

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.