

Adding Your First Users

?? ADMINISTRATOR SETUP GUIDE

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.

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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.

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