DynaTrail Dispatch Administrator Guide

This guide provides system administrators with instructions for configuring and managing the DynaTrail Dispatch platform.

Inside this guide, you will learn how to configure company settings, manage users, customize operational workflows, and maintain system settings for your organization.

Topics in this guide include:

• Company setup and configuration
• User account management
• Permission and role configuration
• System settings and customization
• Administrative tools and system management

This guide is intended for company administrators responsible for managing the DynaTrail Dispatch system within their organization.

Getting Started

Start here to activate your administrator account, log in, and complete the initial setup steps before using DynaTrail Dispatch.

Start Here – New Account Setup

?? ADMINISTRATOR SETUP GUIDE

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Welcome to DynaTrail Dispatch

Before your team begins using DynaTrail Dispatch, the system administrator must complete several initial configuration steps. This guide walks you through the required setup process to prepare your account for daily operations.

Follow the steps below in order.

IN THIS GUIDE

Step 1 — Activate Your Administrator Account

When your company account is created by a DynaTrail employee, the system automatically sends an activation email to your designated administrator.

The email will contain a secure link allowing you to create your password.

 REQUIRED ACTIONS

1. Open the activation email from **DynaTrail Dispatch**
2. Click the **Create Password** link
3. Enter your new password
4. Confirm your password

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What happens next: Once completed, you will be redirected to the DynaTrail login page.

Step 2 — Log Into The System

After creating your password:

1. Go to the DynaTrail login page
2. Enter your **administrator email address**
3. Enter the **password you just created**
4. Click **Login**

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Expected result: After logging in, you will see the main system dashboard.

Step 3 — Open Company Profile Settings

The next step is to configure your company settings.

1. Click **Settings**
2. Select **Company Profile**

The Company Profile section contains several tabs where you will configure important system defaults.

Getting Started

Company Information Setup

?? ADMINISTRATOR SETUP GUIDE

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Before using DynaTrail Dispatch for daily operations, administrators must complete their company profile information.

The Company Information tab contains the core details used throughout the system for invoices, confirmations, and other communications.

IN THIS GUIDE

Opening Company Profile Settings

To access the Company Profile section:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**

This will open the Company Profile settings page where several configuration tabs are available.

Company Information Tab

The **Company Information** tab allows administrators to enter the basic details of their organization.

This information will appear throughout the system and on documents generated by DynaTrail Dispatch.

Administrators should complete the following fields.

Business Contact Email

This email address represents the primary contact for the company.

It may be displayed on documents when sending system notifications, invoices, and other communications.

> **? Tip**
>
> Example email: **dispatch@yourcompany.com**

Company Website

Enter the website address for your company.

This may appear on invoices and customer communications generated by the system.

> **? Tip**
>
> Example website: **www.yourcompany.com**

Business Number

Enter your registered business number or tax identification number.

This information may appear on invoices and other official documents.

> **? Tip**
>
> Examples may include:
>
> **Canadian Business Number (BN)**
>
> **U.S. EIN**

Uploading Your Company Logo

Your company logo can be uploaded within the Company Information section.

Once uploaded, the logo will automatically appear on:

- Carrier confirmations
- Customer invoices
- Other system-generated documents

To upload your logo:

1. Click **Upload Logo**
2. Select your company logo file
3. Click **Save Changes**

> **? Tip**
>
> A high-resolution PNG logo with a transparent background produces the best results on invoices and confirmations.

Saving Your Company Information

After entering your company details:

1. Review the information for accuracy
2. Click **Update**

Your company information will now be used throughout the DynaTrail Dispatch system.

Getting Started

Carrier Confirmation Defaults

?? ADMINISTRATOR SETUP GUIDE

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Carrier confirmations are automatically generated by DynaTrail Dispatch when a load is dispatched to a carrier.

The **Carrier Confirmation Defaults** tab allows administrators to configure the email address and default message that will be used when sending carrier confirmations.

