Administrator Manual

Office setup, billing, invoices, payroll and users

leasetickets.com · Version October 2026
Screenshots come from a practice database with made-up customers and drivers.

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Where the admin side lives

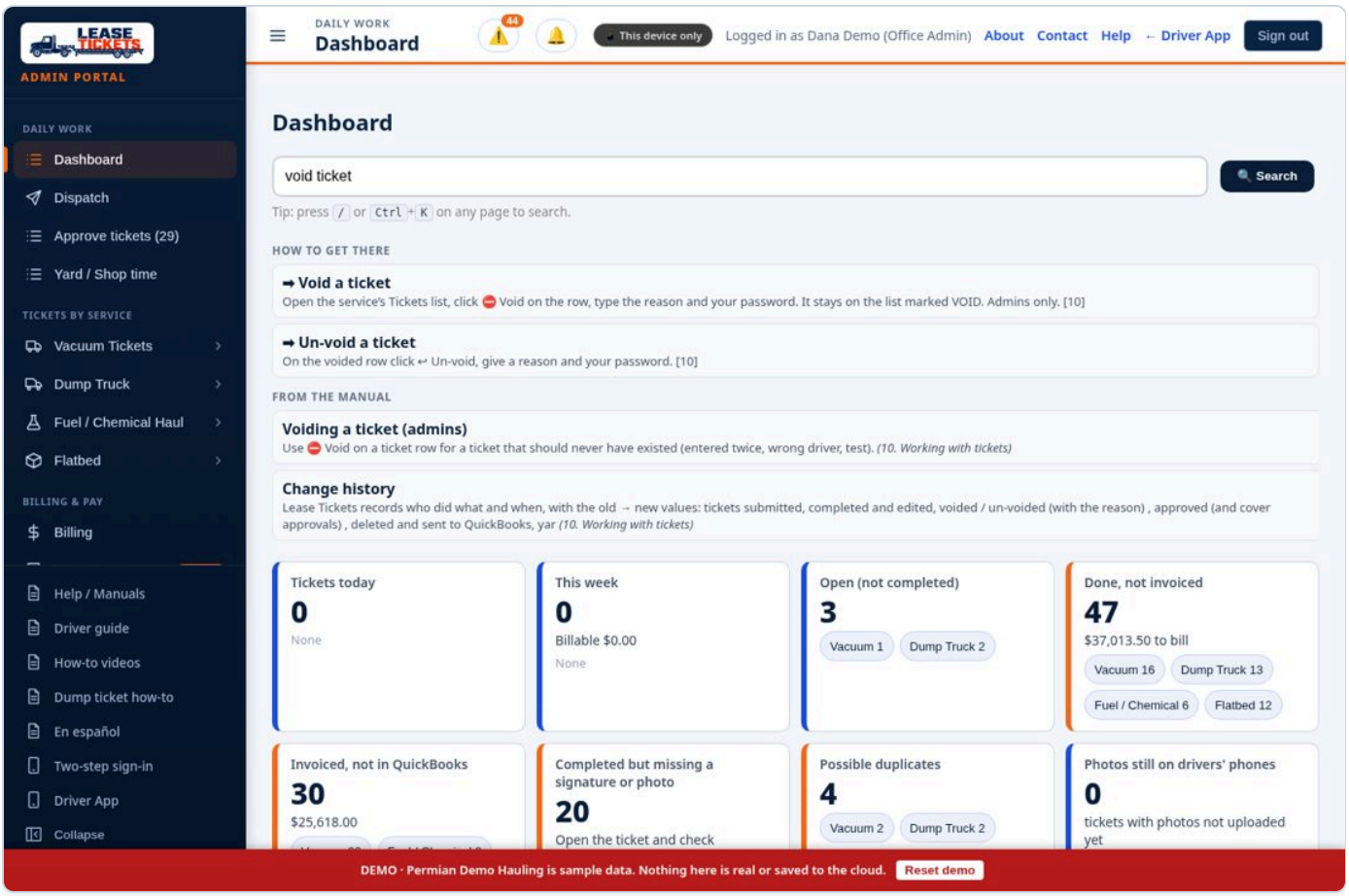
Open **leasetickets.com/admin** on a computer. Drivers use the phone app at **leasetickets.com**. Everything in this manual is on the left sidebar of the admin portal.

Search anything (Dashboard search)

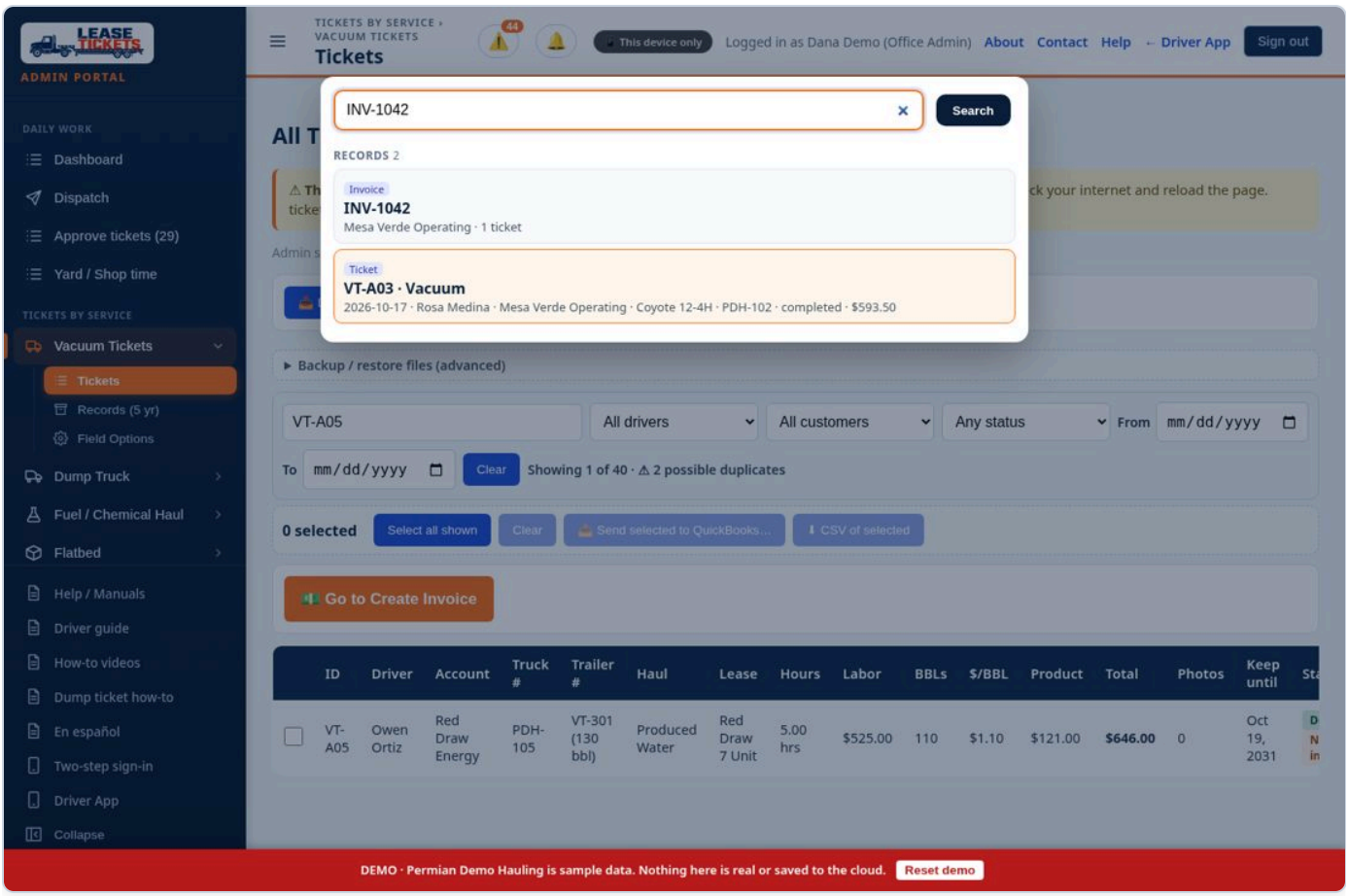
At the top of the **Dashboard** there's a search box. From any page, press **/** or **Ctrl+K** (**⌘K** on a Mac) to open the same search. Type a **ticket #**, **driver**, **truck or trailer**, **customer**, **lease** or **invoice #**, or what you want to do ("void ticket", "add driver", "payroll", "close pay period"). Results come in three groups:

- **How to get there**: click to jump to the right page; the line under it says what to do there.
- **Records**: matching tickets (date, driver, customer, lease, truck, status), drivers, trucks, customers, leases and invoices. Click a ticket to open it in its list.
- **From the manual**: the matching manual topic with its first line.

Use the arrow keys and Enter to pick a result, Esc to close. Search respects your role: **Logistics Coordinators see no dollar amounts, no invoices, and no billing, payroll or user pages** in the results. Search only reads and navigates; it never changes anything.



Dashboard search: how-to results



Ctrl+K from any page: invoice # and its ticket

How-to videos

Short captioned videos (with narration) are under **How-to videos** at the bottom of the sidebar, and on the driver app next to **Help** (**/manuals/videos/**). Office / payroll (English): **Adding deductions and loans** (2:01), **Running and closing a pay period** (2:07) and **Payroll Summary and Payroll archives** (1:56). Dispatch: **Approving tickets** (1:54, incl. covering for a dispatcher who is off). Drivers: **belly dump ticket** (1:28), **vacuum ticket** (1:28) and **flatbed ticket** (1:19). They were recorded on the practice copy with made-up data. The payroll videos are for the office (for example Connie) and are not in the driver app. Driver videos are also in Spanish; see **Videos en español** below.

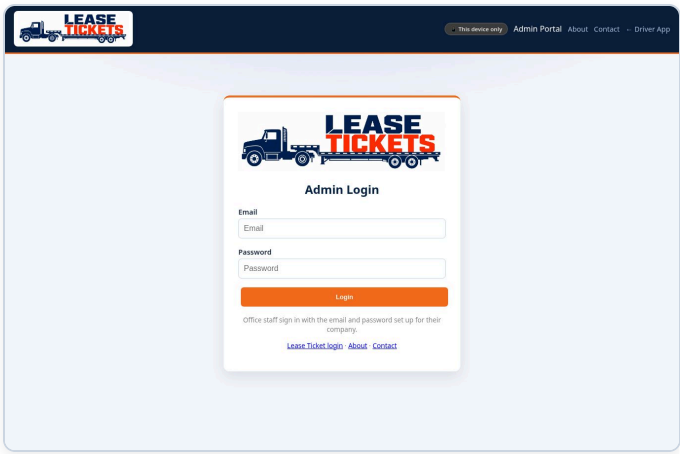
Videos en español

The three driver videos (vacuum, belly dump and flatbed) have a Spanish-narrated version with Spanish captions. Use the **English / Español** toggle on the How-to videos page, or open **Videos en español** in the driver app. The sidebar **En español** page has those videos plus the Spanish Dump ticket how-to PDF. The English videos stay in place. The dispatcher approving-tickets video is English only.

1. Signing in and finding your way

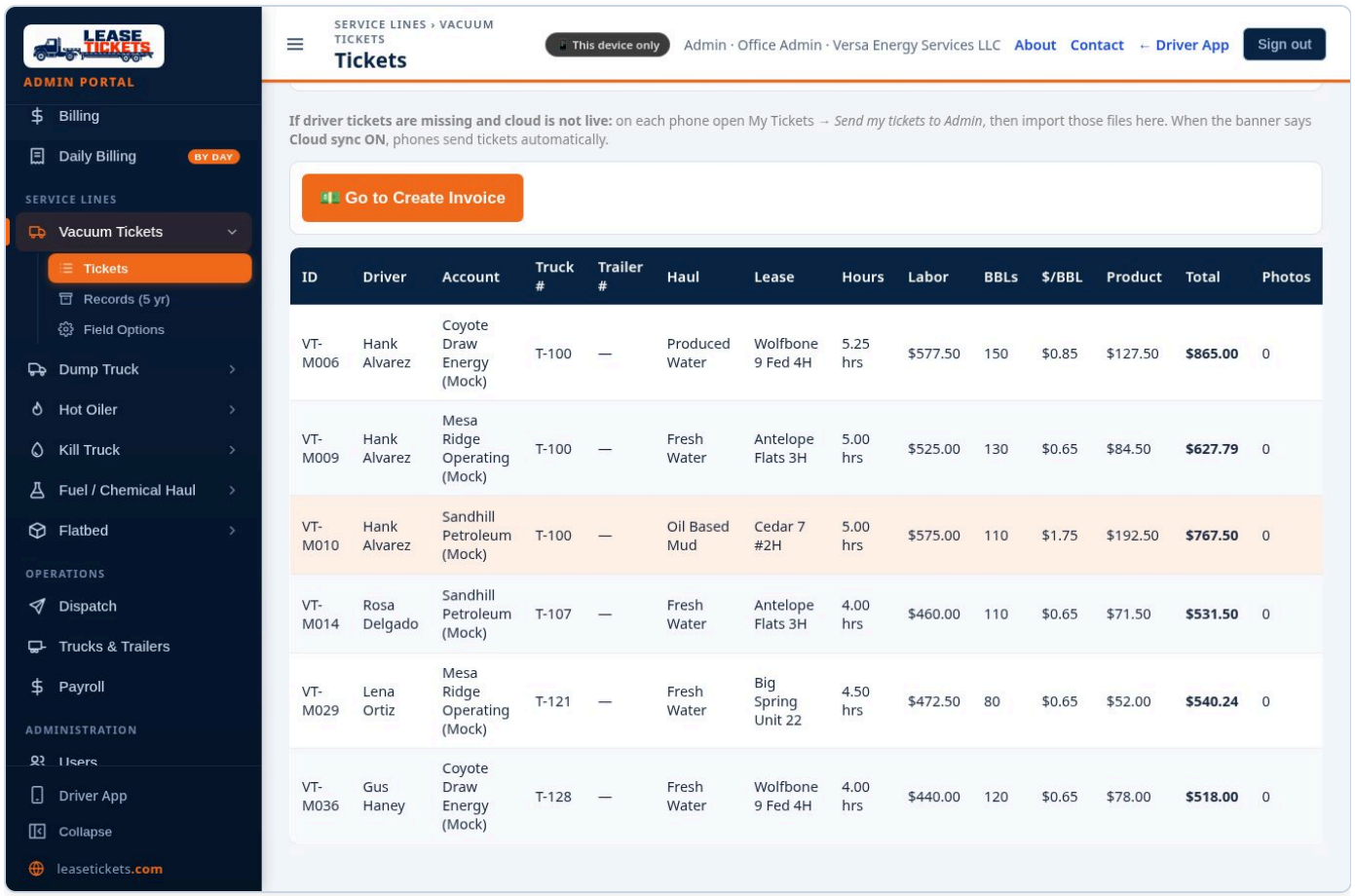
1. Go to **leasetickets.com/admin**.
2. Enter your **Email** and **Password**, then click **Login**.
3. If the office gave you a temporary password, the app asks you to set a new one first.

To change your password later, go to **Users** › **Your password** › **Change my password**.



Admin login

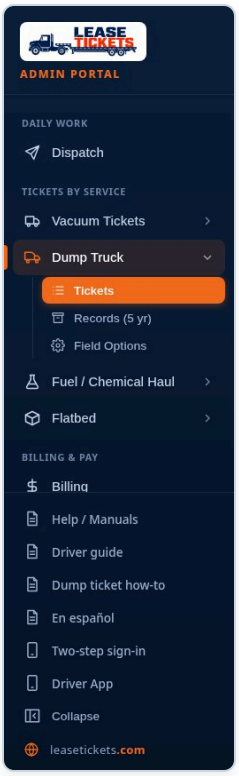
The sidebar



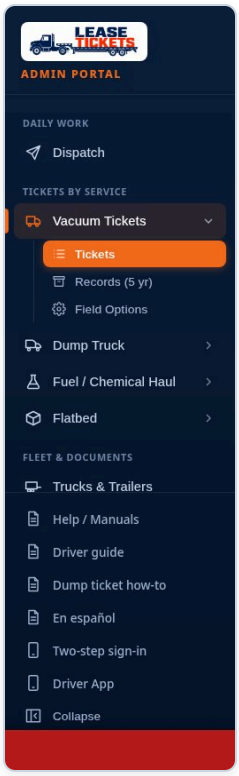
The admin portal. The sidebar is on the left and the sync badge is at the top.

Group	Items	What it's for
Daily work	Dispatch	Assigning loads to drivers
Tickets by service	Vacuum Tickets, Dump Truck, Hot Oiler, Kill Truck, Fuel / Chemical Haul, Flatbed	Ticket lists (with search and filters), edits, **Field Options** (dropdown lists and rates) and **Records (5 yr)** for each line
Billing & pay	Billing, Daily Billing, Payroll	Invoicing completed tickets and driver pay
Fleet & documents	Trucks & Trailers, Documents	Units and their papers, files for drivers
Administration	Users, Accounts, Companies*, Integrations	Logins, customer billing contacts and branding, the agreement, and QuickBooks / OpenInvoice

The menu only shows the groups a person uses. **Logistics Coordinators** (dispatchers) see Daily work, Tickets by service, Fleet & documents and an hours-only **Reports** page; the rest of Billing & pay and Administration are hidden for them.



Admin menu



Dispatcher (Logistics Coordinator) menu

> **NOTE** * **Companies** only shows the service agreement to the admin assigned to it. Developers use it to switch between companies.

Your plan and driver spots

Each company is on a **plan**. The plan sets your monthly price and how many **driver spots** it covers. **A spot is one active driver login.** Trucks, trailers and office users don't count. A deactivated driver frees a

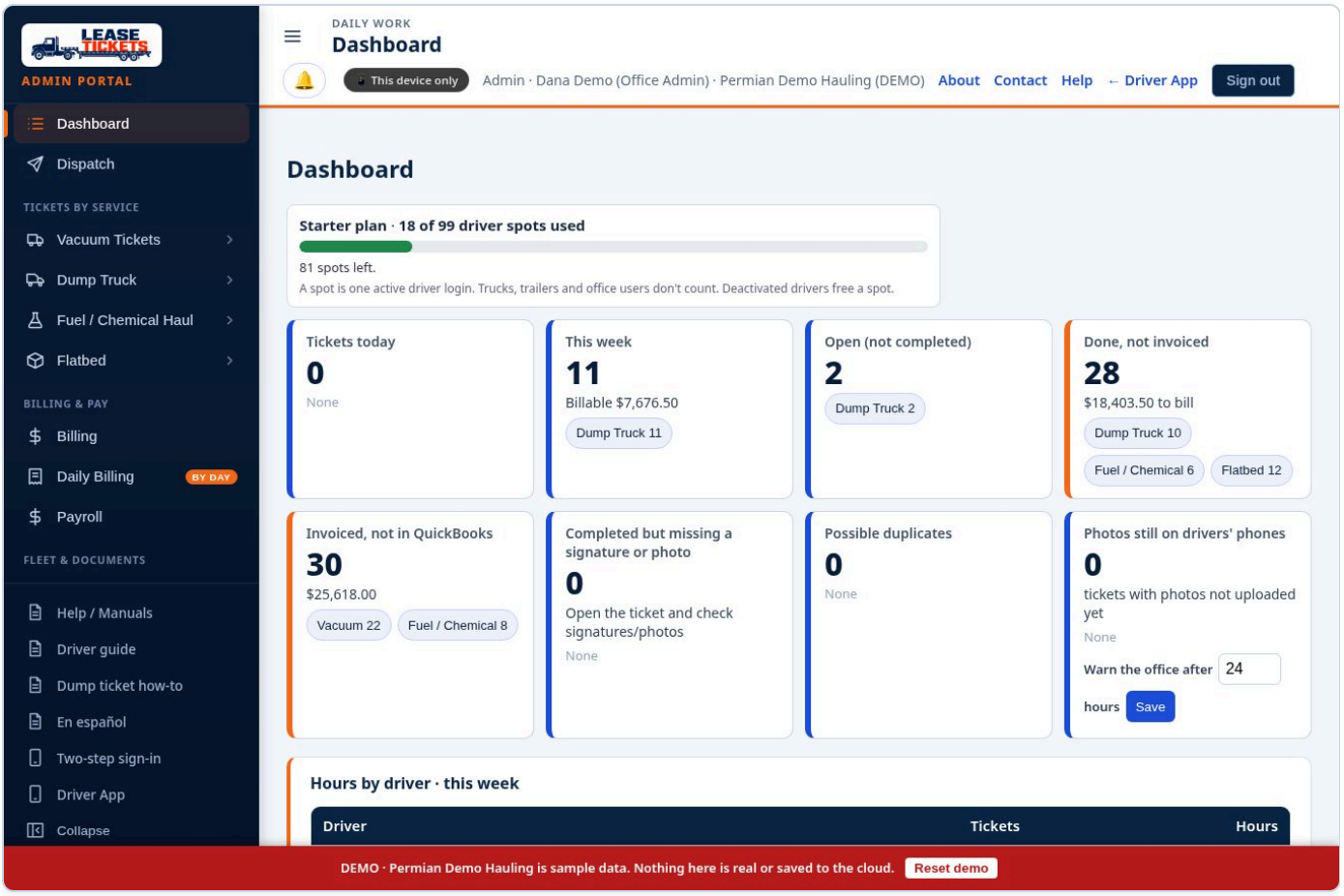
spot.

Plan	Driver spots	Monthly	One-time setup
Starter	0–99 drivers	$400/mo	$500
Pro	100–300 drivers	$600/mo	$750–$1,250
Fleet	301–500 drivers	$1,200/mo	$4,000

Every service line on your subscription (Vacuum, Dump Truck, Fuel / Chemical, Flatbed and so on) is **included** in the plan price. Only the lines on your subscription appear in the menu.

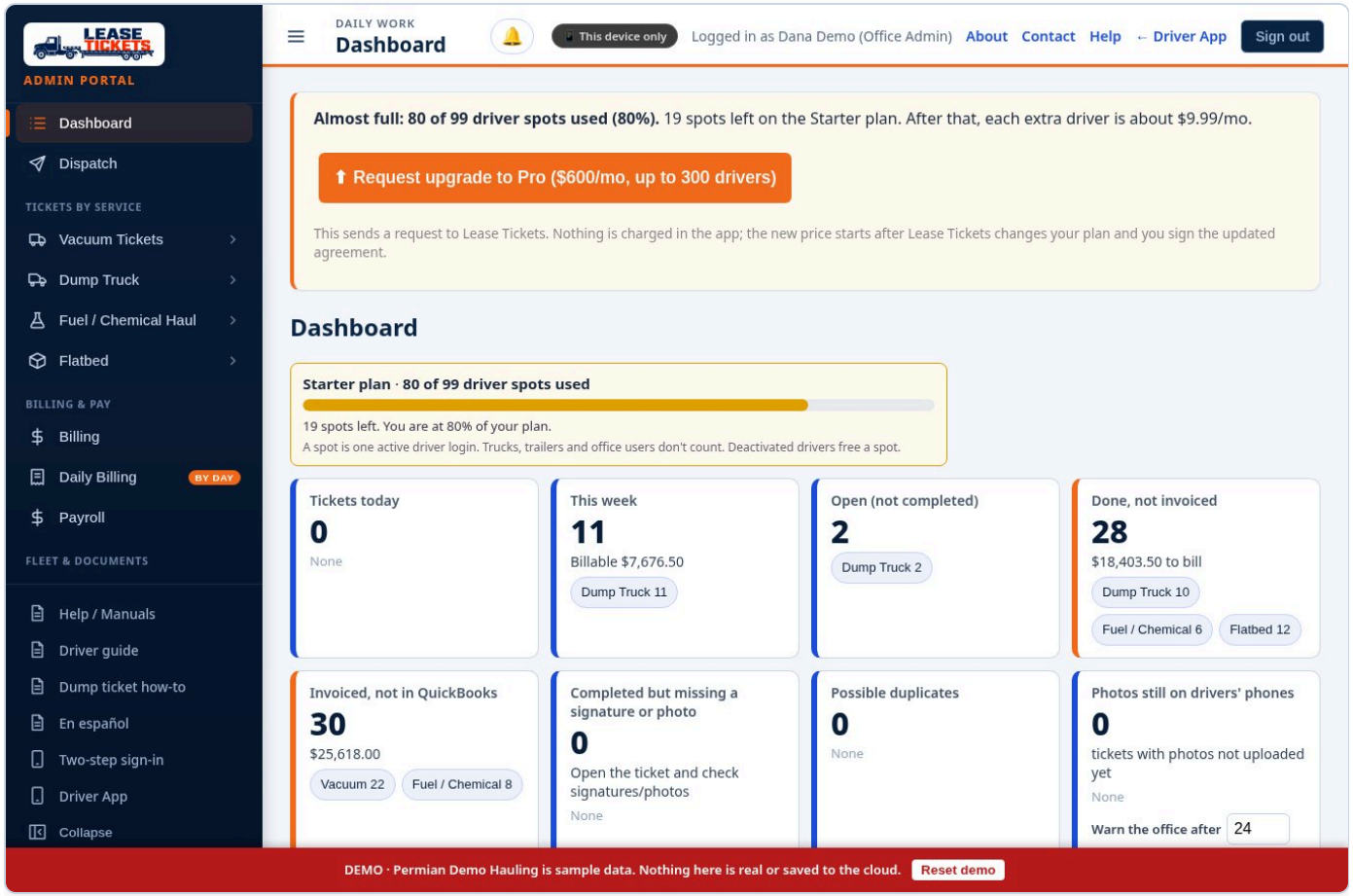
The driver-spot meter

Admins see a meter like **"18 of 99 driver spots used"** at the top of the **Dashboard**, above the driver list on **Users**, and on the 📄 **Agreement** page. Dispatchers (Logistics Coordinators) don't see it.



Dashboard with the meter: 18 of 99 driver spots used (green)

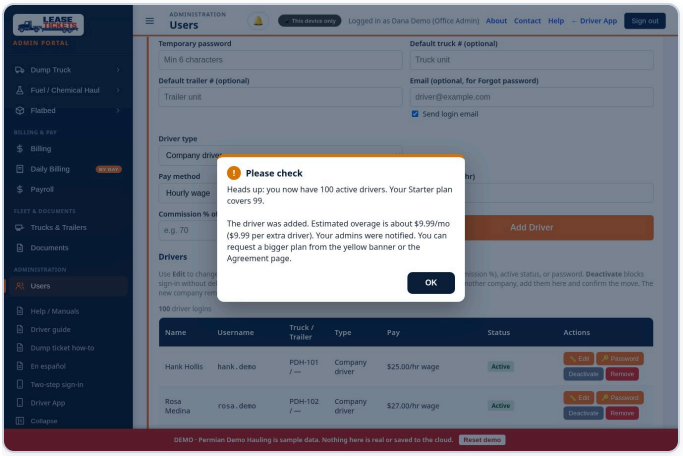
Meter	What it means
Green	Under 80% of your plan.
Yellow: *Almost full*	80% or more of your spots are used. A yellow banner shows at the top of the admin pages, and admins get a 🔔 notification and an email (once, when you cross 80%).
Orange: *Over your plan*	You have more active drivers than the plan covers. The banner shows how many you're over and the **estimated overage, about $9.99 per extra driver per month**. Admins get a 🔔 notification and an email.



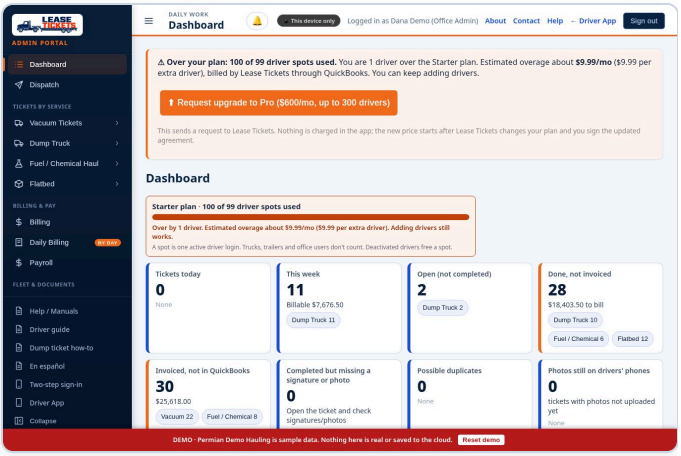
80% warning: yellow banner and meter, with Request upgrade

Going over your plan never stops you

You can **always add drivers**, even past your plan. When you add a driver that puts you over, the app tells you right away and shows the estimated overage. Lease Tickets bills any overage through QuickBooks with your monthly invoice. Nothing is charged by card in the app.



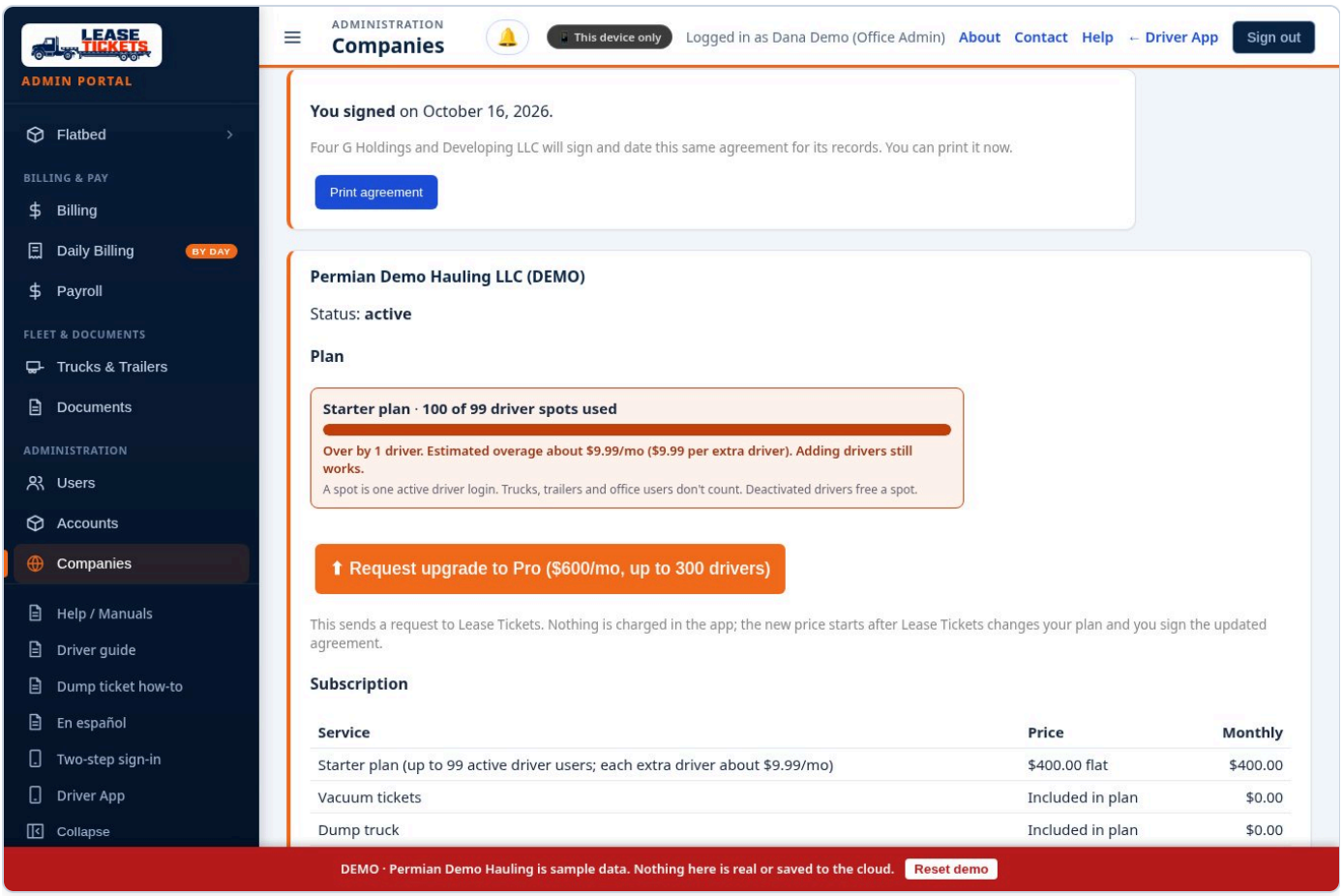
The message after adding the 100th driver on Starter



Over your plan: orange banner, overage estimate and upgrade button

Asking for a bigger plan

1. Click **Request upgrade to …** in the banner, or on **Agreement** under **Plan**.
2. Lease Tickets gets the request by email and on its Companies page. The banner then says *"Upgrade to Pro requested"*.
3. Lease Tickets changes your plan. Because the price changes, the assigned admin **signs the agreement again** (see *The signed agreement* below). Until then, adding new users waits for that signature.



Agreement page: Plan meter, Request upgrade and the subscription table

> **NOTE** The Subscription table shows the plan line and each included service at $0. Older companies that don't have a plan yet still see their per-service prices (flat per month or per truck per month) until Lease Tickets moves them to a plan. Monthly dues are invoiced through QuickBooks, outside the app. If your plan or price changes, the agreement asks to be signed again.

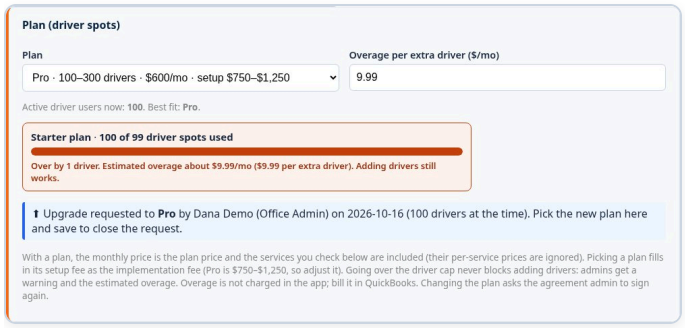
The sync badge

Badge	Meaning
☁ Sync to admin · live	Connected. Tickets from phones show up automatically.
⟳ Connecting…	Still connecting. Give it a few seconds.
☁ Offline (local)	No connection right now. Changes are kept on this device until it reconnects.
📱 This device only	Cloud sync isn't running on this device.
On ticket lists, a yellow note *"This computer is not connected to the cloud"* appears only when there is a problem. When everything is connected there is no banner.	
⚠ Sync error	Something went wrong. Refresh the page. If it keeps happening, sign out and back in.

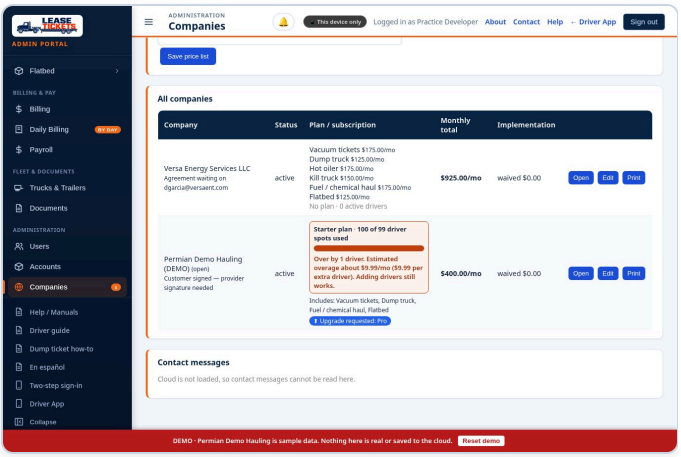
Setting a company's plan (developer)

This part is for the Lease Tickets developer login only.

1. Open **🌐 Companies**. The **All companies** table shows each company's plan meter, the services it includes, and a blue ⬆ **Upgrade requested** tag when an admin asked for a bigger plan. Companies with no plan show their per-service prices and their active driver count.
2. Click **Edit** next to the company. In **Plan (driver spots)**, pick **Starter**, **Pro** or **Fleet**. The editor shows the active driver count and the best-fit plan.
3. Picking a plan fills in its setup fee as the **Implementation fee**: $500, $750 or $4,000. Pro setup can be $750–$1,250, so type the amount you agreed on.
4. **Overage per extra driver** starts at **$9.99/mo**. Change it for one company if you agreed on a different rate.
5. Check the services (ticket lines) the company gets. With a plan they're included, so the per-service prices are greyed out. **Monthly override** still replaces the plan price if you type one.
6. Click **Save company**. Saving a new plan closes an open upgrade request. Because the terms changed, the company's agreement admin is asked to sign again.



Edit company › Plan (driver spots), with an open upgrade request



All companies: plan meter and Upgrade requested tag

> **NOTE** Choosing *No plan* keeps the older subscription (each service priced flat or per truck). Existing companies stay on it until you give them a plan, so their bills and signed agreements don't change. Upgrade requests are emailed to **support@leasetickets.com**. Overage isn't charged in the app; bill it in QuickBooks. Card billing through the shared Stripe setup (from DQLink) comes later.

2. First-time setup checklist

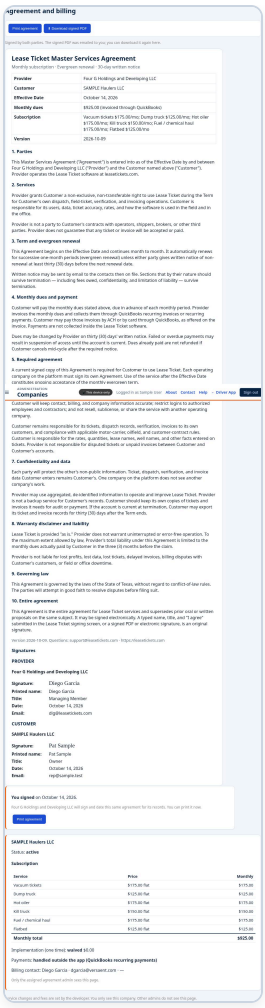
Do these once for a new company, in this order:

1. **Sign the service agreement.** The admin assigned to the agreement opens **Companies**, reads it, types a signature, printed name and title, checks the box, and clicks **Sign agreement**. **No other users can be added until this is done.** Until then, **Users** shows *"Users are locked"*. Lease Tickets then countersigns it, and **you get the fully signed PDF by email** (see *Countersigning agreements* below).
2. **Branding:** **Accounts** › add your logo, USDOT, WHP and emergency phone (section 8).
3. **Trucks and trailers:** **Trucks & Trailers** (section 7). Drivers can't submit a ticket without picking a truck.
4. **Customers and rates:** each service line's **Field Options** (section 3).
5. **Operators, leases, destinations, service types:** also in **Field Options** (section 4).
6. **Drivers and owner operators:** **Users** (section 5). Each active driver uses one spot on your plan.
7. **Office staff:** **Users** › **Add office user** (section 6).

> **TIP** Give drivers the **Driver Guide**. It's under **Help / Manuals** in the driver app menu. Dump truck drivers also have a step-by-step **Dump ticket how-to** (yards vs tons, scale ticket # and photo, net weight, photos, signatures, printing). It's linked on the driver's **New Dump Ticket** page, on the sign-in page and in the admin side menu (**Dump ticket how-to**), at **/manuals/lease-tickets-dump-truck-guide.pdf**. A Spanish version of that PDF is at **/manuals/lease-tickets-dump-truck-guide-es.pdf**. The sidebar and sign-in **En español** page also lists the Spanish driver videos and links to this PDF. On the New Dump Ticket screen, **En español** still opens the PDF directly.

The signed agreement (company admins)

After you sign, Lease Tickets (Four G Holdings and Developing LLC) is notified and countersigns. When that's done, you and Lease Tickets each get an email with the fully signed agreement attached as a PDF named **Lease Ticket MSA - *Company* - *date*.pdf**. Keep it for your records. You can download it again any time under 📄 **Agreement** › **⬇ Download signed PDF**.



