FLEETDESK PRO USER GUIDE

Run your fleet. Not your paperwork.

Plain steps for owner-operators and small carriers

Owner | Dispatcher | Accountant | Driver

November 2026

fleetdeskpro.com

Support: hello@fleetdeskpro.com

HOW TO USE THIS GUIDE

This guide shows you how to run FleetDesk Pro one small step at a time. You don't have to read it front to back. Find your job in the contents, jump to that chapter, and follow the numbered steps.

Page names
Pages are written like **Freight › Loads**: open the **Freight** group in the menu, then tap **Loads**.

Buttons and fields
Buttons look like **Save Load**. Type or tap exactly what you see on the screen.

Tips and warnings
Green boxes are shortcuts. Yellow boxes are things that can cause a problem if you skip them.

Role tags
A small tag such as OWNER means that part is for that role. Your own Help section shows only what your role can open.

WHERE SHOULD I START?

IF YOU ARE THE...	START WITH
Owner-operator or owner	Getting started, Set up your company, Team Access and roles, Loads, then Invoices. Everything else is in the contents.
Dispatcher	Getting started, Set up your company, trucks, drivers and brokers, Loads, quotes and the pipeline, AI Tools: scans, Copilot and Dispatcher
Accountant or bookkeeper	Getting started, Invoices, reminders and factoring, Expenses, fuel receipts, bills and driver pay, IFTA worksheet
Driver	Driver guide: your loads on your phone, Voice assistant (use only while parked), The iPhone and Android app

Need a hand? Email **hello@fleetdeskpro.com**. We usually reply within one business day.

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CHAPTER 1

Getting started

Sign up, log in, find your way around, and finish the setup checklist.

What FleetDesk Pro does

FleetDesk Pro is one place to run a small trucking business: your loads, trucks, drivers, brokers, invoices, expenses, fuel, IFTA, paperwork and driver pay. It also has AI tools that read receipts and rate confirmations for you, a voice assistant for drivers, and an office assistant that watches for late invoices and missing paperwork.

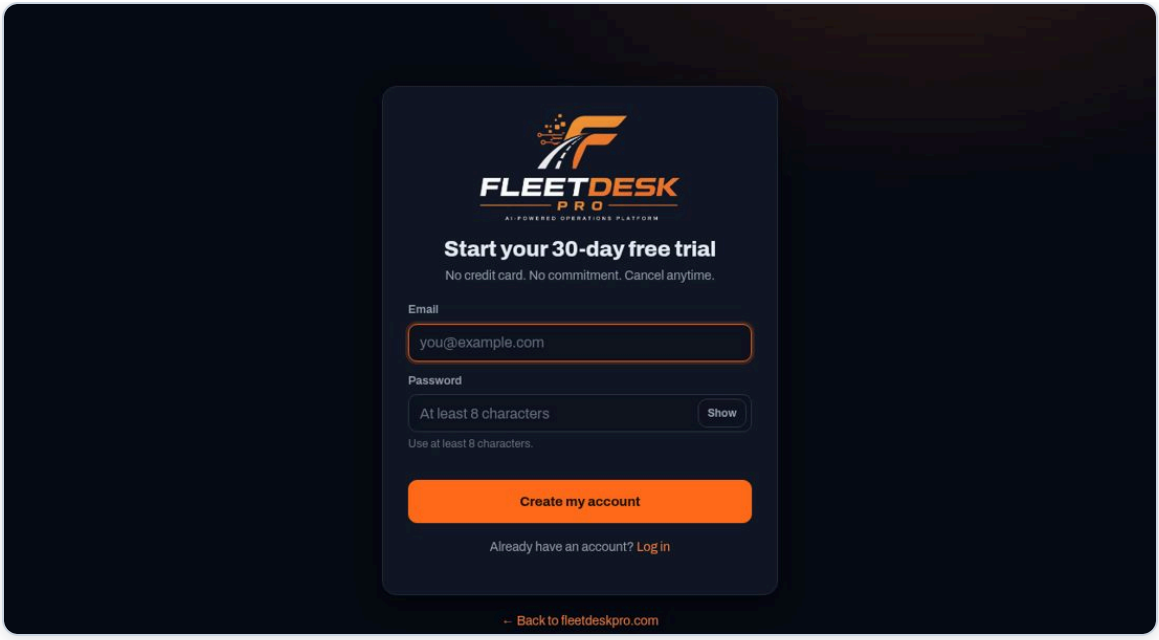
You can use it on a computer, on a phone browser, or in the FleetDesk Pro iPhone and Android app.