These settings ensure confirmations are sent with consistent messaging and proper contact information.

IN THIS GUIDE

Opening Carrier Confirmation Defaults

To configure your carrier confirmation settings:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**

3. Click the **Carrier Confirmation Defaults** tab

This section controls how carrier confirmations are sent from your system.

Carrier Confirmation Email Address

This email address will appear as the sender when carrier confirmations are sent from DynaTrail Dispatch.

Carriers will use this email as the contact for confirmation-related communication.

> **? Tip**
>
> Example email: **dispatch@yourcompany.com**

Default Carrier Confirmation Email Message

This message will automatically appear in the email body when carrier confirmations are sent.

You can use this section to include a standard message that will accompany every confirmation.

Many companies use this space to provide instructions to carriers or important dispatch notes.

> **? Tip**
>
> Example message:
> *Please review the attached carrier confirmation and contact dispatch immediately if any details are incorrect.*

Carrier Confirmation Footer Notes

Footer notes allow you to add additional information that will appear at the bottom of every carrier confirmation document.

This section is commonly used for:

- Terms and conditions
- Payment terms
- Required documentation instructions
- Contact information for dispatch

> **? Tip**
>
> Example footer:
> *Payment terms are Net 30 from receipt of invoice and POD. Carrier must submit all paperwork within 48 hours of delivery.*

Saving Carrier Confirmation Settings

After configuring your confirmation settings:

1. Review your email address and message content
2. Click **Update**

All future carrier confirmations will now use these default settings.

Billing Defaults

?? ADMINISTRATOR SETUP GUIDE

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The **Billing Defaults** tab allows administrators to configure how invoices and billing communications are handled within DynaTrail Dispatch.

These settings control the default email addresses, invoice messages, fuel surcharge configuration, and numbering used when billing trips.

Configuring these defaults ensures invoices and billing communications are sent with consistent formatting and company information.

IN THIS GUIDE

Opening Billing Defaults

To access the Billing Defaults section:

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

This section contains several configuration options that affect how invoices and billing communications are generated.

Billing Email Address

This email address will appear as the sender when invoices and billing communications are sent from the system.

Customers receiving invoices will see this email as the contact for billing questions.

> **? Tip**
>
> Example email: **billing@yourcompany.com**

Send Copies to Billing Email

Administrators can choose whether a copy of each invoice email should also be sent to the billing email address.

This is commonly used to keep an internal record of invoices that were delivered to customers.

> **? Tip**
>
> Many companies enable this option so their accounting team automatically receives a copy of every invoice sent.

Block Trips From Being Billed

This option allows administrators to configure whether new trips are **blocked from billing** by default.

When enabled, trips must be manually approved before invoices can be generated.

This setting is useful for companies that require an accounting review before invoices are sent.

> **? Tip**
>
> Some companies use this setting to ensure paperwork such as PODs has been received before invoicing.

Fuel Surcharge (FSC)

DynaTrail Dispatch allows companies to automatically apply a fuel surcharge to invoices.

If your company uses fuel surcharge billing, this section allows you to configure the rate.

> **? Tip**
>
> Example FSC rate: **12% fuel surcharge**

Default Billing Currency

This setting determines the currency used when generating invoices.

All invoices will default to the selected currency unless manually changed on a specific trip.

> **? Tip**
>
> Common options include: **USD or CAD**

Starting Trip Number

Administrators can define the starting trip number used by the system.

This allows companies transitioning from another dispatch system to continue their existing trip numbering sequence.

> **? Tip**
>
> Example starting trip number: **10500**

POD Email Default Message

This message will appear in the email when sending Proof of Delivery (POD) documents to customers.

You can use this space to provide a standard message when delivering completed shipment documentation.

> **? Tip**
>
> Example message:
> *Please find the attached Proof of Delivery for your records.*

Invoice Email Default Message

This message will appear in the email when invoices are sent to customers.

It allows companies to include a standard billing message with every invoice.