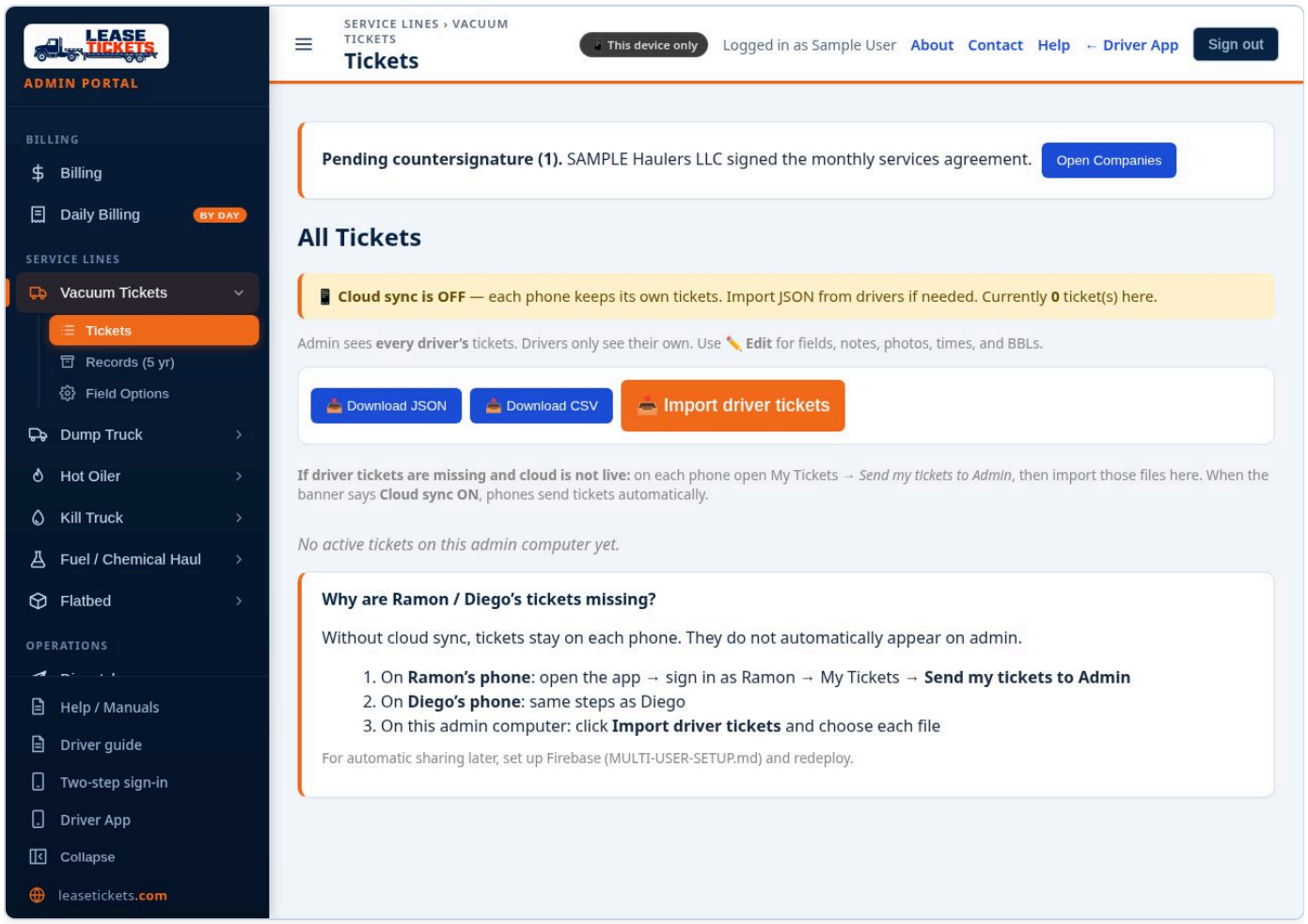
Once both sides have signed, the Agreement page shows Download signed PDF

Countersigning agreements (developer)

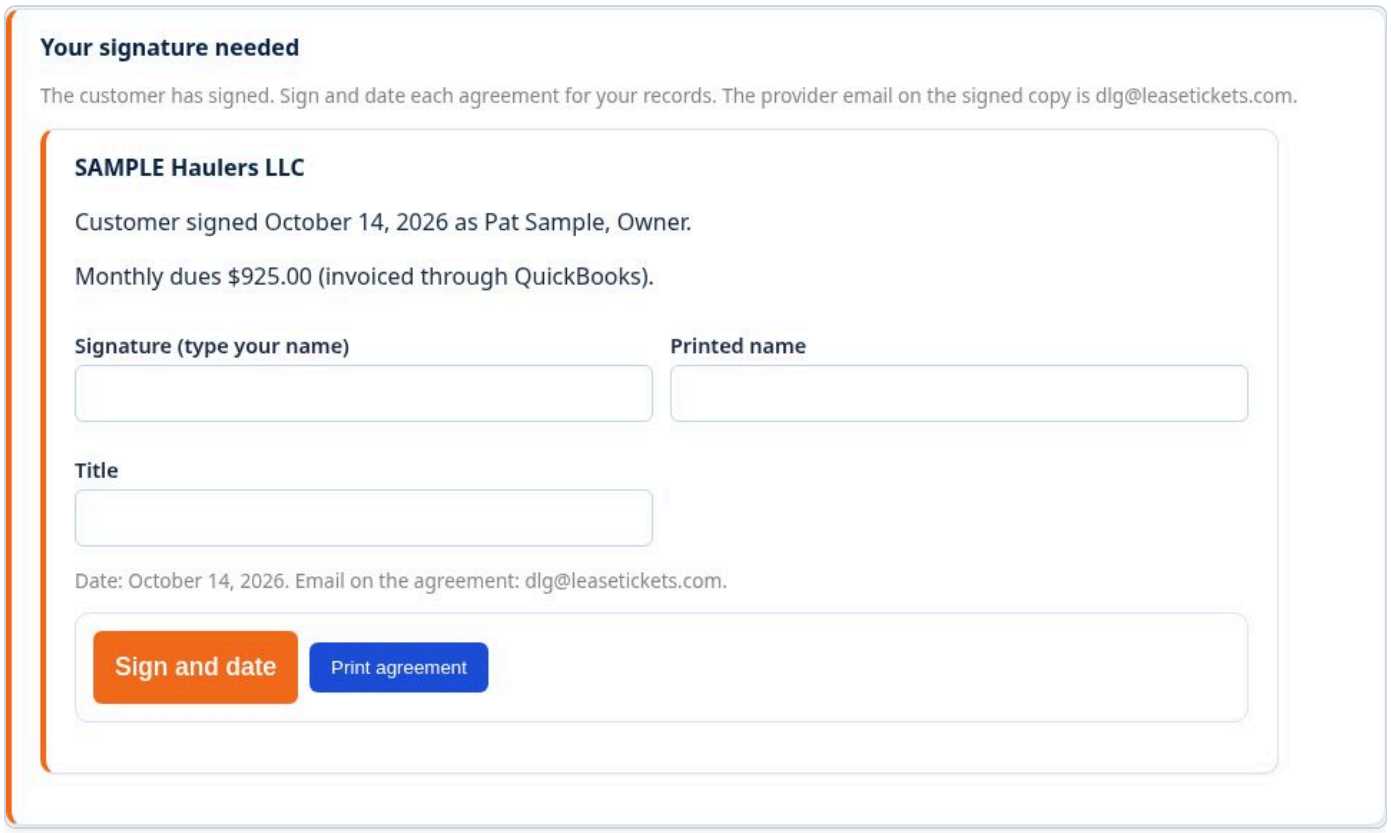
This part is for the Lease Tickets developer login only. Company admins never see it.

1. **You're notified.** When a company's assigned admin signs, an email goes to **support@leasetickets.com** (*"Countersignature needed"*). In the app, a **Pending countersignature (N)** banner shows at the top of the admin pages, and a count badge shows on **Companies** in the sidebar and on the 🌐 Companies tab.
2. **Open the list.** Click **Open Companies** on the banner, or **Administration** › **Companies**. The **Your signature needed** section lists every company that signed and is waiting on you, with who signed, the date and the monthly dues.
3. **Review.** Click **Print agreement** on the card to read the full agreement as the customer signed it.
4. **Sign.** Type your signature, printed name and title, then click **Sign and date**. Today's date and the email you signed in with are added for you.
5. **The signed PDF goes out.** The server builds the fully signed PDF and emails it to the customer's signer and to support@leasetickets.com. A message confirms who it went to. The company row then reads *Agreement signed by both* and the badge count goes down.

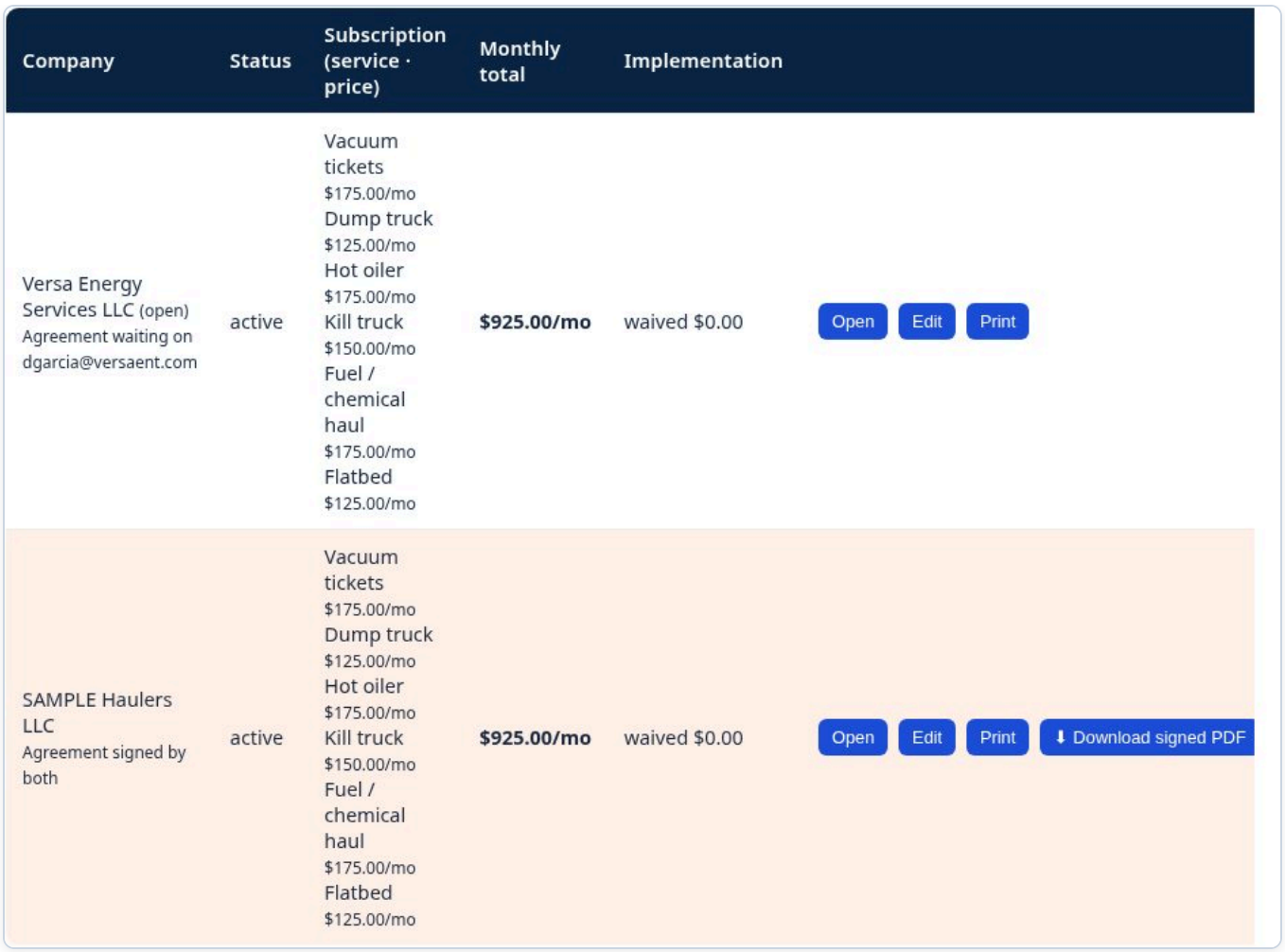
6 **Get a copy later.** Click **⬇ Download signed PDF** on the company row. The PDF is rebuilt from the saved signatures each time; no files are stored.



Pending countersignature banner and the Companies badge



Your signature needed: type your signature, name and title, then Sign and date



Signed by both: Download signed PDF on the company row

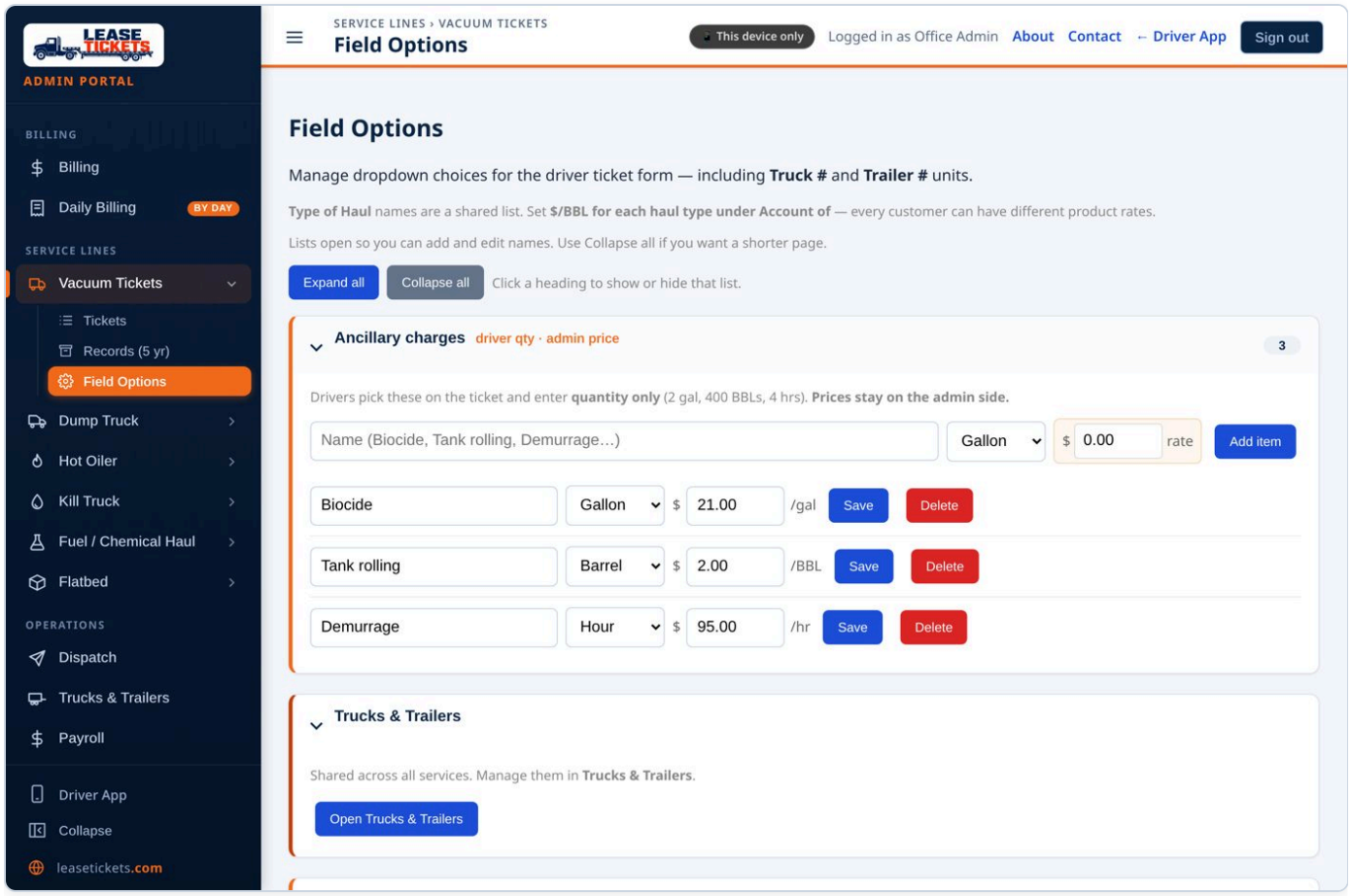
NOTE If the email can't be sent, the app says so. Your signature is still saved. Use **Download signed PDF** and send it yourself. Each signature is emailed once; signing again after a price change starts a new round. If the subscription price changes, the customer is asked to sign again, and the agreement shows up in your list again after they do.

3. Customers (Account of), rates and fuel surcharge

In Lease Tickets a customer is called **Account of**. It's who the ticket is billed to. Each service line keeps its own list of customers and rates in its **Field Options**.

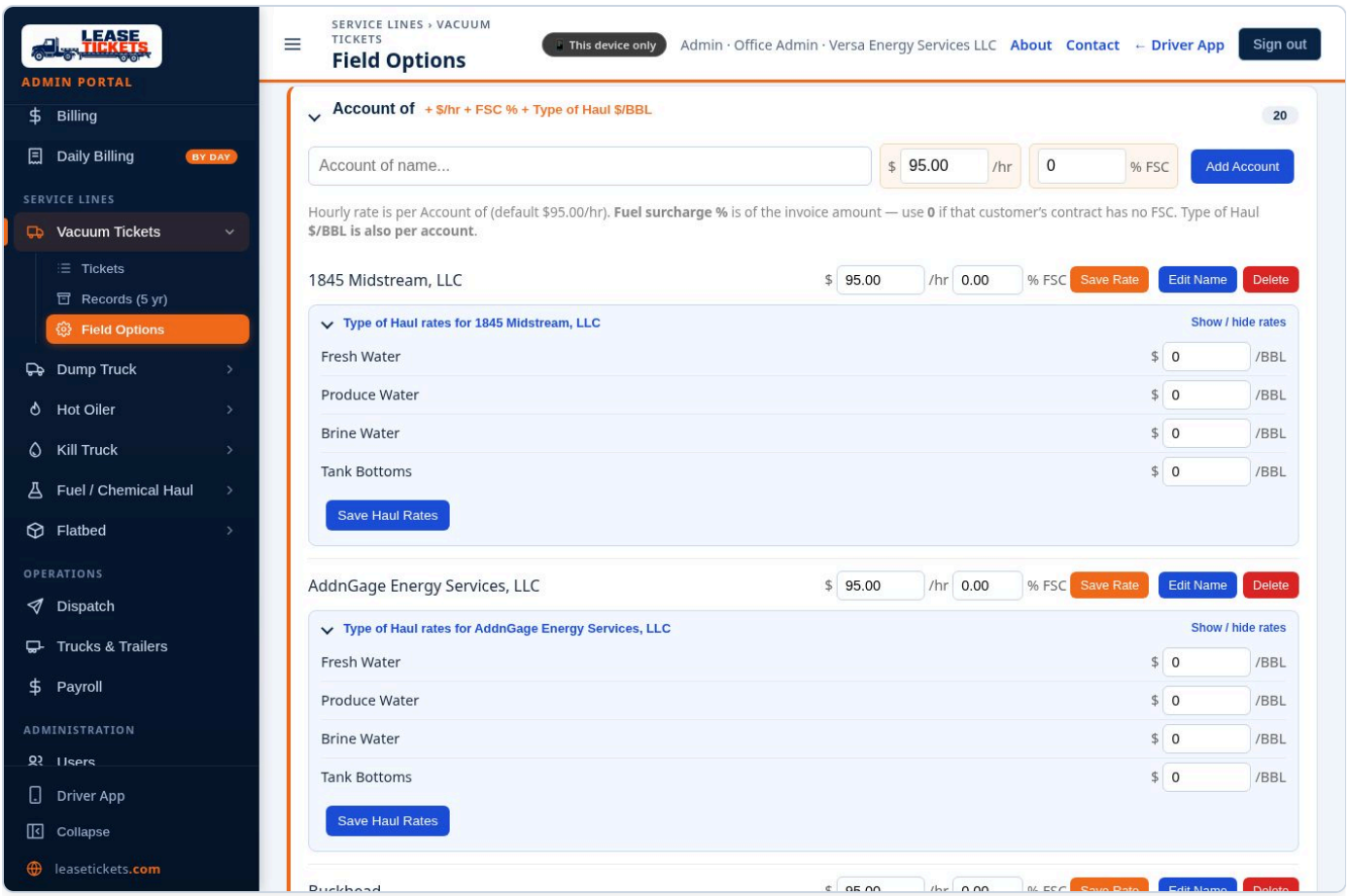
Add a customer (Vacuum example)

1. In the sidebar, open **Vacuum Tickets** › **Field Options**.
2. Open the list **Account of + $/hr + FSC % + Type of Haul $/BBL**.
3. Type the customer name, the hourly rate ($/hr) and the fuel surcharge % (use 0 if the contract has no FSC), then click **Add Account**.
4. Under the new customer, click **Show / hide rates**, enter a $/BBL for each **Type of Haul** (Fresh Water, Produce Water, and so on), and click **Save Haul Rates**.



Adding a customer with its hourly rate and FSC %

The default hourly rate is $95.00/hr until you change it. Fuel surcharge is a percent of the invoice amount. Vacuum invoices bill **hours × $/hr** plus **BBLs × that customer's $/BBL** for the haul type.



Each customer has its own rate, FSC % and haul rates. Use **Save Rate**, **Edit Name** or **Delete**.

Other service lines

Dump Truck, Hot Oiler, Kill Truck, Fuel / Chemical Haul and Flatbed each have their own **Field Options** page, and the invoice page for each line has a **+ Add Account** button. You can also change a customer's hourly rate in **Billing**: pick a single **Service** in the filter and the **Hourly rates** table appears at the bottom.

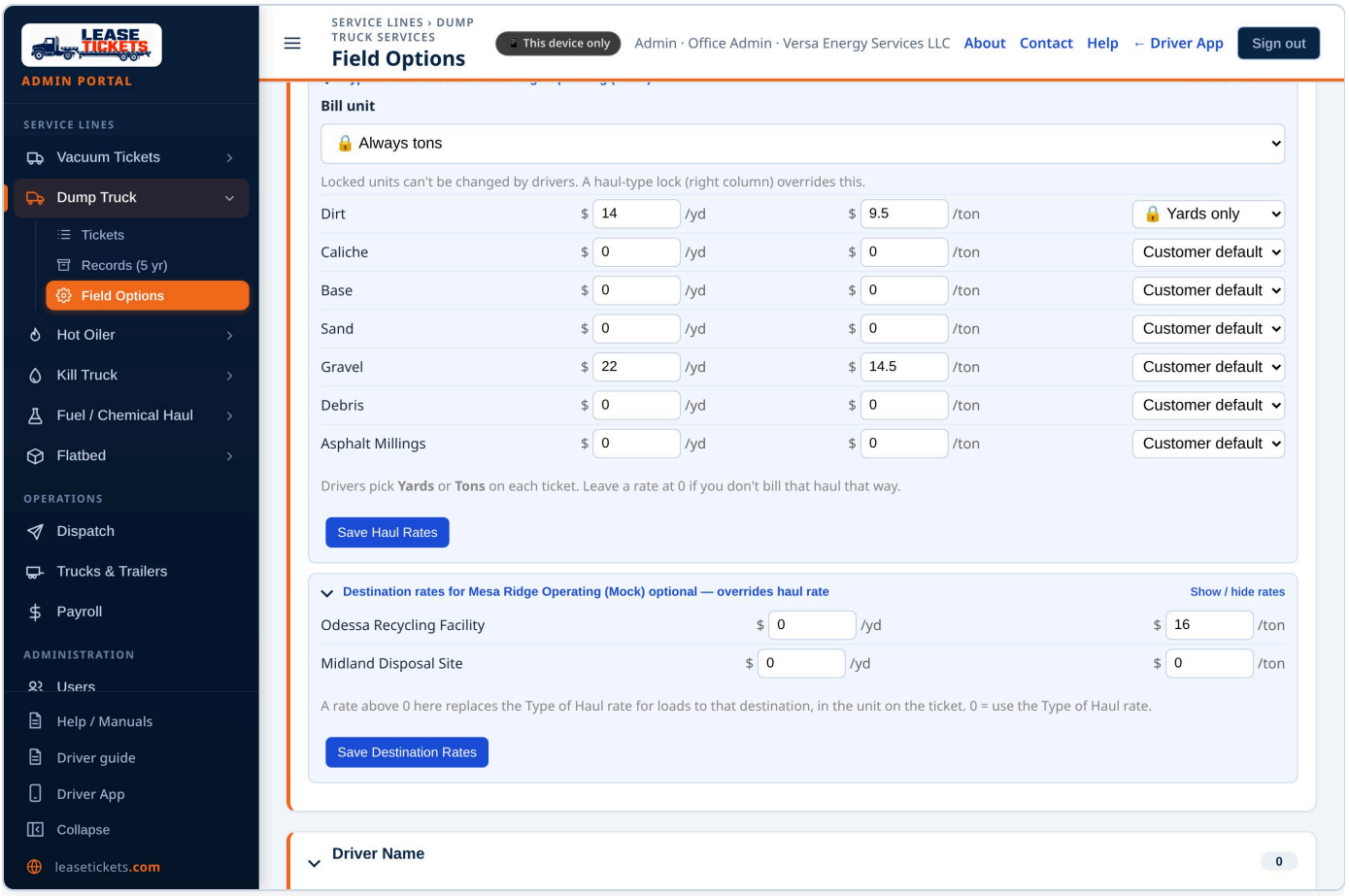
Dump Truck: billing by the yard or by the ton

Every **Type of Haul** can be billed per **yard** or per **ton**. Every new dump ticket needs a **Scale ticket #** and a **Scale ticket photo** (its own photo box, separate from the other photos). Both are checked when the ticket is submitted and when it's completed. For tons, the driver enters the **Net weight (lbs)** from the scale ticket, and the app fills in **tons = net lbs ÷ 2,000**, rounded to 2 decimals. Drivers can't type tons themselves.

> **TIP** Send new dump drivers the **Dump ticket how-to** PDF (Help menu › **Dump ticket how-to**). It shows what drivers see when you lock a unit or set destination rates.

1. Go to **Dump Truck** › **Field Options** and find the customer under **Account of**.

2. Open **Type of Haul rates for ...**. Each haul type has a **$/yd** and a **$/ton** box. Leave a box at 0 if you don't bill that haul that way.
3. **Bill unit** (top of the box): *Driver chooses*, 🔒 *Always yards* or 🔒 *Always tons*. The selector at the end of each haul row can lock just that haul (*Yards only* / *Tons only*), and that overrides the customer setting. Drivers can't change a locked unit. Click **Save Haul Rates**.
4. *Optional:* open **Destination rates for ...** and set a $/yd or $/ton rate for a destination, then click **Save Destination Rates**.



Customer locked to tons, with Dirt locked to yards. Haul rates and destination rates are shown below.

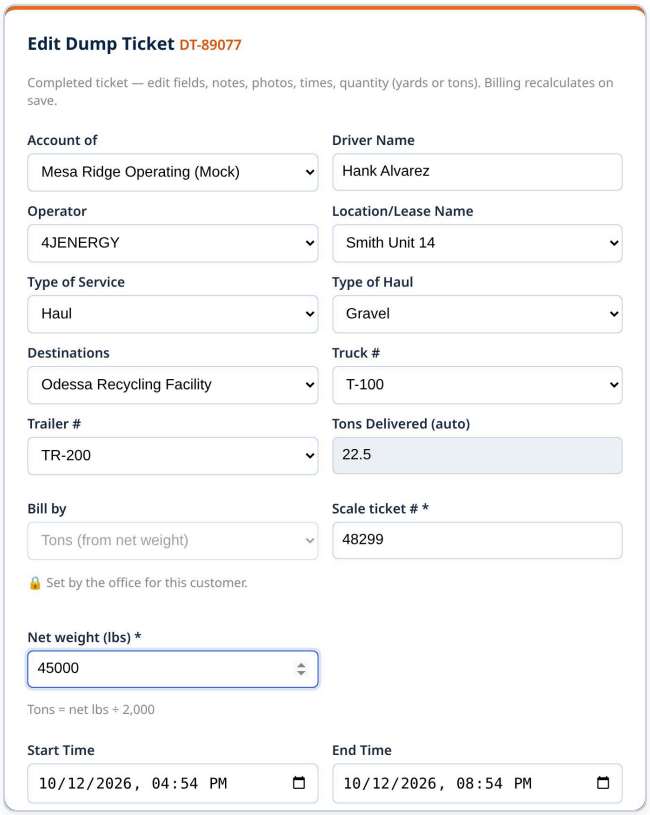
> **WHICH RATE IS USED?** If the destination has a rate above 0 for the ticket's unit, that rate replaces the Type of Haul rate. Otherwise the Type of Haul rate is used. The rate is locked in when the driver submits the ticket.

Example: net weight 45,000 lbs ÷ 2,000 = **22.50 tons** × $16.00/ton (destination rate) = **$360.00** product. Add 4 hrs × $120/hr = $480.00 labor, then ancillary charges and the customer's FSC %.

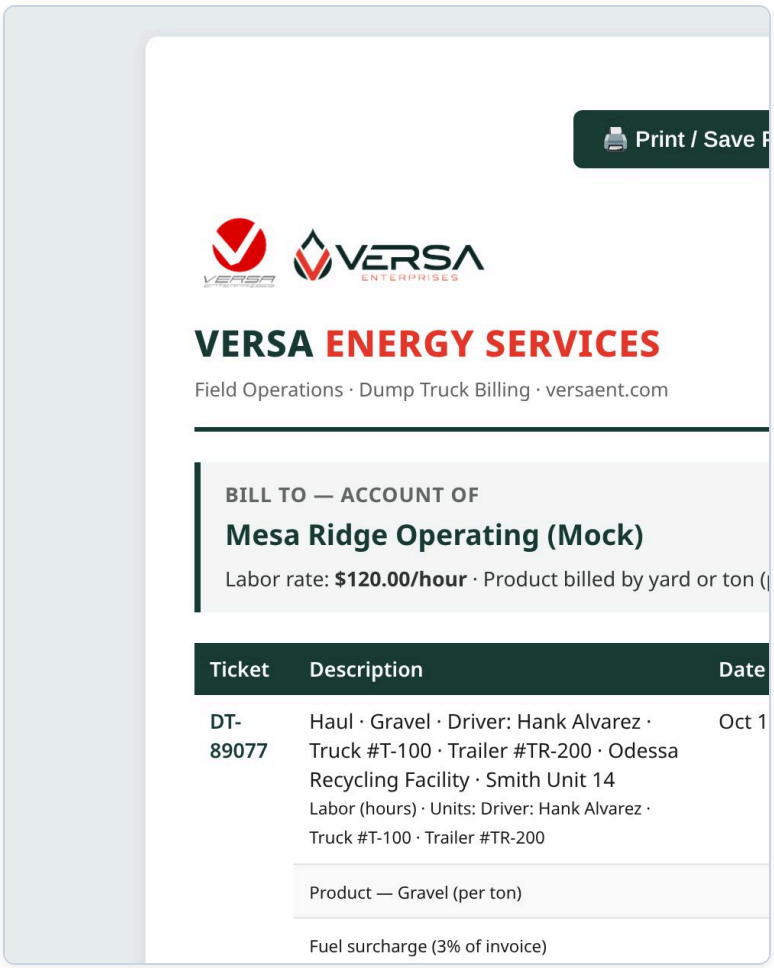
> **NOTE** Tickets that were already open before the scale photo became required can be completed without it. Only tickets started after that need the photo on Complete.

The scale ticket photo is labeled 📷 **Scale ticket** in the edit window's photos, and **Scale ticket** in the invoice photo pages and the printed ticket. The office can replace it from the edit window. The ticket list

shows *incl. scale ticket* in the photo count. The net weight and scale ticket # appear in the ticket list, the edit window, the invoice detail and the printed ticket. When you edit a ton ticket, a net weight is required. Older tickets without a scale ticket # or scale photo stay valid and bill as yards, exactly as before. Invoices that include both units show separate **Total Yards** and **Total Tons** lines. Commission follows the ticket total.



Office edit window: changing the net weight recalculates tons and the billing preview



Invoice detail: 45,000 lbs net = 22.5 ton × $16.00/ton

Ancillary charges

Field Options uses **tabs across the top**, one tab per category, so you do not have to scroll one long page. Open the **Ancillary charges** tab for extra items (gallons, barrels, miles, hours, flat rate, lb). Set the price here. Drivers only enter a quantity on the ticket and never see prices. The last tab you opened is remembered for each service line on this device.

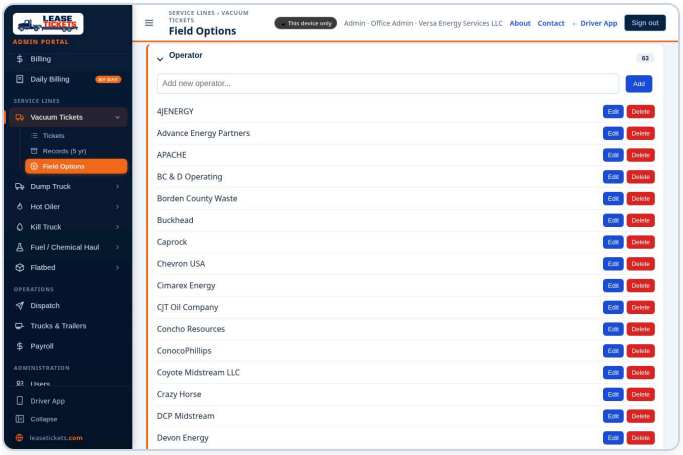
Customer billing contacts

Under **Accounts** › **Account billing and contact**, pick an account and fill in its billing name, email, address, phone and contact, then click **Save account**. The same page has Word templates (**Blank lease / location**, **Blank operator**, **Blank account**) and **Download this company's register**.

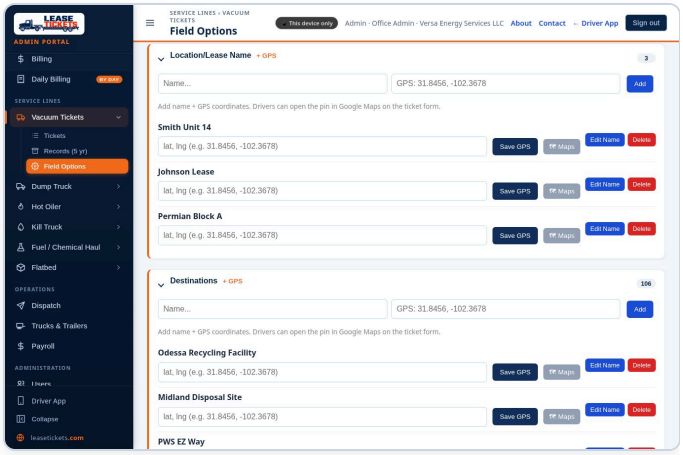
4. Operators, leases and destinations

These are the other dropdowns drivers pick from on a ticket. They're all in each service line's **Field Options**, each on its own tab (price adjustments for a customer are on the **Account of** tab). Nothing about the saved lists or rates has changed — only the page layout.

List	What it is	How to add
Operator	The oil and gas operator of the well or lease	Type the name and click **Add**
Location/Lease Name + GPS	Lease or location, with optional GPS	Type the name and coordinates, then click **Add**. Drivers can tap **Open in Google Maps**.
Destinations + GPS	Disposal, SWD, delivery point	Same as leases. Use **Save GPS** to update coordinates.
Type of Service	For example Water Haul, Off-Spec Oil Pickup	**Add**
Type of Haul	Product names. The $/BBL is set per customer.	**Add Haul Type**



Operator list



Leases and destinations with GPS

TIP Click a tab (for example **Account of**, **Operator**, **Location/Lease Name**, **Destinations** or **Ancillary charges**) to work on that category. The tab names are the same as the lists that used to stack on one long page; they vary a little by service (Fuel / Chemical Haul uses **Pickup Location** and **Products**; Flatbed uses **Pickup** and has no Driver Name list). **Expand all** / **Collapse all** still show or hide lists and rate rows inside the open tab.

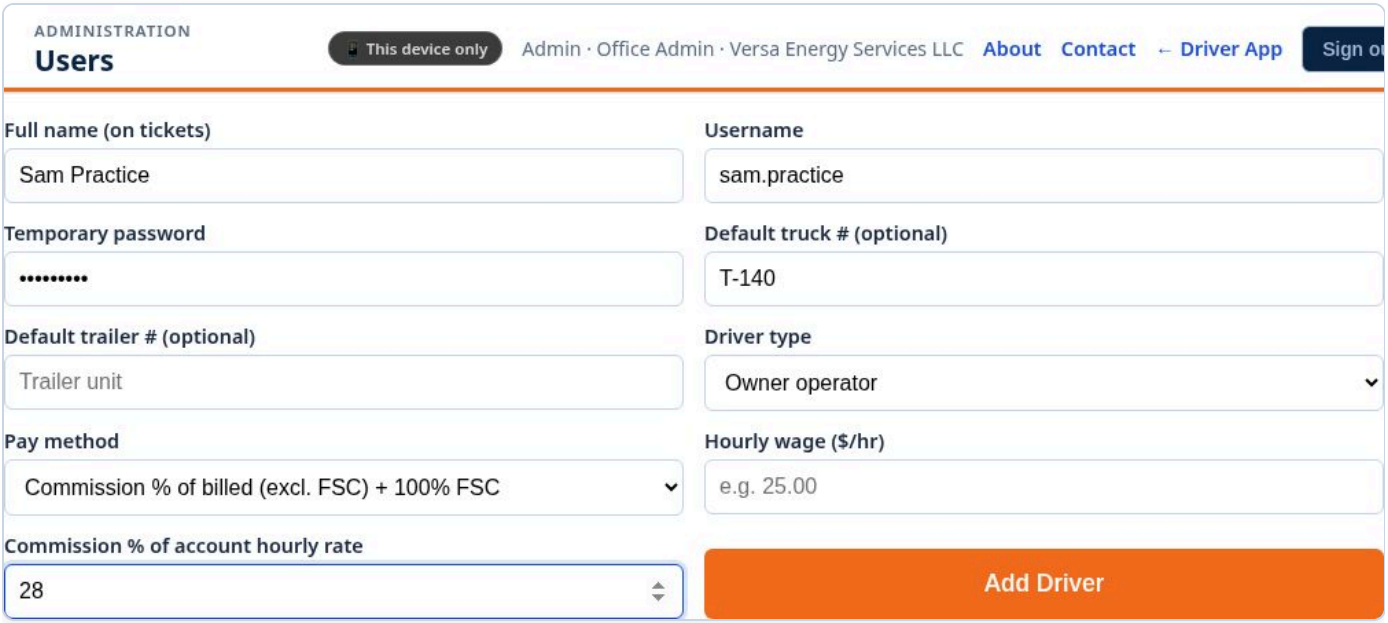
5. Adding drivers and owner operators

Every driver needs their own login. The driver's **type** decides how payroll pays them:

Driver type	Pay method	How they're paid
Company driver	Hourly wage	Hours from completed tickets × wage. Hours over 40 in a Monday–Sunday week are paid at 1.5× (you can change this, see section 15).
Owner operator (lease operator)	Commission % of billed (excl. FSC) + 100% FSC	Their % of each billed ticket total *not counting fuel surcharge*, plus **all** of the fuel surcharge. Then weekly deductions and loan payments come off (section 16).

Add an owner operator

1. Open **Users**. If you see *"Users are locked"*, the agreement hasn't been signed yet (section 2).
2. Under **Add driver login**, enter **Full name (on tickets)**, a **Username** and a **Temporary password** (6+ characters).
3. Optional: **Default truck #** and **Default trailer #**.
4. Set **Driver type** to **Owner operator** and **Pay method** to **Commission % of billed (excl. FSC) + 100% FSC**.
5. Enter the commission percent (for example 25 or 30) and click **Add Driver**.
6. Give the driver their username and temporary password. They set their own password the first time they sign in.



Adding an owner operator at 28% commission

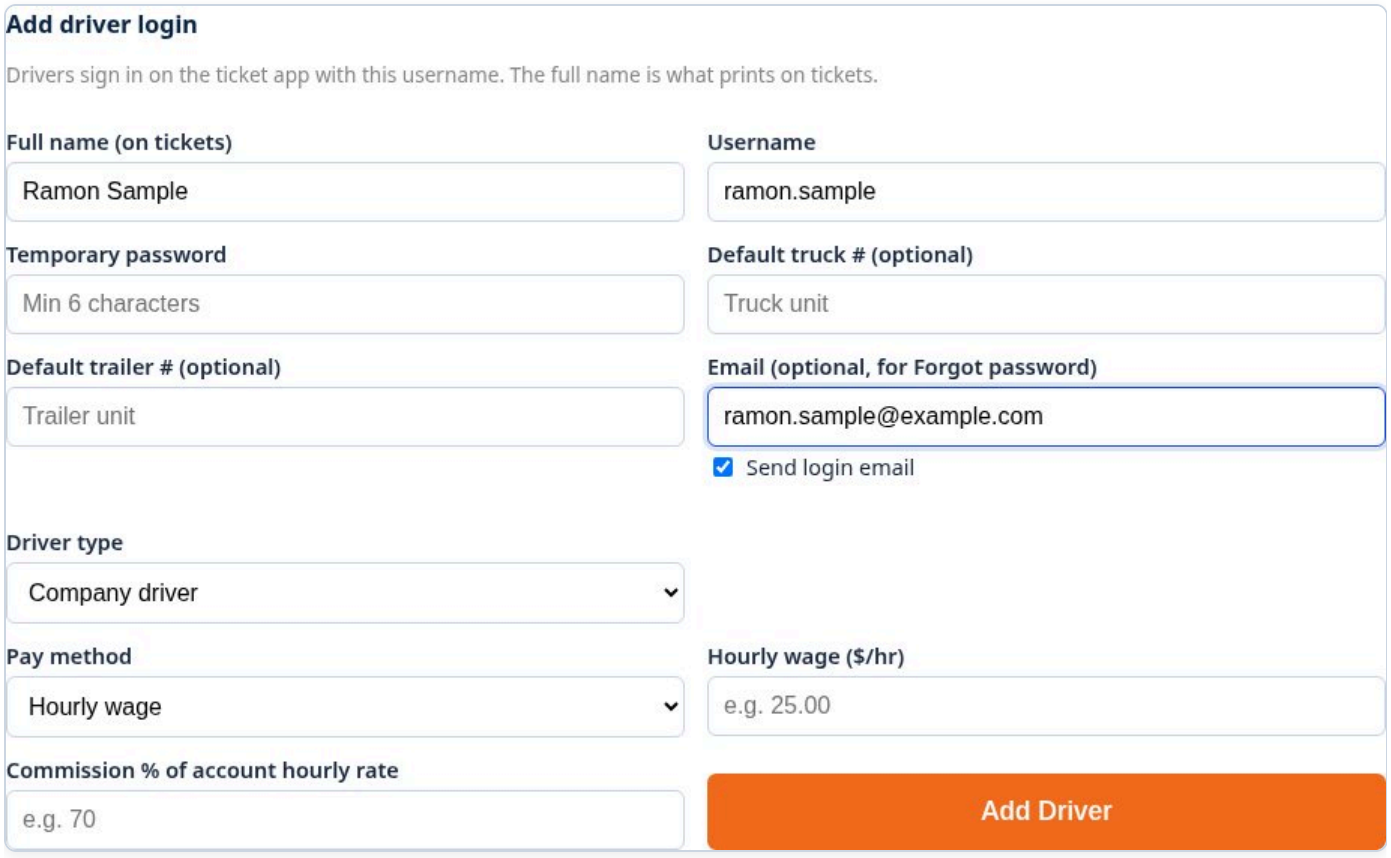
HEADS UP The commission box is labeled *"Commission % of account hourly rate"*, but payroll actually uses the % of the **billed ticket total excluding FSC**, plus 100% of FSC. The pay method dropdown and the payroll page show the correct rule.

Driver email, login email and taxes

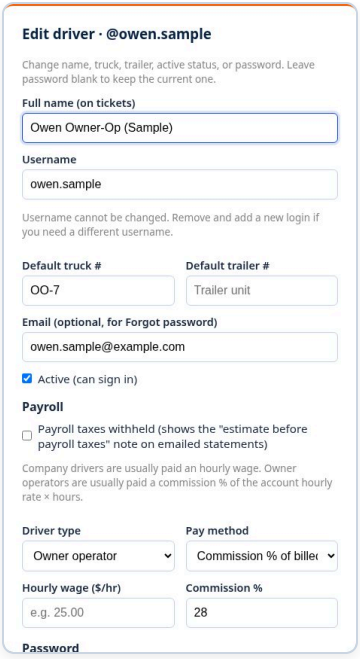
Add driver and ✏️ Edit both have an optional **Email**. With an email on file the driver can use **Forgot password?** and receive emailed pay statements. The email must be unique; username and password are not changed.

Send login email (on by default when an email is entered) emails the driver their username, the sign-in link and a one-time **Set your own password** link (good 7 days). The password you typed is **never** emailed. Each row also has **Resend login email** (limit 5 per user per day).

