

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

?? Billing Email Address

? Send Copies to Billing Email

? Block Trips From Being Billed

? Fuel Surcharge (FSC)

? Default Billing Currency

? Starting Trip Number

? POD Email Default Message

? Invoice Email Default Message

? Invoice Notes

? Saving Billing Defaults

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.

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