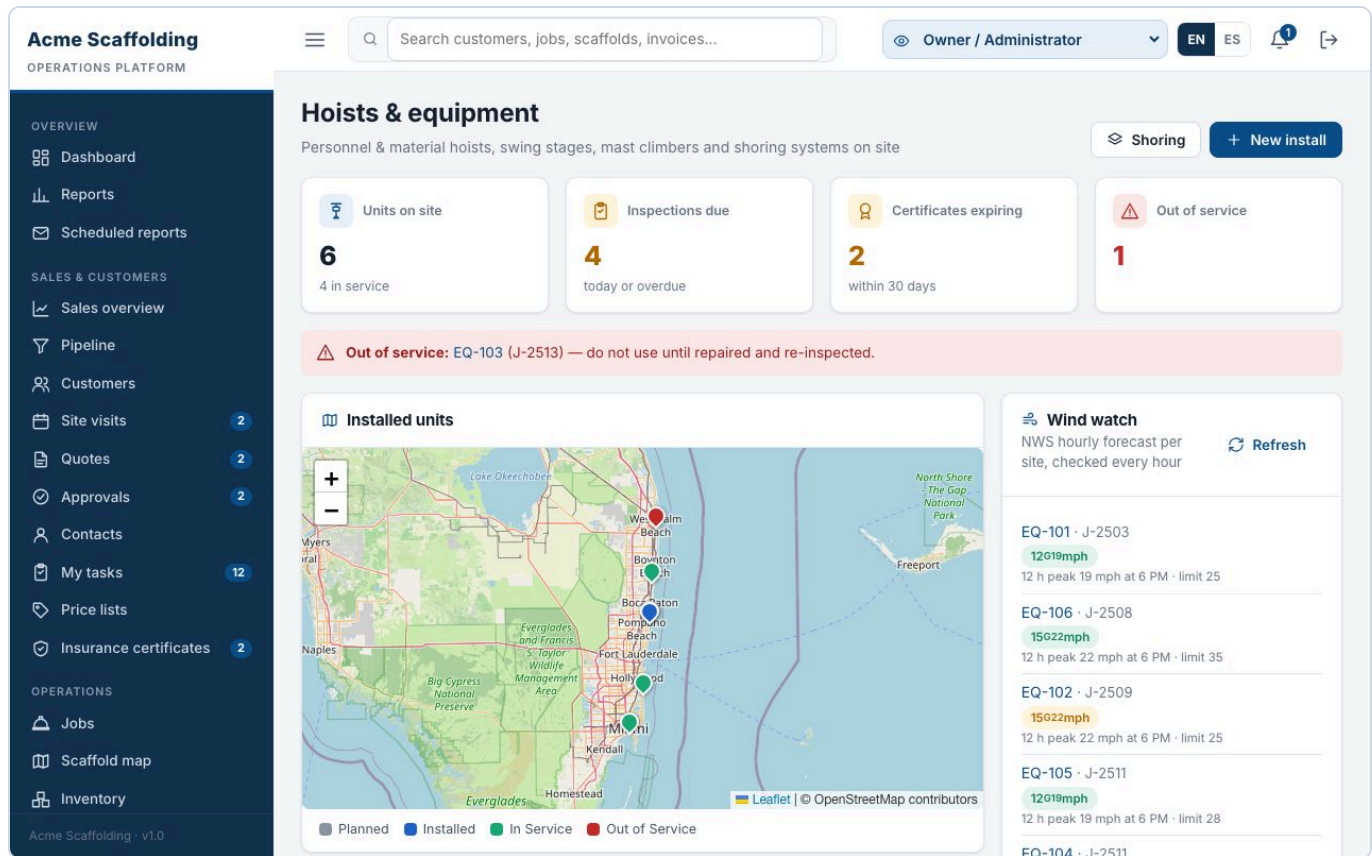
Weekly timesheets.

Hoists, shoring and equipment

Installed equipment and temporary shoring, with their checks and certificates.

Hoists, swing stages and mast climbers

Each installation links its serial-numbered parts (motors, wire ropes) and keeps a log of daily checks, load tests, services, wire-rope inspections and certifications. Swing stages use a fixed daily checklist. Any failed check sets the unit **Out of service** and alerts operations. A wind watch compares the forecast with each unit's wind limit.



Installed equipment on a map.

Shoring layouts

Enter the design load, shore spacing and leg capacity. The system calculates the load per leg, shows utilisation against capacity with a safety indicator and draws a plan view of the shore grid.

Note. The shoring check is indicative. It does not replace an engineered design.

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Shoring layouts

Load per leg versus allowable capacity for every shoring layout

+ New layout

Layouts

4

Active (not stripped)

3

Awaiting removal sign-off

1

1 pours in next 14 days

Over 85% utilised

0

LAYOUT	JOB	SHORE TYPE	DESIGN LOAD (PSF)	SPACING	LOAD / LEG	UTILISATION
Level 3 deck — reshoring posts Level 3, ramp & drive aisle	J-2510 Davie Medical Office — parking garage shoring	Post shores	120	5.0' x 5.0'	3,000 lb	
Level 2 deck — frame shoring towers Level 2, grid lines A-F / 1-6	J-2510 Davie Medical Office — parking garage shoring	Frame shoring towers	185	4.0' x 5.0'	3,700 lb	
Garage deck spall repair — aluminum beams P2 level, bays 4-9	J-2512 Brickell Bay Residences — garage deck repair	Aluminum beams & stringers	160	6.0' x 5.0'	4,800 lb	

A shoring layout.