Sign up and start your free trial

1. Go to **fleetdeskpro.com** and tap **Start free**.
2. Type your email and choose a password with at least 8 characters, then tap **Create my account**.
3. That's it. You land on your Dashboard and your free trial starts right away. No credit card is needed.

The trial lasts **30 days** and every feature is included. After that FleetDesk Pro is one simple price: **$20 a month** for everything, with no tiers.

> **GOOD TO KNOW** You can also sign up inside the phone app: open it, tap the sign-up link on the log in screen and create your account the same way. Prices and payment are only on fleetdeskpro.com.



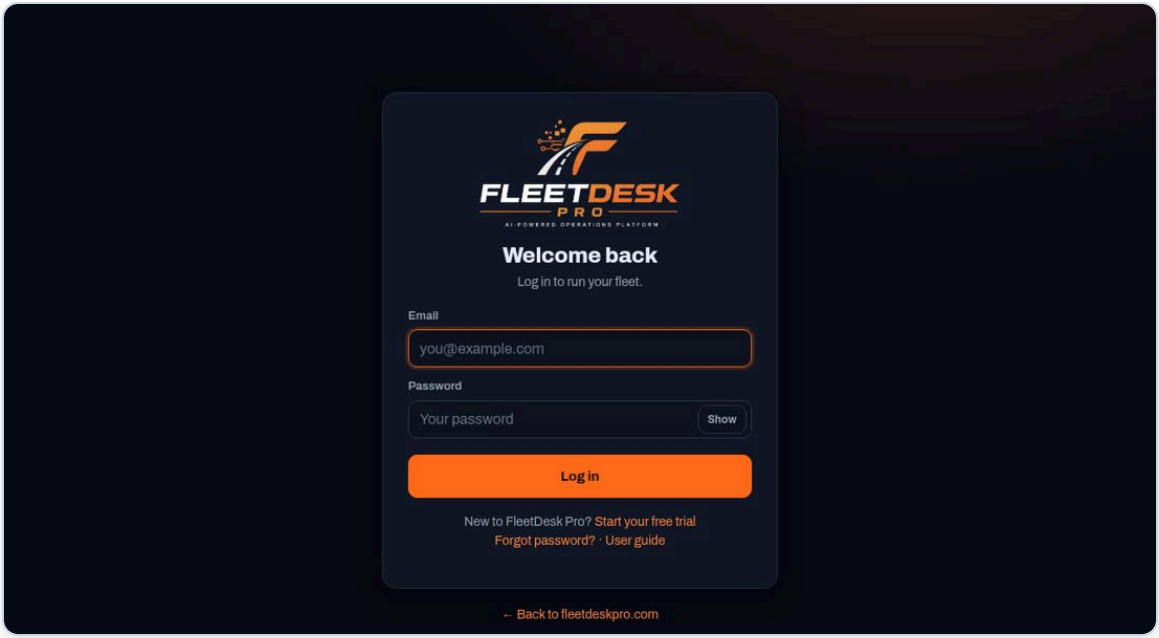
The sign-up page. Your 30-day free trial starts as soon as you create your account.

Log in, log out, forgot password

1. Go to fleetdeskpro.com and tap **Log in**, or open the app.
2. Enter your email and password and tap the log in button.
3. To leave, use the log out icon at the bottom of the menu (or **Log out** at the top of the screen on a driver login).

Forgot your password? Tap **Forgot password?** on the log in page. There is no automatic reset email. Instead, send an email to hello@fleetdeskpro.com from the address on your account with the subject **Password Reset**. We send back a temporary password. Log in with it and change it right away (see Account and password).

> **TIP** Too many wrong passwords in a row will block log in for a few minutes. Wait and try again.



