

# Account & Subscription Management

This section explains how administrators manage the company subscription for DynaTrail Dispatch.

Here you will learn how to view your current subscription, understand the available plan tiers, change your subscription level, update payment details, download invoices, and understand what happens if your truck usage exceeds your current plan.

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# Viewing Your Current Subscription

## ?? ADMINISTRATOR SETUP GUIDE

The Subscription Information tab allows administrators to view the active DynaTrail Dispatch subscription assigned to their company.

This page provides a quick overview of your current plan, billing period, and the number of trucks currently counted toward your subscription tier.

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## Opening the Subscription Information Page

1. Click **Settings**
2. Select **Company Profile**
3. Click **Subscription Information**

## Current Subscription Information

The Current Subscription Information panel displays the key details of your active subscription:

### Start Date

The date your current billing period began.

### End Date

The date your current billing period ends (your subscription renews on this date unless changed or cancelled).

## Plan

Your current subscription tier, based on the number of trucks or broker seats included.

## Usage

The number of trucks or broker seats currently active in your account (used to determine whether you're within the limits of your current tier).

## Price

The monthly cost of your active plan.

## Currency

Billing currency is automatically determined when the account is created based on the company's country.

### ? Tip

Canadian companies are billed in **CAD**, while companies located in the **United States** are billed in **USD**.

## Why This Information Matters

Reviewing this page helps administrators:

- Confirm which subscription tier is active
- Track how many trucks or broker seats are being counted
- Verify renewal dates and billing cycle timing
- Confirm the monthly subscription cost

If your company begins dispatching more trucks or adds more brokers, you may need to upgrade to a higher subscription tier.

# Understanding Subscription Plans

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## Understanding Subscription Plans

The Subscription Plans section displays the available subscription tiers for DynaTrail Dispatch and allows administrators to change the company's subscription plan when needed.

Subscription plans are based on the number of trucks your company manages within the system. Each plan tier supports a specific range of trucks and includes a monthly subscription cost.

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## Opening the Subscription Plans Section

To view the available subscription plans:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **Subscription Information** tab

On this page you will see two main areas:

- **Current Subscription Information** on the left
- **Subscription Plans** on the right

## Subscription Plans Table

The **Subscription Plans** table lists the available subscription tiers your company can choose from.

Each row in the table represents a different subscription plan.

## Plan Type

The **Plan Type** column shows the range of trucks/broker seats included in that subscription tier.

Examples include:

- 1–5 Trucks / 1 Broker Seat
- 6–10 Trucks / 2 Broker Seats
- 11–15 Trucks / 3 Broker Seats

Choose a plan that covers the number of trucks/broker seats your company actively dispatches.

## Price

The **Price** column shows the monthly cost of each subscription tier. The price increases as the number of supported trucks/broker seats increases.

## Description

The **Description** column explains what the plan includes.

*Example: 1–5 truck license for DynaTrail Dispatch*

## Action

The **Action** column contains the buttons used to manage your subscription.

- **Update Subscription** – used to move your company to a different subscription tier.
- **Update Payment** – used to change the payment method associated with your subscription.

## Choosing the Correct Plan

Select a subscription tier that includes the number of trucks your company actively dispatches.

For example:

- A company managing **3 trucks** should use the **1–5 Trucks** plan.
- A company managing **8 trucks** should use the **6–10 Trucks** plan.

- A company with **2 Brokers** should use the **2 Broker Seat** plan

### ? Tip

If your company grows and begins dispatching more trucks or adds new brokers, you can upgrade to a higher subscription tier at any time by following the next article.

# Changing Your Subscription Plan (Carrier)

## ?? ADMINISTRATOR SETUP GUIDE

Administrators can change the company subscription plan at any time from the **Subscription Information** tab.

This is most commonly done when a company needs to **upgrade** to a larger plan to support more trucks, or **downgrade** to a smaller plan after reducing fleet size.

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## Where to Change Your Plan

To change your company subscription plan:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **Subscription Information** tab

In the **Subscription Plans** table, each plan tier includes an **Update Subscription** button.

## Upgrading Your Plan

If your company adds trucks and needs a higher subscription tier, you can upgrade immediately.

To upgrade:

1. In the **Subscription Plans** table, find the plan tier you want to upgrade to
2. Click **Update Subscription** on that plan
3. Complete the checkout process in the Stripe payment window

After payment is completed, you will be returned to the Subscription Information page and the new plan will be active.

#### ? Tip

Upgrades are **prorated**. You will pay the difference in plan pricing for the remainder of the current month, and then you will be billed the full monthly subscription price on the 1st going forward.

## Downgrading Your Plan

If your company reduces the number of trucks being managed, you can downgrade to a smaller subscription tier.

To downgrade:

1. In the **Subscription Plans** table, find the plan you want to downgrade to
2. Click **Update Subscription** on that plan
3. Confirm the change

Your subscription will remain on the current tier for the remainder of the month, and the new lower price will begin on the 1st of the next month.

#### ? Tip

Downgrades do not provide a credit or refund for the current billing period. The reduced plan price will apply starting on the next monthly billing date.