Engineering and document control

Drawings, calculations, permits and the review workflow around them.

The screenshot shows the 'Document register' interface of the Acme Scaffolding Operations Platform. The left sidebar contains navigation links for Overview (Dashboard, Reports, Scheduled reports), Sales & Customers (Sales overview, Pipeline, Customers, Site visits, Quotes, Approvals, Contacts, My tasks, Price lists, Insurance certificates), and Operations (Jobs, Scaffold map, Inventory). The main content area is titled 'Document register' and includes a search bar, user role 'Owner / Administrator', and language options 'EN' and 'ES'. Below the title, there's a summary of document counts: 69 Controlled documents (28 issued to site, 28 approved), 10 Awaiting review, 8 PE-stamped, and 7 Permits expiring (30 days). A yellow warning banner states: 'Drawing check: 1 scaffold(s) built from a drawing that is not the latest issued revision. Review'. Below this, there's a table of documents with columns: Document #, Document Title, Type, Job, Rev, On Site, Status, and Document Owner. The table lists three documents: DWG-2502-002 (Front elevation & east return — scaffold drawings (DSN-1001) 3D, Drawing, J-2502, A, Rev A issued, Issued, —), DWG-2519-001 (Frame — Tower B balconies elevation, Drawing, J-2519, C, Rev A issued, Rejected, Engineer of record), and DWG-GEN-001 (Typical ringlock bay — standard detail sheet 3D, Drawing, Company-wide, A, Rev A issued, Issued, Ana Lucia Torres). A fourth document, Hurricane preparedness plan, is partially visible at the bottom.

The document register.

- **Document register:** drawings, calculations, PE-stamped designs, permits and method statements. Revisions letter automatically (A, B, C...); uploading a new revision supersedes the old one.
- **Review workflow:** Draft → For Review → Approved or Rejected (comments required). Engineers work from the **Review queue**.
- **Transmittals** bundle documents for a customer (for approval, for construction...), send them by email and produce a PDF transmittal sheet.
- **Permits** tracks expiry and flags active jobs with no permit on file.
- **Drawing check** compares the latest issued revision with what is on site.
- **Site drawings** keeps site plans per job.

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Transmittals

Formal issue of drawings and documents to customers

+ New transmittal

All8Draft2Sent3Acknowledged3

TRANSMITTAL #	DATE	JOB	CUSTOMER	TO (CONTACT)	PURPOSE	DOCUMENTS	STATUS
TR-108	Oct 16, 2026	J-2503 Brickell Bay Tower — window replacement	Biscayne Bay Contractors	Jennifer Sanchez	For construction	2	Draft
TR-107	Oct 16, 2026	J-2520 Broward County Courthouse annex — envelope repairs	Broward County Facilities Management	Isabel Johnson	For approval	2	Draft
TR-103	Oct 13, 2026	J-2507 Boca Ocean Residences — concrete restoration	Atlantic Shore Construction	Carlos Flores	For information	2	Acknowledged
TR-106	Oct 3, 2026	J-2517 Port Everglades Terminal 2 — steel repairs	Port Everglades Industrial Services	Marisol Anderson	For construction	2	Sent
TR-104	Sep 27, 2026	J-2511 Lighthouse Point Marina Residences — new construction	Lighthouse Point Development LLC	Anthony Thomas	For construction	2	Sent
TR-101	Sep 14, 2026	J-2501 Ocean Club Towers — 40-year recertification & concrete restoration	Ocean Club Towers Condominium Assn.	Robert Davis	For approval	1	Acknowledged

Transmittals.

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

Items on rent

Rental per cycle

Billed through

Invoiced to date

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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New agreement