> **? Tip**
>
> Example message:
> *Please find the attached invoice for the completed shipment. Thank you for your business.*

Invoice Notes

Invoice notes appear directly on the invoice document itself.

Companies often use this section to include payment terms or other important billing information.

> **? Tip**
>
> Example invoice note:
>
> *Payment terms are Net 30 days from invoice date.*

Saving Billing Defaults

After configuring your billing settings:

1. Review the information for accuracy
2. Click **Update**

All future invoices and billing communications will now use these default settings.

Driver Settlement Defaults (Carriers Only)

?? ADMINISTRATOR SETUP GUIDE

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The **Driver Settlement Defaults** tab allows carrier companies to configure how driver settlements and payroll calculations are handled within DynaTrail Dispatch.

These settings define the default currency used for settlements, the payroll cutoff period, and how exchange rates are applied when converting between currencies.

> **?? Note**
>
> This section is only used by carrier accounts. Broker-only accounts will not see this tab.

IN THIS GUIDE

Opening Driver Settlement Defaults

To access the Driver Settlement Defaults section:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **Driver Settlement Defaults** tab

This section contains configuration options used when calculating driver settlements and payroll.

Driver Settlement Currency

This setting determines the default currency used when calculating driver settlements.

All settlement calculations will use this currency.

> **? Tip**
>
> Example settlement currency: **USD or CAD**

Payroll Cutoff Date

The payroll cutoff date determines which trips are included in the current payroll period.

Trips completed before the cutoff date will be included in the current settlement cycle.

Trips completed after the cutoff date will be included in the next payroll cycle.

> **? Tip**
>
> Many companies set the cutoff date to match their monthly payroll schedule.

Exchange Rate Handling

If your company operates across multiple currencies, DynaTrail Dispatch allows you to control how exchange rates are applied when calculating driver settlements.

Administrators can choose to allow the system to automatically apply exchange rates or manually set a specific rate.

Automatic Exchange Rate

When automatic exchange rates are enabled, the system will automatically apply the current exchange rate when converting between currencies.

It will use the current exchange rate based on the date of the item being converted.

> **? Tip**
>
> Automatic exchange rates are recommended for companies that regularly operate across USD and CAD transactions.

Manual Exchange Rate

If manual exchange rates are used, administrators can specify a fixed exchange rate when calculating settlements.

This allows companies to use their own internal exchange rate policies.

> **? Tip**
>
> Some companies use a fixed exchange rate for accounting consistency across settlement periods.

Saving Driver Settlement Settings

After configuring your settlement settings:

1. Review the configuration options
2. Click **Update**

All driver settlements will now use these default settings.

Getting Started

QuickBooks Integration

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DynaTrail Dispatch allows companies to integrate their system with **QuickBooks Online** to simplify accounting and reduce manual data entry.

Once connected, invoices and financial transactions generated in DynaTrail can automatically be recorded in your QuickBooks account.

This integration helps ensure your accounting records remain accurate and synchronized with your dispatch operations.

IN THIS GUIDE

Opening QuickBooks Integration Settings

To access the QuickBooks integration settings:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**

3. Click the **QuickBooks Defaults** tab

This section allows administrators to connect their QuickBooks account and configure how financial data will be posted.

Connecting to QuickBooks

To enable QuickBooks integration:

1. Click **Connect to QuickBooks**
2. Log into your **QuickBooks Online** account
3. Authorize DynaTrail Dispatch to access your QuickBooks data

Once connected, DynaTrail will be able to create invoices inside QuickBooks using the products and services you configure.

> **? Tip**
>
> You must have **administrator access in QuickBooks Online** to authorize the integration.

Products and Services Setup

DynaTrail Dispatch posts invoice line items to **QuickBooks Products and Services**.

Each billing category in DynaTrail should be mapped to a corresponding **Product or Service** item in QuickBooks.

These items determine how revenue is categorized in your accounting reports.