In ✏️ Edit, **Payroll taxes withheld** (on by default) controls whether emailed statements show the note *"This statement is an estimate before payroll taxes. If you have taxes withheld, your actual pay will be lower."* Turn it off for owner operators who handle their own taxes.



Add driver with Email and Send login email



Edit driver: Email and Payroll taxes withheld

Add a company (hourly) driver

Same steps, but choose **Company driver**, pay method **Hourly wage**, and enter the **Hourly wage ($/hr)**.

Manage drivers

6 driver logins

Name	Username	Truck / Trailer	Type	Pay	Status	Actions
Hank Alvarez	hank.mock	— / —	Company driver	$25.00/hr wage	Active	✎ Edit 🔑 Password Deactivate Remove
Rosa Delgado	rosa.mock	— / —	Company driver	$28.00/hr wage	Active	✎ Edit 🔑 Password Deactivate Remove
Tom Briggs	tom.mock	— / —	Owner operator	Commission 25% of billed (excl. FSC) + 100% FSC	Active	✎ Edit 🔑 Password Deactivate Remove
Lena Ortiz	lena.mock	— / —	Owner operator	Commission 25% of billed (excl. FSC) + 100% FSC	Active	✎ Edit 🔑 Password Deactivate Remove
Gus Haney	gus.mock	— / —	Owner operator	Commission 30% of billed (excl. FSC) + 100% FSC	Active	✎ Edit 🔑 Password Deactivate Remove
Ivy Ramos	ivy.mock	— / —	Owner operator	Commission 30% of billed (excl. FSC) + 100% FSC	Active	✎ Edit 🔑 Password Deactivate Remove

The driver list shows each driver's type, pay and status

Button	What it does
✏️ Edit	Change name, truck, trailer, payroll type and rate, or active status
🔑 Password	Set a new temporary password. The driver must change it at next sign-in.
Deactivate	Blocks sign-in but keeps the login and its tickets
Remove	Deletes the login

> **NOTE** Each **active** driver login uses one spot on your plan (see *Your plan and driver spots* in section 1). The meter above the driver list shows how many you're using. Deactivating a driver frees the spot. Adding drivers past your plan is never blocked; you'll see the estimated overage.



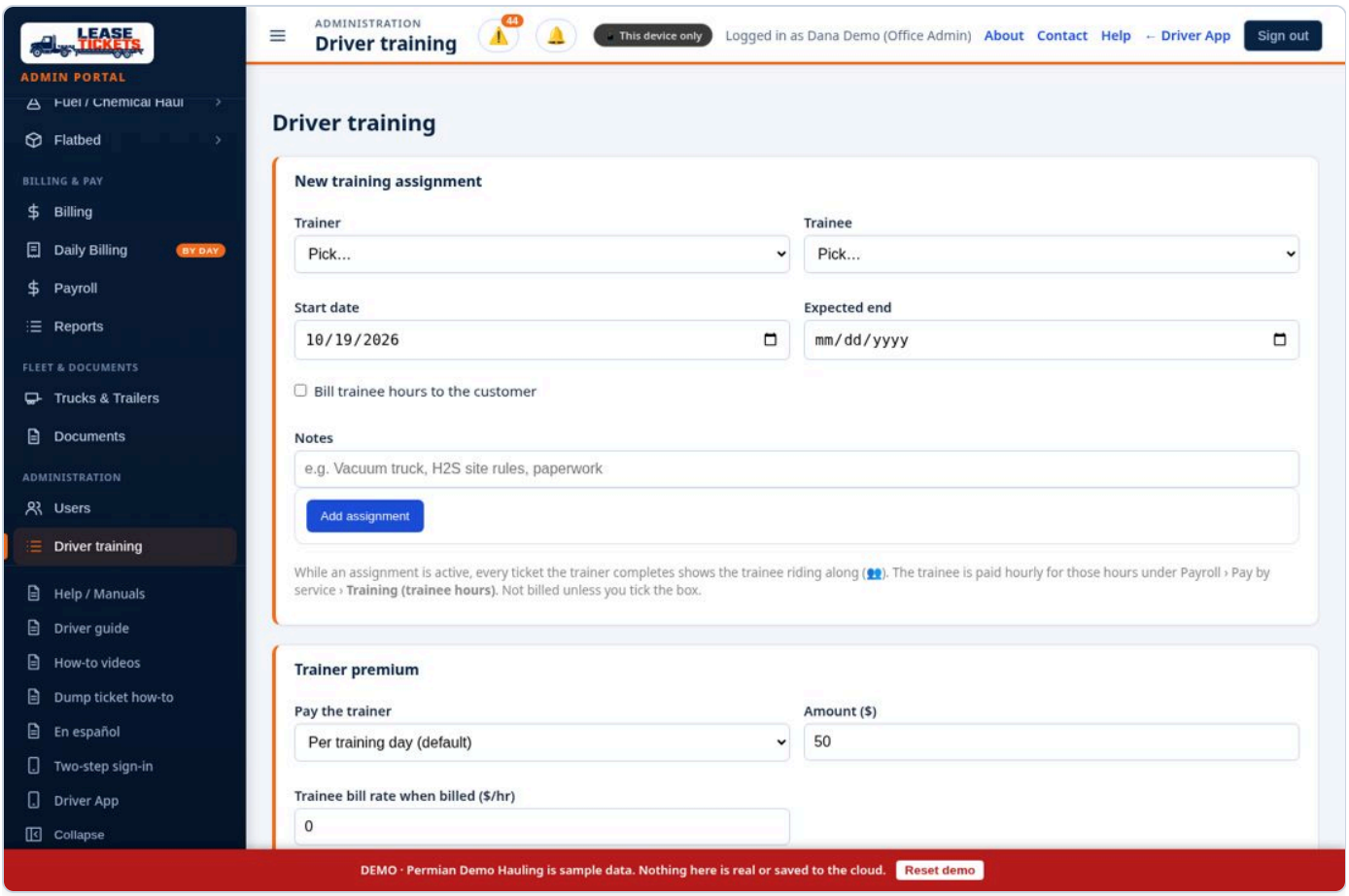
The meter above the driver list on Users

> **NOTE** A driver can only belong to one company. If you add a driver who already works for another company, you'll be asked to confirm the move. Their old tickets stay with the old company.

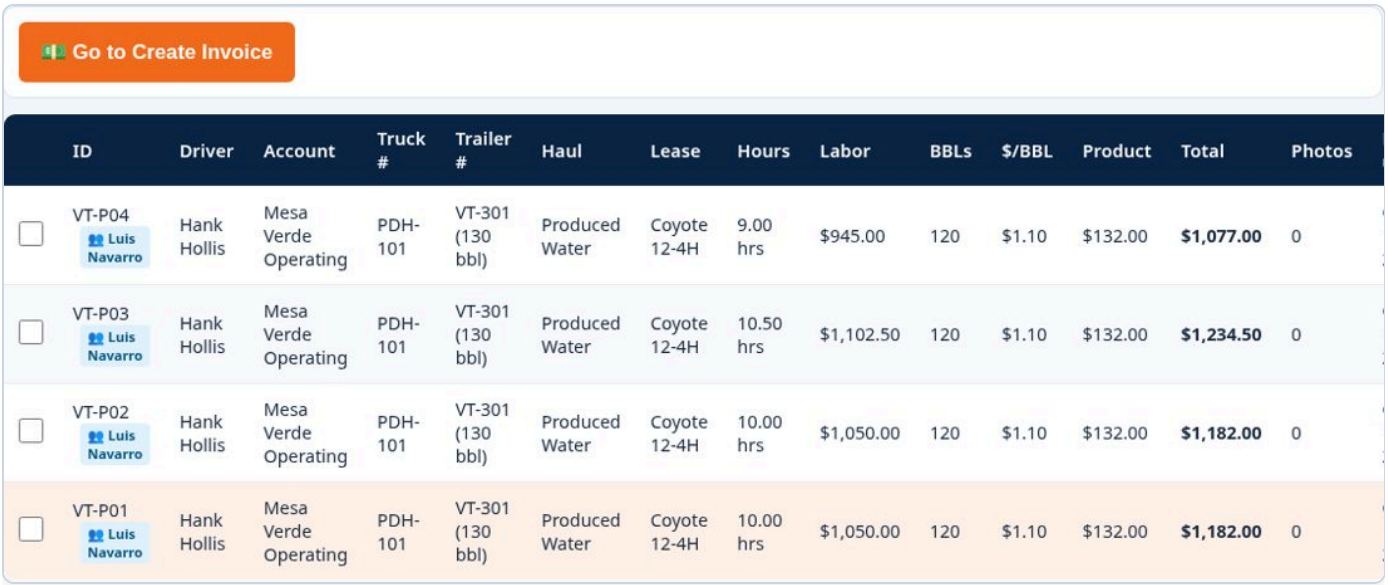
Driver training (trainer and trainee)

Open **Driver training** under Administration. Click **Add assignment**, choose the **Trainer** and the **Trainee**, the **Start date** and **Expected end**, and notes (what is being taught). While the assignment is active, every ticket the trainer completes in that window counts as a **ride-along** for the trainee: the trainee's hours on those tickets come from the trainer's ticket times, and the ticket list shows a **👥 trainee name** badge.

- **Trainee pay:** hourly, under the **Training** pay rule (Payroll › Pay by service). Overtime is figured in Payroll with the trainee's full week.
- **Trainer premium:** default **$50 per training day** (any day the trainer completed at least one ticket with the trainee). Change it under **Trainer premium**: per training day, per training hour, or none. It is paid to the trainer as its own line, **Trainer premium**, on his payroll statement and is not overtime pay.
- **Billing:** trainee hours are not billed to the customer unless the assignment says so (then the trainee bill rate is used).
- **Sign-off:** when training is done, the trainer signs off (**Trainer signs**, with his password) and then an admin signs off (**Admin signs**, re-entering the admin password). The assignment then shows *Completed* with both names and dates.



Driver training: assignments, sign-off and trainer premium

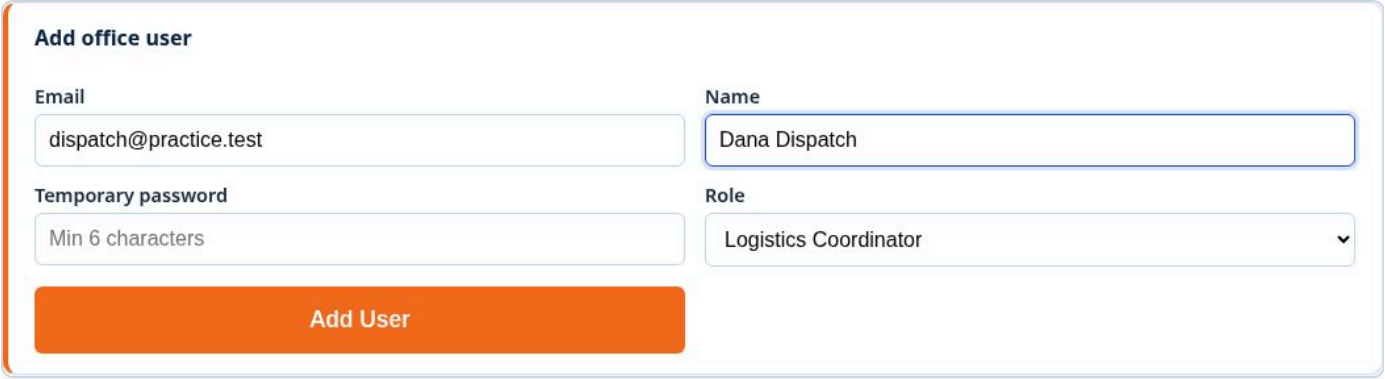


Trainer's tickets show the trainee riding along

6. Office users and roles

1. **Users** › **Add office user**: enter the email, name and a temporary password.
2. Pick a **Role** and click **Add User**. Leave **Send login email** checked to email them their sign-in email and a 7-day **Set your own password** link (the password is not emailed).

Instead of setting a password, you can use **Invite by email** at the top of Users (section 20) and let them choose their own.



Adding a Logistics Coordinator

Role	Can do	Can't do
Admin	Everything for their own company	See other companies
Logistics Coordinator	Dispatch, tickets, Trucks & Trailers, Documents, Reports (hours only)	Billing, Daily Billing, invoicing, rates, payroll, pay by service, deductions and loans, user management, any dollar amounts in Reports, safety-number entry
Driver	Their own tickets and loads in the driver app	The admin portal
Developer (Lease Tickets staff)	Switch between companies and set up new ones	Not assigned by customers

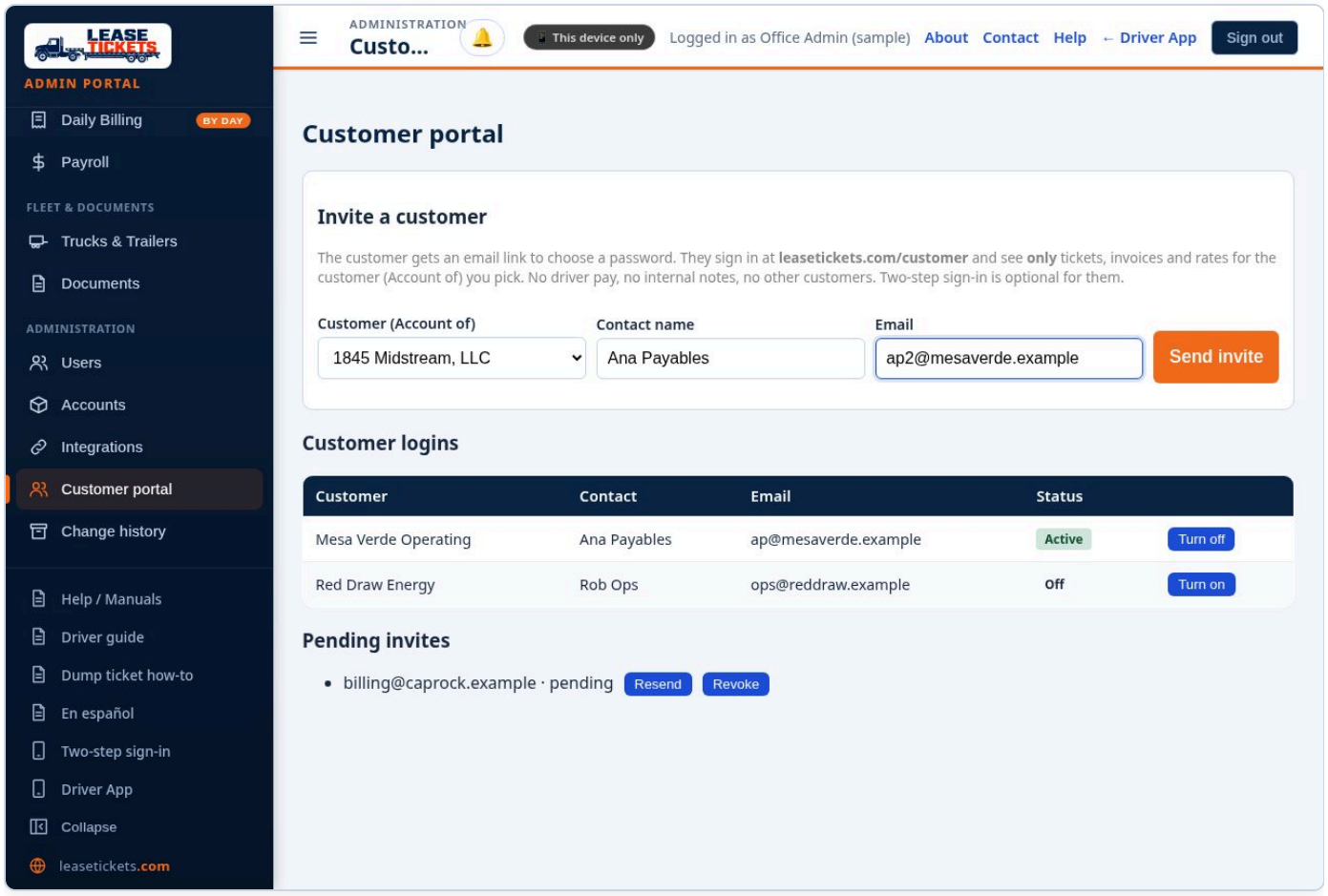
Developer logins

Developer logins (Lease Tickets staff who can open every company) can be added, changed or removed **only by the platform owner's account**. Other developers and company admins can't create developers, promote someone to developer, or send a login email to a developer; the server refuses it. Invitations can only be for drivers, logistics and admins. The owner is identified by a fixed account ID, not by email, so the owner can change their sign-in email without losing this.

Customer portal (customer logins)

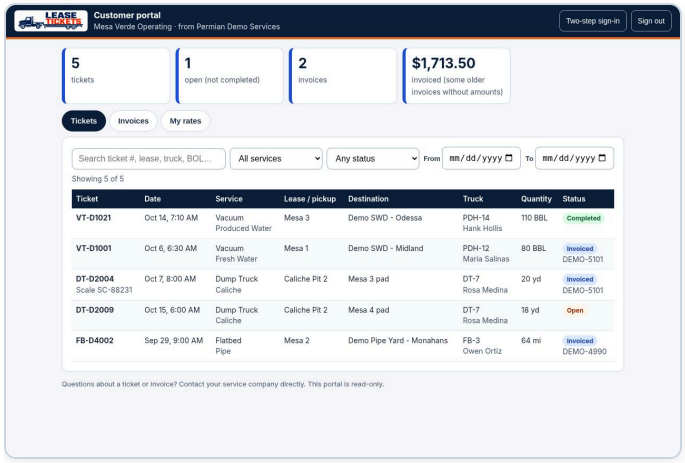
You can give a customer their own login at **leasetickets.com/customer**. They see **only** their own company (one Account of): its tickets (date, service, lease, destination, truck, driver, quantities, status, invoice #), its invoices with totals, and the rates set up for that account. They never see other customers, driver pay, costs, internal notes, or your standard price lists. The portal is read-only.

1. Administration › **Customer portal** (admins only).
2. Pick the **Customer (Account of)**, enter the contact's name and email, then click **Send invite**. They get an email to choose their own password (link good for 7 days).
3. The list shows every customer login. **Turn off** signs them out at once and blocks sign-in. **Turn on** restores it. Pending invites can be resent or revoked.

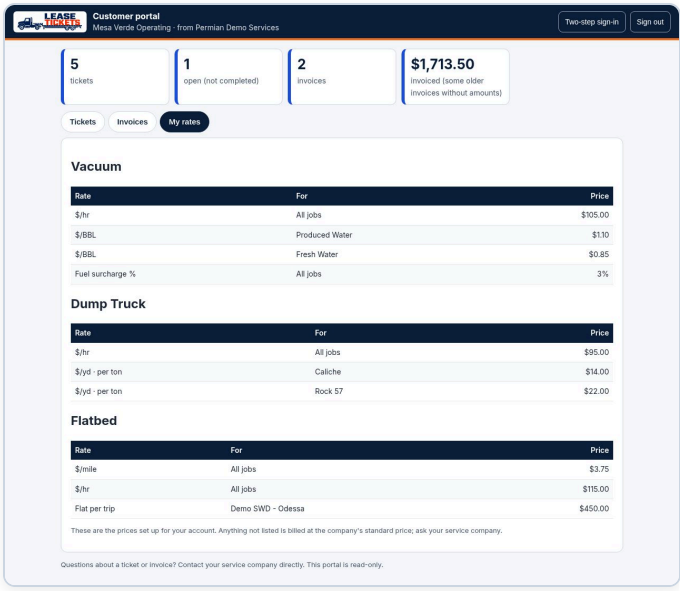


Customer portal page

Customers sign in with email and password. **Two-step sign-in is optional** for them: they turn it on from **Two-step sign-in** in the portal. Forgot password works the same as for office users.



What the customer sees: their tickets

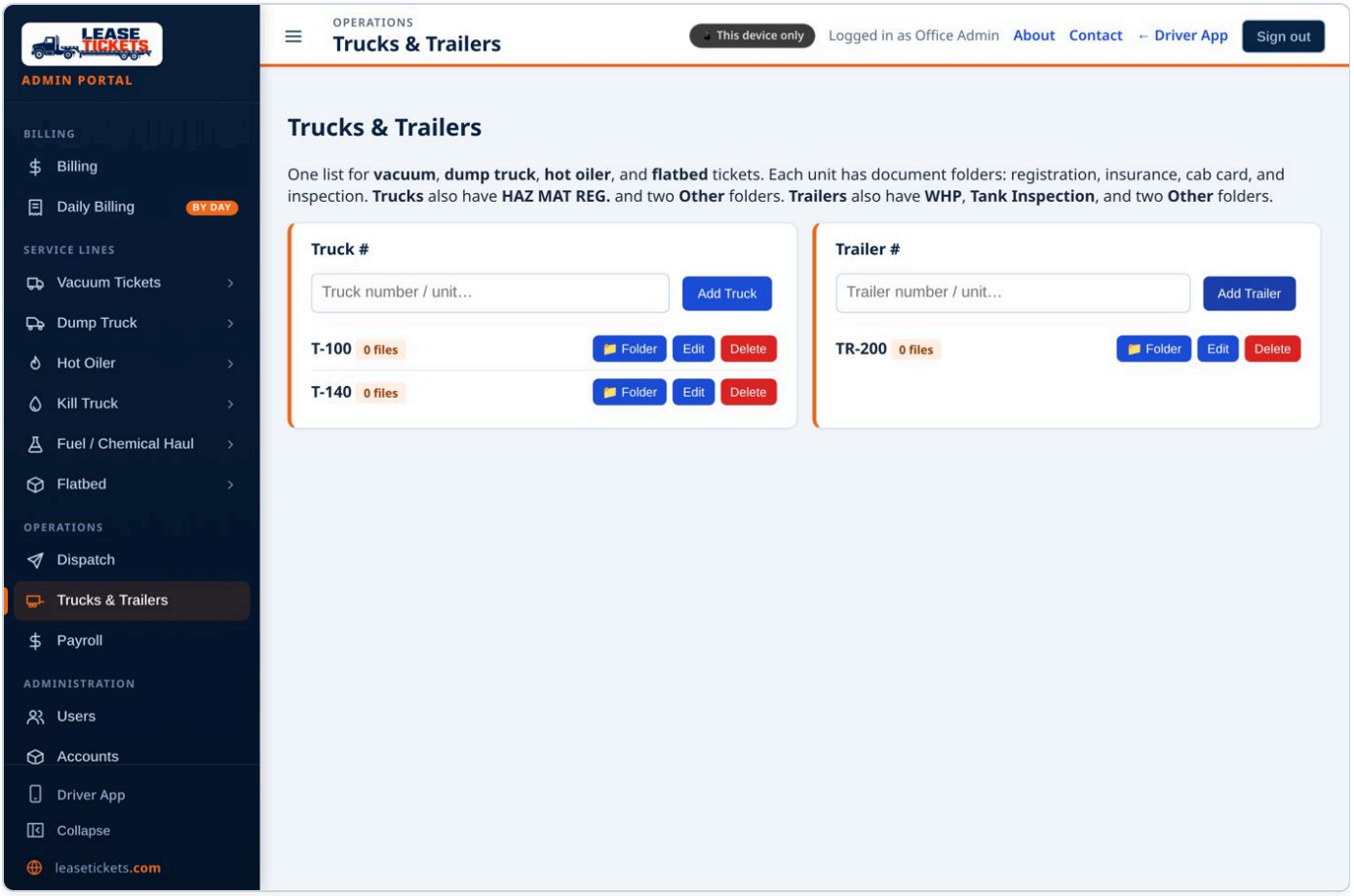


Their own rates only

NOTE Invoice totals appear for invoices made after this update (Lease Tickets now saves each ticket's amount when it is invoiced). For older invoices, the portal says "See the invoice you received". Rates come from the account's own prices (hourly, per BBL/yd/ton/mile, flat per destination, fuel surcharge). Anything at your standard price isn't listed.

7. Trucks & Trailers

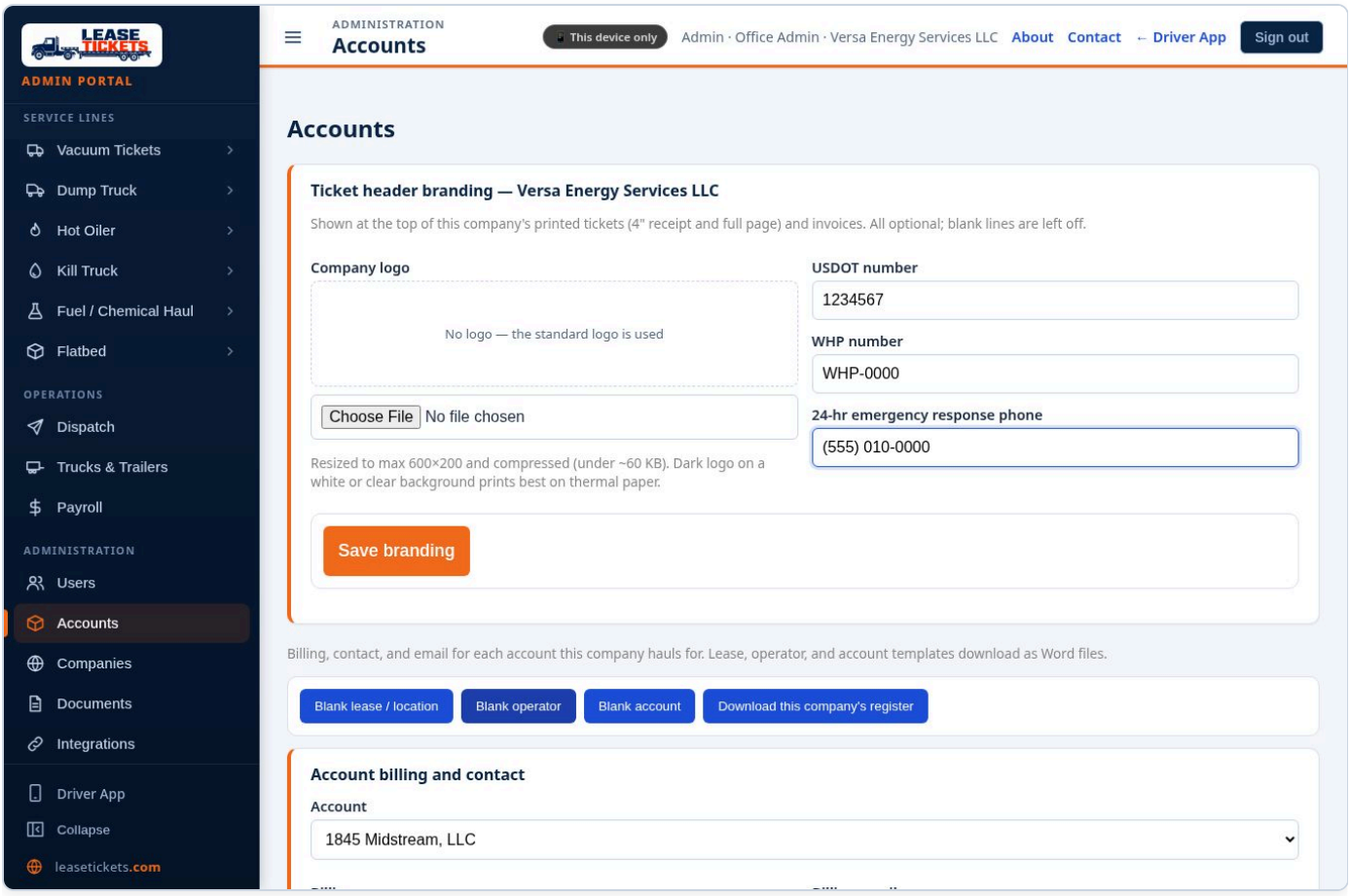
One shared list of units for every service line. Type a unit number and click **Add Truck** or **Add Trailer**. Each unit has document folders (registration, insurance, cab card, inspection; trucks also have HAZ MAT REG. and two Other folders). Drivers can open these folders from their phone.



Trucks & Trailers

8. Company branding on tickets and invoices

1. Open **Accounts**. The **Ticket header branding** box is at the top.
2. Upload a **Company logo**. It's resized automatically. A dark logo on a white or clear background prints best on thermal receipts.
3. Enter your **USDOT number**, **WHP number** and **24-hr emergency response phone**. All of these are optional, and blank lines are left off the printout.
4. Click **Save branding**.

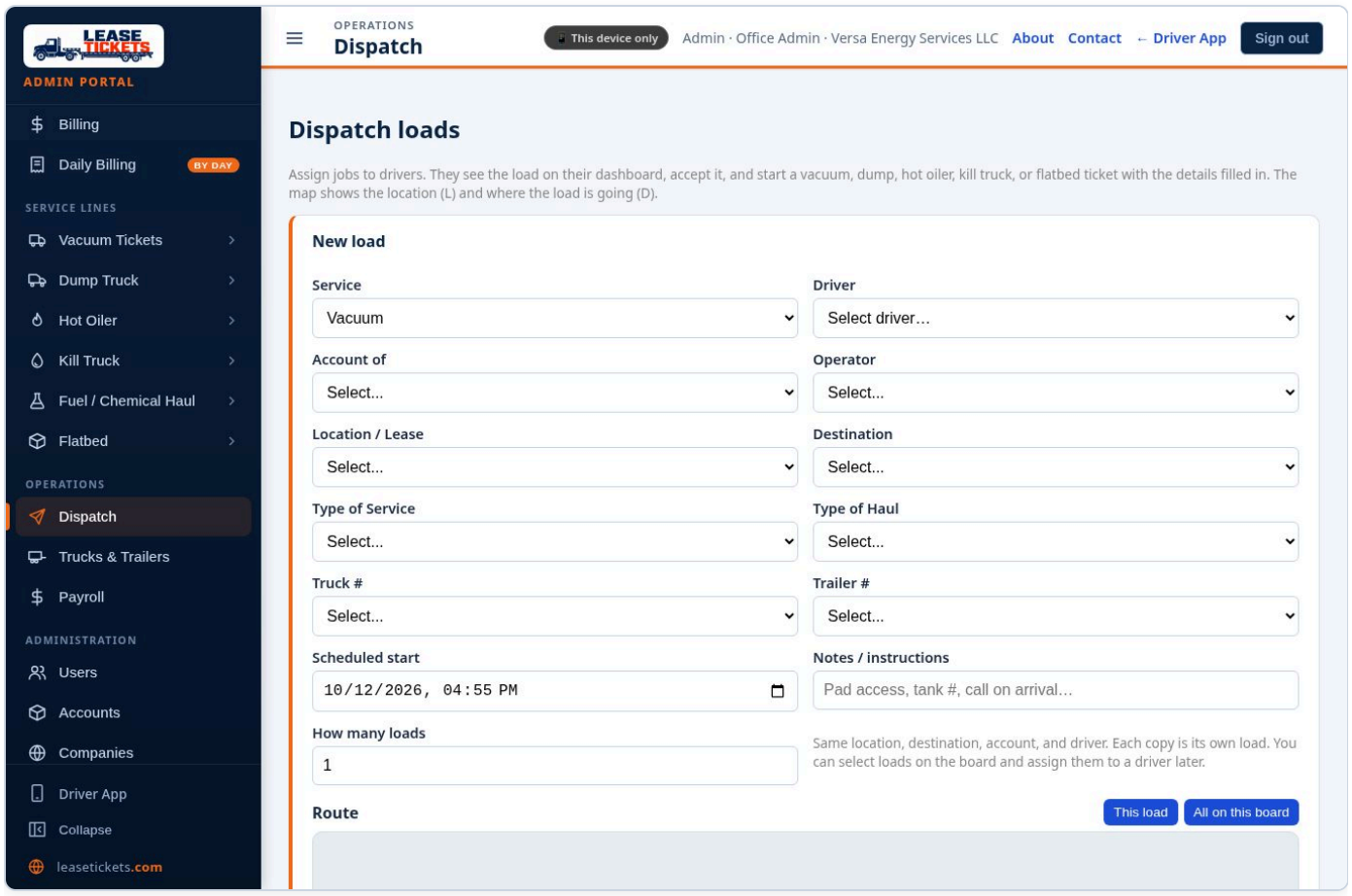


Branding appears on 4" receipts, full-page tickets and invoices

9. Dispatch

Dispatch assigns loads to drivers. The driver sees the load on their dashboard, accepts it, and starts a ticket with the details already filled in.

1. Under **New load**, choose the **Service** and the **Driver**.
2. Fill in Account of, Operator, Lease, Destination, Type of service / haul, Truck and Trailer, the **Scheduled start** and any notes. **Account of** (customer), Driver, Operator, Lease and Destination are search boxes: tap one to see the whole list, or start typing a name (for example "oxy") to narrow it, then tap the name or use the arrow keys and Enter. Only names already in the list can be picked; typed text that doesn't match is cleared. Add a new customer in Field Options first. Use **copies** to send the same load more than once.
3. Submit. The load shows up on the **Board**, where you can follow its status.



Dispatch: new load form and map

The **Route map** sits in its own full-width card under New load, so it uses the width of the Dispatch page (laptop and tablet). Green **L** is the location; orange **D** is the destination. **This load** and **All on this board** refit the map.

Editing a load on the Board

On the Board, each assigned or open load has ✏️ **Edit** next to Show on map, Directions, Reassign and Cancel. You can change the account, location / lease, destination (the pin and coordinates update from Field Options), scheduled start, truck, trailer, type of service / haul, notes and driver. The driver sees the updated load on their dashboard (no extra text message is sent). If the load is already **in progress** (en route, on site, or started), only **notes** and **destination** can be changed, and the change is written to Change history. Completed and cancelled loads cannot be edited.

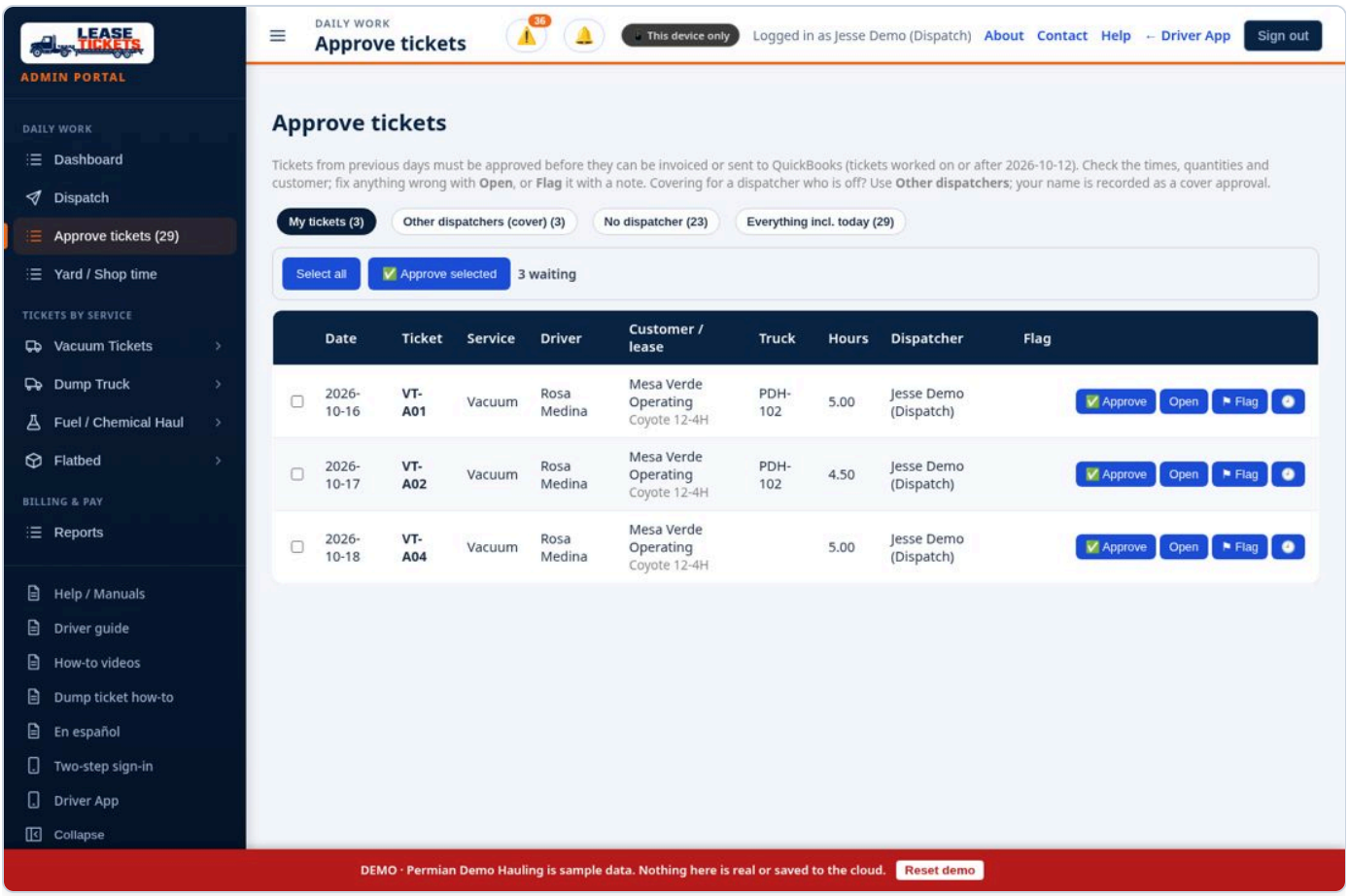
Approve tickets (dispatcher approval before billing)

Every completed ticket worked on or after **Oct 20, 2026** must be approved by a dispatcher (Logistics Coordinator) or an admin before it can be invoiced, put on a Daily Billing invoice or sent to QuickBooks. Older tickets are not held up. Open **Approve tickets** under Daily work; the number is how many are waiting.

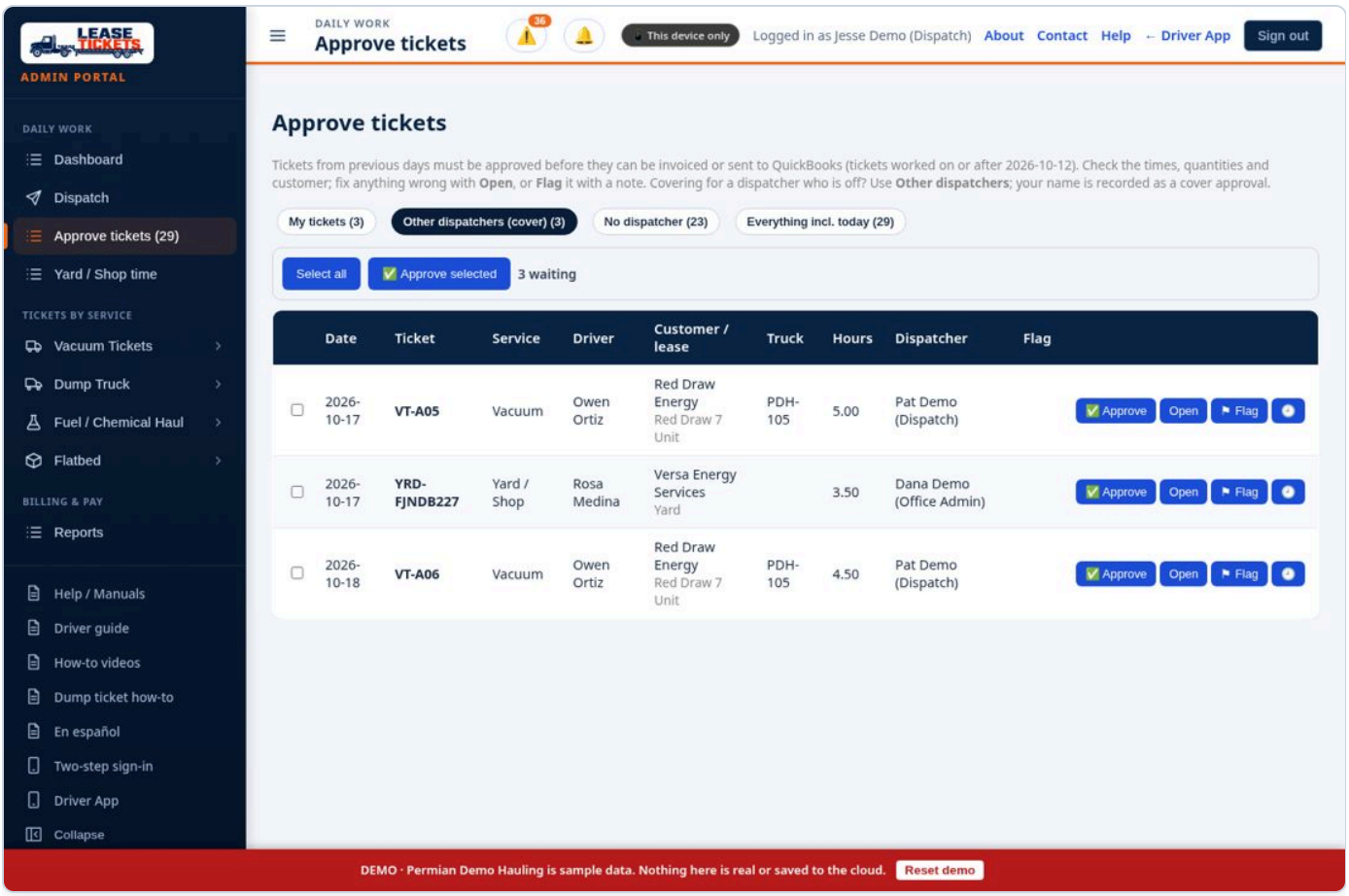
1. **My tickets** lists the previous days' completed tickets from loads **you** dispatched (for yard / shop time: the ones you sent). Check the date, driver, customer / lease, truck and hours.
2. Click 👁️ **Preview** (or the ticket row) to view the full ticket — header, times in your local time, quantities, prices (admins; logistics coordinators do not see dollar amounts), notes, photos (tap to enlarge) and signatures — without opening Edit or Print. From the preview you can ✅ **Approve** or ⚑ **Flag** the ticket.
3. Something wrong? **Open** goes to the ticket so you can fix it (the change is in History). Not sure yet? ⚑ **Flag** it with a note; flagged tickets stay in the queue and show the note.
4. Click ✅ **Approve** on a row, or tick several (or **Select all**) and click **Approve selected**.