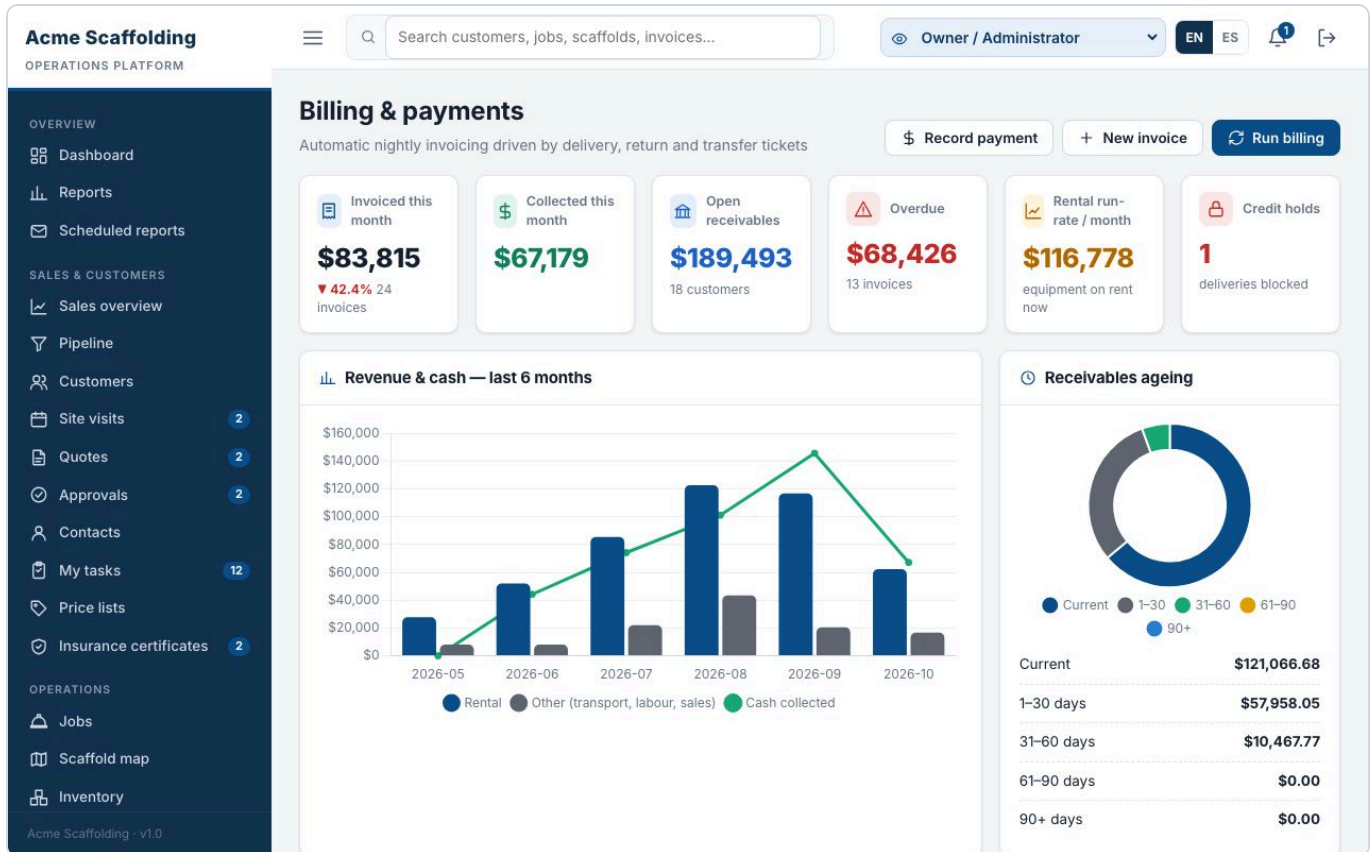
AllActiveOff HireDraftClosed

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 $\times$ 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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Export

New invoice

All

Open

Overdue

Paid

Draft

Void

Invoice # or customer

Type: All

mm/dd/yyyy

mm/dd/yyyy

Filter

INVOICE #	CUSTOMER	TYPE	DATE	DUE	STATUS	TOTAL	BALANCE
INV-24130	Tri-County Concrete Restoration	Late Fee	Oct 16, 2026	Nov 15, 2026	Open	\$25.00	\$25.00
INV-24129	Palmetto Restoration Co.	Rental	Oct 16, 2026	Nov 15, 2026	Open	\$6,209.04	\$6,209.04
INV-24128	Meridian Structural Group	Late Fee	Oct 15, 2026	Nov 14, 2026	Open	\$215.11	\$215.11
INV-24127	Gold Coast Construction Services	Rental	Oct 12, 2026	Nov 11, 2026	Open	\$3,840.27	\$3,840.27
INV-24126	Atlantic Shore Construction	Rental	Oct 12, 2026	Nov 11, 2026	Open	\$10,192.98	\$10,192.98
INV-24125	Ocean Club Towers Condominium Assn.	Rental	Oct 12, 2026	Oct 27, 2026	Open	\$6,205.58	\$6,205.58
INV-24124	Port Everglades Industrial Services	Rental	Oct 11, 2026	Nov 10, 2026	Paid	-\$0.01	\$0.00
INV-24123	Tri-County Concrete Restoration	Rental	Oct 11, 2026	Nov 10, 2026	Paid	-\$0.01	\$0.00
INV-24122	Port Everglades Industrial	Rental	Oct 10, 2026	Nov 9, 2026	Open	\$6,205.58	\$6,205.58

The invoice list.

Acme Scaffolding

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Search customers, jobs, scaffolds, invoices...

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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

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**.

Collections, ledger and finance reports

Control credit, apply deposits and see the books.

- **Collections & credit:** credit holds, the dunning board by stage, failed-payment retries and customers at risk. Finance can release a hold manually.
- **Deposits:** security deposits held until the job has no active agreement, then applied oldest invoice first; pre-payments are applied every night.
- **General ledger:** every invoice, payment, credit note and refund posts double-entry automatically (receivables, cash, tax payable, revenue by stream). The trial balance drills down to each entry.
- **Sales tax:** tax by county and month, prepared for your return.
- **Finance reports:** AR ageing, cash received, revenue by customer, job, item, county, month and type, revenue forecast, customer balances and statements, all exportable.
- **Period close:** close the books through a date; nothing dated on or before it can be changed. Only the administrator can reopen it.