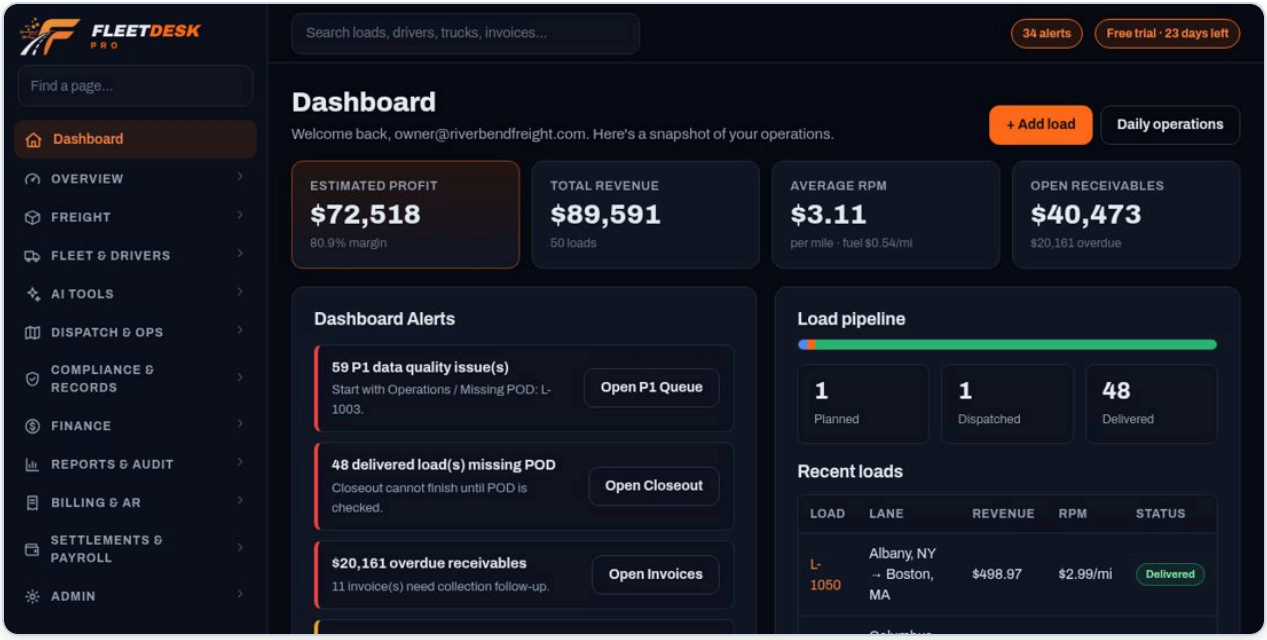
The log in page.

A quick tour of the screen

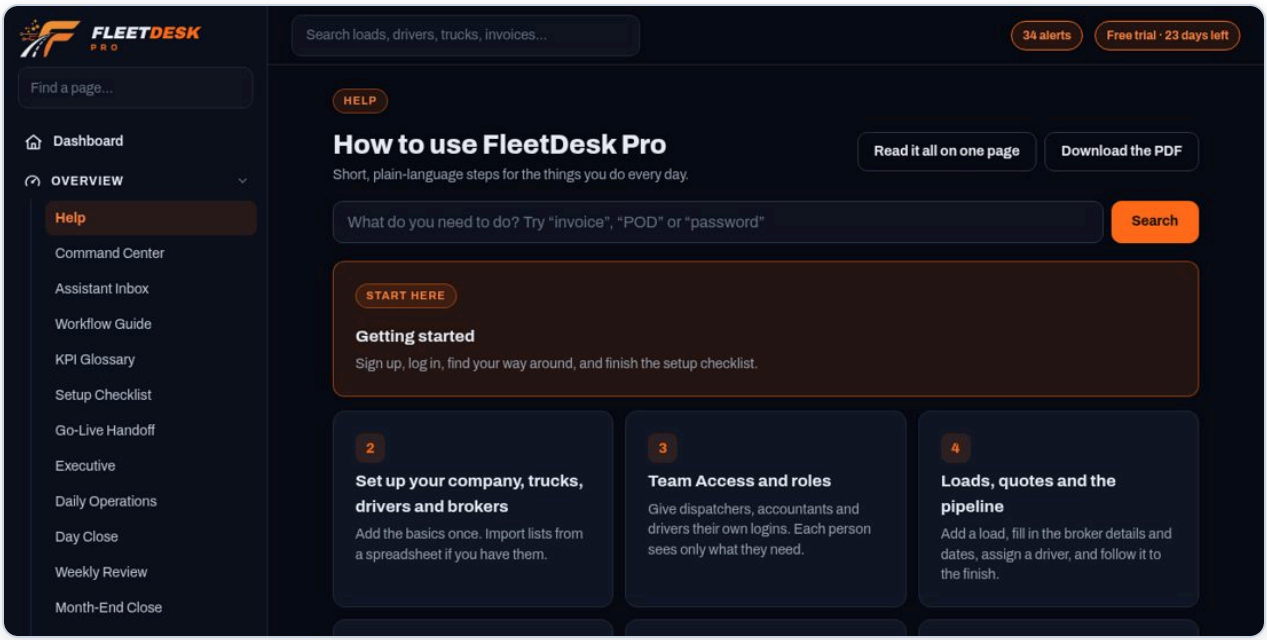
- **Menu (left side on a computer).** Groups like Freight, Fleet & Drivers, AI Tools and Finance. Tap a group to open it. On a phone, tap **More** at the bottom right to open the menu.
- **Find a page.** The small box at the top of the menu filters the menu as you type, so you can jump to any page by name.
- **Search bar (top).** Search loads, drivers, trucks and invoices in one box.
- **Phone bottom bar.** Home, Loads, Trucks, Drivers and More.
- **Trial and plan badge (top right).** Shows how many free trial days are left, or Pro active once you subscribe.
- **Alerts badge.** When the office assistant finds something, a badge like 2 alerts appears at the top. Tap it to open the Assistant Inbox.