Covering for a dispatcher who is off: open **Other dispatchers**. Any dispatcher or admin can approve those tickets so billing isn't held up. The ticket records who approved it and that it was a **cover approval for** the other dispatcher. **No dispatcher** lists tickets that didn't come from a dispatched load (anyone who can approve may approve them). **Everything incl. today** shows all waiting tickets, including today's.

Each approval is in the ticket's 🕘 **History** and in Change history (*Ticket approved*, with “cover for …” when it was a cover). Drivers can't approve. If a driver changes an approved ticket from the app (not just a photo upload), the approval is cleared and the ticket comes back to the queue. Voided tickets never need approval and are never billed.



Approve tickets: my tickets

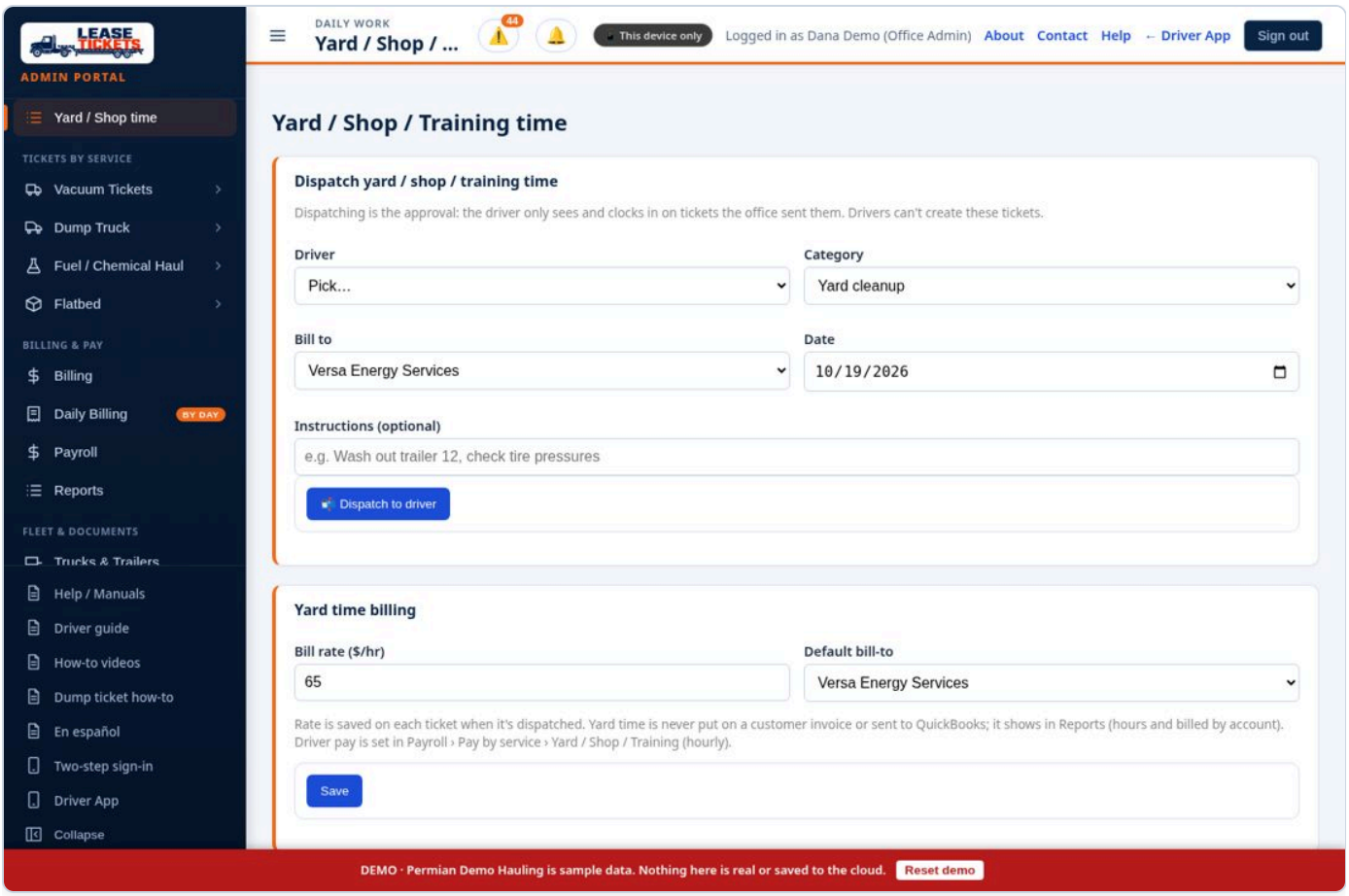


Covering for another dispatcher

Yard / Shop / Training time

For in-house work that isn't a customer load (yard cleanup, truck maintenance, shop work, training, safety meetings). Only the office can create it: open **Yard / Shop time** under Daily work, pick the **Driver**, **Category**, **Date** and optional **Instructions**, and click **📬 Dispatch to driver**. The driver sees it on his dashboard and taps **▶ Clock in** and **⏹ Clock out**, and says what work he did. Drivers can't start yard time on their own.

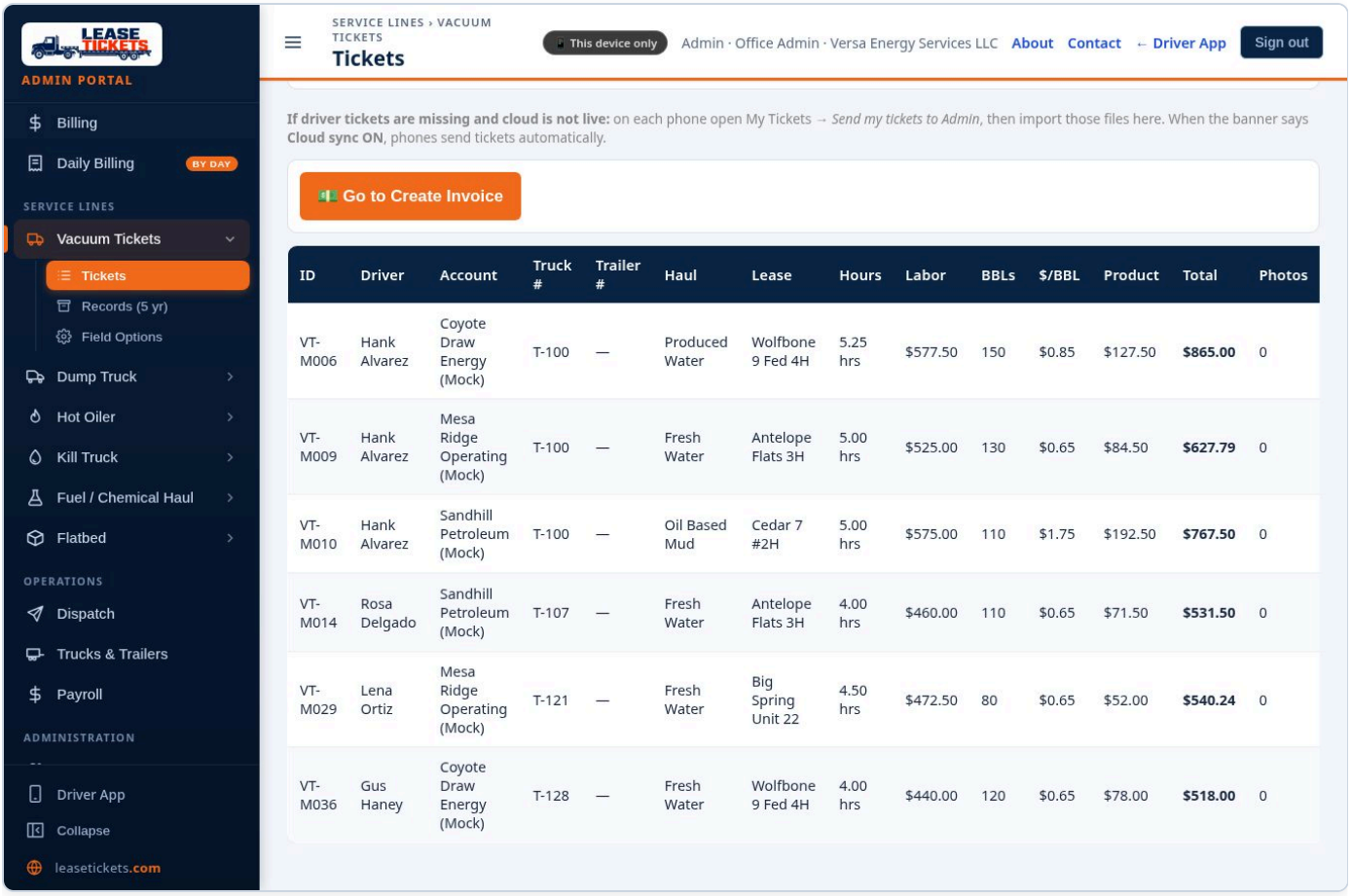
- **Pay:** always hourly, under the **Yard / Shop / Training** pay rule in Payroll › Pay by service (also for owner operators). Hours count toward weekly overtime.
- **Billing:** billed internally to **Versa Energy Services** (or the **Default bill-to** you set) at the **Bill rate ($/hr)** on this page. It is never invoiced to a customer or sent to QuickBooks.
- The office can fix the clock times, void a yard ticket like any other ticket, and see it in Reports › Yard / shop / training hours by account.



Yard / Shop time: send to a driver, bill rate

10. Working with tickets

Each service line has a **Tickets** list showing every driver's tickets, with hours, labor, product, total, photos and status.



Vacuum ticket list

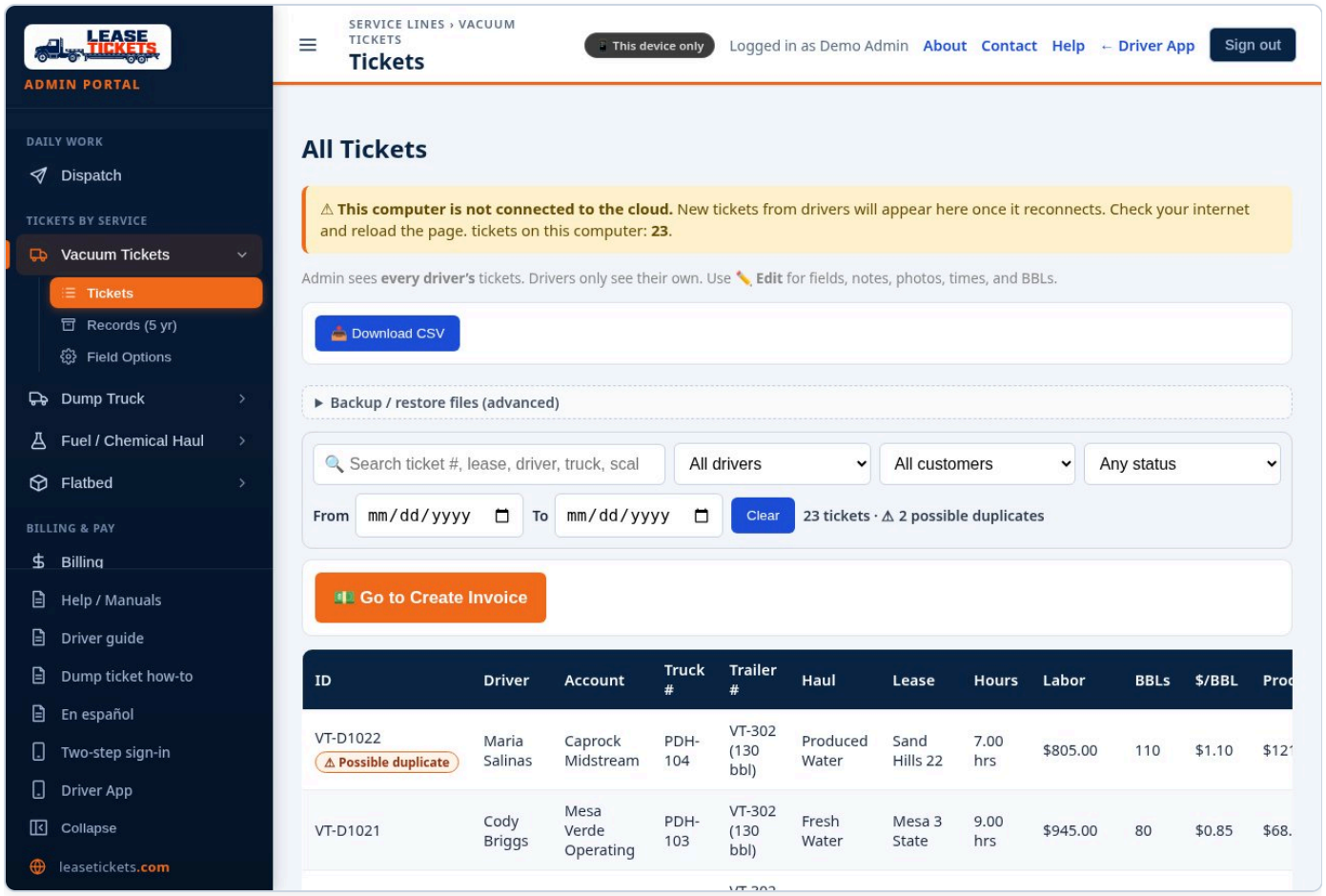
Preview a ticket

Click 👁 **Preview** or the ticket row to open a full view of the ticket (customer, lease, driver, truck / trailer, times in the device's local time, reroutes, line items and totals, notes, barrels / quantities, photo thumbnails you can enlarge, and signatures). Use this to review a ticket for approval without opening Edit or Print. Admins see prices; logistics coordinators see quantities only. The same preview is on **Approve tickets**.

Action	Use it to
👁️ Preview	View the full ticket, including photos and signatures, without editing or printing
✏️ Edit	Fix fields, notes, photos, times or BBLs. Admin edits don't require signatures.
🖨️ Print	Print the ticket (section 13)
💵 Invoice	Invoice that ticket on its own
📥 Download CSV	Export the list for a spreadsheet
Backup / restore files (advanced)	Click to open. **Download JSON** keeps an offline backup; **Import driver tickets** loads a backup file a driver sent. Not needed day to day: tickets sync automatically.

Search and filter tickets

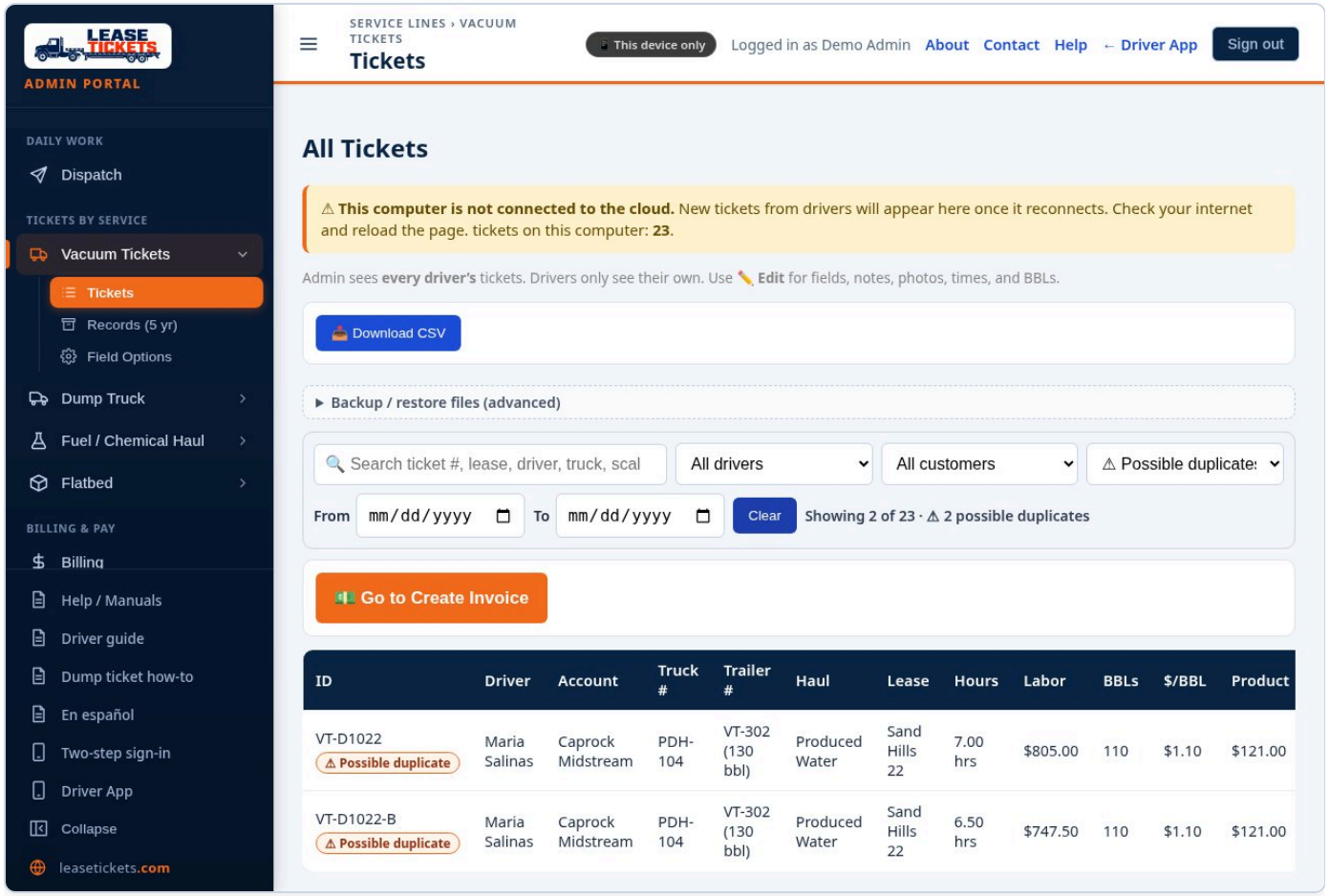
Every ticket list has a search bar. Type any part of a ticket #, lease, driver, truck, scale ticket # or BOL #, or a word from the notes. Narrow it with **All drivers**, **All customers**, a status (*Open*, *Done, not invoiced*, *Invoiced*, ⚠ *Possible duplicates*) and a **From / To** date (ticket start date). The bar shows "Showing X of Y". Filters stay set while you move around the portal; **Clear** resets them. Drivers get a simpler **Search my tickets** box and an Open / Completed filter on their My Tickets lists.



Ticket list with search and filters

Duplicate-ticket warning

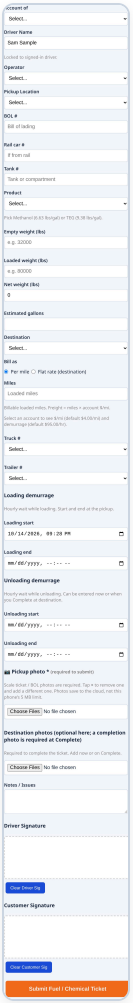
A ticket is flagged ⚠ **Possible duplicate** when another ticket has the **same truck and the same lease / pickup with a start time within 90 minutes**, or the **same scale ticket # or BOL # for the same customer**. Drivers see a warning when they submit one and must confirm it's a separate load. In the office, flagged tickets show a badge on the list and the ⚠ *Possible duplicates* filter lists them side by side. Nothing is deleted or blocked automatically: check the pair, then delete the extra one before invoicing (deleting only archives it to Records (5 yr)).



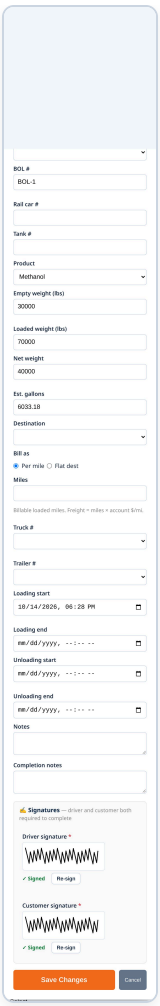
Possible duplicates filter

> **NOTE** On a driver's phone the warning only checks that driver's own tickets. The office list checks every driver's tickets for that service line.

HEADS UP Drivers can't complete a ticket without **both** a driver signature and a customer signature. **Vacuum, Fuel / Chemical and Flatbed tickets work exactly the same way:** the driver submits the ticket (start time, account, operator, pickup/lease, destination, truck and trailer) with a required **pickup photo**, then taps **Complete**, enters the **end time**, takes a **new completion / delivery photo** on the Complete screen (earlier photos don't count) and gets **both signatures**. Tickets that were already open before this change don't need a pickup photo, but still need the completion photo. Photos are tagged by stage and labeled **Pickup photo** or **Completion / delivery photo** on printed tickets and invoice photo pages. Fuel / Chemical is never created already-completed, asks for the Operator like the other lines (also editable in the edit window), and its unloading start time is optional. Service-specific fields are unchanged. Dump truck scale-ticket rules are unchanged.



Fuel / Chemical new ticket: Operator and required pickup photo



Operator in the Fuel / Chemical edit window

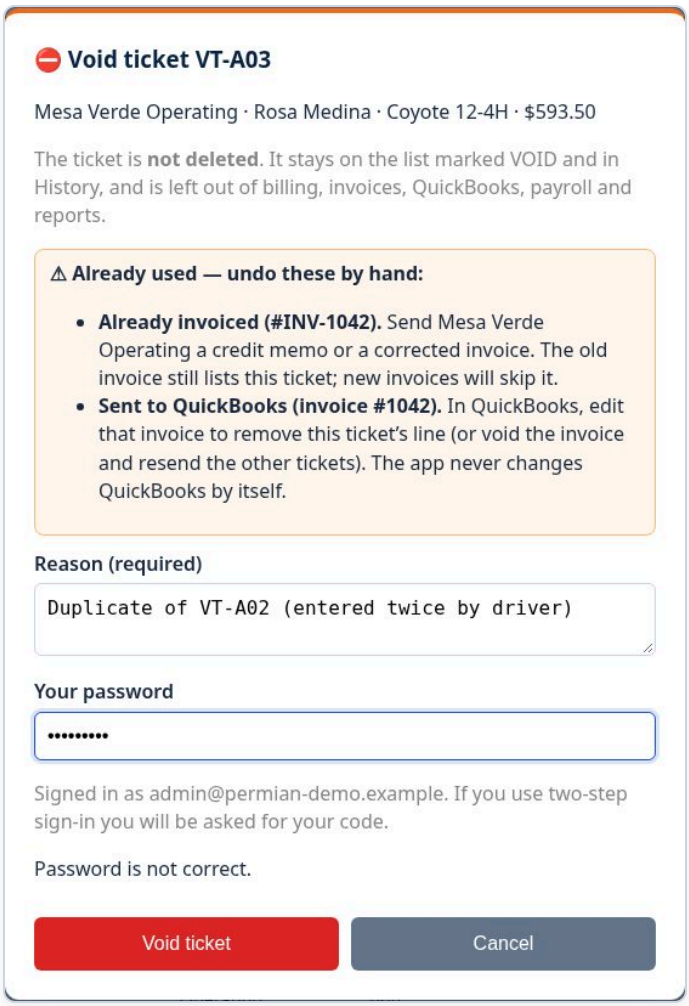
Voiding a ticket (admins)

Use **⛔ Void** on a ticket row for a ticket that should never have existed (entered twice, wrong driver, test). A voided ticket is **never deleted**: it stays on the list struck through with a **VOID** badge, keeps its History, and is left out of billing, invoices, Daily Billing, QuickBooks, payroll and reports. Only admins can void.

1. Click **⛔ Void**. Type the **reason** (required).
2. Re-enter **your password** (and your two-step code if you use one).
3. Click **Void ticket**.

> **HEADS UP** The dialog warns you when the ticket was **already invoiced**, **already sent to QuickBooks** or is in a **closed pay period**. Voiding doesn't change those: send the customer a credit memo or corrected invoice, edit the invoice in QuickBooks, and adjust pay on the next statement.

To undo, click **↩ Un-void**, give a reason and your password. Both are recorded.



Void a ticket: reason, password and warnings

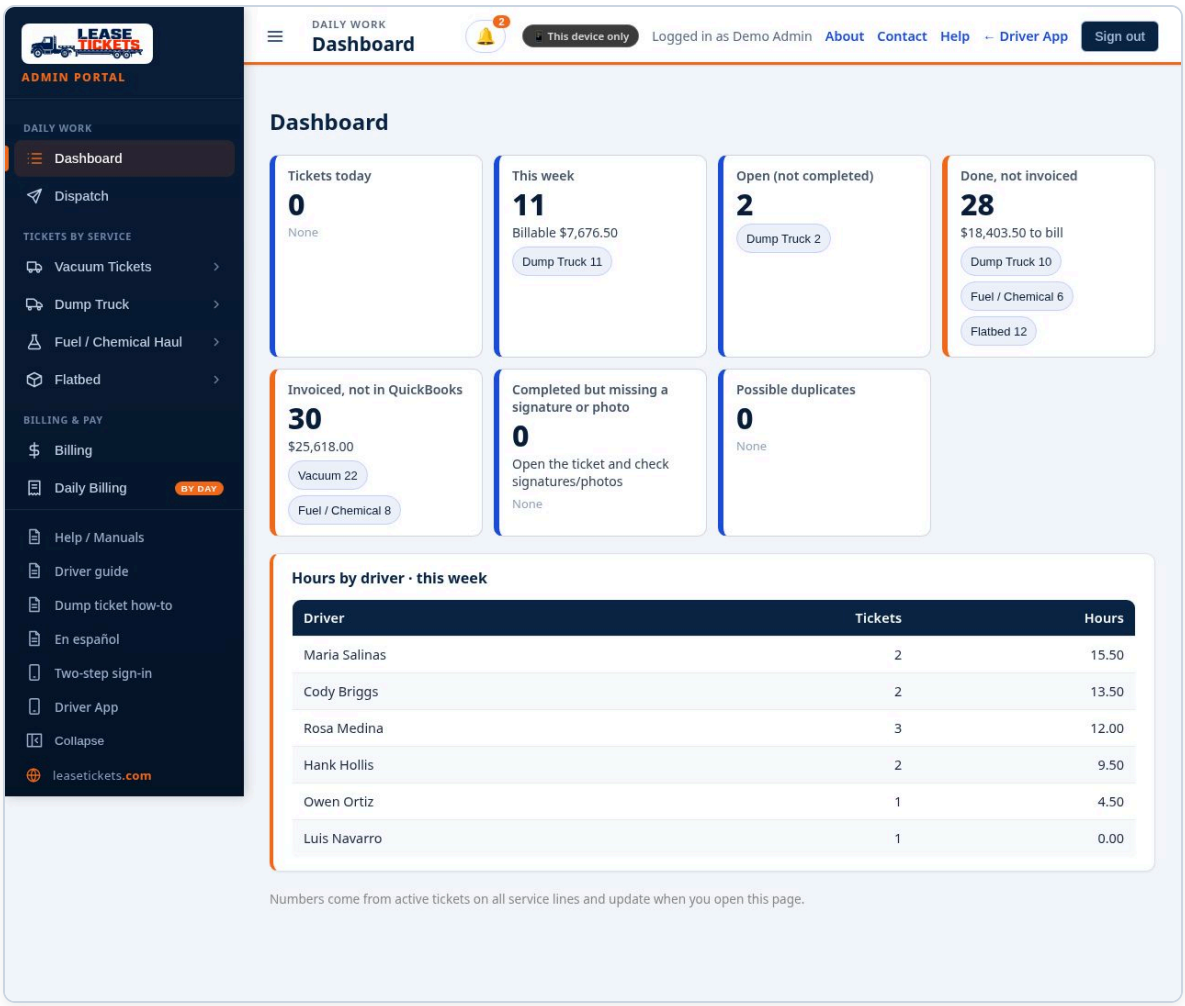


	ID	Driver	Account	Truck #	Trailer #	Haul	Lease	Hours	Labor	BBLs	$/BBL	Product	Total	Ph
☐	VT-A09	Maria Salinas	Mesa Verde Operating	PDH-104	VT-301 (130 bbl)	Produced Water	Coyote 12-4H	—	—	110	$1.10	$121.00	**$121.00**	0
☐	VT-A07	Maria Salinas	Mesa Verde Operating	PDH-104	VT-301 (130 bbl)	Produced Water	Coyote 12-4H	5.00 hrs	$525.00	110	$1.10	$121.00	**$646.00**	0
☐	VT-A06	Owen Ortiz	Red Draw Energy	PDH-105	VT-301 (130 bbl)	Produced Water	Red Draw 7 Unit	4.50 hrs	$472.50	110	$1.10	$121.00	**$593.50**	0
☐	VT-A05	Owen Ortiz	Red Draw Energy	PDH-105	VT-301 (130 bbl)	Produced Water	Red Draw 7 Unit	5.00 hrs	$525.00	110	$1.10	$121.00	**$646.00**	0
☐	VT-A04	Rosa Medina	Mesa Verde Operating	—	VT-301 (130 bbl)	Produced Water	Coyote 12-4H	5.00 hrs	$525.00	110	$1.10	$121.00	**$646.00**	0
☐	~~VT-A03~~ ⚠ Possible duplicate VOID	Rosa Medina	~~Mesa Verde Operating~~	~~PDH-102~~	~~VT-301 (130 bbl)~~	~~Produced Water~~	~~Coyote 12-4H~~	~~4.50 hrs~~	~~$472.50~~	~~110~~	~~$1.10~~	~~$121.00~~	**$593.50**	0
☐	VT-A02 ⚠ Possible duplicate	Rosa Medina	Mesa Verde Operating	PDH-102	VT-301 (130 bbl)	Produced Water	Coyote 12-4H	4.50 hrs	$472.50	110	$1.10	$121.00	**$593.50**	0
☐	VT-A01	Rosa Medina	Mesa Verde Operating	PDH-102	VT-301 (130 bbl)	Produced Water	Coyote 12-4H	5.00 hrs	$525.00	110	$1.10	$121.00	**$646.00**	0

A voided ticket stays on the list

Dashboard

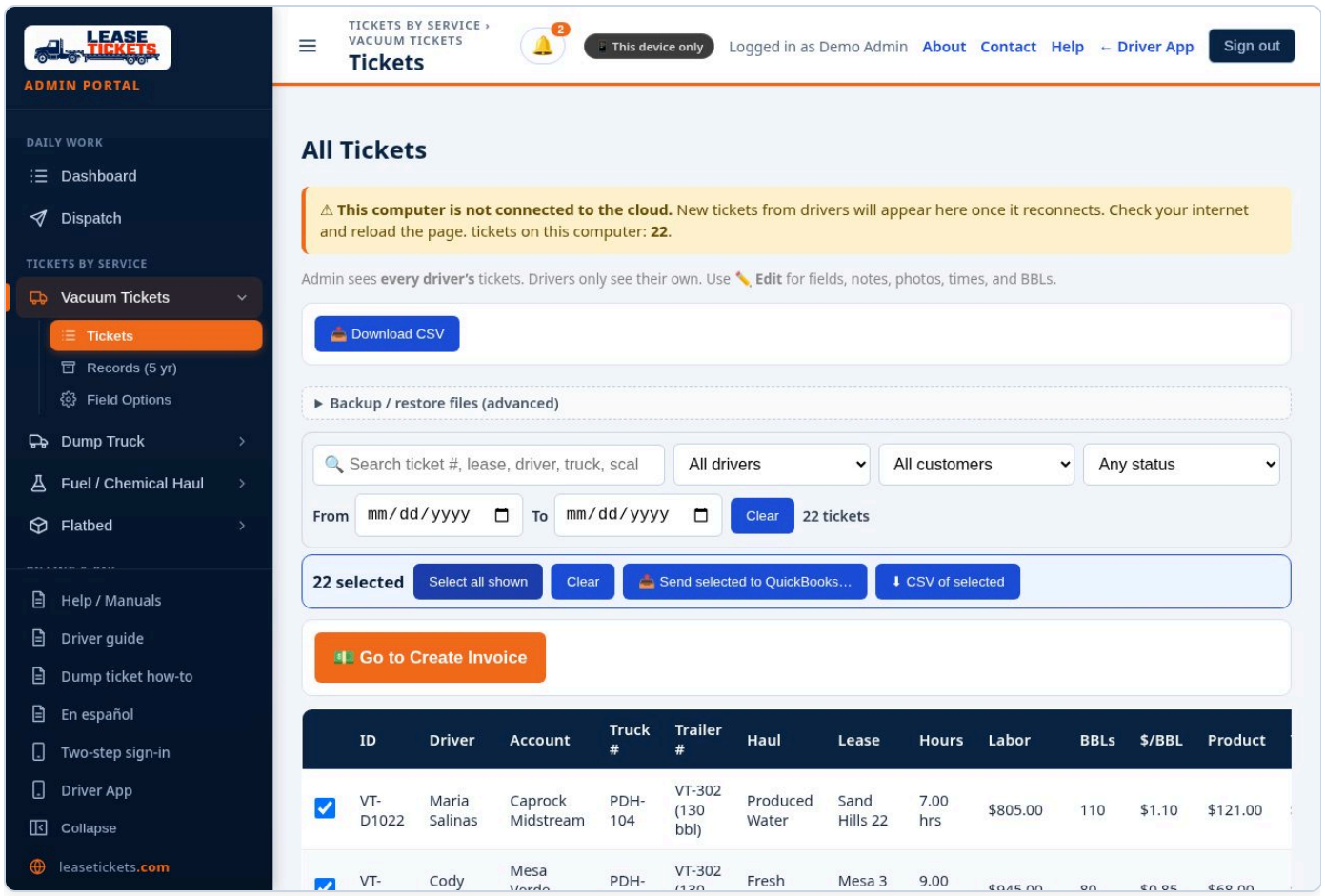
Dashboard (top of the sidebar, under Daily work) is the first stop each morning. The cards show tickets today and this week, open tickets, tickets that are done and waiting for billing, completed tickets missing a signature or photo, and possible duplicates. Each card has buttons per service line that open that line's ticket list already filtered. Below the cards: hours by driver this week. Admins also see dollar totals. **Logistics Coordinators (dispatchers) see counts and hours only, never dollar amounts.**



Dashboard (admin view)

Selecting several tickets (bulk actions)

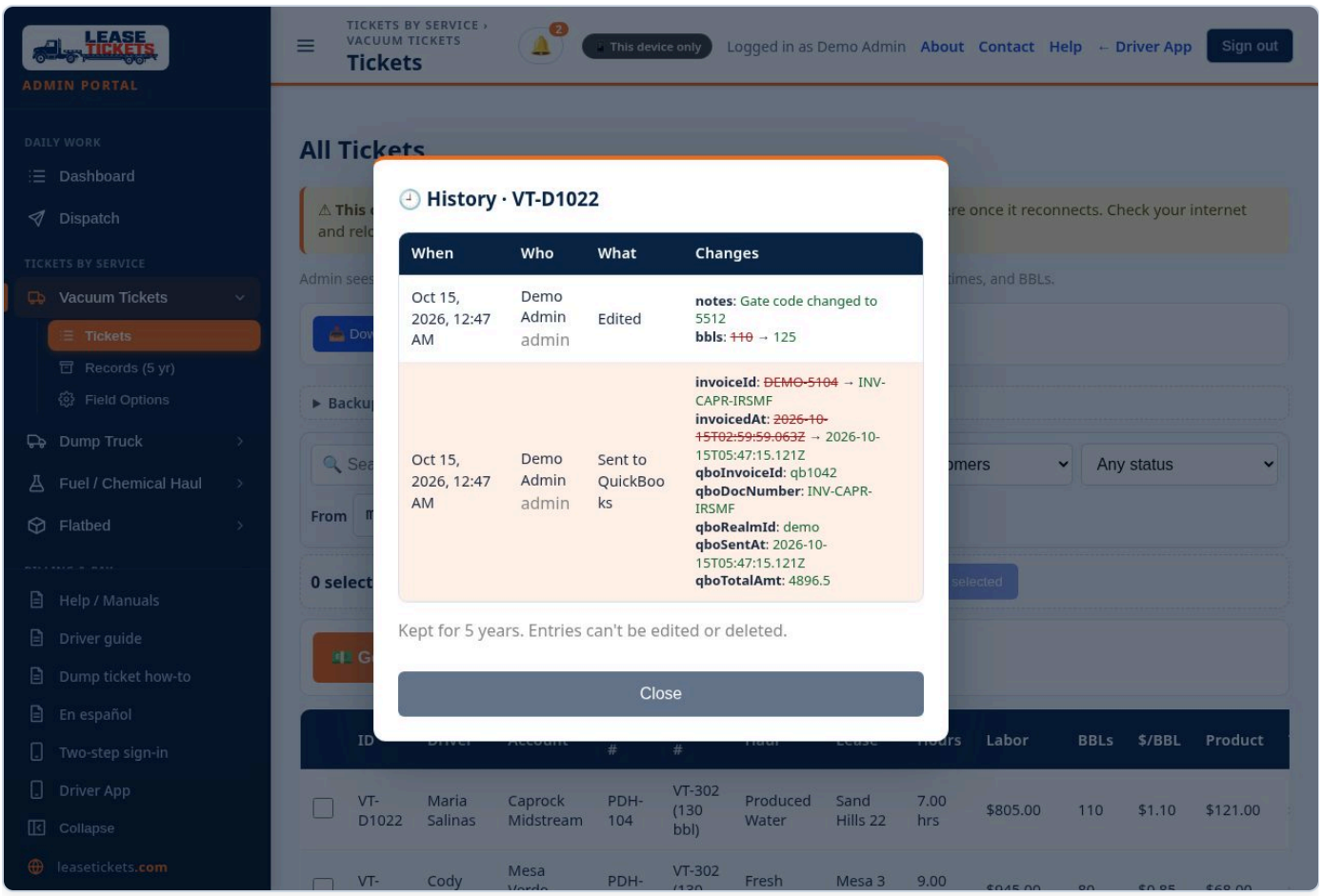
Every office ticket list has a checkbox column and a bar above it. Tick tickets one by one, or filter the list and click **Select all shown**. Then use **⬇ CSV of selected** or (admins) **📤 Send selected to QuickBooks…** (see section 14). **Clear** unticks everything.



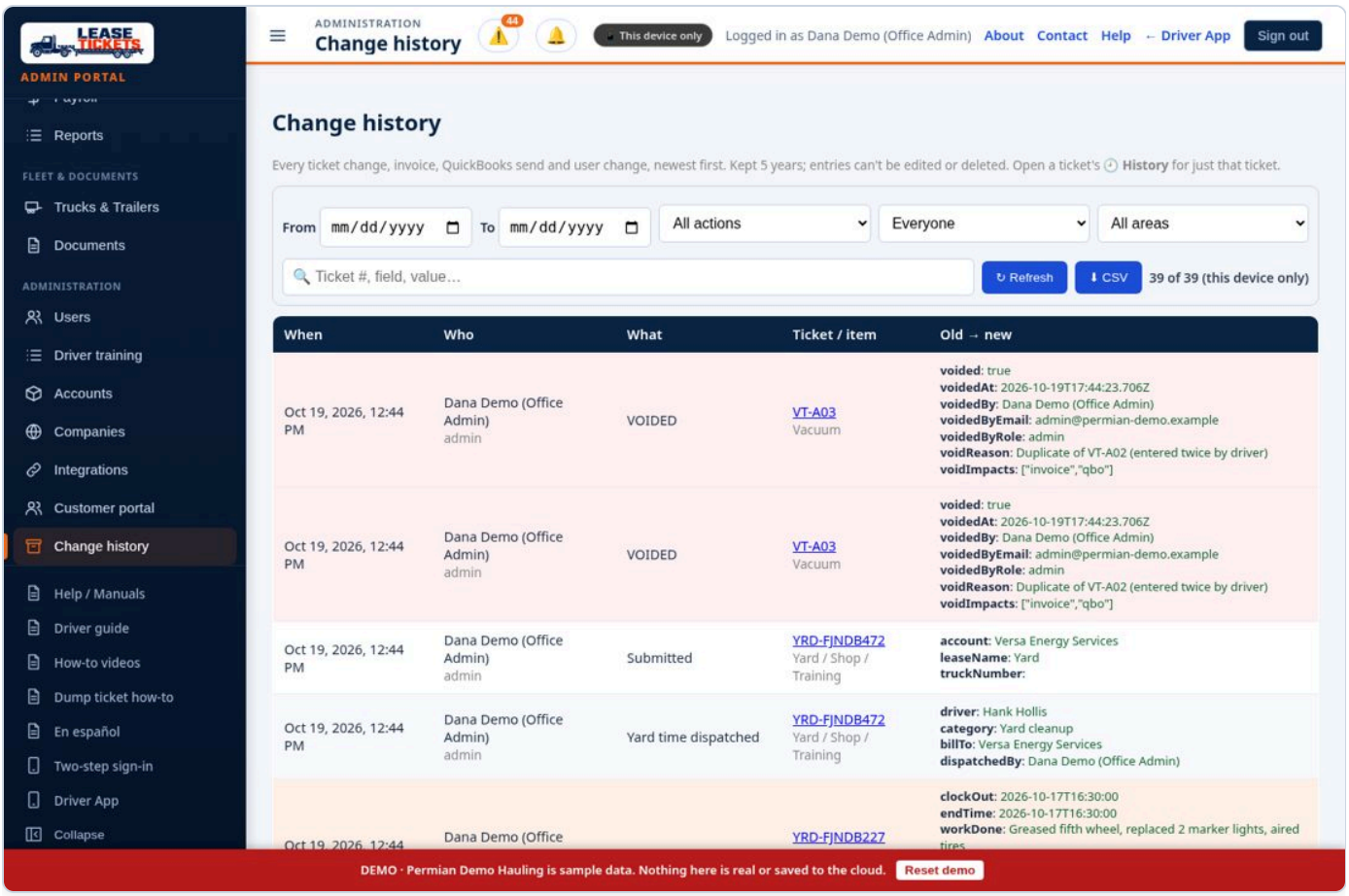
Bulk bar with tickets selected

Change history

Lease Tickets records who did what and when, with the old → new values: tickets submitted, completed and edited, **voided / un-voided (with the reason)**, **approved (and cover approvals)**, deleted and sent to QuickBooks, **yard time sent, clocked in and out**, **pay changes** (driver pay, pay by service, overtime settings), training sign-offs, plus user and invite changes. Click **🕘 History** on a ticket row for that ticket, or open **Change history** under Administration. The log page filters by **date range**, **action**, **person**, **service line** and a **search** box (ticket #, name or value). Entries are kept **5 years** and can't be edited or deleted. Passwords and codes are never stored, only "(changed)". If a phone or computer is offline, the entry is kept on that device and shown right away, then sent when it reconnects. Admins and developers see history. Dispatchers don't.