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OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

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Collections & credit control

Dunning schedule, failed-payment retries, late fees (1.5% / month after 10 days) and automatic credit holds

Send statements now Billing settings

Overdue invoices

13

\$68,425.82

Customers on hold

1

Payment retries scheduled

1

At risk of hold (7 days)

0

Credit holds

Customers on hold cannot receive new deliveries until released

CUSTOMER	REASON	SINCE	TYPE	BALANCE	
Gold Coast Construction Services	Invoice 30 days past due	Sep 24, 2026	Automatic	\$40,766.47	Release hold

Dunning board

Reminder	Due today	Overdue notice	Second notice
0 · \$0	4 · \$20,950	2 · \$15,813	2 · \$
	Galt Ocean Mile Condominium Assn. INV-24079 · due Oct 10, 2026 6 days late \$6,188.62	Meridian Structural Group INV-24073 · due Oct 4, 2026 12 days late \$14,340.92	Gold Coast Construction Services INV-24061 · due Sep 22, 2026 24 days late \$7,7
	Tri-County Concrete Restoration INV-24083 · due Oct 12, 2026	Tri-County Concrete Restoration INV-24075 · due Oct 5, 2026	Tri-County Concrete Restoration INV-24069 · due Sep 28, 2026

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Collections and credit control.

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General ledger

Built-in double-entry ledger — every invoice, payment, credit and refund posts automatically · No period closed yet

01/01/2026

10/16/2026

Apply

Export

Trial balance

ACCOUNT	TYPE	DEBIT	CREDIT	BALANCE
1000 Cash — Operating account	Asset	\$225,040.94	\$0.00	\$225,040.94
1010 Card & ACH clearing (payment processor)	Asset	\$207,339.48	\$0.00	\$207,339.48
1200 Accounts receivable	Asset	\$621,872.99	\$432,380.49	\$189,492.50
2100 Sales tax payable — Florida state	Liability	\$0.00	\$31,005.14	-\$31,005.14
2110 Sales tax payable — county surtax	Liability	\$0.00	\$5,167.56	-\$5,167.56
4000 Rental revenue	Revenue	\$0.08	\$467,025.73	-\$467,025.65
4100 Sales revenue (consumables & equipment)	Revenue	\$0.00	\$29,992.00	-\$29,992.00
4200 Transport revenue	Revenue	\$0.00	\$23,850.00	-\$23,850.00
4300 Labour & installation revenue	Revenue	\$0.00	\$62,920.00	-\$62,920.00
4400 Damage & loss recovery	Revenue	\$0.00	\$64.00	-\$64.00
4500 Late fee income	Revenue	\$0.00	\$1,848.57	-\$1,848.57
Total		\$1,054,253.49	\$1,054,253.49	

The trial balance.

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Florida sales tax

6% state sales tax + county discretionary surtax by job-site county · exemption certificates honoured automatically

2026-10Export

Tax collected — 2026-10 (for DR-15)

COUNTY	INVOICES	GROSS SALES	EXEMPT SALES	TAXABLE	STATE TAX	SURTAX	NET TAX DUE
Broward	13	\$35,061.18	\$0.00	\$32,928.38	\$1,975.71	\$329.29	\$2,305.00
Miami-Dade	4	\$12,062.90	\$0.00	\$7,972.32	\$478.34	\$79.72	\$558.06
Palm Beach	7	\$31,919.35	\$0.00	\$27,270.49	\$1,636.23	\$272.70	\$1,908.93
Total	24	\$79,043.43	\$0.00	\$68,171.19	\$4,090.28	\$681.71	\$4,771.99

County rates

Edit rates

COUNTY	STATE	SURTAX	COMBINED	NOTES
Broward	6.0%	1.0%	7.0%	Transportation surtax
Collier	6.0%	0.0%	6.0%	
Hendry	6.0%	1.0%	7.0%	
Hillsborough	6.0%	1.5%	7.5%	
Lee	6.0%	0.5%	6.5%	