> **? Tip**
>
> In QuickBooks Online, products and services are used on invoices and are linked to accounts for reporting.

If you have not yet created the required products and services in QuickBooks, follow the official QuickBooks setup guide below.

QuickBooks Setup Guide:
[How to set up Products and Services in QuickBooks Online](#)

Mapping Products and Services

Once your QuickBooks products and services are created, you can configure DynaTrail to use them when generating invoices.

Common examples include:

- Freight Charges
- Fuel Surcharge (FSC)
- Detention
- Layover
- Accessorial Charges
- Customs or Brokerage Fees

> **? Tip**
>
> Creating clear product and service names in QuickBooks will make your financial reporting much easier.

Carrier Accounts – Driver Settlement Items

Carrier companies may also configure products or services used when recording driver-related transactions.

This ensures driver settlements and additional charge types are properly categorized inside QuickBooks.

> **? Tip**
>
> Proper product and service mapping helps maintain clean financial records and simplifies accounting reconciliation.

Saving QuickBooks Integration Settings

After completing the QuickBooks configuration:

1. Verify that the QuickBooks connection is active
2. Confirm the correct products and services are configured
3. Click **Update**

DynaTrail Dispatch will now be able to synchronize invoices and billing transactions with your QuickBooks account.

Subscription Information

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Once your company is ready to activate billing, you can select the subscription plan that matches your company's size.

DynaTrail Dispatch offers flexible plans based on the number of trucks or licenses required for your operation.

IN THIS GUIDE

Selecting a Subscription Plan

To choose a plan:

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

In this section, you will see a list of available subscription plans.

Each plan includes:

- The number of trucks or licenses included
- The monthly subscription price
- The plan description

When you find the plan that matches your company size, click **Purchase Subscription**.

Completing Your Subscription Payment

After clicking **Purchase Subscription**, a secure checkout window will open.

This payment window is powered by **Stripe**, a trusted global payment provider.

Inside the checkout window, you will enter:

- Email address
- Credit card number
- Expiration date
- CVC security code
- Billing country and postal code

Once the payment information is entered, click **Subscribe**.

> **? Tip**
>
> Stripe securely processes your payment and does not store your credit card information inside DynaTrail.

After Subscribing

Once your payment is successfully processed:

1. Stripe will confirm your subscription
2. You will automatically be returned to the **Subscription Information** page inside DynaTrail
3. Your selected subscription plan will now be active

Your system will now be fully unlocked and ready for daily operations.

Trial Period Reminder

New accounts begin with a **30-day trial period**.

You may subscribe at any time during the trial.

If no subscription is selected before the trial ends, system access may be deactivated until a plan is activated.

Adding Your First Users

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After completing your company setup and activating your subscription, the next step is to add the members of your team to the system.

Each person who will be working inside DynaTrail Dispatch should have **their own user account**.

DynaTrail is designed so that **only one computer can be logged into a user account at a time**. This prevents multiple people from working from the same login simultaneously. Creating individual user accounts ensures that each team member has their own access to the system and can work independently.

Individual user accounts also allow each employee to maintain their own:

- User profile information
- Customizable email signature used when sending confirmations and communications
- Activity history within the system

For these reasons, we strongly recommend creating a separate login for every employee who will use the system.

IN THIS GUIDE

Opening the Users Page

To begin adding your team members:

1. Click **Settings** in the left navigation menu
2. Select **Users**

This will open the **User Management** screen.

The screen is divided into two main sections:

- **User List** on the left side
- **User Creation Panel** on the right side

The user creation panel is where new accounts are added.

Creating a New User

To create a new user account:

1. Enter the user’s **First Name**
2. Enter the user’s **Last Name**
3. Enter the user’s **Email Address**

The email address entered here will be used for the user’s system login.

After entering the information, click **Create**.

Password Setup Email

Once a new user is created, the system will automatically send a **password setup email** to the email address entered for that user.