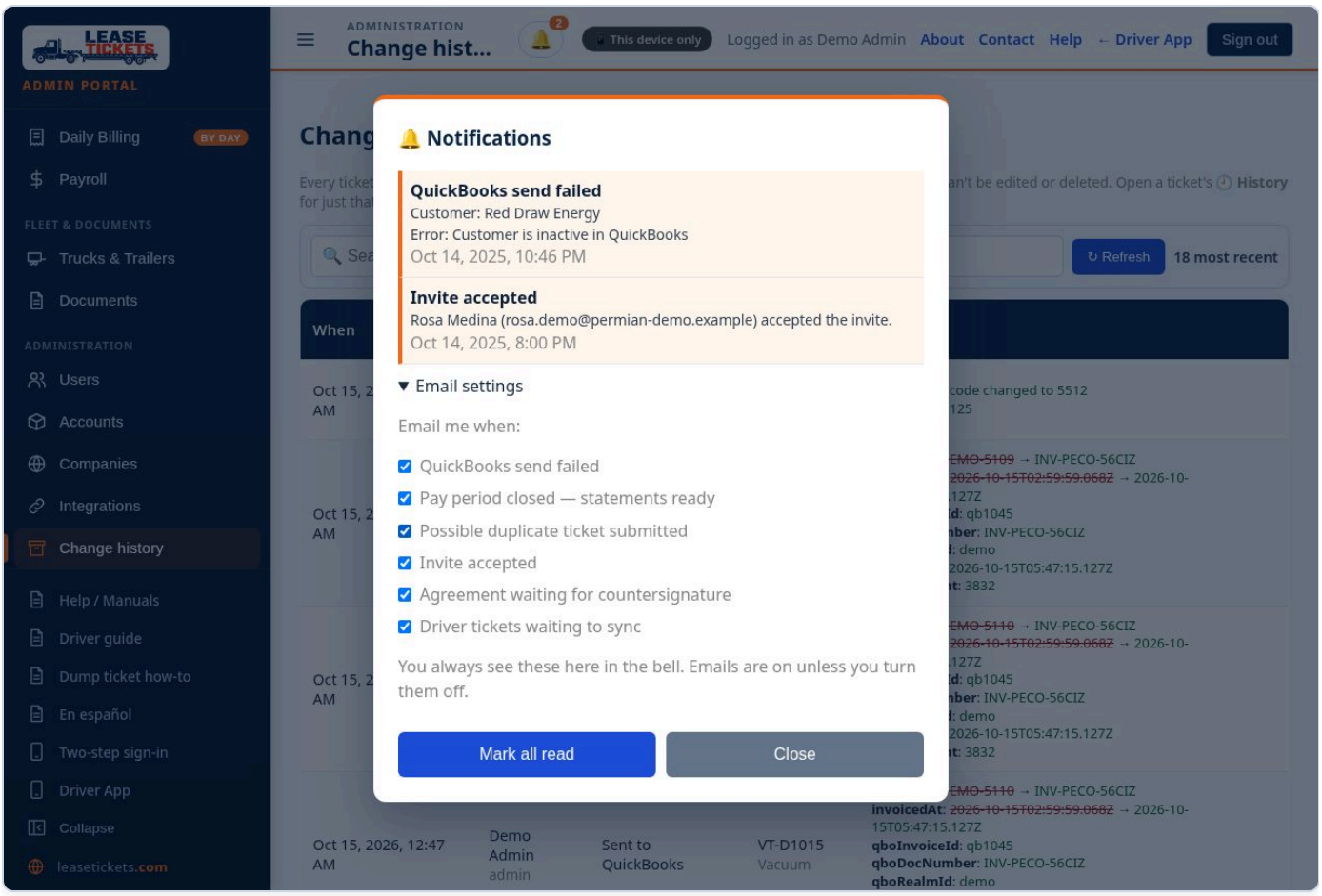
History of one ticket



Change history with filters

Notifications (🔔)

The bell at the top of the portal shows office notifications: QuickBooks send failed, pay period closed (statements ready), possible duplicate ticket submitted, invite accepted, agreement waiting for countersignature, driver tickets waiting to sync, **driver spots almost full (80%)**, **over your plan's driver spots**, and **plan upgrade requested**. Click it to read them, then **Mark all read**. Each office admin also gets these by **email, on by default**. To turn some off, open **Email settings** in the bell window and untick them. The bell itself always shows everything.

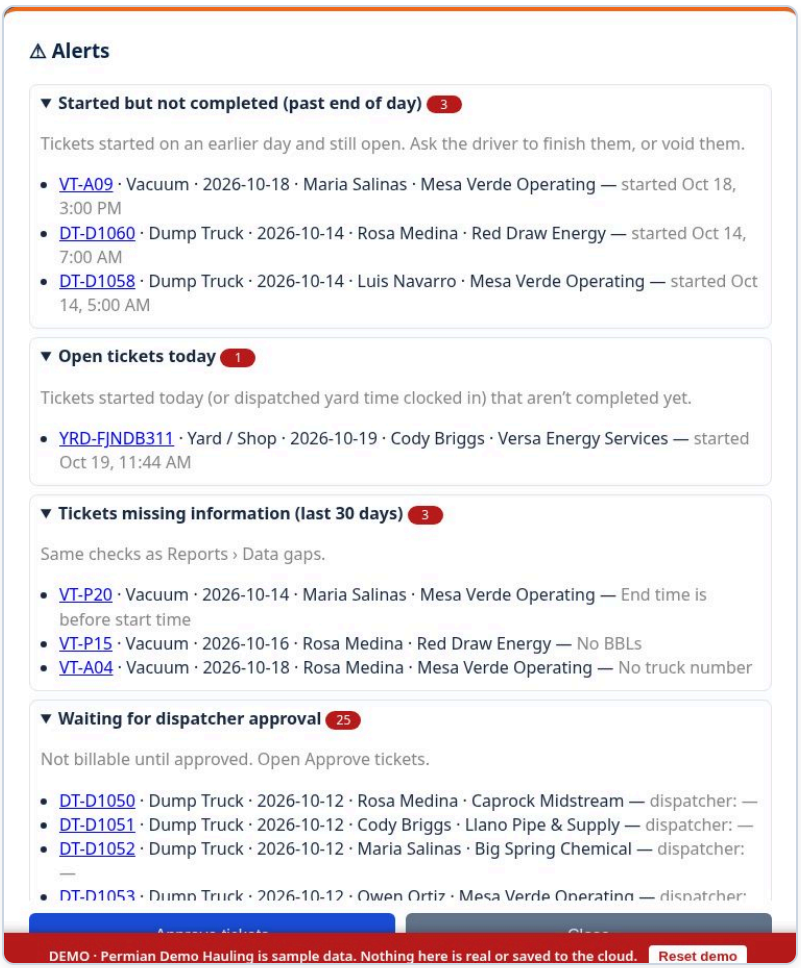


Notifications and email settings

Alerts (⚠️)

The ⚠️ button next to the bell shows a count and opens a list in six groups (customer approval and rerouted loads first). Click a ticket # to open it.

- **Started but not completed (past end of day)**: started on an earlier day and still open. Ask the driver to finish it, or void it.
- **Open tickets today**: started today (or yard time clocked in) and not completed yet.
- **Tickets missing information (last 30 days)**: the same checks as Reports › Data gaps (no end time, end before start, no BBLs / tons, no truck, no customer, missing signature or photo).
- **Waiting for dispatcher approval**: not billable until approved, with the dispatcher's name. **Approve tickets** opens the queue.



Alerts

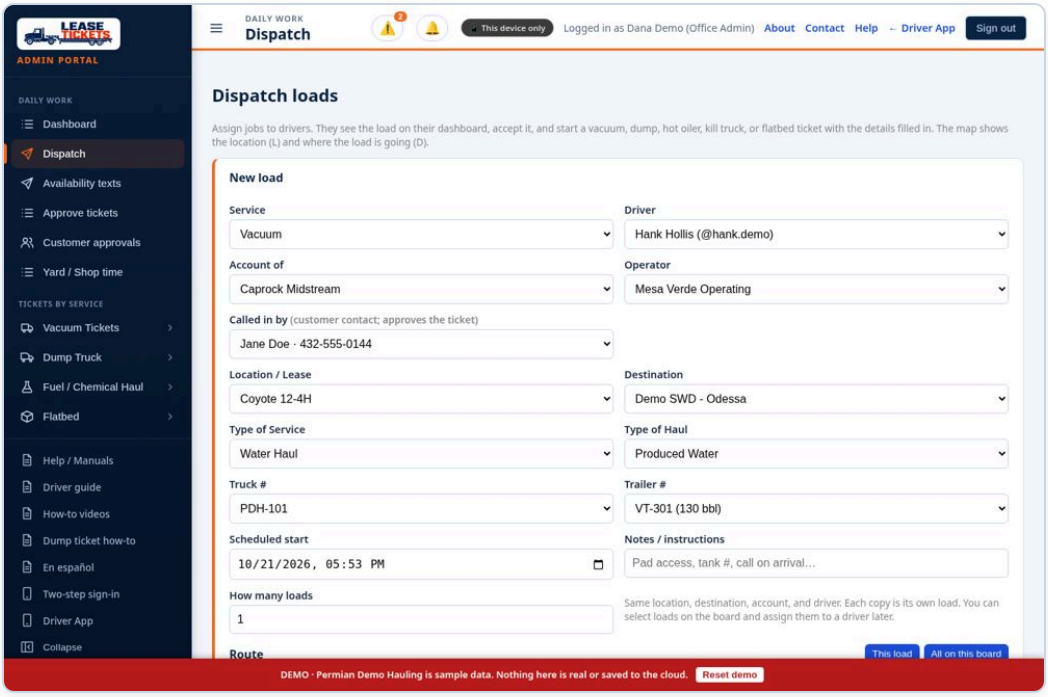
Customer ticket approval

Some customers (for example Select Water) want to approve each ticket before you bill it. Turn it on per customer, and the person who called in the load gets a secure link to approve it.

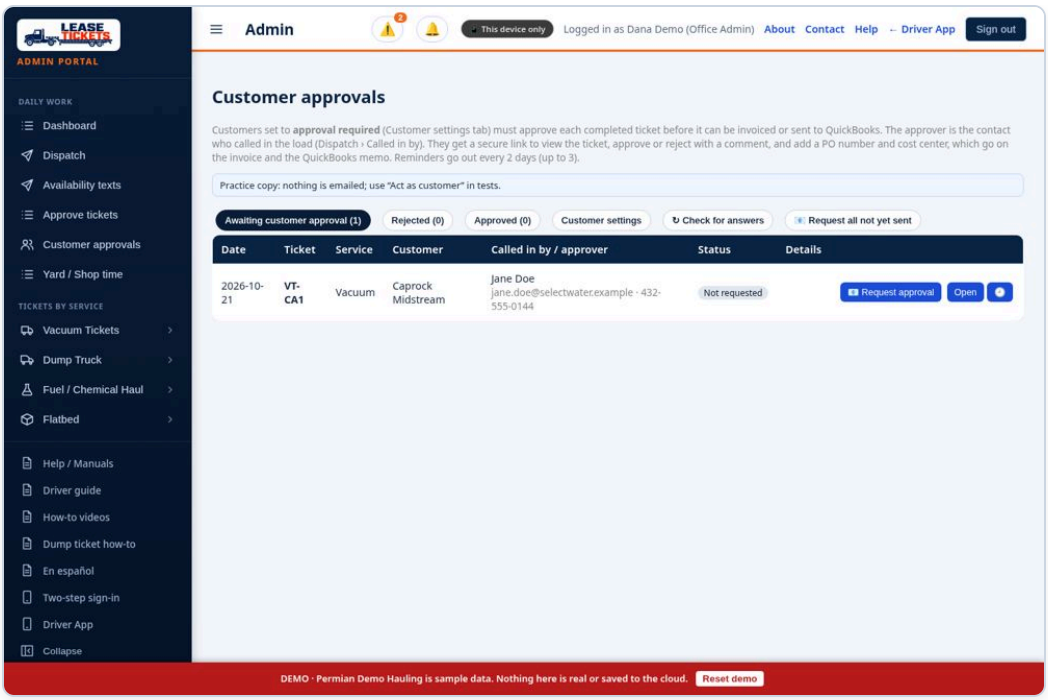
- **Turn it on:** **Customer approvals › Customer settings**. Tick **Required** for the customer and pick the start date (tickets worked before it are not affected). Add the customer's contacts (name, phone, email) here or while dispatching.
- **Dispatch:** pick **Called in by** under the customer (or *+ Add new contact…*). That contact becomes the approver for the ticket.
- **Request:** after the ticket is completed (and dispatcher-approved), open **Customer approvals › Awaiting customer approval** and click **📧 Request approval** (or **Request all not yet sent**). The approver gets an email with a secure link (good for 30 days). No login needed.
- **The customer** sees the ticket and charges, can print / save it as PDF, and clicks **Approve** or **Reject** (a reject needs a comment). They can add a **PO number** and **cost center**.
- **Answers** come back to the 🔔 bell (admins and dispatchers) and show on the page. **↻ Check for answers** pulls them right away (the app also checks every 2 minutes).
- **Billing:** until the customer approves, the ticket is left out of invoices, Daily Billing and QuickBooks, the same way as dispatcher approval. The PO and cost center go on the invoice line, the

QuickBooks line and the QuickBooks memo.

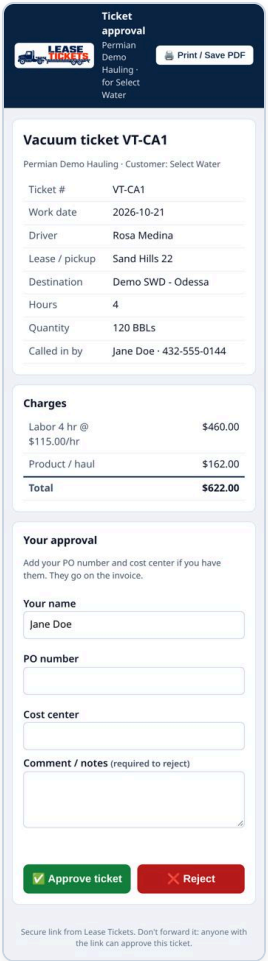
- **Rejected:** fix the ticket with Edit, then click **Re-send after fix**.
- **Reminders:** click **🔔 Remind** any time (the old link stops working). The server also reminds automatically every 2 days, up to 3 times. ⚠️ Alerts lists rejected tickets, tickets not requested yet, and requests waiting over 2 days.
- **For accounting:** on the Approved tab, **⬇️ Approved PDF** opens the ticket with a green stamp (who approved, when, PO, cost center, approval ID). Save it as PDF and attach it to the QuickBooks invoice.
- **Change history** records each request, approval, rejection and cancel (ticket.customer_request / customer_approved / customer_rejected / customer_cancel).
- **Sandbox:** until Lease Tickets turns on live email, nothing is emailed to customers. Each request gives you a **🔗 Sandbox link** to open the customer page yourself.



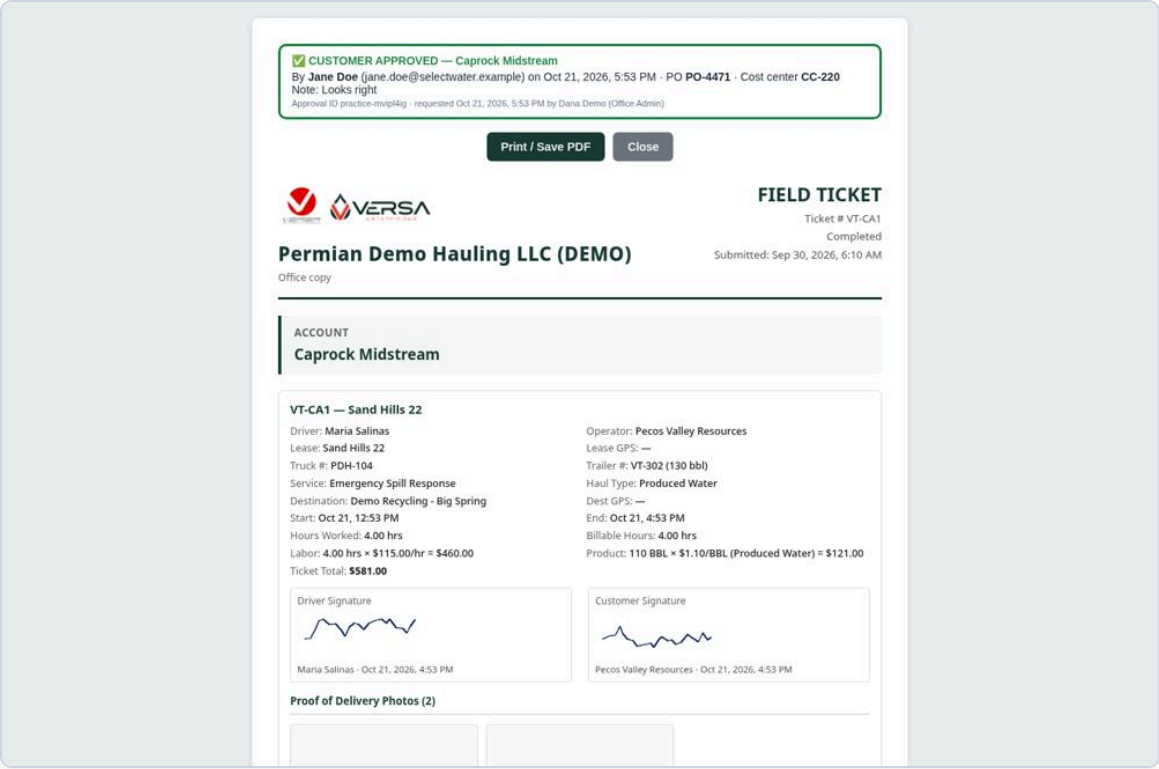
Dispatch › Called in by



Customer approvals



What the customer sees (phone)



Approved ticket PDF with stamp

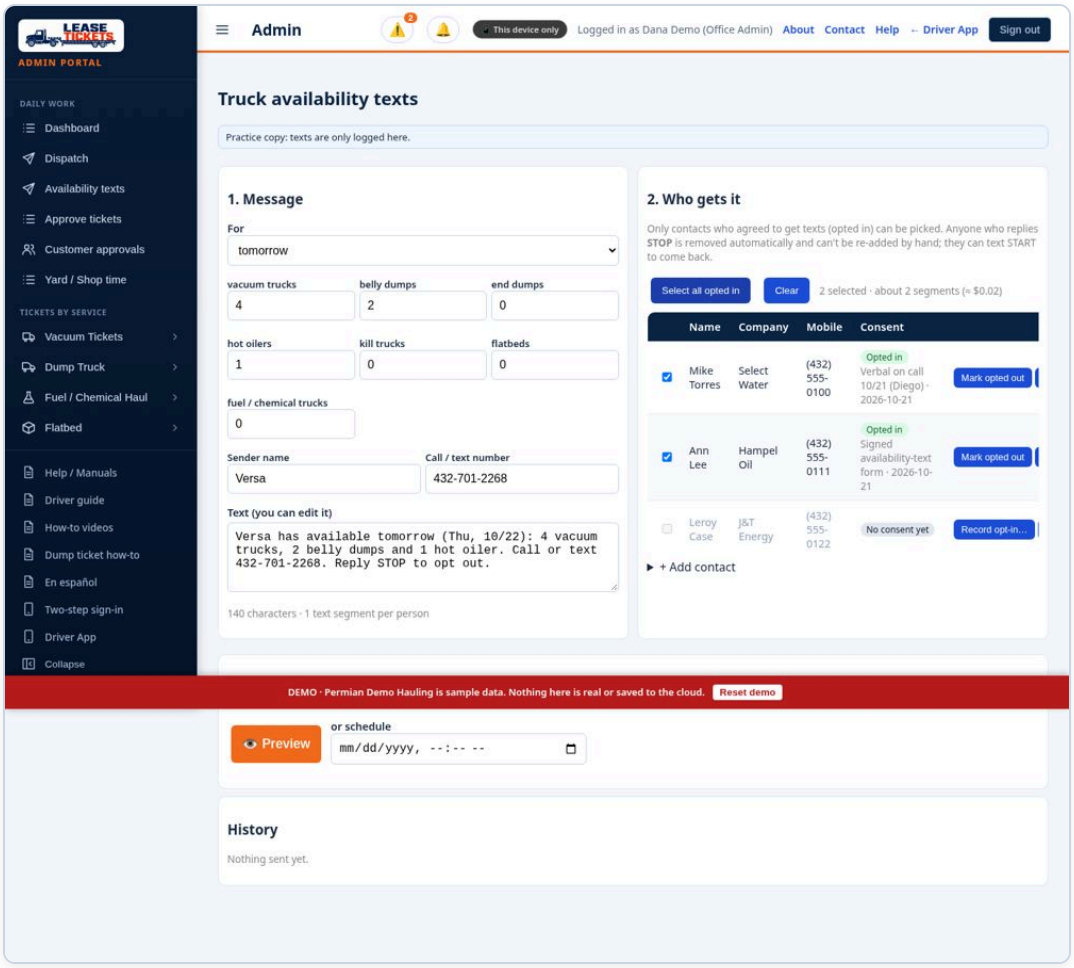
Truck availability texts (SMS)

Admins can text customers which trucks are open today or tomorrow: **Availability texts** in the sidebar.

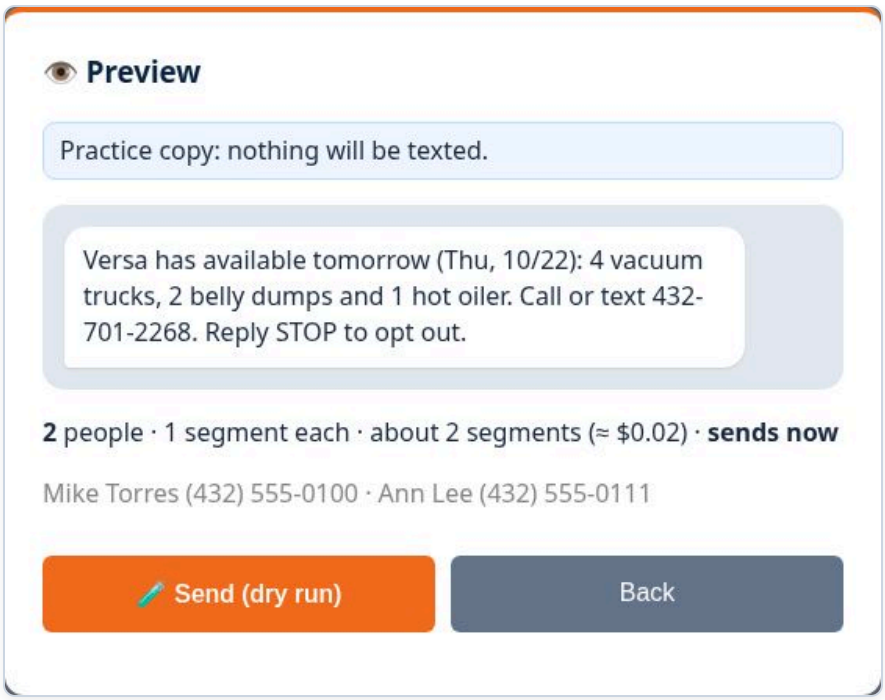
- **Contacts:** add name, company and mobile number. Only add someone who signed the **Lease Tickets SMS Consent Form**, and record the date they signed. Keep the signed form, because carriers require this proof. Contacts without consent can't be picked.
- **Versa customers:** use the Versa form at **leasetickets.com/versa/sms-consent-form.pdf**. Its office contact numbers are **432-701-8444 and/or 432-701-3715**. Texts still come from 432-999-5334, and STOP/START go to that number.
- **SMS consent form and page:** print or email the blank form from **leasetickets.com/sms-consent-form.pdf**. The public page **leasetickets.com/sms-consent** explains how customers opt in and links the Privacy Policy and SMS Terms. Twilio reviews these pages, so don't change the consent wording without updating the campaign. Texts are for truck availability only. Don't use them for invoices, approvals or marketing.
- **STOP:** when someone replies STOP (or UNSUBSCRIBE, CANCEL, END, QUIT) they are opted out automatically and the server skips them on every send, even if picked. START opts them back in. Twilio sends the confirmation replies to STOP, START and HELP; Lease Tickets just records the change, so the contact's status updates on this page.
- **Who gets it:** tap anywhere on a contact's row (or its big checkbox) to pick them. A picked contact shows a solid orange box with a white check, and the whole row turns orange so you can see who's picked at a glance. Tap again to unpick, or use **Select all opted in**. **Clear** unpicks everyone.
- **Message:** enter how many of each truck type are open and pick today or tomorrow. The text is written for you, like *"Versa has available tomorrow (Thu, 10/22): 4 vacuum trucks, 2 belly dumps*

and 1 hot oiler. Call or text 432-701-2268. Reply STOP to opt out.". You can edit it. Keep "Reply STOP to opt out". The counter shows characters and text segments (1 segment = up to 160 plain characters; emoji cut it to 70).

- **Send:** 👁 **Preview** shows the text, who gets it and the estimated cost, then **Send now**, or pick a time to **Schedule** (cancel it under History).
- **History** shows every send with how many went out, were skipped (opted out) or failed.
- **Dry run:** until the texting account is approved and turned on, the page says DRY RUN and nothing is texted. Sends are only logged.



Availability texts

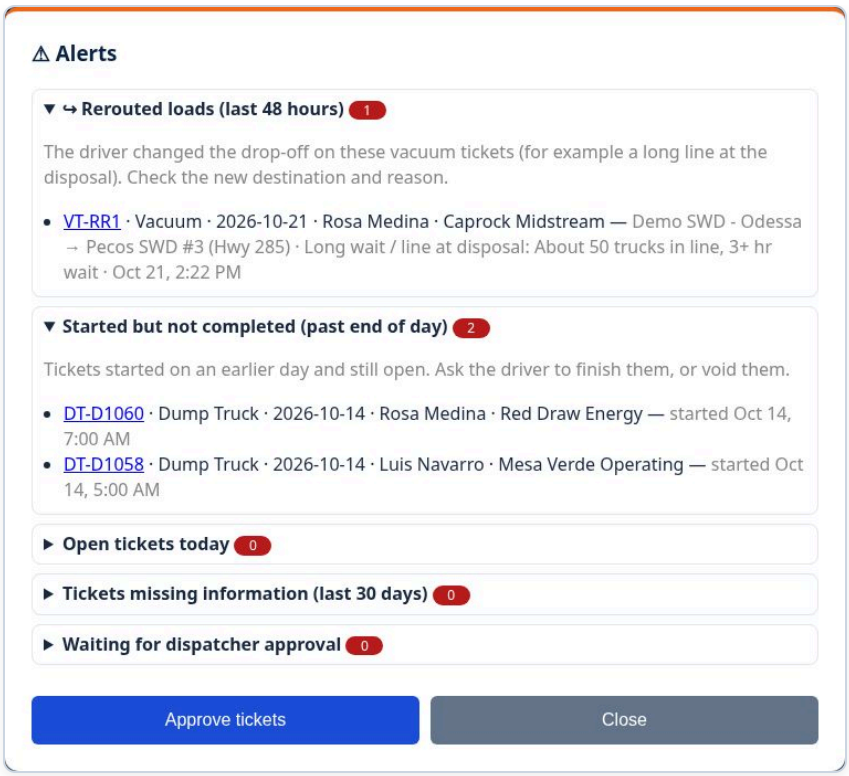


Preview before sending

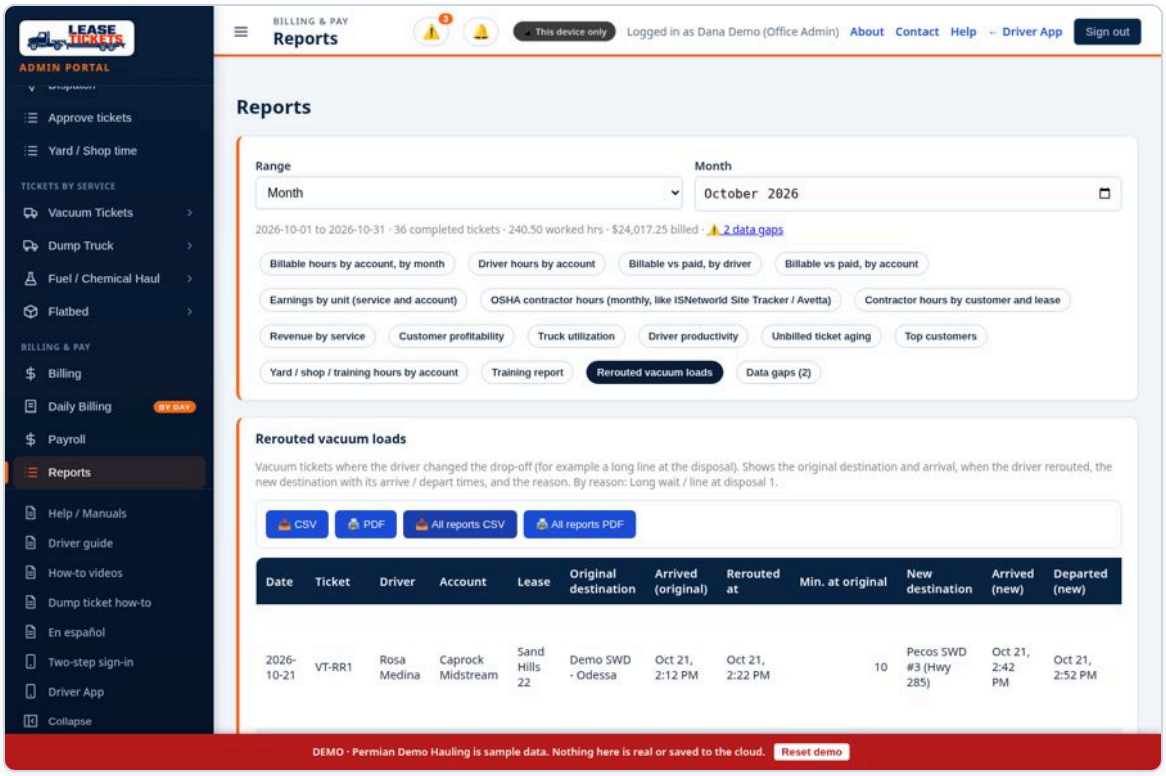
Rerouted vacuum loads

A driver on an open vacuum ticket can tap ↪ **Reroute** to change the drop-off, for example when there's a long line at the disposal or the site is closed. He picks or types the new destination and must pick a reason (Long wait / line at disposal, Site closed, Customer request, Dispatcher instruction, or Other with a note).

- **Dispatch is told right away:** a 🔔 notification (and email, on by default) to admins and dispatchers, and the load shows under ⚠️ Alerts › **Rerouted loads (last 48 hours)**.
- **Kept on the ticket:** the original destination and arrival time, when he rerouted, the new destination and its arrive / depart times, the reason and note. The Destination field becomes the new drop-off.
- **Where you see it:** a ↪ **Rerouted** badge on the Vacuum Tickets list (click it for the details and the change log), the printed ticket (4" and full page), invoice lines, QuickBooks line descriptions and Daily Billing.
- **Change history** records it as *ticket.reroute* with every field that changed.
- **Reports › Rerouted vacuum loads** lists every reroute in the range with minutes spent at the original drop-off, plus a count by reason (CSV / PDF).
- Billing is not changed by a reroute; hours still run from start to end time. Fix anything on the ticket with Edit as usual.



Alerts › Rerouted loads

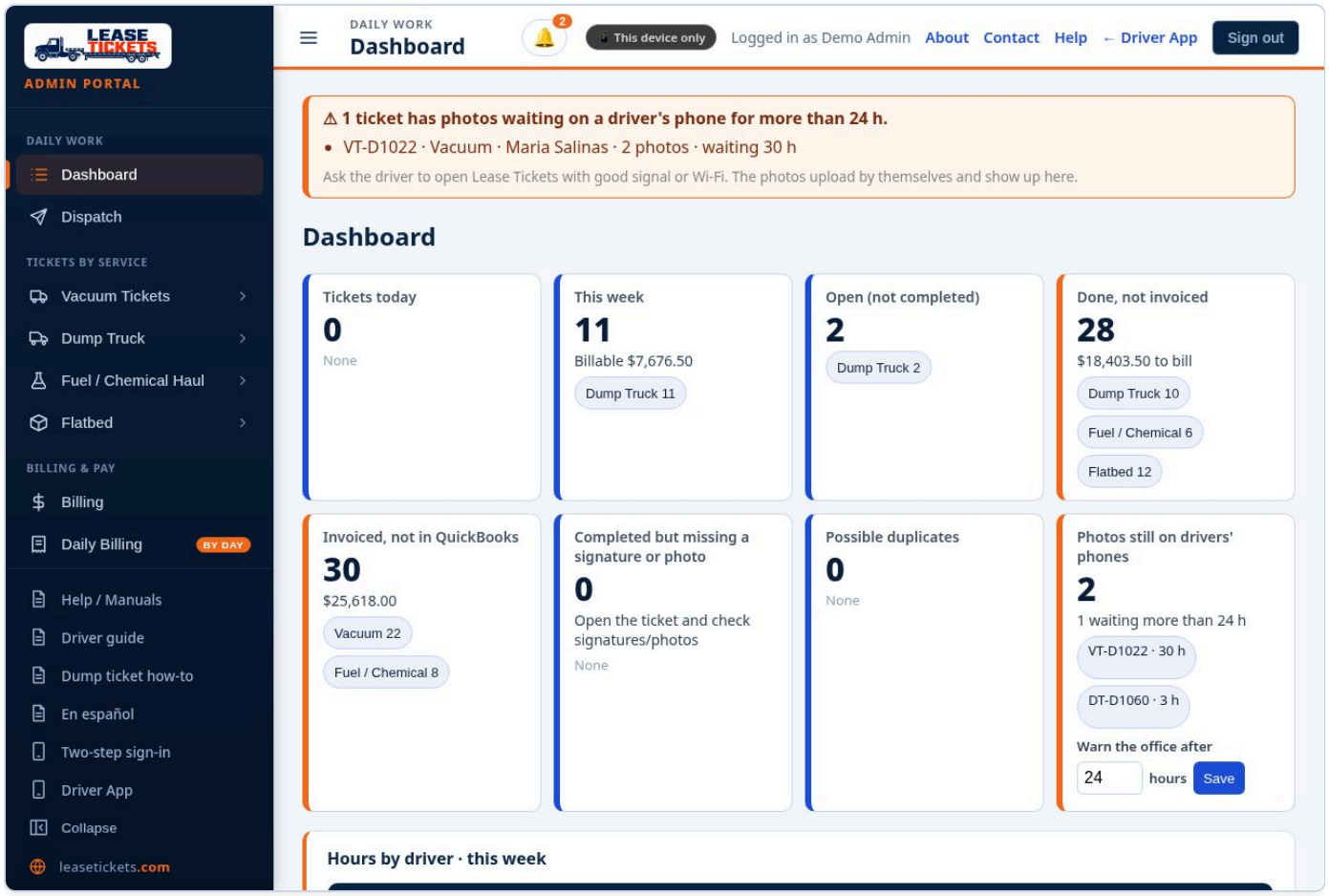


Reports › Rerouted vacuum loads

Photos still on drivers' phones (no signal)

Drivers can submit or complete a ticket with no signal. The ticket is saved, and the photos stay on the phone until it has signal, then upload by themselves and show up on the ticket. Until then the ticket

shows a **"Photo waiting to upload"** picture. The Dashboard card **Photos still on drivers' phones** lists those tickets. If any has waited longer than the warning time (**24 hours** by default), an orange banner shows on every admin page and the office gets a **"Driver tickets waiting to sync"** notification (bell and email). Admins change the hours on that card (*Warn the office after … hours*, 1–168). Ask the driver to open Lease Tickets with good signal or Wi-Fi on the **same phone**. The photos only exist on that phone until they upload, so the phone must not be wiped or the app data cleared.

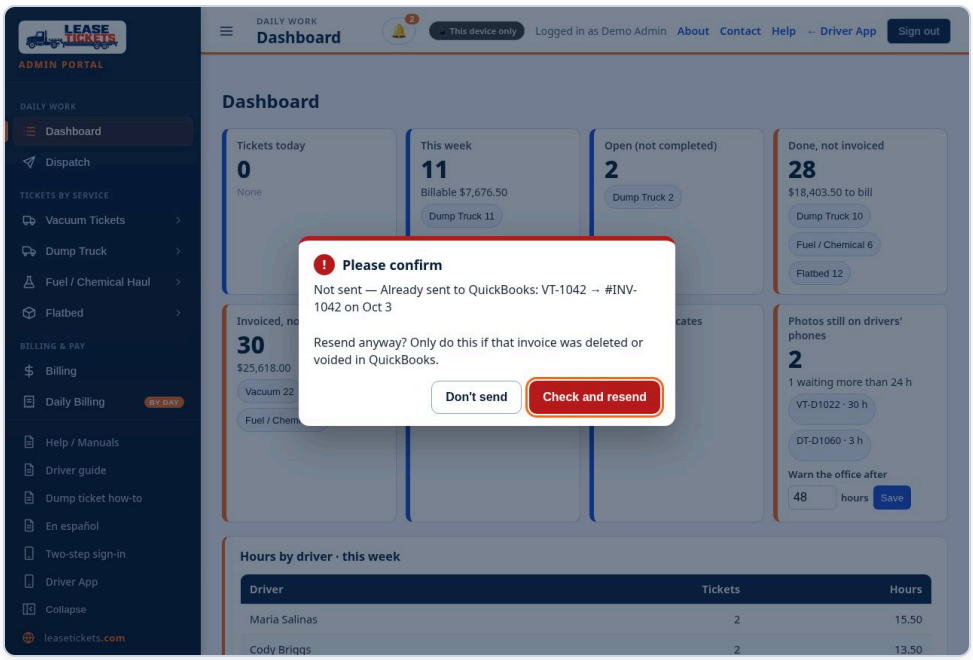


Warning banner and the Dashboard card with the hours setting

> **NOTE** A phone that is completely offline can't tell anyone. The office warning starts once the ticket itself reaches the office (it usually does before the photos, since it's much smaller), or the phone gets any connection.

Messages and questions

Messages ("✅ Saved", "❌ … failed") and many questions now open in a Lease Tickets window with a colored bar: green for done, orange for "please check", red for errors. Press **Enter** for the main button and **Esc** to close or cancel. Some older yes/no questions still use the browser's own box. They work the same way.

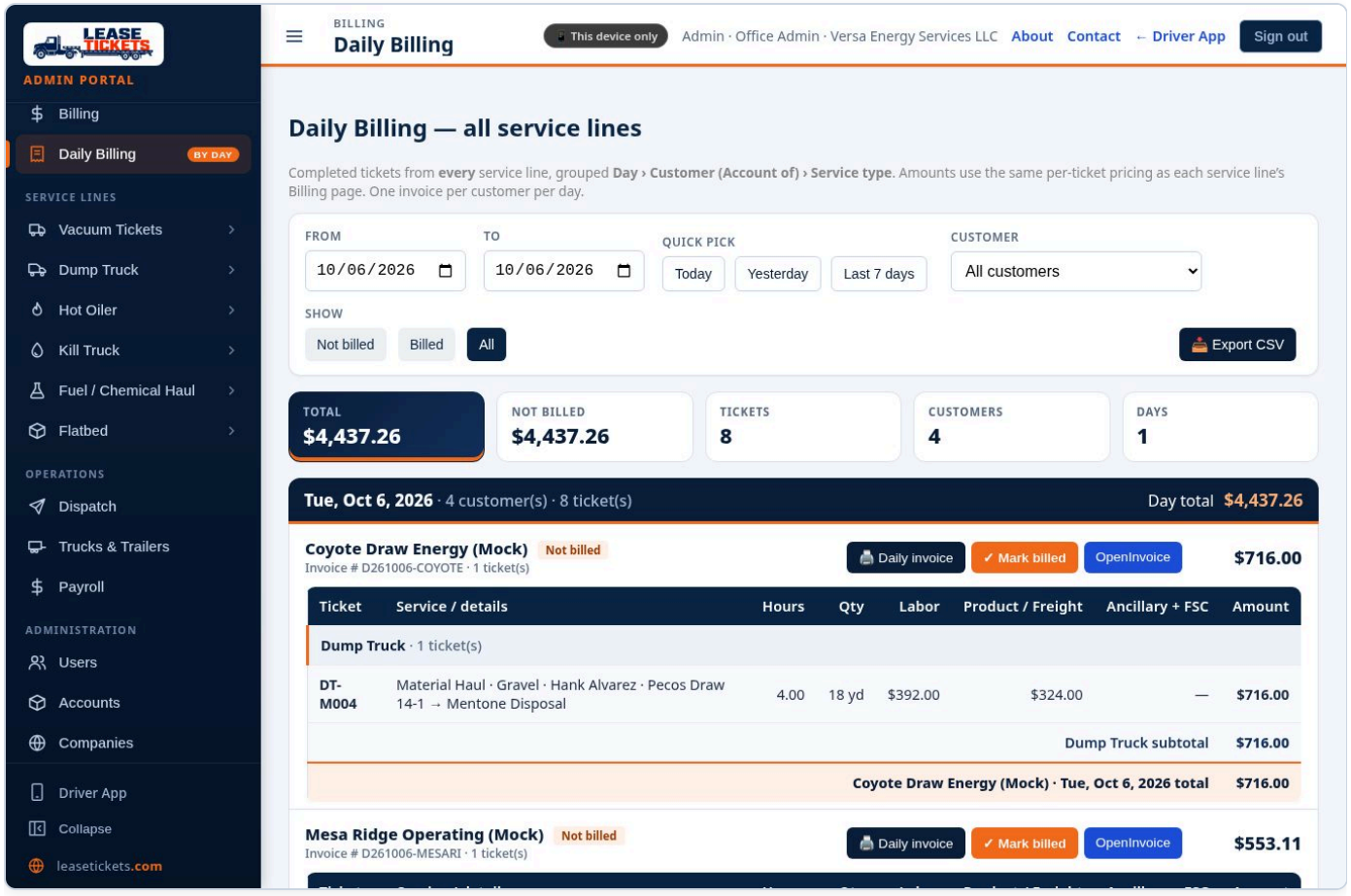


A Lease Tickets question (QuickBooks resend)

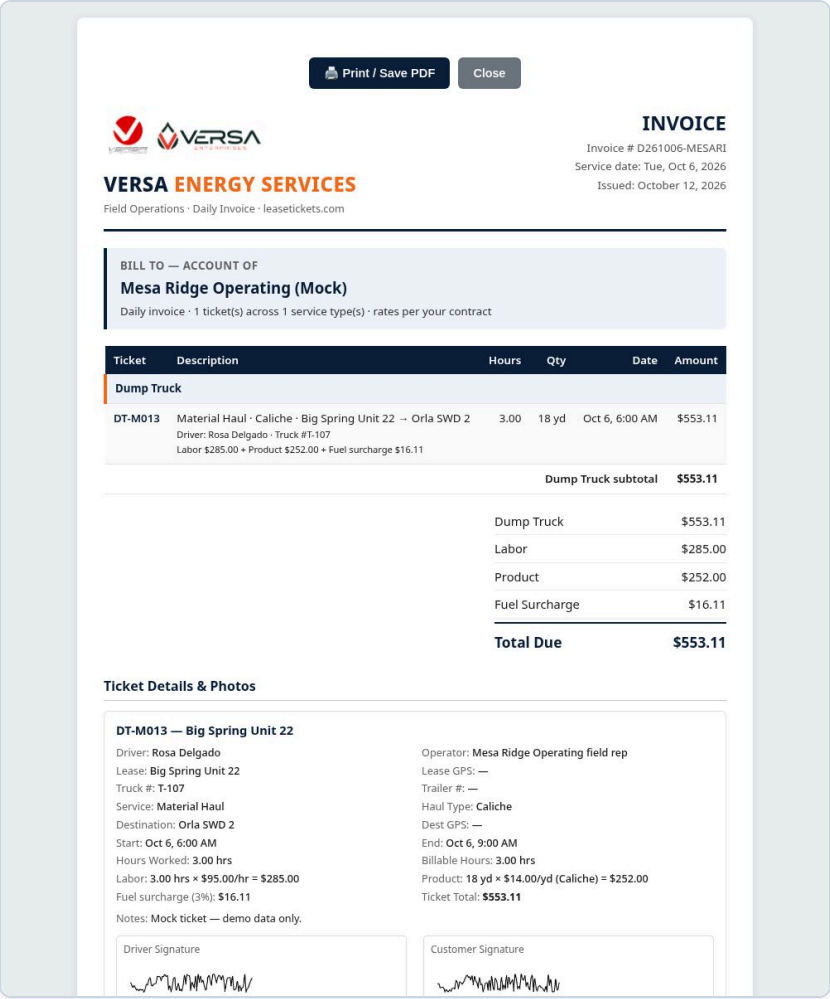
11. Daily Billing

Daily Billing shows completed tickets from **every** service line, grouped **Day › Customer › Service type**, with subtotals. Amounts use the same pricing as each line's billing. You get one invoice per customer per day.