Exemption certificates

+ Add certificate

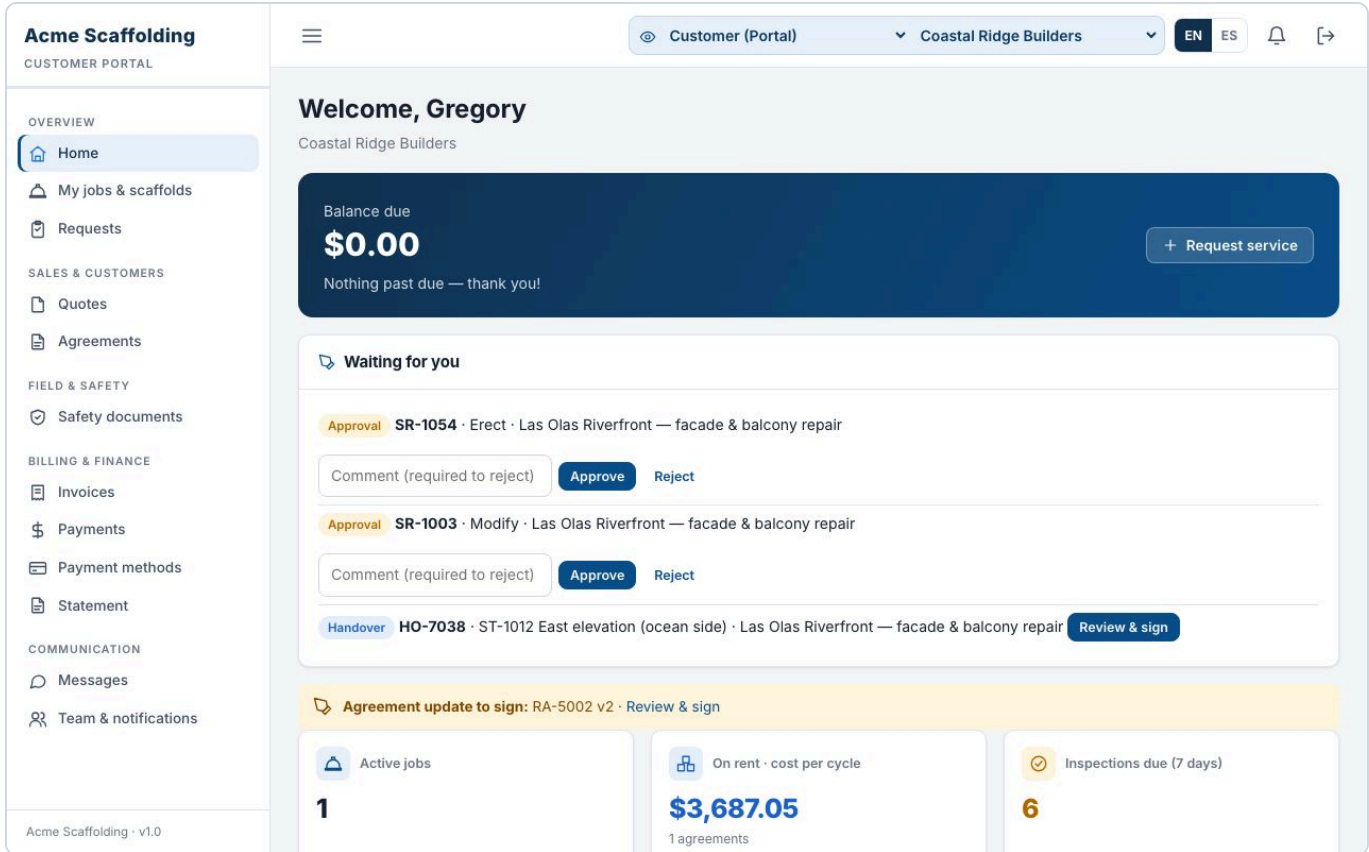
CUSTOMER	CERTIFICATE #	TYPE	EXPIRES	STATUS
Port Everglades Industrial Services	16-8015557723C-1	Florida Annual Resale Certificate (DR-13)	Sep 6, 2026	Expired
Broward County Facilities Management	85-8012622145C-4	Government Entity	Jun 30, 2029	Valid

Sales tax by county.

CHAPTER 21

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
See every job, scaffold tag status, next inspection and equipment on rent	My jobs & scaffolds
Request erect / modify / dismantle / inspection or a pickup	Requests → New request
Download tickets, inspection reports and handover certificates	Safety documents

Customers can...	Where
Read every message you sent them	Messages
Manage who at their company can use the portal	Team & notifications

Acme Scaffolding

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Customer (Portal)

Coastal Ridge Builders

EN ES

Invoices

All Open Past due Paid

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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Customer (Portal)

Coastal Ridge Builders

ENES

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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Advanced customer portal

Jobs, scaffolds, requests and safety documents for your customers.

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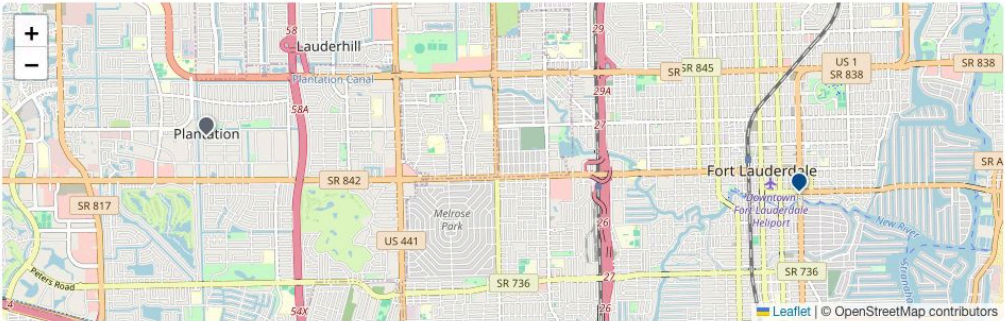
Acme Scaffolding - v1.0

Customer (Portal)

Coastal Ridge Builders

EN ES

My jobs & scaffolds



JOB	SITE	STATUS	SCAFFOLDS	NEXT INSPECTION
J-2502 Las Olas Riverfront — facade & balcony repair	401 E Las Olas Blvd, Fort Lauderdale	Active	7 1 red	Oct 16, 2026
J-2521 Plantation office park — re-roof access	8000 W Broward Blvd, Plantation	Completed	0	—

A job in the portal with its scaffold map.