The user will need to:

1. Open the email from **DynaTrail Dispatch**
2. Click the **Create Password** link
3. Enter their new password
4. Confirm the password

After completing this process, the user will be able to log into the system using their email address and newly created password.

> **? Tip**
>
> If the user does not see the password setup email, ask them to check their **spam or junk folder**.

Assigning User Permissions

Below the user information fields you will see the **permissions table**.

This section controls what parts of the system the user can access.

Each module includes the following permission options:

Permission	Description
View	Allows the user to see information
Create	Allows the user to create records
Edit	Allows the user to modify records
Delete	Allows the user to remove records
Full	Grants full access to the module

Administrators should only enable the permissions required for the user's role.

For example:

- Dispatchers typically need access to **Dispatch Boards** and **Order Entry**
- Accounting staff typically require access to **Billing** and **Reports**

Creating Additional Users

Repeat the same process to add additional team members.

Each employee should have their own **login credentials** so they can work independently inside the system.

Providing separate accounts ensures:

- Only one workstation is logged into a user account at a time
- System activity can be accurately tracked by user
- Each employee can configure their own profile and email signature

This helps maintain proper accountability and organization within the system.

User Profile Settings

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Each user in DynaTrail Dispatch has their own **User Profile** where they can configure personal settings and preferences.

These settings allow users to customize how emails are sent and how information is displayed within the system.

User profile settings include:

- Personal contact email overrides
- Custom email signature
- Optional screen column visibility

These settings apply only to the **individual user account** and do not affect other users in the system.

IN THIS GUIDE

Opening Your User Profile

To access your profile settings:

1. Click the **User Profile** icon in the left navigation menu
2. The **My Profile** page will open

From here, you can configure your personal communication settings and display preferences.

Contact Email Overrides

The profile includes three optional email fields:

Invoice Email

This email address will be used when **sending invoices** from the system.

If this field is left blank, the system will use the **default invoice email configured in Company Profile settings**.

Carrier Confirmation Email

This email address will be used when **sending carrier confirmations**.

If left blank, the system will use the **default carrier confirmation email configured at the company level**.

Reports Email

This email address will be used when **sending reports generated from the system**.

If this field is not filled in, the system will use the **default reports email configured by the company**.

> **? Tip**
>
> These fields allow individual users to override company defaults if they prefer communications to be sent from their personal dispatch email.

Email Signature

Each user can configure their own **email signature**.

This signature will automatically be included when sending communications such as:

- Carrier confirmations
- Customer communications
- System-generated emails

The signature editor supports standard formatting such as:

- Text formatting
- Links
- Images
- Company logos

Many companies include information such as:

- User name
- Job title
- Company name
- Phone number
- Company contact information

This ensures that all outbound communication includes consistent professional contact details.

Optional Column Display Settings

Users can also configure which columns appear on certain system screens.

These settings allow users to customize the information visible in dispatch boards and other operational views.

Examples include optional columns for:

- Purchase Order numbers
- Delivery PO numbers
- Carrier information
- Equipment type
- PARS/PAPS information
- Trip documents

Each section allows users to **toggle columns on or off** depending on their workflow preferences.

These display settings apply only to the **current user** and will not affect other users.

Dispatch and Board Display Options

The profile also includes optional column settings for several system areas, including:

- **Daily Work Log**
- **Carrier Dispatch Boards**
- **Billing Board**
- **Tracing Screen**
- **Highway Dispatch Boards**

Users can enable or disable columns within each section to tailor their workspace.

This helps ensure each user sees the information most relevant to their role.

Saving Your Profile Changes

After making any updates to your profile settings:

1. Review the changes carefully
2. Click **Update User Profile**

Your changes will take effect immediately.

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.

Viewing Your Current Subscription

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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.

IN THIS GUIDE

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 trucksor 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

?? ADMINISTRATOR SETUP GUIDE

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.

IN THIS GUIDE

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.

IN THIS GUIDE

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

?? ADMINISTRATOR SETUP GUIDE

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.