1. Pick **From** / **To**, or use a quick pick: **Today**, **Yesterday**, **Last 7 days**.
2. Optionally filter by **Customer**. Under **Show**, choose Not billed, Billed or All.
3. For each customer and day, click **🖨️ Daily invoice** to print or save a PDF. The app then asks whether to mark those tickets billed.
4. Or click **✓ Mark billed** directly. Use **Undo billed** to reverse it.
5. **📤 Export CSV** downloads what's on screen.



Daily Billing for one day: totals, then each customer with its service types



The daily invoice prints every ticket with its photos and signatures

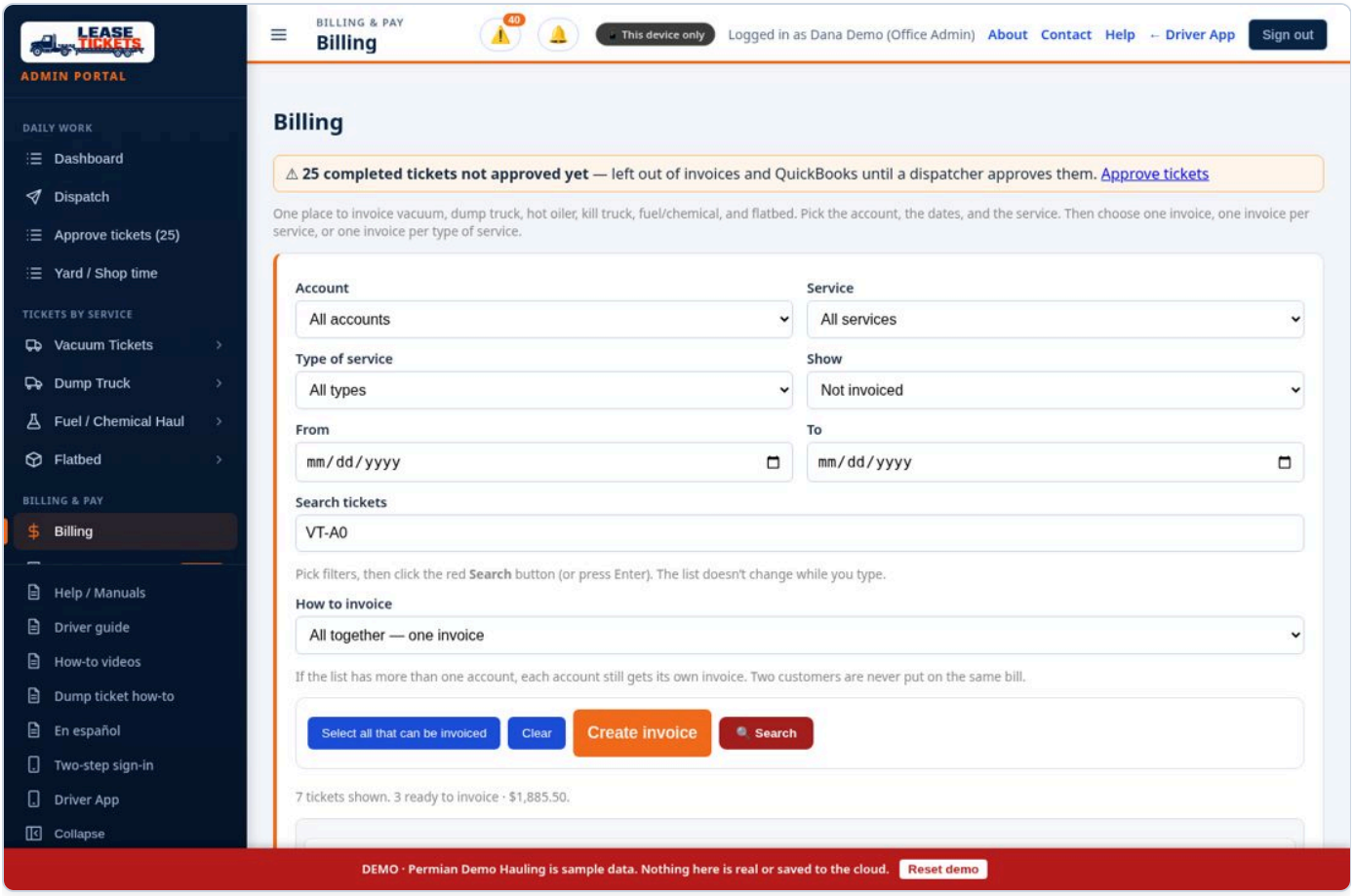
NOTE If QuickBooks or OpenInvoice is set up, each group also shows a **QuickBooks** / **OpenInvoice** button.

NOTE Daily Billing, Billing and QuickBooks only include **approved** tickets (section 9) and never voided ones. When tickets are waiting for approval, an orange bar at the top shows how many, with a link to **Approve tickets**.

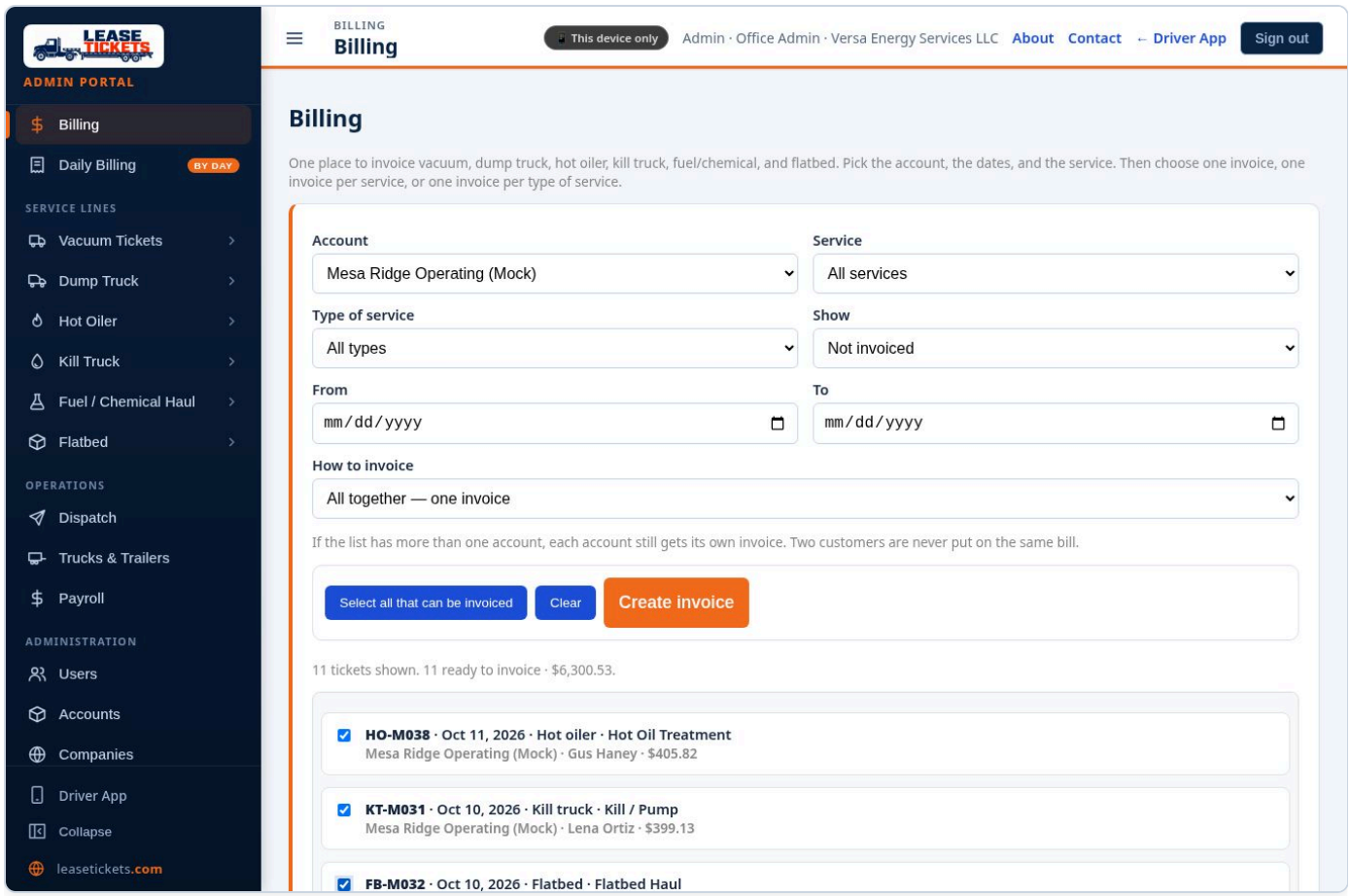
12. Billing (Create invoice)

Billing is for invoicing over any date range, such as weekly or monthly.

1. Choose the **Account**, **Service**, **Type of service**, **Show** (Not invoiced / Already invoiced / All) and the dates. To find particular tickets, type in **Search tickets** (ticket #, lease, driver, truck, scale / BOL #).
2. Click the red **🔍 Search** button next to **Create invoice**, or press **Enter**. The list only changes when you search, not while you type or pick dates; if you change a filter without searching, the summary says *Filters changed. Click Search to update the list.* **Show** starts on **Not invoiced**: to find a ticket that was already invoiced, set Show to **All**. If nothing matches but already-invoiced tickets do, the list says how many and offers a **Show all** button. The summary shows the time of the last search.
3. Under **How to invoice**, choose **All together — one invoice**, **Separate invoice for each service** or **Separate invoice for each type of service**.
4. Check the tickets you want (or click **Select all that can be invoiced**), then click **Create invoice**.



Billing: the red Search button and the approval warning



Billing with one customer selected

NOTE Two customers are never put on the same invoice. If several accounts are selected, each one gets its own invoice. Open tickets need an end time before they can be invoiced. Tickets waiting for dispatcher approval show *Waiting for dispatcher approval* and can't be ticked; voided tickets show *VOID*.

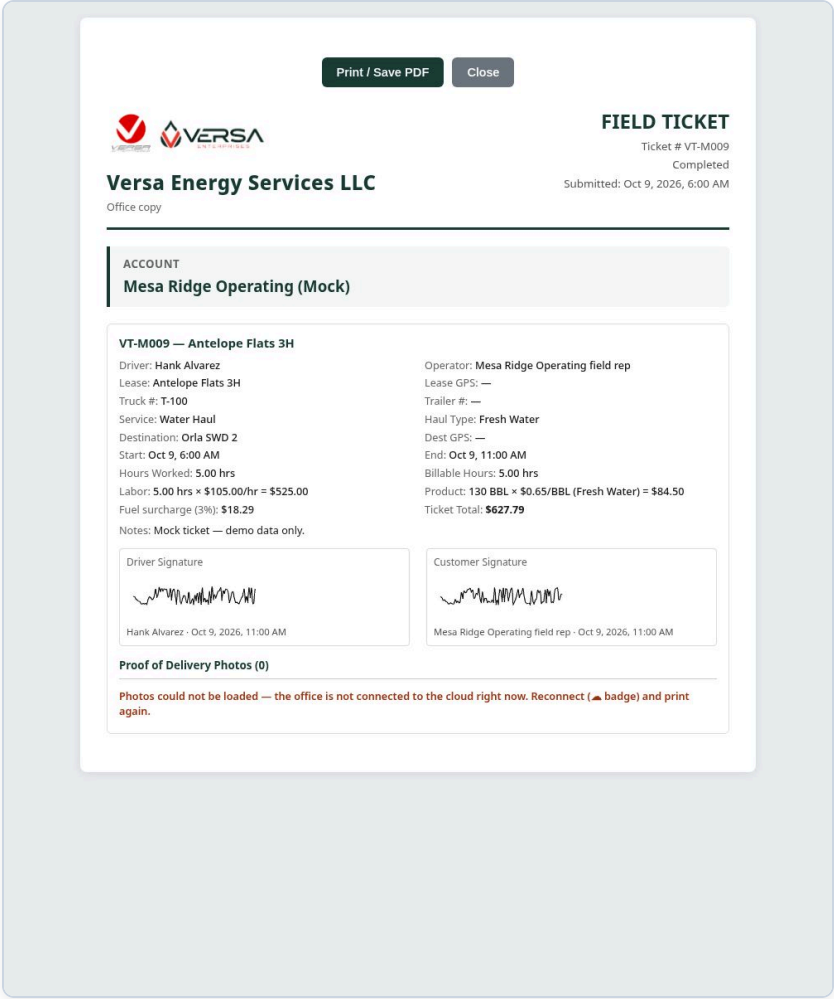
13. Printing

Clicking 🖨️ Print opens a print window with a format picker:

Format	Best for
4" receipt	Drivers printing on a Brother RJ-4250WB (or similar 4-inch) mobile printer. There's an optional *Include photos on receipt* checkbox.
Full page	Letter-size office copy. This is the default on computers.
Field ticket 3.5×9	Pre-printed 3.5″ × 9″ ticket stock

Click **Print / Save PDF** and choose a printer or "Save as PDF". Photos and signatures print in dark ink on white.

Prices on printed tickets: When a **driver** prints a field ticket (4" receipt, 3.5×9, or full-page ticket), rates, dollar amounts, fuel surcharge $, subtotals and the ticket total are left off. Hours, barrels, miles, weights and other quantities still print. Office / admin ticket prints and invoices still show prices. Times on the ticket (Submitted, Start, End) use the device's local time, with the zone abbreviation (for example CST).



Full-page ticket print preview

14. QuickBooks and OpenInvoice

Integrations has two parts: **QuickBooks Online** (sends invoices straight into your QuickBooks company) and **OpenInvoice (Enverus)** (makes PIDX XML / CSV files for operator portals). Only **admins** and **developers** see Integrations and the QuickBooks buttons. Logistics coordinators and drivers can't connect or send.

QuickBooks: how the connection works

- **One connection per company.** Each company connects its own QuickBooks company (one QuickBooks company per Lease Tickets company). All of that company's admins share it, on any computer. Other companies never see it.
- The connection is stored on our server, not in your browser. Browsers can't read it. It renews itself automatically (a weekly check also keeps it fresh).
- You need to sign in with the secure sign-in (and two-step code). If Integrations says **Sign in again**, log out and back in.

Connect QuickBooks

1. Sign in as an admin and open **Integrations**.
2. Click **Connect QuickBooks Online**.
3. Intuit's page opens. Sign in with a QuickBooks user who is an **admin of the QuickBooks company**, choose the company, and click **Connect**.
4. You come back to Integrations with "QuickBooks Online connected for this company." The panel shows **Connected**, the QuickBooks company name, and the date the current authorization is good until.

If you see a yellow warning after connecting, that QuickBooks company is already connected to another Lease Tickets company. Check that you picked the right one.

Statuses and buttons

Status	Meaning / what to do
Not connected	Click **Connect QuickBooks Online**. If the button is greyed out, the QuickBooks keys aren't set on the server. Contact Lease Tickets support.
Connected	**Refresh company info** re-reads the company name. **Reconnect** runs the Intuit sign-in again (use it to switch QuickBooks companies). **Disconnect** removes it.
Reconnect needed	QuickBooks refused the saved authorization (for example, it was revoked in QuickBooks, the QuickBooks user lost access, or it expired). Click **Reconnect QuickBooks** and sign in again. Nothing is sent until you do.
Sign in again	Your sign-in is too old. Log out and back in.

Disconnect

Disconnect (or **Remove**) deletes the connection for **every admin of your company** and asks Intuit to revoke Lease Tickets' access. Invoices already in QuickBooks stay there. You can also remove the app inside QuickBooks (Settings → Apps). After that, Lease Tickets shows Reconnect needed.

Before you send: set up QuickBooks

- **Income account.** QuickBooks needs at least one account of type **Income**. Lease Tickets uses the first Income account it finds when it creates its service item. If you have none, sending fails with "No Income account found in QuickBooks."
- **One service item.** Every invoice line uses one Service item. Its name is set under **Integrations → Invoice settings → Service item name** (default: your company name plus "Field Services", for example **"Pioneer Hauling Field Services"**). If no item with that exact name exists, Lease Tickets creates it. To post to a different income account, create the item yourself in QuickBooks first with the account you want, and type its exact name here. This setting and **Always send to QuickBooks** are saved **for your company** on the server, so every admin uses the same values.
- **Customers.** The ticket's **Account of** name is the QuickBooks customer. Lease Tickets looks for a customer whose **Display name** is exactly that name. If it finds one it uses it. If not, it **creates a new customer** with that name (with the note "Created by <your company> (Lease Tickets)"). So make the Account of names in Lease Tickets match your QuickBooks display names exactly (spelling, punctuation, "Inc." and so on), or you'll get duplicate customers. If the matching customer is **inactive** in QuickBooks, it isn't found and creating a new one fails because the name is taken. Make it active first.
- **Terms and due date.** Lease Tickets doesn't send terms or a due date. QuickBooks uses the customer's terms, or your company default.
- **Sales tax.** Lease Tickets doesn't calculate or send sales tax. If automatic sales tax is on in QuickBooks, QuickBooks may add tax itself. Check the invoice in QuickBooks.
- **Invoice date** is the day you send it.

How tickets become invoice lines

One QuickBooks invoice is created per send, for one Account of, with one or more lines per ticket. Each line description starts with the ticket number.

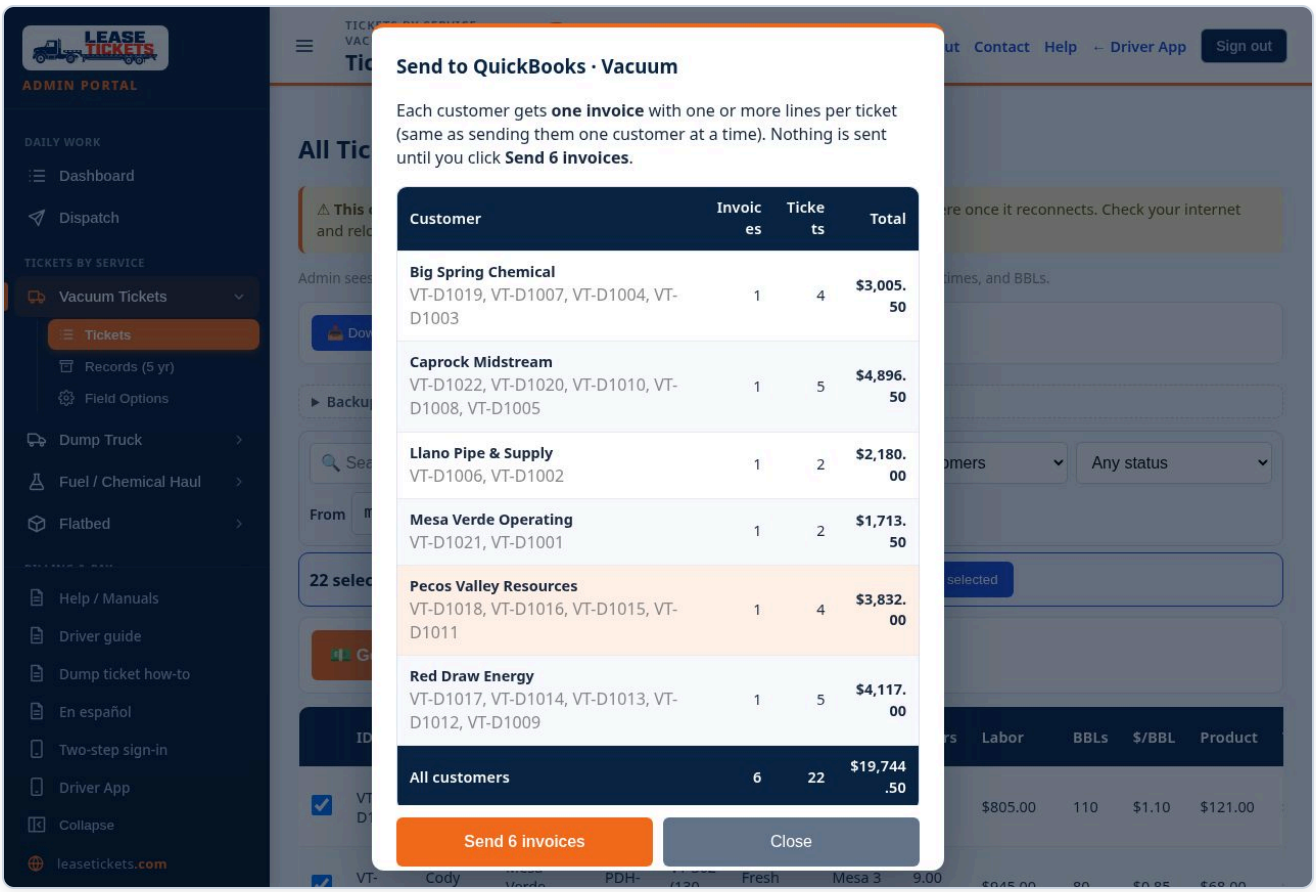
Ticket	Lines sent
Vacuum, hot oil, kill truck, dump	**Labor** (hours × hourly rate) and **Product** (quantity × unit price, with the unit in the description: BBL, yd or ton). Each ancillary charge is its own line. If a ticket has only a total, one line with that total.
Dump by yard or ton	Quantity is the yards or tons on the ticket and the unit shows in the description, for example "12 ton @ $18.00/ton". The QuickBooks line has no unit-of-measure field. The product line also shows **"destination rate (destination name)"** when a destination rate was used, the **scale ticket #**, and net lbs for tons.
Flatbed, chem haul	One **Freight** line (miles × rate per mile), or a **Flat rate** line (pickup → destination), or an **Hourly** line. Plus ancillary lines.

Fuel surcharge, demurrage and other charges. Each ticket's **Fuel surcharge (x%)** and **Demurrage** are sent as their own lines. Anything else that is in the ticket total (for example an old ancillary total with no detail) is sent as an "Other charges" line. So the QuickBooks invoice total equals the Lease Tickets invoice total, to the cent. After sending, Lease Tickets compares the two. If QuickBooks shows a different total (usually because QuickBooks added sales tax), you get a warning.

The QuickBooks invoice number is the Lease Tickets invoice number (for example INV-1042, DINV-..., HOINV-...) when you send from **Create invoice** or Daily Billing. With **Send to QuickBooks only**, one ticket gets **INV-<ticket #>** and several tickets get a number such as INV-ACME-7K2QD. The number is always the same for the same tickets. The private note lists your company name and the ticket numbers. The customer message reads "Thank you for your business — <your company name>".

Sending many tickets at once (bulk)

On a ticket list, tick the tickets (or filter and click **Select all shown**), then click **📤 Send selected to QuickBooks...**. They're grouped the same way as always: **one invoice per customer (Account of) on that service line**. Tickets that aren't completed, are already in QuickBooks, have no customer or come to $0 are left out, and the screen says why. The confirm window lists each customer with its ticket numbers, number of tickets and total, plus a grand total. **Nothing is sent until you click Send N invoices.** Invoices are then sent one by one, with every duplicate guard below. At the end you get a result for each invoice (✅ invoice # or ❌ the reason). If one fails, fix it and send the same selection again: the ones that worked are skipped. A failure also sends a "QuickBooks send failed" notification. Dispatchers don't have this button.



Bulk send: per-customer count and total before anything is sent

Sending an invoice

- **Billing tab (each service line):** pick the Account of and check tickets. **Create invoice** prints the invoice and marks the tickets invoiced. Then, if QuickBooks is connected, it asks "Send this invoice to QuickBooks Online?" (OK sends, Cancel prints only). If **Always send to QuickBooks** is on, it sends without asking. **Send to QuickBooks only** sends without printing.
- **Daily Billing:** each customer-day has a **QuickBooks** button. It sends one invoice per service line in that day, numbered with the daily invoice number (with -VACU, -DUMP... added when the day has more than one service line).
- When it works you see "Sent to QuickBooks" with the invoice #, total and customer. Each ticket then shows a green badge: **Sent to QuickBooks #INV-1042 on 10/13/2026**. In Daily Billing, a customer-day that has been fully sent shows the badge instead of the QuickBooks button.

Duplicate protection

- Once tickets are on a QuickBooks invoice, Lease Tickets records the QuickBooks invoice id, number, QuickBooks company and date, on the ticket and on our server. **The same tickets can't be sent again** from Billing, the Invoiced filter, Send to QuickBooks only, or Daily Billing, by any admin on any computer. If even one ticket in your selection was already sent, nothing is sent and you see "Already sent to QuickBooks: ... → #...".

- Double-clicks, two admins clicking at once, or a retry after a dropped connection can't create two invoices. The server locks those tickets while sending, and QuickBooks gets the same request id, so it returns the invoice it already made.
- **Resend anyway** (admins only): if you really need to send again, answer OK to "Resend anyway?". Lease Tickets first checks QuickBooks. If the earlier invoice was **deleted or voided**, it sends a new one. If the earlier invoice is still open, it warns you that this would bill twice, and only sends if you type **RESEND**. Every resend is recorded.
- OpenInvoice files are not blocked this way. Check the ticket's Invoiced badge before preparing them again.

After sending

- **Edits don't sync.** Changing a ticket, rate or price in Lease Tickets after sending does **not** change the QuickBooks invoice. Edit the invoice in QuickBooks (or void it there and send again).
- **Payments** are received and recorded in QuickBooks. Lease Tickets doesn't read payments or balances back.
- Voiding or deleting an invoice in QuickBooks doesn't change the ticket's Invoiced status in Lease Tickets.

Error messages

When QuickBooks refuses something, the message ends with **(QuickBooks reference: ...)**. Send that reference to Lease Tickets support. Intuit uses it to find the exact request.

Message	What to do
QuickBooks is not connected for this company	Connect under Integrations.
Reconnect needed / authorization refused	Integrations → **Reconnect QuickBooks**.
QuickBooks needs the secure sign-in	Log out and back in.
No Income account found in QuickBooks	Create an Income account in QuickBooks, then send again.
Nothing to bill (all line amounts are zero)	The tickets have no rates. Set rates/prices, then send.
Duplicate name / name already exists	A customer or item with that name exists but is inactive (or is another type, for example a vendor). Make it active or rename one of them.
Already sent to QuickBooks: VT-... → #...	Those tickets are already on a QuickBooks invoice. Check it in QuickBooks. Use **Resend anyway** only if it was deleted or voided.
The earlier QuickBooks invoice still exists	You asked to resend, but the first invoice is still open in QuickBooks. Void or delete it there first, or type RESEND to send a second invoice on purpose.
This invoice is already being sent	Another click or another admin is sending the same tickets right now. Wait a moment and refresh.
QuickBooks total differs from the Lease Tickets total	QuickBooks probably added sales tax. Check the invoice in QuickBooks.
Duplicate document number	That invoice number is already in QuickBooks (for example, typed in by hand). Check QuickBooks before sending again.
Could not reach the QuickBooks service	Check your internet and try again.

QuickBooks troubleshooting

Problem	What to do
Duplicate customers in QuickBooks	The Account of name didn't match the QuickBooks display name exactly. Merge them in QuickBooks and make the names match.
QuickBooks total differs from the Lease Tickets invoice	Lease Tickets sends every charge, including fuel surcharge and demurrage. A difference usually means QuickBooks added sales tax. Check the invoice's tax settings in QuickBooks.
Invoice went to the wrong QuickBooks company	Integrations shows the connected company name. Use Reconnect and pick the right company, then void the wrong invoice.
A ticket shows "Sent to QuickBooks" but the invoice is gone	It was deleted in QuickBooks. Select the ticket and send again. Answer OK to "Resend anyway?" and Lease Tickets confirms it was deleted, then sends.

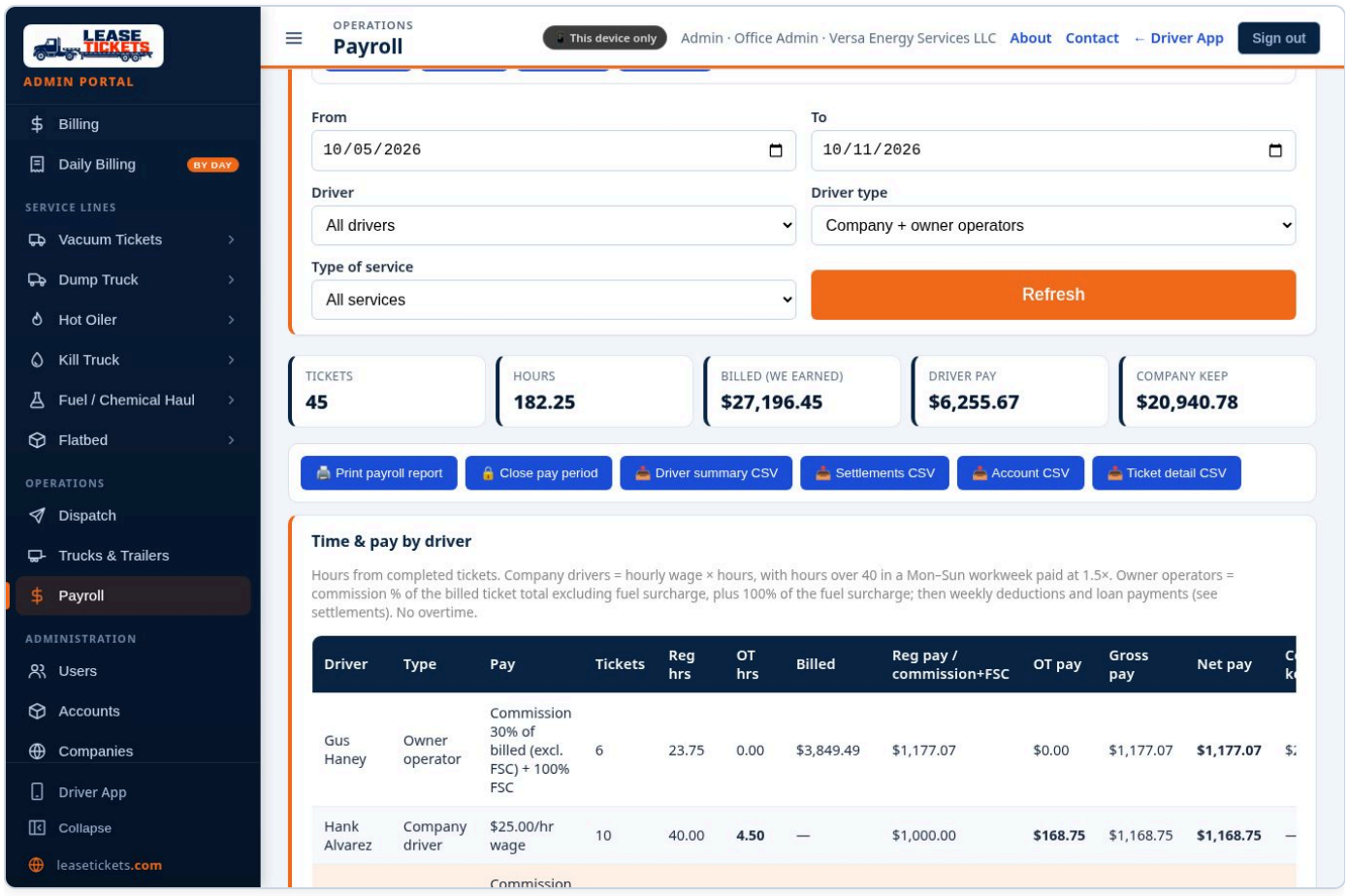
OpenInvoice (Enverus)

- Fill in your **supplier profile** and map each Account of to the **buyer name** (plus AFE/PO) used in OpenInvoice. These are saved **for your company** on the server and shared by all admins. Settings from an older browser are moved over automatically the first time.
- When you invoice, Lease Tickets downloads **PIDX XML** and/or **CSV** files to upload in OpenInvoice or SupplierLink. Daily Billing has an **OpenInvoice** button per customer-day.
- Optional: a **webhook address and API key** can be saved. They are stored on the server for your company (the key is never shown again). Then invoices are also posted there. With no webhook, it's download-only.
- The same line rules as QuickBooks apply: fuel surcharge, demurrage and other charges are their own lines, so the file total equals the Lease Tickets invoice total.

15. Payroll

Payroll comes from **completed tickets**. Set each driver's type and rate under **Users** first. The Payroll page has four tabs across the top: **Overview** (pay period, totals, settlements, pay by service, overtime settings, close / print / CSVs, closed periods and archives), **Recurring deductions**, **One-time deductions** and **Loans**. The last tab you opened is remembered on this device. Deductions and loans are still stored the same way — only the layout is split, so you do not have to scroll one long page.

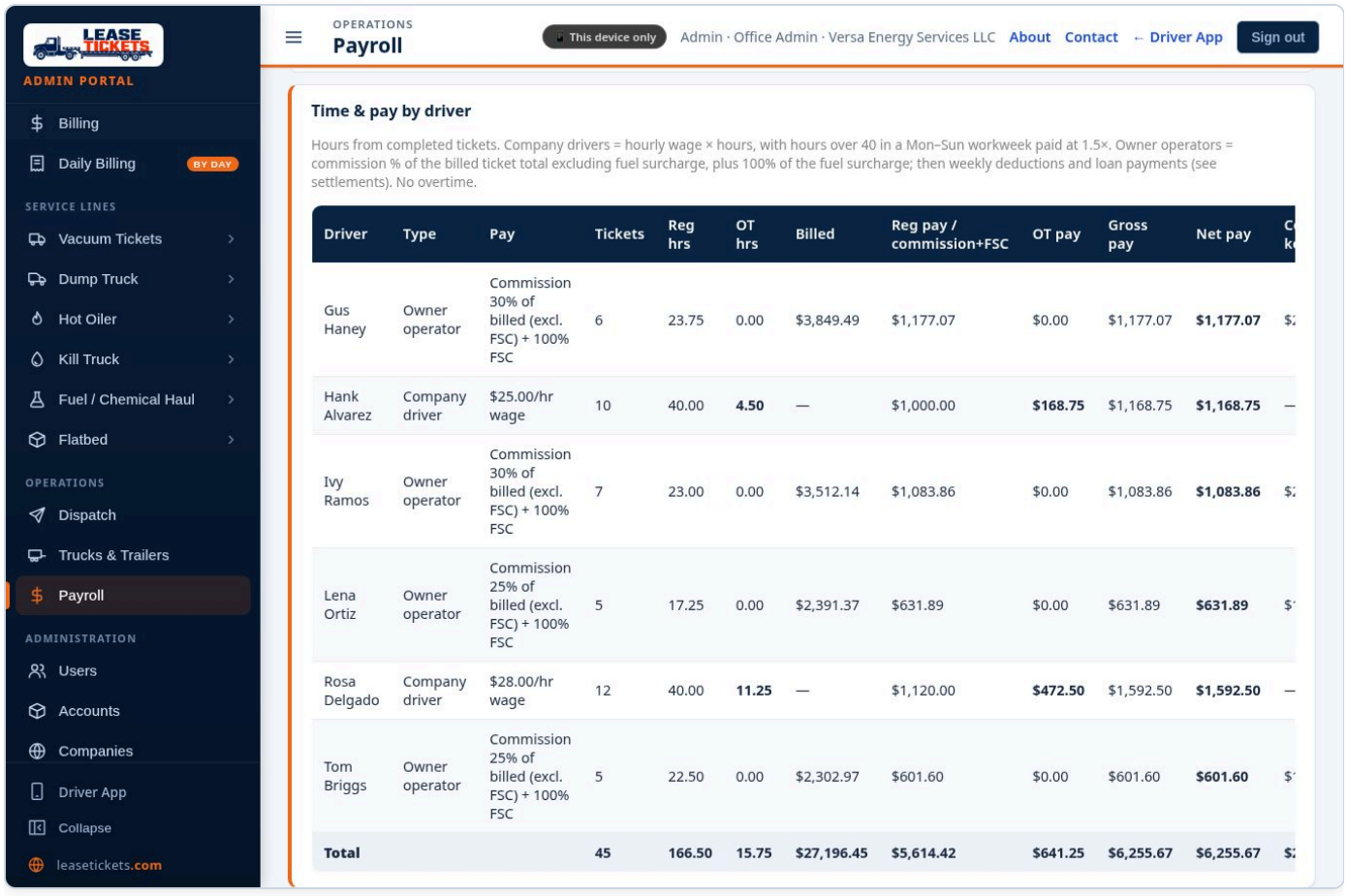
1. Open **Payroll**. Stay on **Overview** (or click it). Pick a pay period (**This week**, **Last week**, **This month**, **Last month**) or enter **From** / **To**.
2. Optionally filter by **Driver**, **Driver type** and **Type of service**, then click **Refresh**.
3. Check the totals: Tickets, Hours, Billed (we earned), Driver pay, Company keep.



Payroll for one week

How pay is figured

	Company driver (hourly)	Owner operator (commission)
Basis	Hours from completed tickets	Billed ticket total from the same billing math as invoices
Pay by service	Can be paid hourly on one service and commission on another (see **Pay by service** below)	Not affected: always their own % + 100% FSC
Pay	Regular hours × wage + overtime hours × wage × 1.5	Commission % × (ticket total **minus** fuel surcharge) + **100%** of fuel surcharge
Overtime	Over 40 hrs in each Mon–Sun week. Each week in the range is figured separately. Weeks with hourly *and* commission tickets: overtime on the hourly tickets only (blended rate is an optional setting, below).	None
Deductions	—	Weekly deductions, one-time items and loan payments (section 16)
What's shown	Hours and pay only. Customer billed amounts are hidden.	Billed basis, FSC, commission, gross, deductions, net

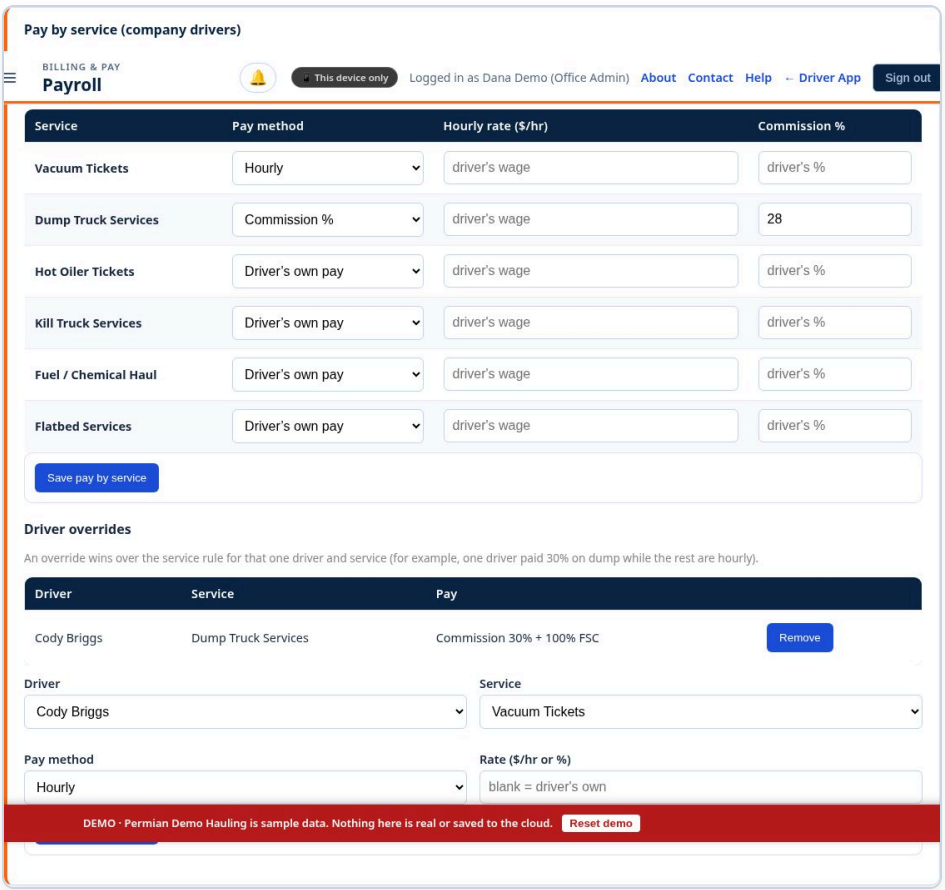


Time & pay by driver

Pay by service

Each service (Vacuum, Dump, Hot Oiler, Kill Truck, Fuel / Chemical, Flatbed) can have its own pay method for **company drivers**. On the Payroll **Overview** tab, open **Pay by service (company drivers)**.