Acme Scaffolding

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Customer (Portal)

Coastal Ridge Builders

ENES

Service requests /

Request service

What do you need? *

Modify

Job *

—

Scaffold (optional)

—

Requested date *

10/18/2026

Priority

Normal

On-site contact phone

Details *

e.g. Please collect all frames and planks from the north elevation — scaffold is clear and ready.

Submit request

Requesting a service. It lands on your Requests board.

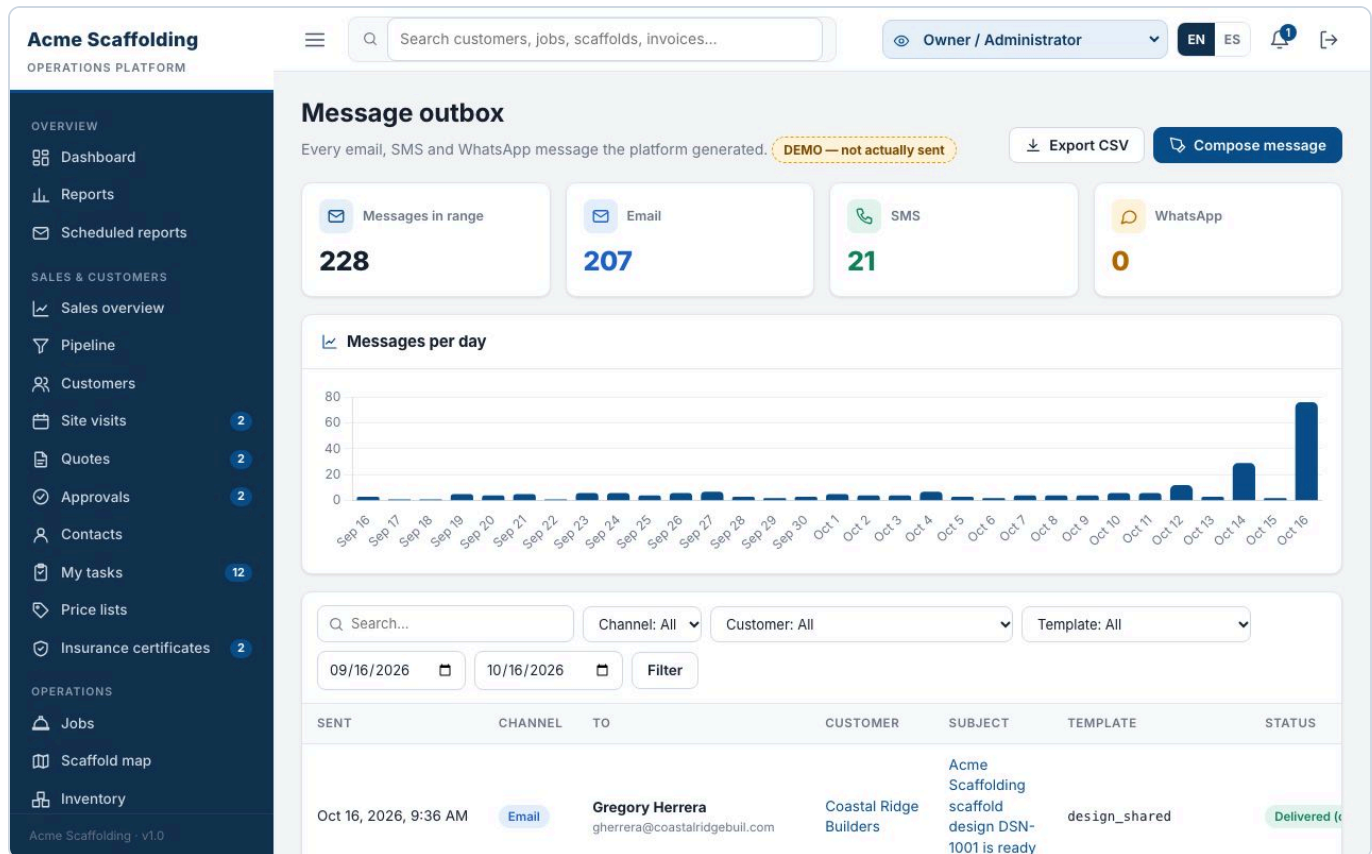
With Starter, customers also see their jobs and the status of every scaffold, receive handover certificates to sign online, raise requests and message you.

Communication and the storm center

Messages in English and Spanish, and a playbook for severe weather.

Messages

The system sends email, SMS and WhatsApp messages from bilingual templates: invoice issued, payment receipt, payment failed, overdue notices, credit hold, delivery on the way and completed, request received and scheduled, scaffold red-tagged, quote sent and more. Each contact receives them on their preferred channel and in their language.



The outbox: every message the system has sent.

- **Templates:** edit wording in English and Spanish with a live preview.
- **Notification rules:** which event sends which template to whom, on which channel. Switch any of them off.
- **Compose** one-off messages, or send **broadcasts** to a group (all active customers, a county, all crews).

Note. Email, SMS and WhatsApp are written to the in-app outbox until a delivery provider is connected for your company; ask your administrator what is set up.

Acme Scaffolding

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Message templates

Bilingual templates used by billing, dispatch, safety, sales and the Storm Center. Variables in {{double braces}} are filled automatically.