# Changing Your Subscription Plan (Brokers)

## ?? ADMINISTRATOR SETUP GUIDE

Administrators can change the company broker seat subscription at any time from the **Subscription Information** tab.

This is typically done when a company needs to **add additional broker seats** for new staff members, or **reduce seats** if the number of active brokers decreases.

## Where to Change Your Subscription

To change the broker seat subscription:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **Subscription Information** tab

The **Subscription Plans** table will display the available broker seat tiers.

## Broker Seat Subscription Plans

Each plan tier represents the number of broker seats available in your account.

Examples include:

- 1 Seat Broker
- 2 Seat Broker
- 3 Seat Broker
- 4 Seat Broker

The number of seats determines how many brokers can actively use the system at the same time.

## Upgrading Your Broker Seat Plan

If your company adds new brokers or dispatch staff, you may need to upgrade to a larger seat plan.

To upgrade:

1. Locate the plan that matches the number of broker seats you need
2. Click **Update Subscription** for that plan
3. Complete the payment process in the Stripe checkout window

After the payment is completed, the new seat plan will become active immediately.

#### ? Tip

When upgrading your subscription, the price difference is **prorated**. You will only pay the difference between the plans for the remainder of the current month. On the 1st of the next month, the full monthly subscription price for the new plan will apply.

## Downgrading Your Broker Seat Plan

If your company reduces the number of active brokers, you can move to a smaller subscription tier.

To downgrade:

1. Select the lower seat plan you want to move to
2. Click **Update Subscription**
3. Confirm the subscription change

Your current subscription will remain active for the remainder of the month, and the lower plan price will take effect on the next monthly billing cycle.

#### ? Tip

Downgrading your subscription does not provide a credit or refund for the current billing period. The new lower price will apply starting on the next billing cycle.

# Updating Your Payment Method

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DynaTrail Dispatch uses Stripe for secure subscription billing. If you need to change the credit card used for your subscription, you can update the payment method directly from the **Subscription Information** page.

Once updated, all future subscription charges will be billed to the new payment method.

## Opening the Subscription Information Page

To access subscription billing settings:

1. Click **Settings**
2. Select **Company Profile**
3. Click the **Subscription Information** tab

## Updating Your Payment Method

To update the credit card used for subscription billing:

1. Locate the **Update Payment** button in the **Subscription Plans** section
2. Click **Update Payment**
3. A secure Stripe billing page will open in your browser
4. Select an existing payment method or choose **Add payment method**
5. Enter the new credit card details
6. Click **Update** to save the payment method

After the update is completed, you will automatically be returned to the DynaTrail Dispatch application.

### ? Tip

DynaTrail Dispatch does not store your credit card details. All billing information is securely processed and stored by Stripe.

## What You Will See in Stripe

When the Stripe billing page opens, you may see the following options:

- Select an existing saved card
- Add a new payment method
- Enter card number, expiry date, and security code
- Confirm the update using the **Update** button

Stripe may also display a **Return to DynaTrail Dispatch** link after the payment method is updated.

### ? Tip

If you click **Go back** on the Stripe page before clicking **Update**, your payment method will not be changed.

## After Updating Your Payment Method

Once the update is completed:

- Your subscription remains active
- The new payment method will be used for future billing
- Your next monthly charge will automatically use the updated card

# Viewing & Downloading Past Subscription Invoices

## ?? ADMINISTRATOR SETUP GUIDE

The **Subscription History** window lets administrators view past subscription charges and download a PDF copy of each invoice for your records.

## Open Subscription History

1. Go to **Settings ? Company Profile ? Subscription Information**.
2. Click **Subscription History** (top-right of the page).

A window will open showing your subscription invoice history.

## Understanding the Subscription History Table

Each row in the Subscription History table represents a subscription charge. The table includes:

- **Start Date** — The start date of the billing period for that charge.
- **Plan Type** — The subscription tier that was billed (example: **1-5 Trucks or 2 Broker Seats**).
- **Status** — The payment status for that invoice.
- **Amount** — The total amount charged for the invoice.
- **Download** — A button to download the invoice PDF.

### ? Tip

If you see **PAID / ACTIVE**, it typically means the invoice is paid and the subscription is currently active for that billing period.

# Download an Invoice PDF

1. Open **Subscription History**.
2. Find the invoice row you want to download.
3. Click **Download Invoice**.

Your browser will download a PDF invoice file. You can save it, print it, or forward it to your accounting team.

## What You'll See in the Downloaded Invoice

The downloaded PDF invoice will include key billing details such as:

- **Invoice number**
- **Date of issue and date due**
- **Bill-to company contact details**
- **Amount due**
- **Plan description** (example: **1-5 Trucks or 2 Broker Seats**) and the billing period (example: **Mar 1 – Mar 31**)
- **Subtotal, tax, and total** (if applicable)
- A **Pay online link** (when available)

### ? Tip

Downloaded invoices are the best source for reconciling subscription charges, since they show the billing period, totals, and any applicable taxes.