1. For each service pick a **Pay method**: **Driver's own pay** (the default, uses the wage or % on the driver under Users, exactly like before), **Hourly**, or **Commission %**.
2. Enter the **Hourly rate** or **Commission %** for that service, or leave it blank to use each driver's own wage or %.
3. Click **Save pay by service**.
4. Need one driver paid differently on one service? Under **Driver overrides** pick the driver, service, method and rate and click **Save driver override**. Overrides win over the service rule. **Remove** takes it away.



Pay by service: Vacuum hourly, Dump 28% commission, one driver override (30% on Dump)

Each ticket is paid by its own service's rule. Commission is always % of the billed total **excluding** fuel surcharge, plus 100% of the fuel surcharge. Owner operators are never changed by these rules. Nothing changes for anyone until you set a rule: with every service on **Driver's own pay**, pay is figured the same way as before.

> Changing a rule changes the numbers for open pay periods right away. Closed pay periods keep their saved numbers, and the Payroll page lists closed periods whose live numbers now differ, so you can decide whether to reopen them.

If a service is set to Hourly with a blank rate and a driver has no hourly wage (for example a commission driver who runs one vacuum ticket), Payroll shows **Pay rate missing** for that driver until you set a rate.

Overtime settings

Under **Overtime (company drivers on hourly pay)**, turn **Pay overtime** on or off and set **Overtime after (hours / week)** and the **Overtime multiplier**. Then click **Save overtime settings**.

Weeks with hourly and commission tickets

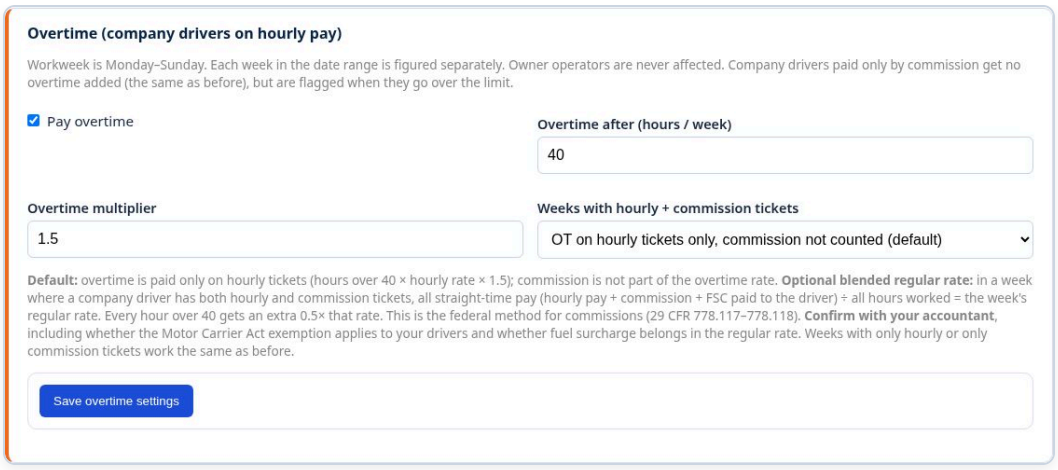
The setting **Weeks with hourly + commission tickets** controls overtime when a company driver has both kinds of tickets in the same Mon–Sun week:

- **OT on hourly tickets only (the default).** Commission is **not** part of the overtime rate. All tickets count toward the 40 hours, but only hourly tickets past 40 are paid at hourly rate × 1.5. Commission tickets are paid their commission and nothing more.
- **Blended regular rate (optional, off by default).** All straight-time pay for the week (hourly pay + commission + fuel surcharge paid to the driver) ÷ all hours worked = the regular rate; each hour over 40 adds 0.5 × that rate. This follows the federal method for commissions (29 CFR 778.117–778.118).

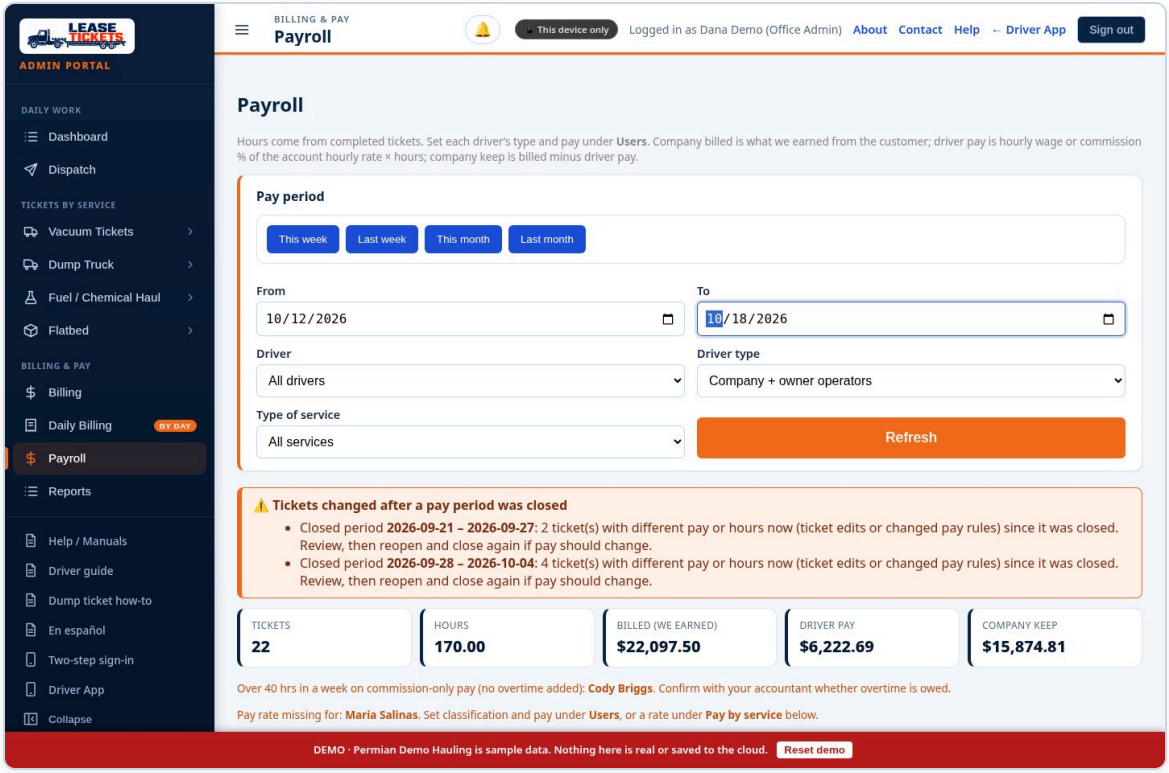
Example (default): 39.5 hrs of vacuum at $25/hr ($987.50) + 9.5 hrs of dump at 28% ($342.44) = 49 hrs. The 9 hours past 40 are hourly tickets: 9 × $25 × 1.5 = $337.50 overtime instead of $225 straight time. Total $1,442.44. With the blended option the same week pays $1,452.08.

Weeks with only hourly tickets work as before. Weeks with only commission tickets get no overtime added, and Payroll flags any company driver over 40 hours on commission-only pay.

> **CHECK WITH YOUR ACCOUNTANT** that this method fits your drivers: whether the Motor Carrier Act overtime exemption (FLSA 13(b)(1)) applies, whether commission belongs in the overtime rate, and any state rules.



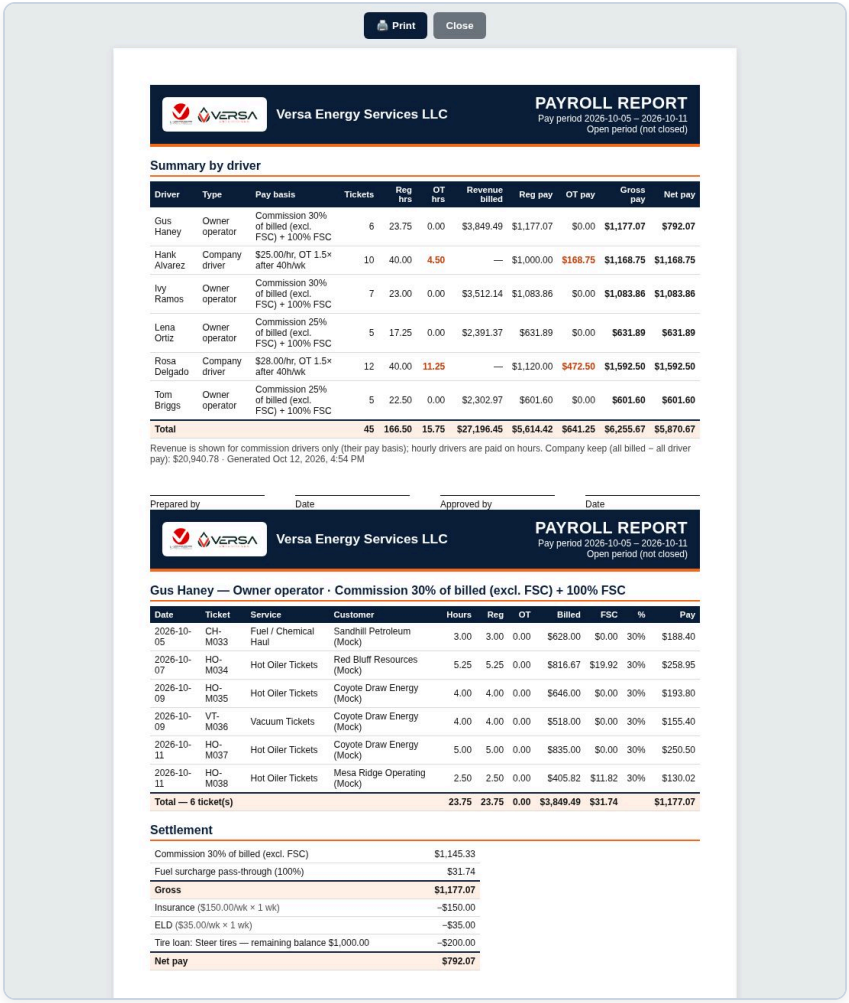
Overtime settings with the mixed-week choice (default: hourly tickets only)



Payroll flags: commission-only over 40 hrs, pay rate missing

Reports and exports

🖨️ **Print payroll report** prints a letter-size report: a summary per driver, a detail page for each driver, owner operator settlement pages, and *Prepared by / Approved by* lines. You can also download **Driver summary CSV**, **Settlements CSV**, **Account CSV** and **Ticket detail CSV**.



Printable payroll report

Driver pages show a **Pay by service** table when a driver worked more than one service or is paid by a service rule. Drivers paid hourly on some services and commission on others get a combined page: each ticket's pay method, straight pay and OT pay, the per-service totals, and the week's regular rate when the optional blended rate is on. Billed amounts show only on their commission tickets. The **Ticket detail CSV** has a **Pay rule source** column (Driver default, Service rule, Driver override).



Permian Demo Hauling LLC (DEMO)

PAYROLL REPORT

Pay period 2026-10-12 – 2026-10-18
Open period (not closed)

Hank Hollis — Company driver · Pay by service

Date	Ticket	Service	Customer / lease	Pay method	Hours	Reg	OT	Billed	Straight pay	OT pay	Pay
2026-10-12	VT-P01	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	10.00	10.00	0.00	—	$250.00	$0.00	$250.00
2026-10-13	DT-D1054	Dump Truck Services	Caprock Midstream / Pecos Bend 9	28% + FSC	4.00	4.00	0.00	$420.00	$117.60	$0.00	$117.60
2026-10-14	DT-D1059	Dump Truck Services	Caprock Midstream / Red Draw 7 Unit	28% + FSC	5.50	5.50	0.00	$803.00	$224.84	$0.00	$224.84
2026-10-15	VT-P02	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	10.00	10.00	0.00	—	$250.00	$0.00	$250.00
2026-10-16	VT-P03	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	10.50	10.50	0.00	—	$262.50	$0.00	$262.50
2026-10-17	VT-P04	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	9.00	0.00	9.00	—	$0.00	$337.50	$337.50
Total — 6 ticket(s)					**49.00**	**40.00**	**9.00**		**$1,104.94**	**$337.50**	**$1,442.44**

Pay by service

Service	Pay method	Tickets	Hours	Billed (commission tickets)	Straight pay	OT pay	Pay
Vacuum Tickets	$25.00/hr (service rule)	4	39.50	—	$762.50	$337.50	$1,100.00
Dump Truck Services	28% of billed excl. FSC + 100% FSC (service rule)	2	9.50	$1,223.00	$342.44	$0.00	$342.44
Total		**6**	**49.00**		**$1,104.94**	**$337.50**	**$1,442.44**

Settlement

Hourly pay + overtime (by service)	$1,100.00
Commission (by service, excl. FSC)	$342.44
Fuel surcharge pass-through (100%)	$0.00
Gross	**$1,442.44**
Net pay	**$1,442.44**

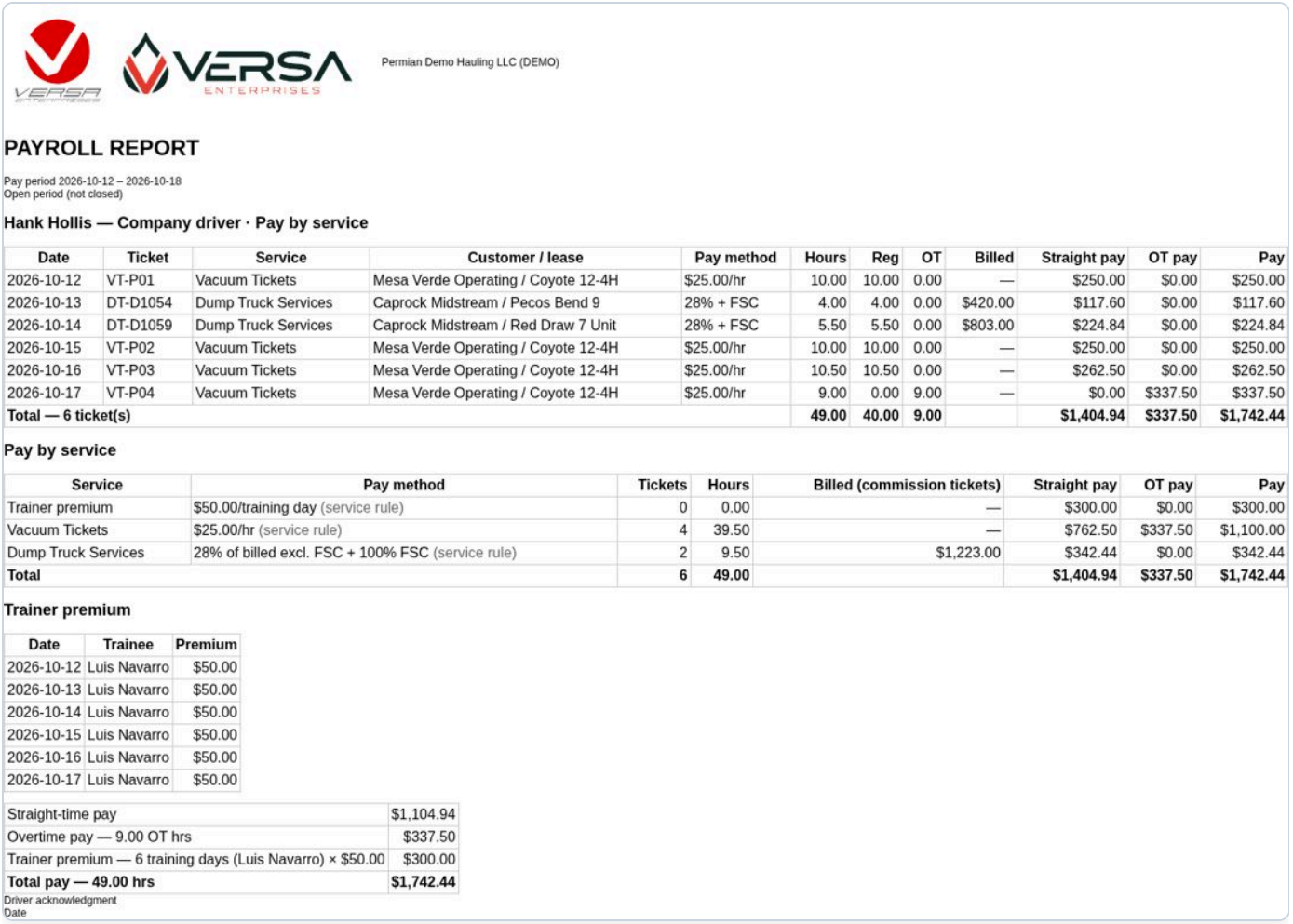
Driver acknowledgment

Date

Statement for a driver paid hourly on Vacuum and commission on Dump

Yard / shop time, training and the trainer premium in payroll

Yard / Shop / Training time and **Training** (trainee ride-along) hours are always paid hourly, using their own rows in **Pay by service**; the pay method can't be changed for them. Their hours count toward weekly overtime. The **Trainer premium** (default $50 per training day, section 5) is added to the trainer's statement as its own line, isn't counted as a ticket and isn't part of overtime. Voided tickets are never paid; voiding a ticket in a closed period doesn't change that period (adjust on the next statement).



Permian Demo Hauling LLC (DEMO)

PAYROLL REPORT

Pay period 2026-10-12 – 2026-10-18
Open period (not closed)

Hank Hollis — Company driver · Pay by service

Date	Ticket	Service	Customer / lease	Pay method	Hours	Reg	OT	Billed	Straight pay	OT pay	Pay
2026-10-12	VT-P01	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	10.00	10.00	0.00	—	$250.00	$0.00	$250.00
2026-10-13	DT-D1054	Dump Truck Services	Caprock Midstream / Pecos Bend 9	28% + FSC	4.00	4.00	0.00	$420.00	$117.60	$0.00	$117.60
2026-10-14	DT-D1059	Dump Truck Services	Caprock Midstream / Red Draw 7 Unit	28% + FSC	5.50	5.50	0.00	$803.00	$224.84	$0.00	$224.84
2026-10-15	VT-P02	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	10.00	10.00	0.00	—	$250.00	$0.00	$250.00
2026-10-16	VT-P03	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	10.50	10.50	0.00	—	$262.50	$0.00	$262.50
2026-10-17	VT-P04	Vacuum Tickets	Mesa Verde Operating / Coyote 12-4H	$25.00/hr	9.00	0.00	9.00	—	$0.00	$337.50	$337.50
Total — 6 ticket(s)					**49.00**	**40.00**	**9.00**		**$1,404.94**	**$337.50**	**$1,742.44**

Pay by service

Service	Pay method	Tickets	Hours	Billed (commission tickets)	Straight pay	OT pay	Pay
Trainer premium	$50.00/training day (service rule)	0	0.00	—	$300.00	$0.00	$300.00
Vacuum Tickets	$25.00/hr (service rule)	4	39.50	—	$762.50	$337.50	$1,100.00
Dump Truck Services	28% of billed excl. FSC + 100% FSC (service rule)	2	9.50	$1,223.00	$342.44	$0.00	$342.44
Total		**6**	**49.00**		**$1,404.94**	**$337.50**	**$1,742.44**

Trainer premium

Date	Trainee	Premium
2026-10-12	Luis Navarro	$50.00
2026-10-13	Luis Navarro	$50.00
2026-10-14	Luis Navarro	$50.00
2026-10-15	Luis Navarro	$50.00
2026-10-16	Luis Navarro	$50.00
2026-10-17	Luis Navarro	$50.00

Straight-time pay	$1,104.94
Overtime pay — 9.00 OT hrs	$337.50
Trainer premium — 6 training days (Luis Navarro) × $50.00	$300.00
Total pay — 49.00 hrs	**$1,742.44**

Driver acknowledgment
Date

Trainer premium on the trainer's statement

16. Deductions & loans (owner operators)

On the **Payroll** page, use the tabs at the top. Recurring weekly deductions, one-time deductions / credits, and loans each have their own tab. One-time items are a separate list in company data (not a frequency flag on weekly deductions). Nothing about how amounts are stored or how settlements are calculated has changed — only the page layout.

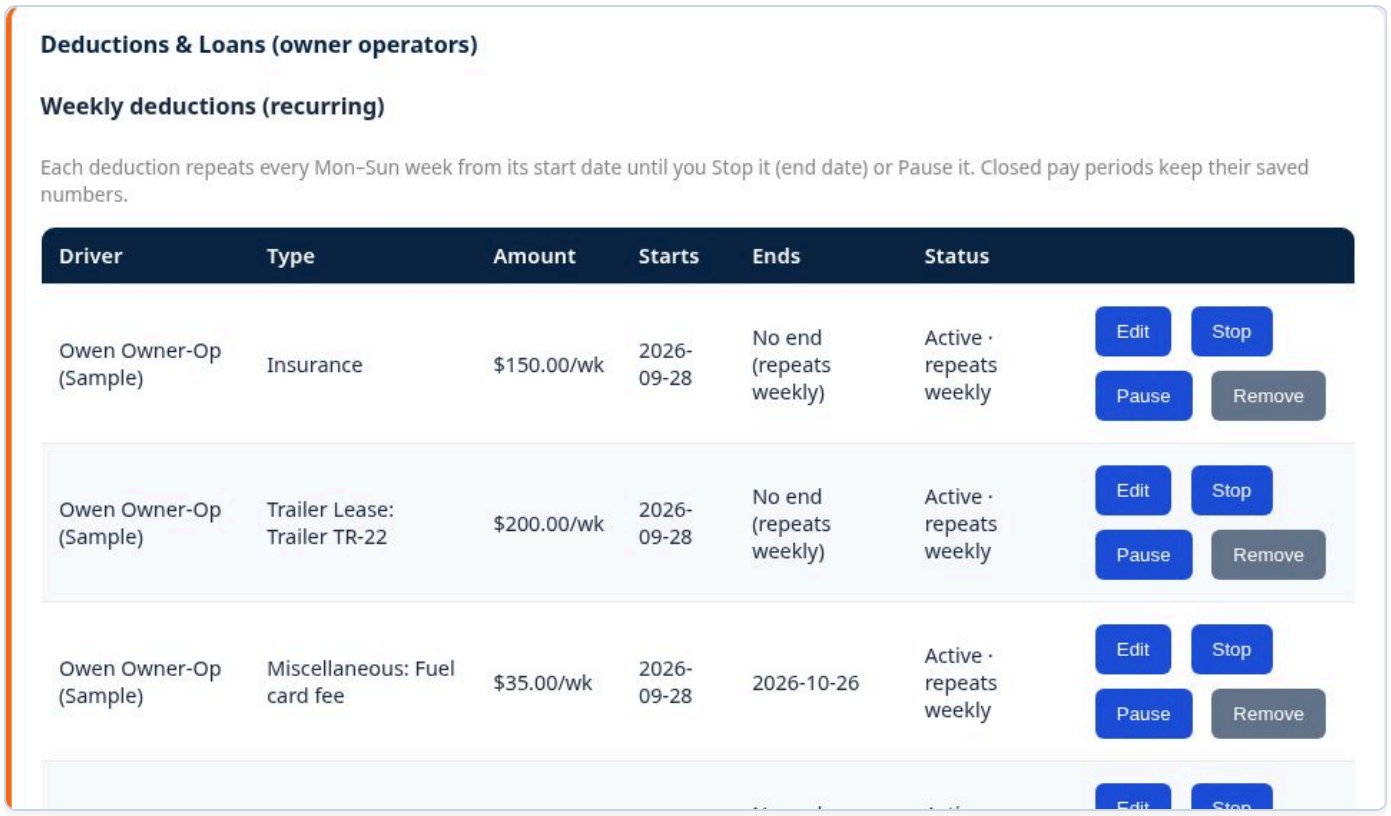
The office how-to videos Adding deductions and loans, Running and closing a pay period and Payroll Summary and archives were recorded against the earlier single-page Payroll layout (all three sections on one long scroll). The steps and buttons are the same; look for each section on its own tab now.

Owner operators appear in the **Driver** list as soon as their user account is set to **Owner operator** under **Users** — no ticket is required first. (Company drivers on commission pay also appear.) If a name is missing, open **Users**, confirm **Driver type** is Owner operator, then return to Payroll (or click Refresh).

Weekly deductions

Pick the **Driver** and the **Type** (Insurance, Administration, ELD, **Trailer Lease**, **Crude Trailer Lease**, **Vacuum Trailer Lease**, **Belly Dump Trailer Lease**, **Flatbed Trailer Lease**, **Truck Tractor Lease**, **Escrow**, **Miscellaneous**, Other). The lease types and Escrow are regular weekly deductions (not loans): they have no balance and show on the settlement under their type name, the **Amount**, **As** (Fixed $ per week or % of weekly gross), the **Start date**, an optional **End date**, an optional label and a **Description / note** (required for Miscellaneous, shown on the statement). Click **Add weekly deduction**.

Deductions repeat automatically every Monday–Sunday week from the start date until the end date. **Edit** changes the amount, note or end date; **Stop** sets the last week it applies; **Pause** / **Resume** turns it off and on; **Remove** deletes it. Changes only affect open periods. Closed pay periods keep their saved numbers.



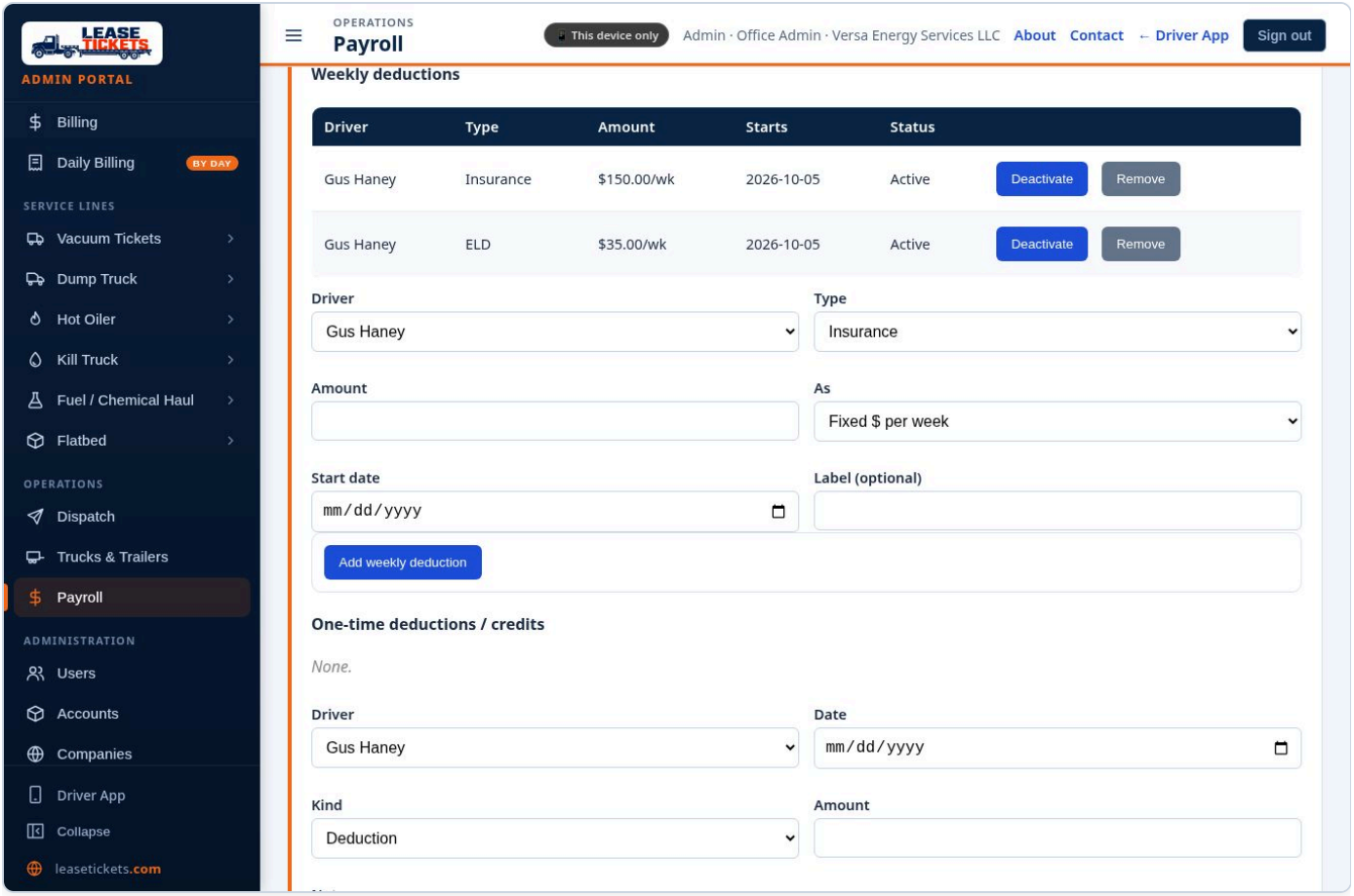
Recurring weekly deductions with Edit, Stop and Pause

One-time deductions / credits

Driver, date, **Kind** (Deduction or Credit), amount and note, then **Add one-time item**.

Loans (tire, repairs, other)

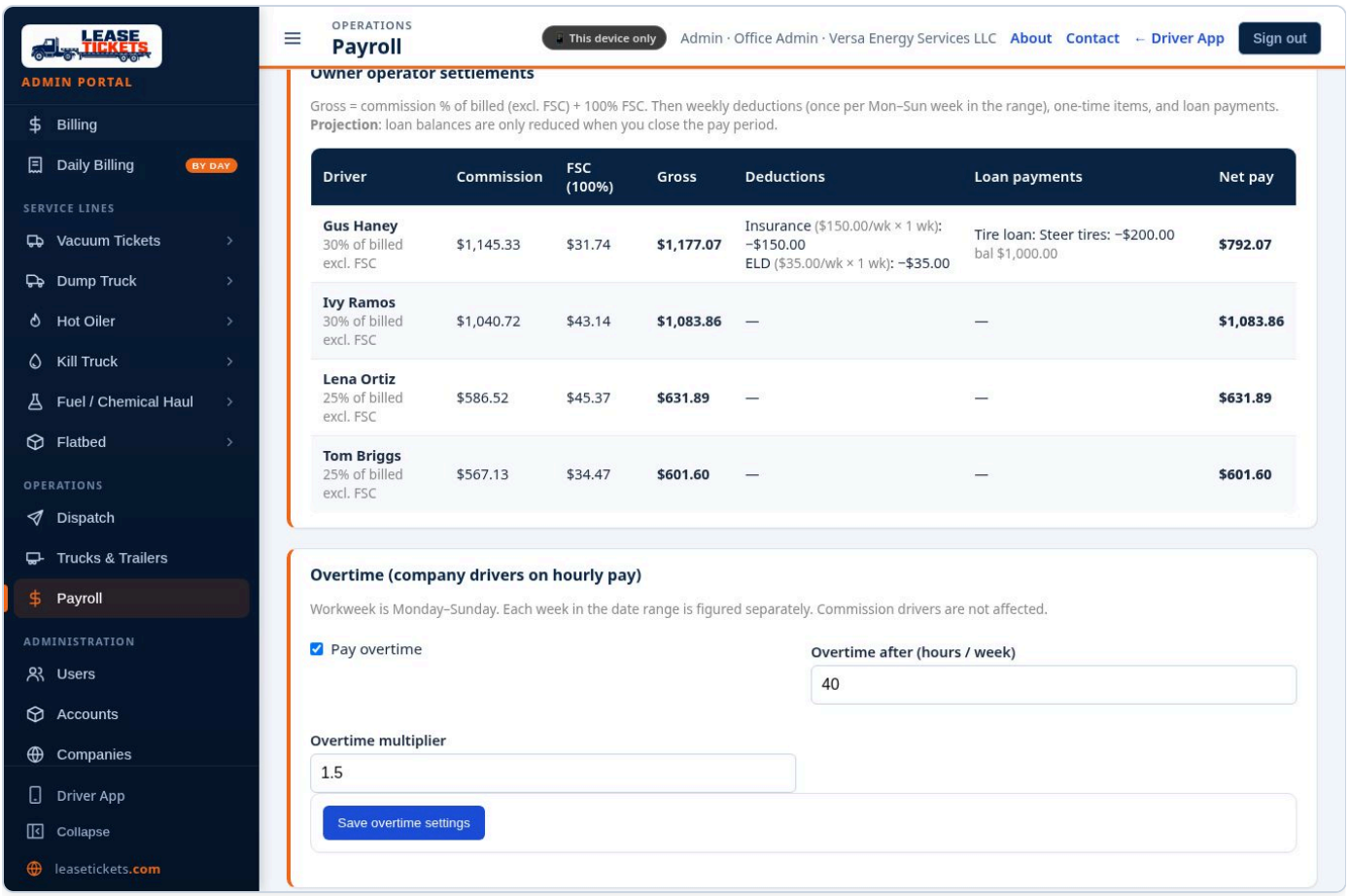
Driver, type, description, **Principal**, **Weekly payment** and start date, then **Add loan**. While a pay period is open, the payment is only *projected*. The balance goes down when you **close** the pay period. The last payment is capped at whatever balance is left. Use **Extra payment / adjust** for extra payments (enter a negative number to add to the balance). Each loan keeps a payment history. Loans stop automatically when the balance reaches $0.



Weekly deductions for an owner operator

Settlements

On the Payroll **Overview** tab, the **Owner operator settlements** table shows Commission, FSC (100%), Gross, each deduction, loan payments with the remaining balance, and **Net pay**. If net pay comes out below zero, it's shown in red with a warning.

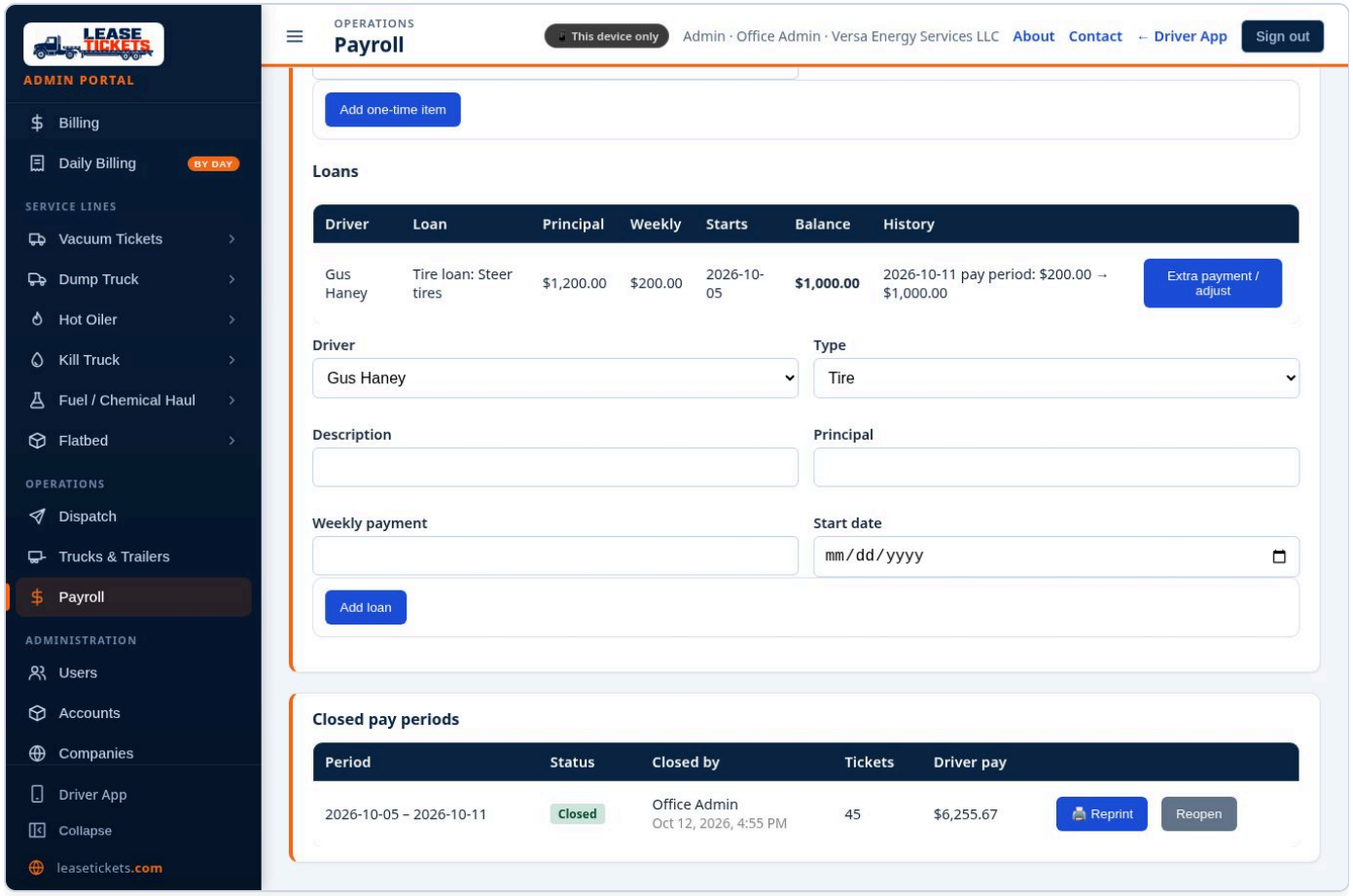


Settlement: gross → deductions → loan payment → net

A short office how-to video walks through this: Adding deductions and loans (2:01), under **How-to videos**.

17. Closing pay periods

1. Set the pay period dates and check the numbers.
2. Click **🔒 Close pay period** and confirm. **Every driver and service is included, no matter which filters are set.**
3. A snapshot is saved, and loan balances drop by that period's payments.



Closed pay periods with Reprint and Reopen

🖨️ Reprint prints the saved snapshot exactly as it was closed. **Reopen** backs out that period's loan payments, and the old snapshot is kept for reference. You can't close a period that overlaps one that's already closed. If a ticket inside a closed period is edited later, the app warns you.

A short office how-to video walks through closing, reopening and emailing statements: Running and closing a pay period (2:07).

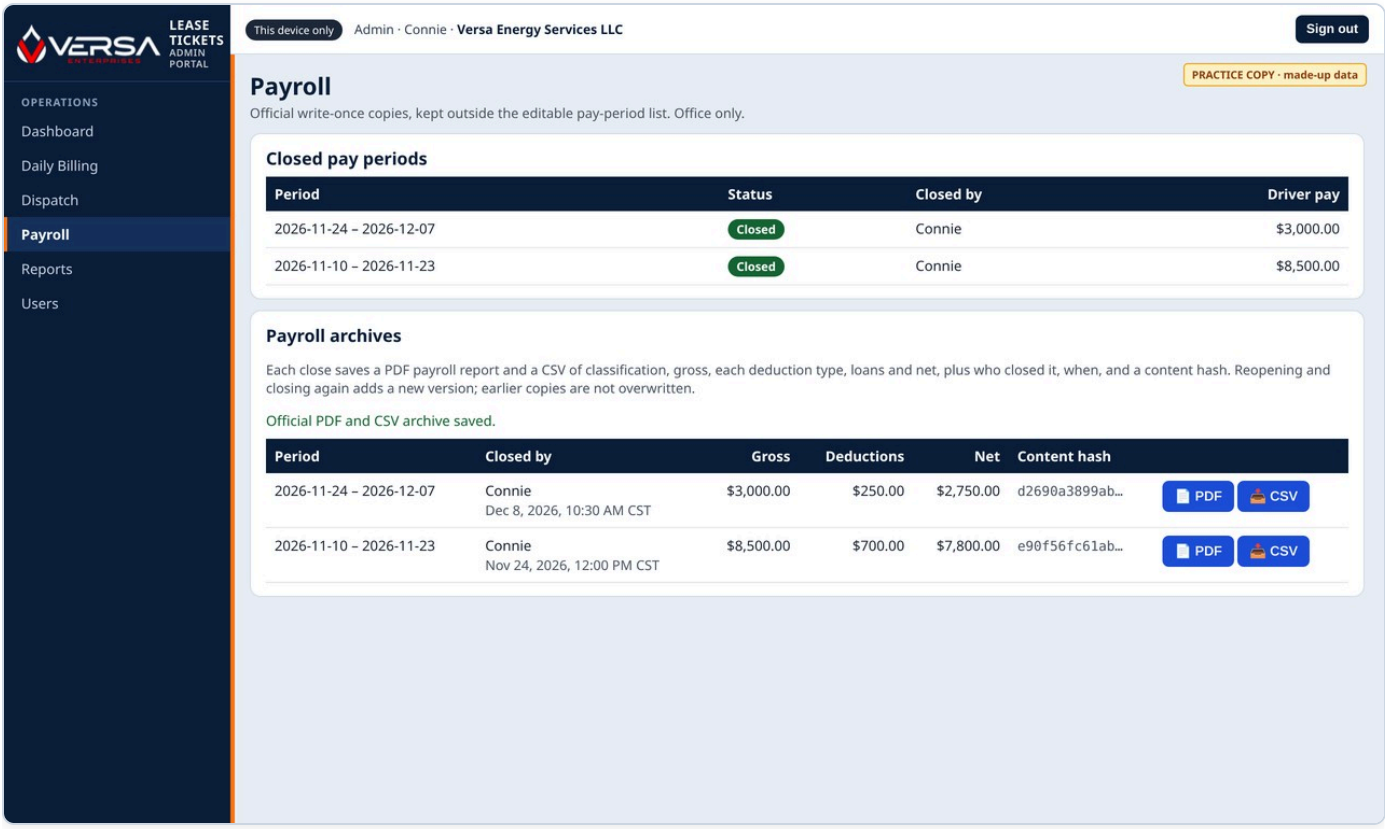
Payroll archives

When you close a pay period, Lease Tickets also saves an official **write-once archive**: a PDF payroll report and a CSV with each driver's classification, gross, each deduction type, loan payments and net, plus totals. The archive records who closed the period, when, and a content hash (SHA-256). It is kept

outside the editable pay-period list, so later ticket edits, a reopen, or a change to deductions do not alter that copy. If you reopen a period and close it again, a **new version** is added; the earlier archive is not overwritten.