+ New template

TEMPLATE	TRIGGER EVENT	CHANNEL	LANGUAGES	VARIABLES	SENT	LAST USED	ACTIVE
General announcement broadcast_general	Manual broadcast	Email	ENES	contact, message	0	—	Active
Card expiring card_expiring	Saved card expires next month (sent on the 1st)	Email	ENES	brand, last4, contact, customer, exp, link	1	8 h ago	Active
Tax certificate expiring cert_expiring	Tax-exempt certificate expires in 30 days	Email	ENES	cert_number, expiry_date, contact	0	—	Active
Insurance certificate expired coi_expired	Customer COI has expired	Email	ENES	contact, coverage, customer, policy_no, expiry_date	0	—	Active
Insurance certificate expiring coi_expiring	Customer COI expires in 30 / 14 days	Email	ENES	days, contact, coverage, customer, insurer, policy_no, expiry_date	0	—	Active
Credit hold notice credit_hold_notice	Customer placed on credit hold	Email	ENES	contact, customer, reason	0	—	Active
Credit hold released credit_hold_released	Credit hold released	Email	ENES	contact, customer	0	—	Active

Message templates.

Job-site weather

Active jobs with a location are checked against the weather forecast. Operations and foremen are alerted when wind passes your threshold, which you set on the Job-site weather page.

Storm center

Acme Scaffolding

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Storm center

Hurricane & severe-weather mode for South Florida job sites

No active storm warnings

Monitoring the National Hurricane Center feed for Broward, Miami-Dade and Palm Beach. Atlantic hurricane season runs June 1 – November 30.

Active jobs in tri-county area

Scaffolds standing

Field employees

209328

Simulate hurricane warning

Demo: Inject a mock NHC advisory and run the full storm playbook.

Storm name

Alert level

Hurricane Rene

Hurricane Wai

Category

Crew report time

Category 2

6:00 AM

Affected counties

☒ Broward

☒ Miami-Dade

☒ Palm Beach

☐ Monroe

☐ Martin

☐ St. Lucie

☐ Hendry

Weather alerts — live NWS + simulation

Refresh live NWS feed

All clear Tropical Storm Ernesto · Tropical Storm

Warnings discontinued — Ernesto moving away to the north-northeast

All watches and warnings discontinued.

Aug 18, 2026, 8:00 AM · Mock NHC feed · Broward, Miami-Dade, Palm Beach

Tropical Storm Warning Tropical Storm Ernesto · Tropical Storm

Tropical Storm Warning for Broward, Miami-Dade and Palm Beach — Ernesto

Sustained winds of 45–55 mph with higher gusts expected within 36 hours. Heavy rain 3–6 inches.

Aug 15, 2026, 5:00 AM · Mock NHC feed · Broward, Miami-Dade, Palm Beach

Tropical Storm Watch Tropical Storm Ernesto · Tropical Storm

Tropical Storm Watch issued for the southeast Florida coast — Ernesto

Tropical-storm conditions are possible within 48 hours.

Aug 13, 2026, 5:00 PM · Mock NHC feed · Broward, Miami-Dade, Palm Beach

Storm center with the weather-alert feed and the storm-mode control.

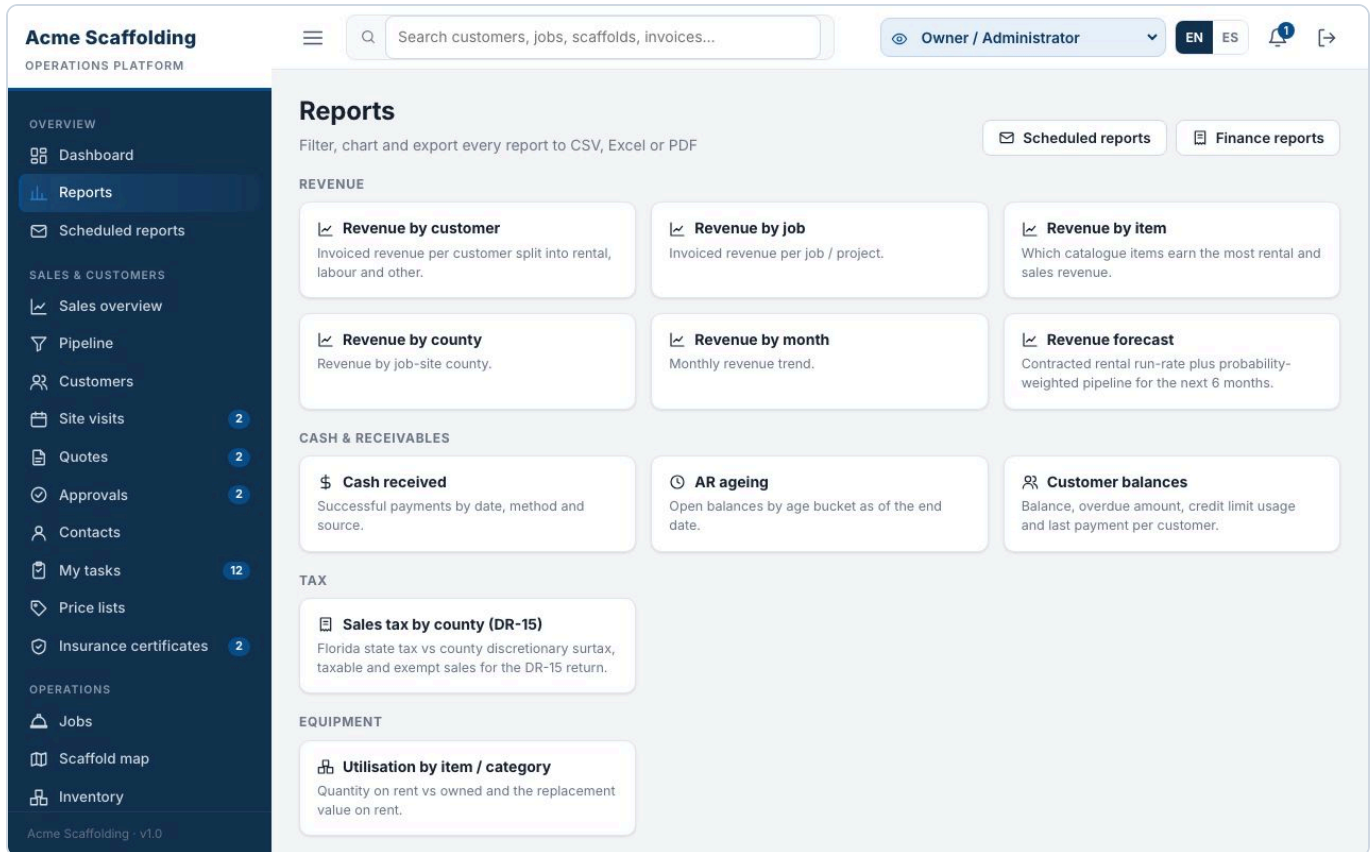
Weather-service alerts for your region arrive automatically. Starting **storm mode** shows a red banner across the whole system and gives every active job a storm-prep checklist (remove netting and wrap, secure loose materials, verify ties, lower swing stages, tie off hoists, photograph). Prep work orders are created, customers and crews are alerted, and a readiness board shows progress per job. After the storm, press **All clear**: post-storm inspections are created and every affected scaffold becomes due for inspection today.

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Reports

The numbers owners ask for, with filters and exports.



The reports catalogue.

Reports lists operational and financial reports: revenue by customer, job, item, county or month; cash received; receivables ageing; sales tax; revenue forecast; utilisation; quote win and loss; job profitability; inspection compliance; customer balances. Each has date and customer filters, an on-screen table and chart, and CSV, Excel and PDF export. Save a filter for next time.

Scheduled reports emails a report to chosen people on a schedule (daily, weekly or monthly).

Acme Scaffolding

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Acme Scaffolding · v1.0

Search customers, jobs, scaffolds, invoices...

Owner / Administrator

ENES

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Reports /

Scheduled reports

Reports emailed automatically as PDF, CSV or Excel attachments (demo outbox — nothing is sent)

+ New schedule

Active schedules

Due today

Emails sent (last 30 days)

NAME	FREQUENCY	RECIPIENTS	ATTACHMENT FORMAT	NEXT RUN	LAST SENT	
Friday inspection compliance Inspection compliance	Weekly on Friday	maria@acme-scaffolding.example	PDF	Oct 16, 2026	Never	OpenSend nowEdit
Monday summary for the owner Management summary · preset=last_7	Weekly on Monday	daniel@acme-scaffolding.example	PDF	Oct 19, 2026	Oct 12, 2026 1 email(s) · management-summary-2026-10-11.pdf · 15 rows	OpenSend nowEdit
Monthly revenue by customer Revenue by customer · preset=last_month	Monthly on day 1	daniel@acme-scaffolding.example, linda@acme-scaffolding.example, yesenia@acme-scaffolding.example	Excel (.xlsx)	Nov 1, 2026	Oct 1, 2026 3 email(s) · revenue-customer-2026-09-30.xlsx · 20 rows	OpenSend nowEdit
Pipeline & win/loss (Spanish) Quote win/loss & pipeline · preset=atd	Weekly on Monday	kevin@acme-scaffolding.example	PDF	Inactive	Never	OpenSend nowEdit

Scheduled reports.

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, discount limits
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

Acme Scaffolding

OPERATIONS PLATFORM

Search customers, jobs, scaffolds, invoices...

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Company settings

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

Sample PDF

Company profile

Company name

Legal name

Acme Scaffolding

Acme Scaffolding

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.

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Search customers, jobs, scaffolds, invoices...

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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

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Templates & numbering

Document templates and number sequences

Inspection templates 9

Checklists for scaffold, hoist and swing-stage inspections

Message templates 30

Bilingual email / SMS / WhatsApp templates

Kit templates 6

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
3D scaffold designer	Draw a scaffold from measurements and get the exact parts list, drawings and labour estimate.	Complete

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	—	✓	✓
Requests & work orders	—	✓	✓
Inspections, handovers & safety	—	✓	✓
People, crews & timesheets	—	✓	✓
Hoists, shoring & equipment	—	✓	✓
Engineering & document control	—	✓	✓
Communication & storm center	—	✓	✓

Module	Light \$99	Starter \$399	Complete \$999
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.