Open the **Payroll archives** list under **Payroll** (below Closed pay periods) or on the **Reports** tab. Each row has **📄 PDF** and **📥 CSV** download. Only office admins see this list (not dispatchers or drivers). If the archive does not save at close, use **Retry archive**. History (🕘) logs the close, the reopen, and the archive (period id and hash).

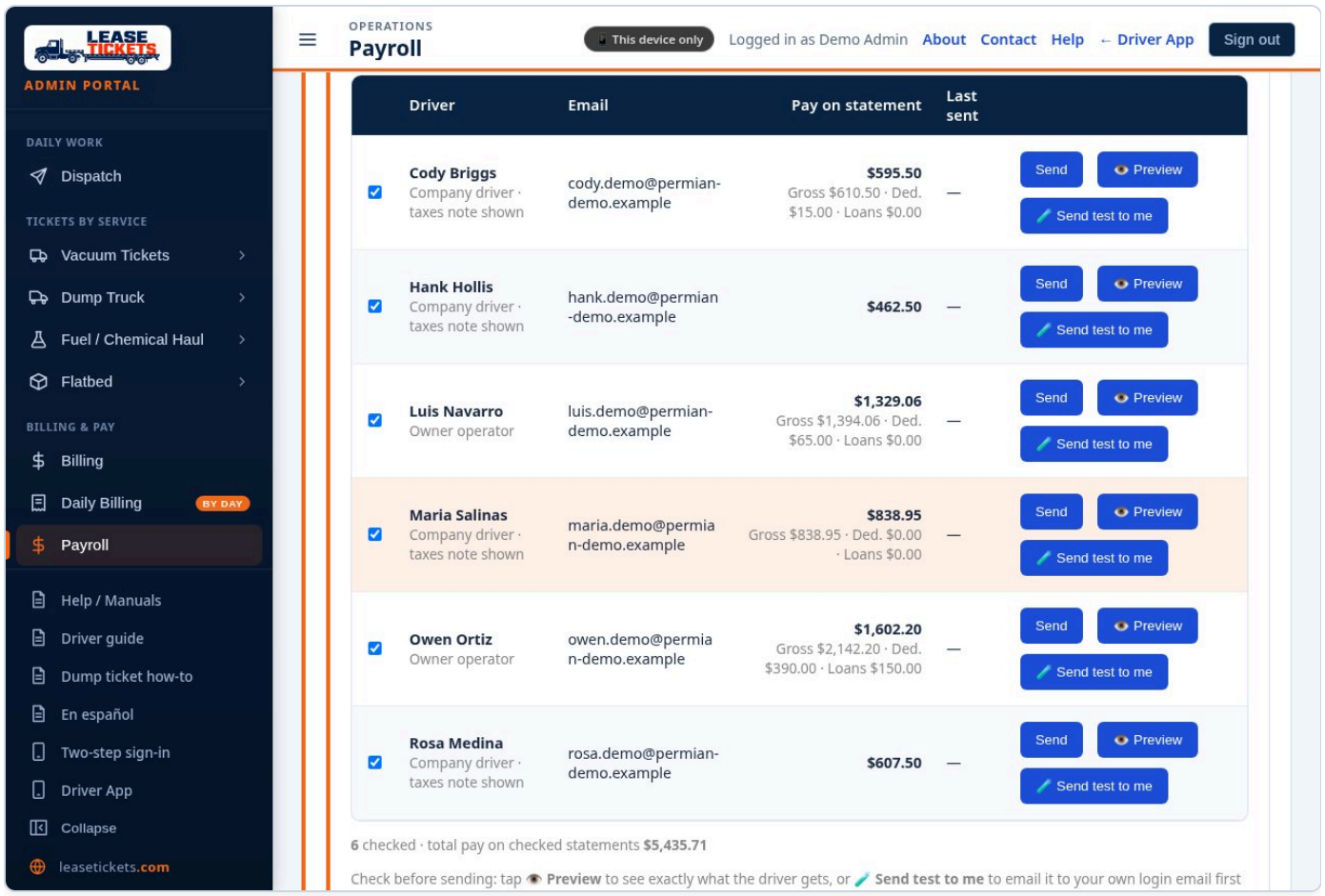
A short office how-to video covers the official archive and the Payroll Summary report: Payroll Summary and Payroll archives (1:56).



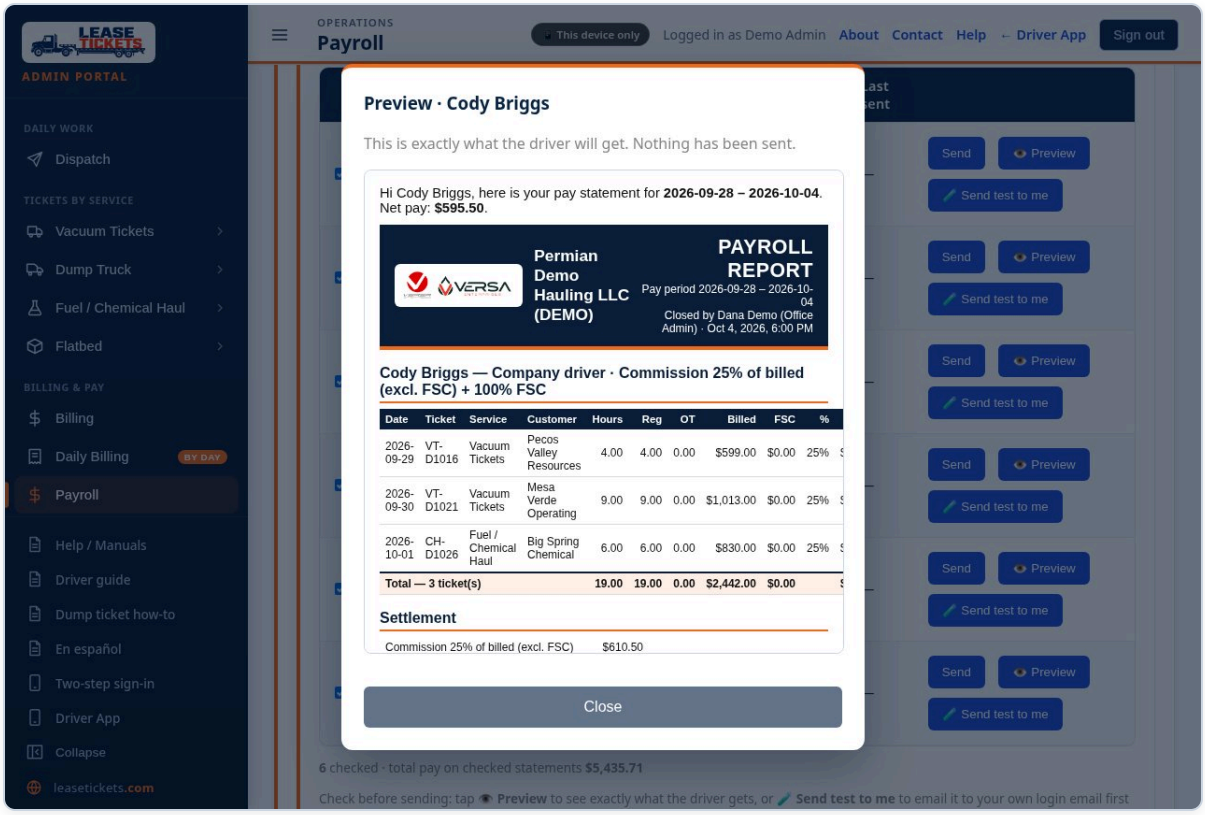
Payroll archives: official write-once PDF and CSV for each closed period (practice copy, made-up data)

Email statements

On a closed period, click **📧 Email statements**. Each driver is listed with their email and when a statement was last sent. Check the drivers and click **Send to checked**, or use **Send** / **Resend statement** on one row. **👁 Preview** opens the statement in a window inside the page (nothing is sent). **🧪 Send test to me** emails that driver's statement to **your own login email** only, marked TEST; the driver gets nothing and it doesn't count as sent (limit 20 test emails a day). The list shows each driver's **pay on the statement** (net, with gross, deductions and loans for owner operators) and a running total for the checked drivers, and **Send to checked** asks you to confirm the names and total first. Drivers with no email on file are listed as **skipped**. Each driver gets only their own page (the same as the printed report) plus, unless their *Payroll taxes withheld* box is off, the note that the statement is an estimate before payroll taxes. Emails go only to the address on the driver's login.



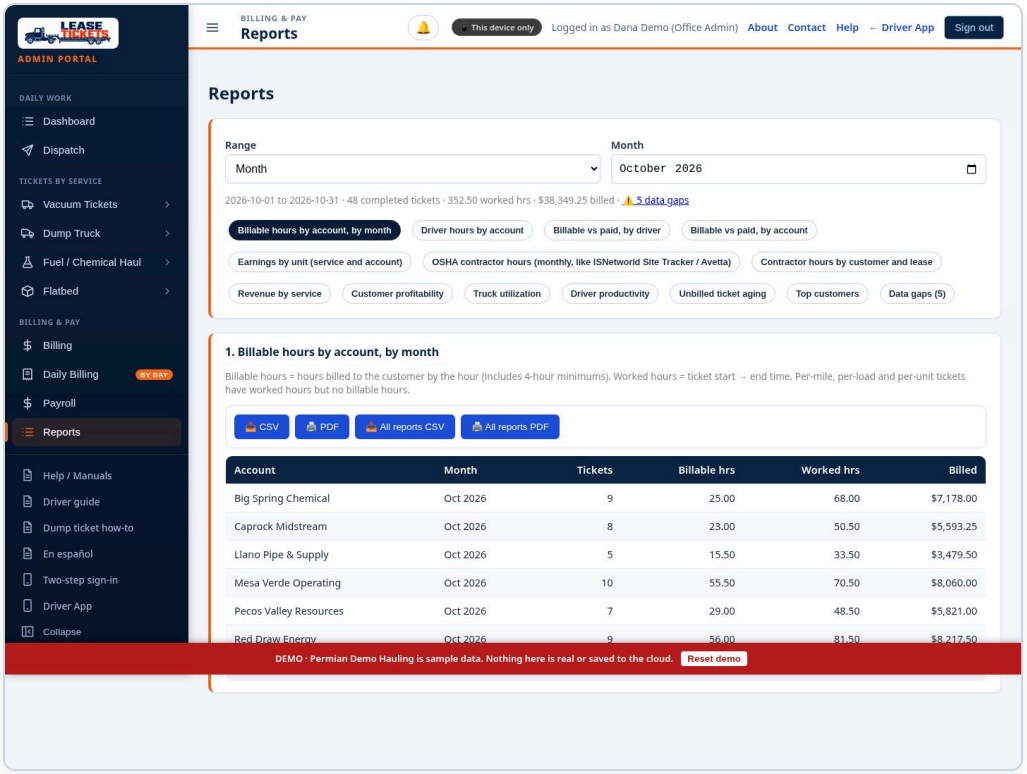
Email statements: pay per driver, Preview and Send test to me



Statement preview: exactly what the driver gets

18. Reports (hours, margins, OSHA)

Open **Reports** in the left menu (under Billing & pay). Pick a **Month**, or switch **Range** to **Custom range** and enter From / To. Click a report name to show it. Each report has **CSV** and **PDF** (print, then *Save as PDF*); **All reports CSV** / **All reports PDF** export everything for the range. **Payroll Summary** has its own range picker (saved pay period, custom start / end, or by month) and does not use the Month range at the top of the page.



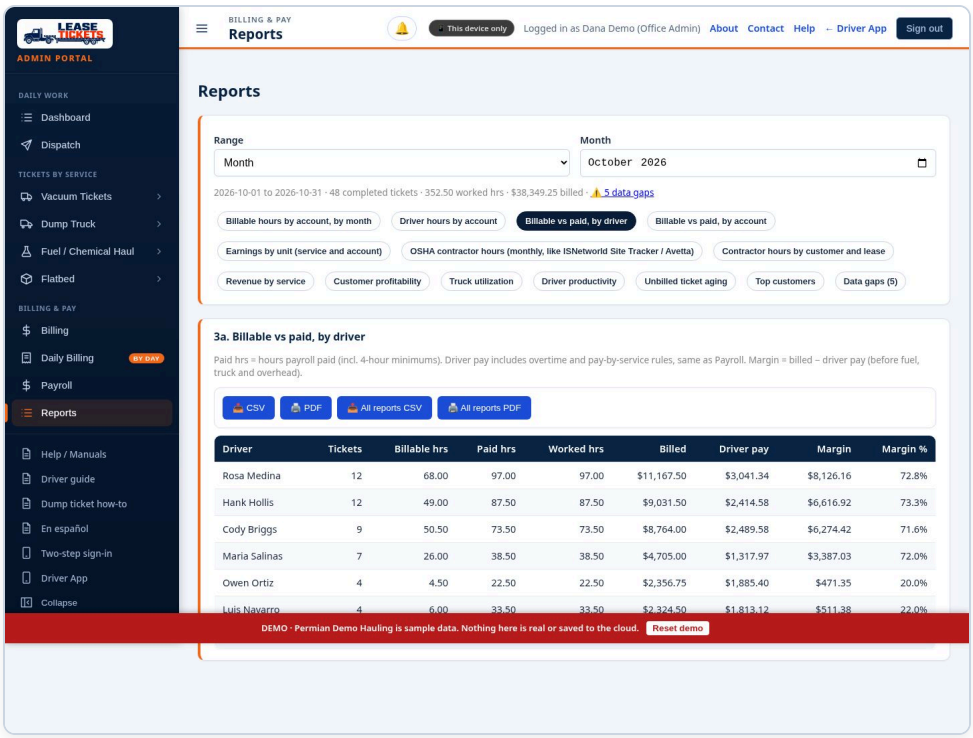
Reports page: month picker, report list and the Billable hours report

How hours are counted

- **Worked hours** = each completed ticket's start time to end time (Fuel / Chemical: loading start to unloading end).
- **Billable hours** = hours billed to the customer by the hour, including 4-hour minimums. Per-mile, per-load and per-ton tickets have worked hours but no billable hours.
- **Paid hours** = hours Payroll paid. Driver pay comes from Payroll, so overtime and pay by service match.
- Cancelled tickets are left out. Open tickets are listed under Data gaps until they're completed.

The reports

Report	What it shows
1. Billable hours by account, by month	Tickets, billable hours, worked hours and billed $ per customer per month
2. Driver hours by account	Days, tickets, worked and billable hours per driver per customer
3a/3b. Billable vs paid	Per driver and per account: billable, paid and worked hours, billed, driver pay, margin and margin %
4. Earnings by unit	Per service and account: loads, hours, BBL, tons, yards, miles, gallons, and $ per load, per worked hour and per unit
5. OSHA contractor hours	Monthly hours per customer/operator (employee and owner-operator hours apart), headcount, miles, your safety numbers, TRIR and DART
5b. Contractor hours by customer and lease	The same hours and headcount split by lease / site
6a–6f	Revenue by service, customer profitability, truck utilization, driver productivity, unbilled ticket aging, top 10 customers
Payroll Summary	Office only. Gross, total deductions and net for every driver, grouped by classification (hourly employee, commission employee at each %, owner operator), with a subtotal per group and a clear **TOTAL PAYROLL PAID** line
Payroll archives	Office only. Official write-once PDF and CSV copies of each closed pay period (gross, each deduction type, loans and net, plus who closed it, when, and a content hash). Also listed under Payroll
Data gaps	Tickets with missing or odd data (missing start/end time, end before start, over 24 hrs, no BBLs/tons/yards/miles, no account, driver or truck, $0 billed, pay rate not set, not completed) and what each one leaves out



Billable vs paid by driver, with margin

Margin is billed minus driver pay only. Fuel, truck, insurance and overhead are not in the app, so real profit is lower.

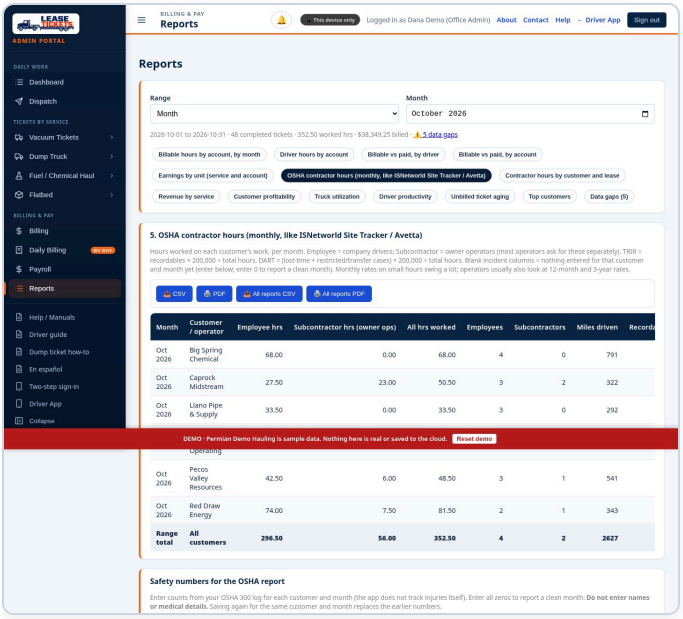
OSHA contractor hours report

Operators that use ISNetworld (Site Tracker) or Avetta usually ask each month for hours worked on their sites, headcount and incidents. This report gives you those numbers per customer and month: **Employee hrs** (company drivers), **Subcontractor hrs** (owner operators), headcount for each, miles driven, then your safety numbers and the rates:

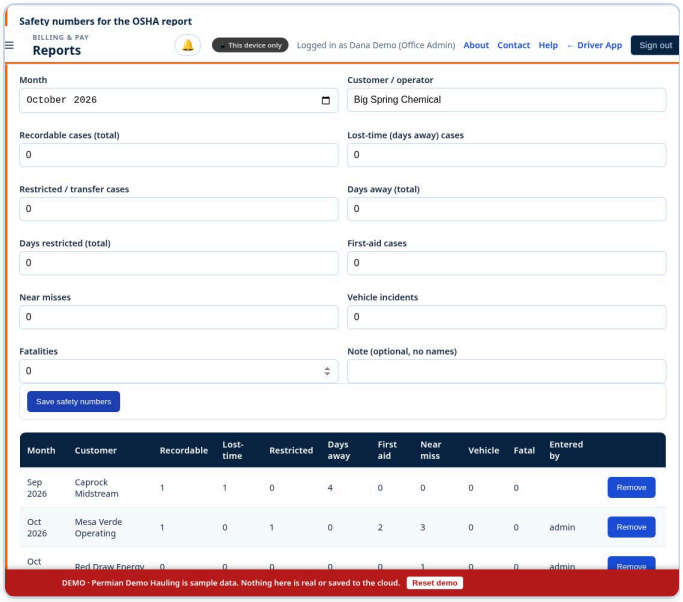
- **TRIR** = recordable cases × 200,000 ÷ total hours.
- **DART** = (lost-time + restricted / transfer cases) × 200,000 ÷ total hours.

The app doesn't track injuries, so enter the counts from your OSHA 300 log under **Safety numbers for the OSHA report** (shown below the OSHA report): pick the month and customer, enter recordable cases, lost-time cases, restricted / transfer cases, days away, days restricted, first aid, near misses, vehicle incidents and fatalities, and click **Save safety numbers**. Enter all zeros for a clean month; blank means nothing entered yet. Lost-time + restricted cases can't be more than total recordables. **Never enter names or medical details.** These numbers are private to admins.

Monthly rates on a few hundred hours swing a lot (one case on 70 hours is a TRIR in the thousands). Operators also look at 12-month and 3-year rates, so run a custom range for those. Check each operator's own definitions (for example, which hours count as on their sites) before submitting.



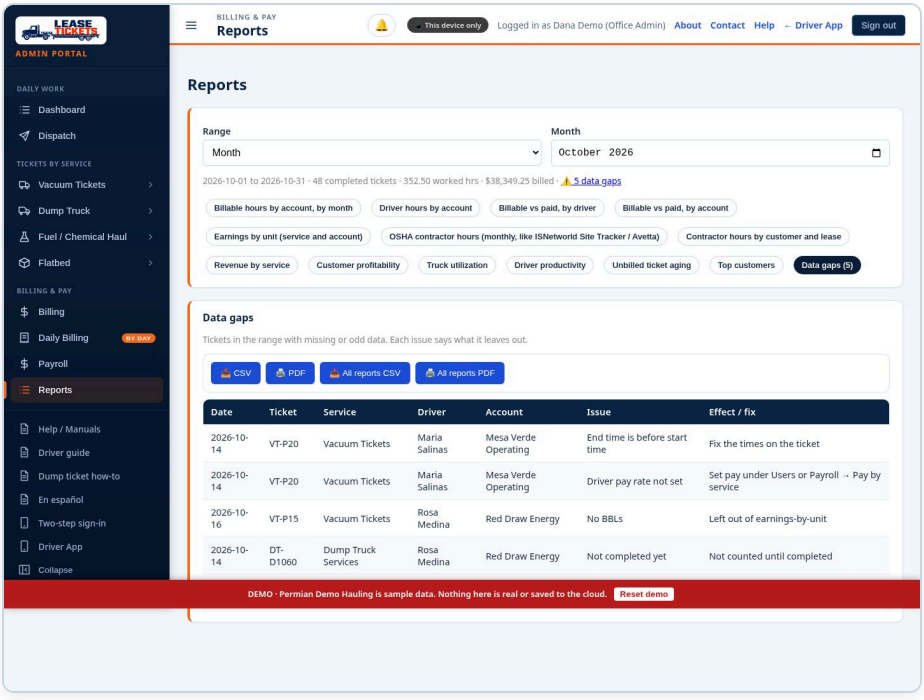
OSHA contractor hours with TRIR and DART



Entering safety numbers for a month and customer

Data gaps

The line under the date picker shows how many data gaps the range has; click it to see the list. Fix the tickets (times, units, account, truck) and the reports update.



Data gaps for the month

Payroll Summary

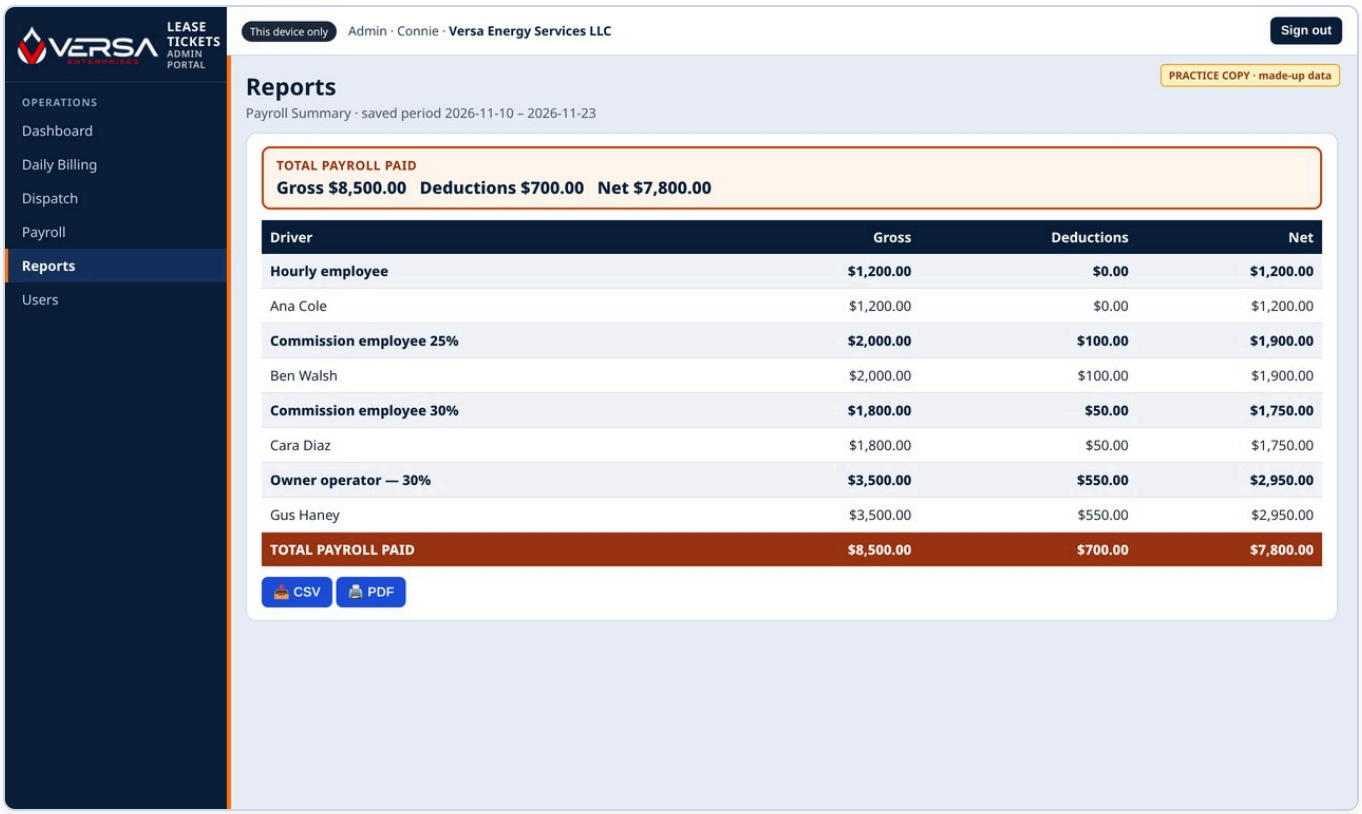
This report is for office and accounting (for example Connie). It lists **every driver** with only three money columns: **Gross pay**, **Deductions** and **Net pay**. Drivers are grouped by classification — hourly employee, commission employee at each rate (for example 25% or 30%), hourly + commission (company), and owner operator — with a subtotal under each group and a prominent **TOTAL PAYROLL PAID** line for the grand total of gross, deductions and net.

The numbers come from the same Payroll math used to close a period. Gross is the driver pay already calculated on tickets (hourly, overtime, commission, fuel surcharge and trainer premium as they appear on Payroll). Deductions include recurring items (insurance, administration, ELD, trailer / crude / vacuum / belly-dump / flatbed leases, truck / tractor lease, escrow, miscellaneous), one-time deductions or credits, and loan payments (tire, repair or other). Credits reduce the deductions total. Hourly employees who are not run through owner-operator settlements show deductions of $0 and net equal to gross — the report does not invent hourly deduction math.

When you open Payroll Summary, use its own range picker (the Month / Custom range at the top of Reports still applies to the other reports):

- **Saved pay period** — one closed (or saved) pay period. The report uses the snapshot stored when the period was closed, so later ticket edits do not change these numbers.
- **Custom start / end** — any date range. If the dates exactly match a closed period, you get that snapshot. Otherwise the figures are a live projection; loan balances are only reduced when you close the period on the Payroll page.
- **By month** — pick a month and year to roll up every **closed** pay period that ends in that month. Reopened periods are left out of the paid total. A period that starts in one month and ends in another is counted in the month it ends. For example, November 24 – December 7 is included in December, not November. Periods are not split or pro-rated across months. If the same driver appears in two closed periods ending in that month, their amounts are added together.

CSV and PDF / print are available, same as the other reports. Logistics Coordinators (dispatchers) do not see Payroll Summary. Drivers do not have a Reports tab.

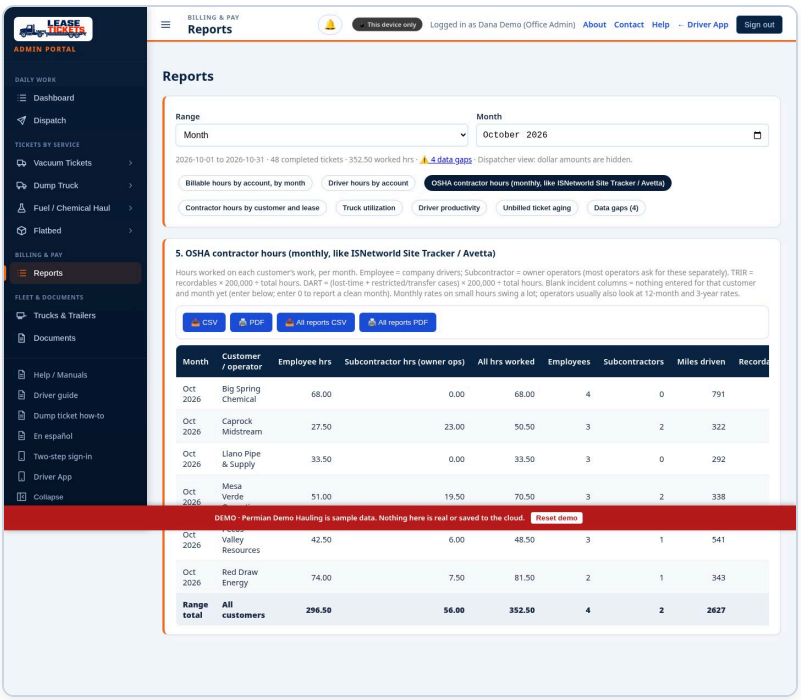


Payroll Summary: Driver, Gross, Deductions, Net, grouped by classification, with TOTAL PAYROLL PAID (practice copy, made-up data)

A short office how-to video covers this report and the archives: Payroll Summary and Payroll archives (1:56).

Who sees what

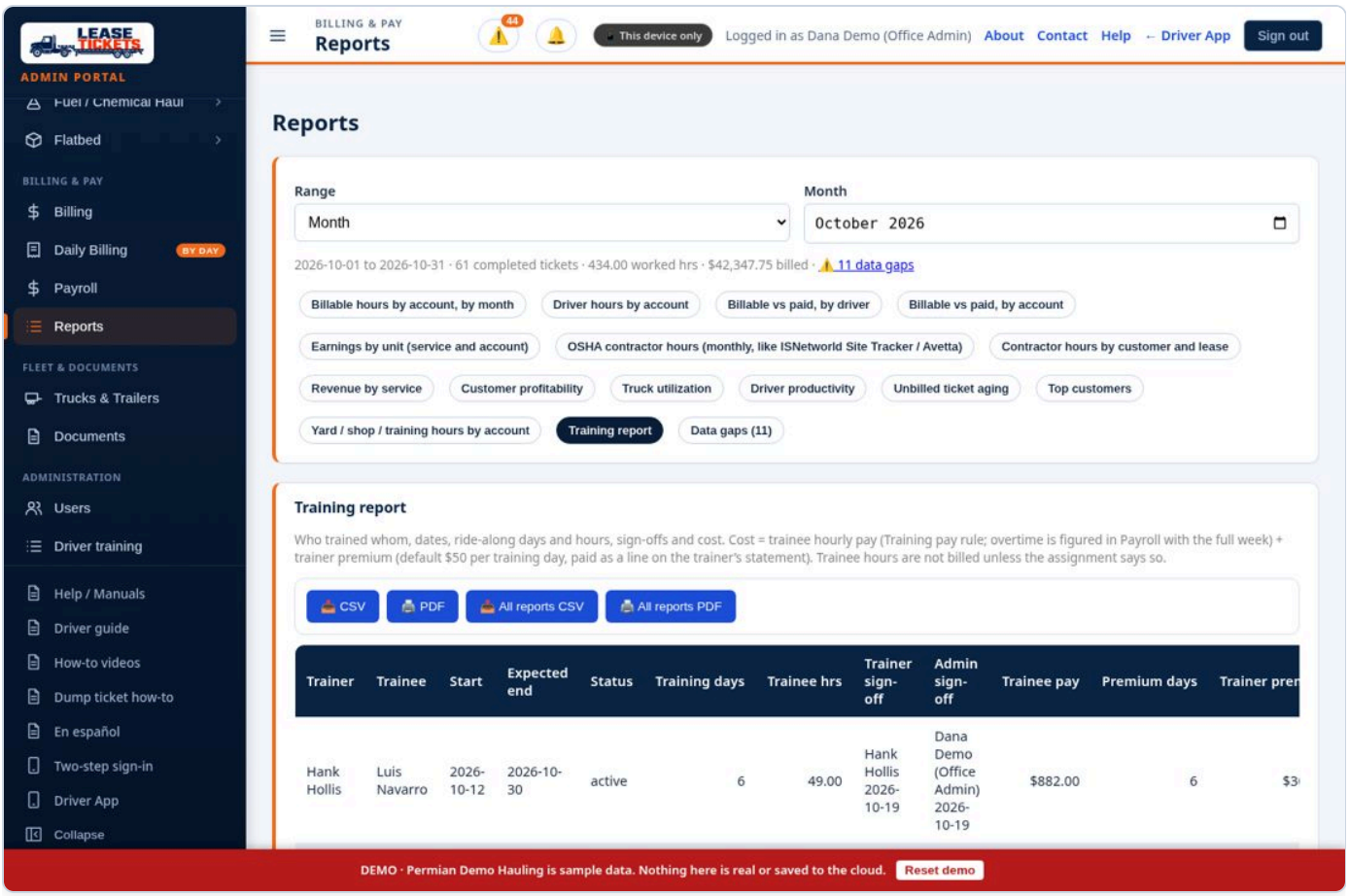
Admins see every report. Logistics Coordinators (dispatchers) see only the hours reports (billable hours, driver hours, OSHA hours, truck utilization, driver productivity, aging counts and data gaps), with **no dollar amounts** and no safety-number entry.



Dispatcher view: hours only

Yard / shop / training hours and the Training report

Yard / shop / training hours by account lists in-house hours by category, driver, pay and internal bill amount. The **Training report** lists each assignment: trainer, trainee, dates, status, training days, trainee hours, sign-offs, trainee pay, premium days, trainer premium (e.g. $50.00/day) and total cost. Both have CSV / PDF export. Voided tickets are left out of every report.



Training report

19. Documents for drivers

Documents › **Upload Files** (up to about 5 MB per file). Drivers download them from **Documents** in the driver app. Unit papers such as registration and insurance go in **Trucks & Trailers** folders instead.

20. Records and backups

Each service line has **Records (5 yr)**. Tickets are kept for 5 years from the ticket date. Deleting a ticket during that window only archives it. Download a full archive at least once a year (**📦 Download 5-year archive (JSON)** / **📥 Download CSV**) and keep a copy on your company drive.

21. Two-step sign-in (MFA)

Developer, admin **and dispatcher (logistics)** accounts must use two-step sign-in. It is optional for drivers and off unless they turn it on. It works with any authenticator app, such as Google Authenticator, Microsoft Authenticator, 1Password, or Authy.

Dispatchers: grace period

Dispatchers get a few days to set it up (5 days from their first sign-in after this change, unless a fixed start date is set on the server). Until then they sign in as usual and see a yellow bar at the top: **Two-step sign-in is required for dispatchers. Set it up by ...**. After the date, sign-in asks them to set it up before they can continue.

How a dispatcher sets it up (2 minutes):

1. Install an authenticator app on your phone (Google Authenticator or Microsoft Authenticator are free).
2. Sign in to Lease Tickets as usual, then click **Set up now** on the yellow bar (or **Two-step sign-in** at the bottom of the sidebar) and choose **On**.
3. In the app tap **+** › **Scan a QR code** and scan the code on screen (or type the key shown under it).
4. Type the 6-digit code from the app and click **Confirm**.
5. Save the 10 recovery codes somewhere safe (print or password manager), tick **I saved these**, and click Done.

From then on, signing in on a new computer asks for the current code. Tick **Trust this device for 30 days** on your own work computer. If you get a new phone, ask a developer to **Reset 2-step** for you, or use a recovery code.

First setup

Sign in with your password. If your role requires it, a **Set up two-step sign-in** window opens. Scan the QR code, or type the key shown under it into your app. Then enter the 6-digit code from the app. You will see **10 recovery codes**. Download or copy them, keep them somewhere safe, tick **I saved these**, and click Done.

Signing in

After your password, enter the current 6-digit code. Tick **Trust this device for 30 days** to skip the code on that browser for 30 days. After 5 wrong codes, the account is locked for 15 minutes.

Lost phone: recovery codes

On the code screen, click **Use a recovery code** and enter one of your saved codes. Each code works only once. To get a new set of 10, go to **Two-step sign-in** (sidebar, or Users → Your password) and click **New recovery codes**. This cancels the old codes.

Resetting a user

If a user has lost both their phone and their codes, a developer can click **Reset 2-step** on that user's row under Users. That user is signed out everywhere and sets up again at their next sign-in.

Manage

From the **Two-step sign-in** link you can see your status and how many codes are left, get new codes, forget this device, or (for optional roles only) turn it off. Turning it off needs a current code.

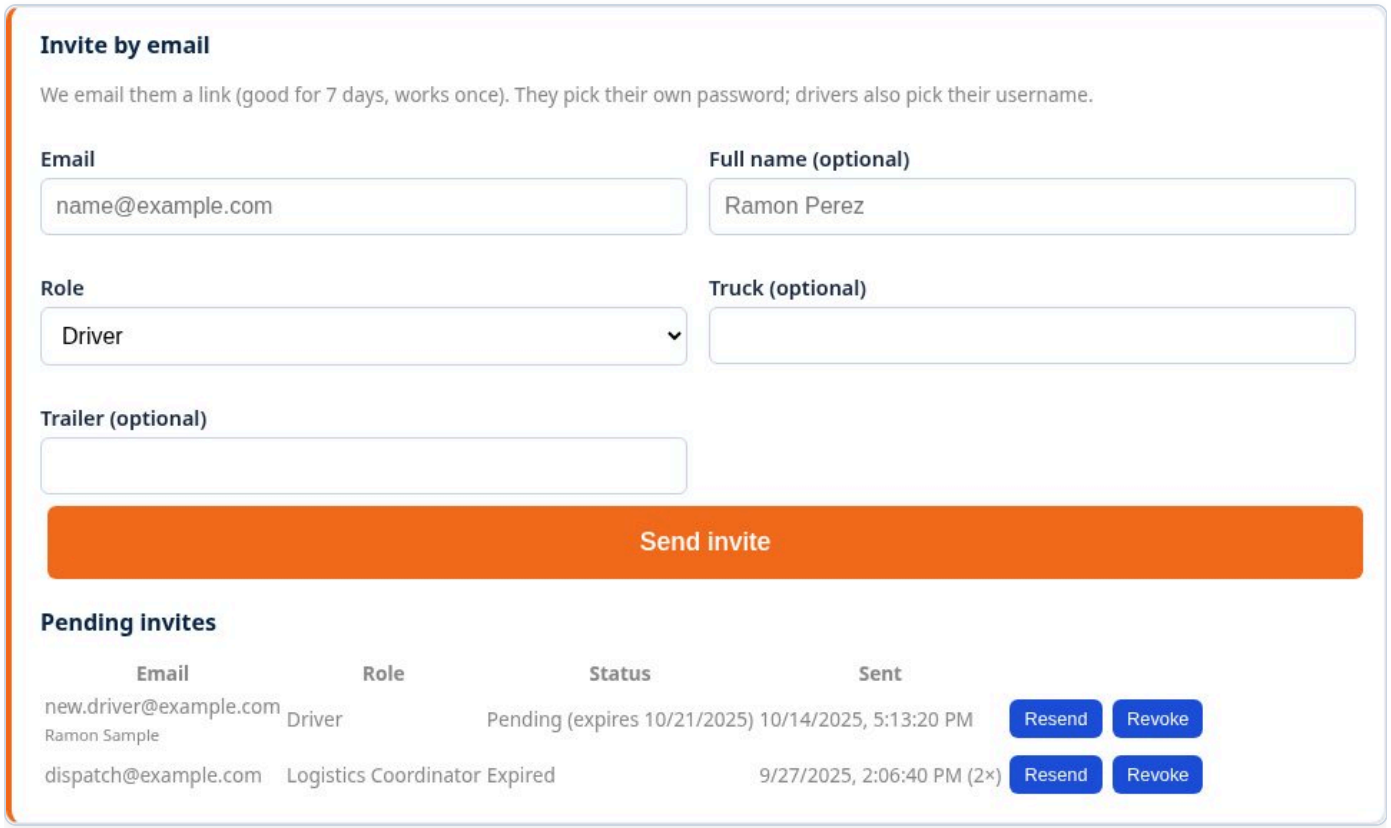
How passwords are stored

Passwords go to the server over a secure (HTTPS) connection and are stored only as a slow, salted **scrypt** hash, which is much harder to crack than the old method. Accounts created before Oct 2026 are upgraded automatically the next time the person signs in. Nobody has to reset their password.

Drivers see only their own tickets

Each ticket and load records which driver login it belongs to. A driver's phone only loads and can only change **their own** tickets and loads (a trainee riding along can also **view** the trainer's tickets from the training days). The office (admins and dispatchers) still sees everything. If a driver says an older ticket is missing from their phone, check that the driver name on the ticket matches the name under Users exactly; two drivers with the same name must be told apart (for example add a middle initial).

Invite by email and Forgot password



Invite by email and Pending invites

Invite: under **Users** › **Invite by email**, enter the person's email, pick **Driver**, **Logistics Coordinator** or **Admin** (and optionally name, truck and trailer), and click **Send invite**. They get a link that works once and expires in 7 days; they choose their own password (drivers also choose a username). **Pending invites** lists open invites; **Resend** sends a fresh link (the old one stops working) and **Revoke** cancels it.

Forgot password: anyone can click **Forgot password?** on the sign-in page and enter their email or driver username. If the account has an email on file, a reset link (good for 1 hour, one use) is emailed. Drivers added the old way have no email on file, so you still reset their password under Users. After a reset, admins still need their two-step code.

22. Troubleshooting

Problem	What to do
No signed PDF email arrived	Check spam. The PDF is sent only after Lease Tickets countersigns. You can always use **Download signed PDF** on the Agreement page.
"Users are locked"	The assigned admin has to sign the agreement under **Companies**.
A driver's tickets aren't showing up	Check the driver's badge says ☁ **Sync to admin · live**. If not, ask them to send a backup (**My Tickets › Backup file (only if the office asks) › Backup tickets (JSON)**) and use **Backup / restore files (advanced) › Import driver tickets** on that ticket list.
A driver can't submit a ticket	Make sure trucks and trailers exist, and that the customer, operator and lease lists have entries. Photos need a live cloud connection.
Payroll shows $0 for a driver	Their tickets must be **completed** (have an end time), and their type and rate must be set under Users.
Owner operator pay looks high	Remember they get 100% of the fuel surcharge on top of their commission.
Can't close a pay period	It overlaps a period that's already closed. Reopen that one first.
Locked out of two-step sign-in	Use a recovery code, or ask a developer to reset you under Users.
Help	leasetickets.com/contact