The **Dashboard** is your home page. It shows estimated profit, total revenue, average rate per mile and open invoices at the top. Below that are alerts, your load pipeline (Planned, Dispatched, Delivered), your recent loads and quick action buttons. Open **All metrics** at the bottom for the full list of numbers.

Need this guide again? Tap **Help** in the menu (on a driver login, the **Help** button at the top of the screen) at any time. It always opens the guide for your role first.



The Dashboard, with the menu on the left, the search bar on top and the trial badge on the right.



The Help section lists the guides for your role. Drivers see the driver guide first.

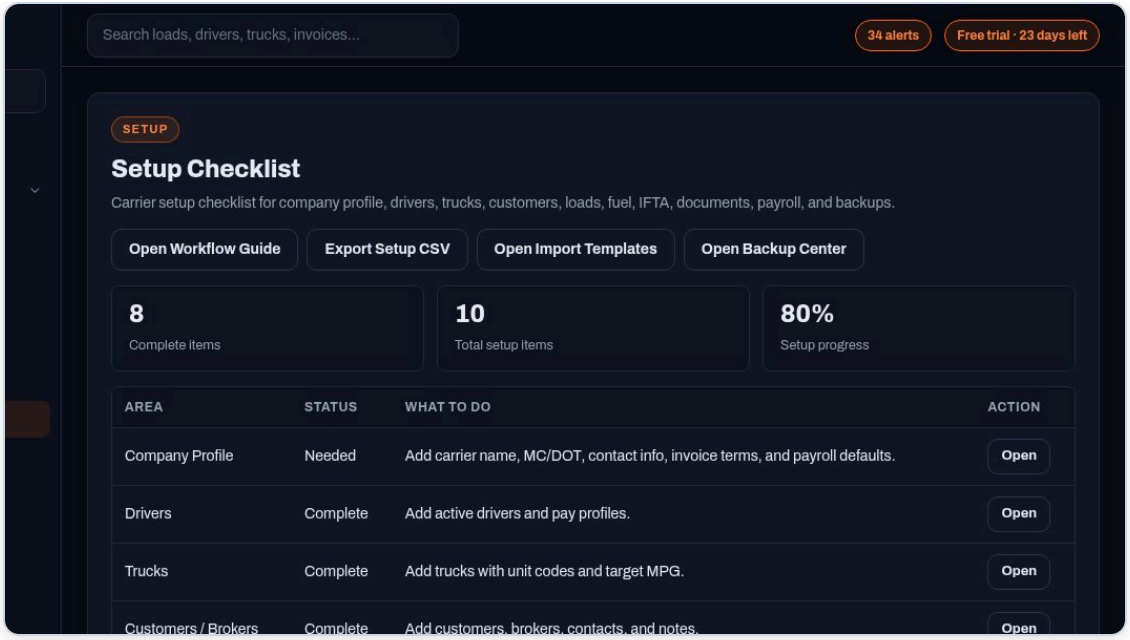
The setup checklist OWNER, DISPATCHER

Open **Overview › Setup Checklist** to see what is left to set up. It lists ten things and marks each one **Complete** or **Needed**, with an **Open** button that jumps straight to the right page.

ITEM	WHAT TO DO
Company Profile	Add your company name, MC and DOT numbers, phone, email and invoice terms in **Admin › Settings**.
Drivers	Add your drivers and how they are paid in **Fleet & Drivers › Drivers**.
Trucks	Add each truck with a unit code (and MPG if you know it) in **Fleet & Drivers › Trucks**.
Customers / Brokers	Add the brokers and shippers you work with in **Fleet & Drivers › Shippers / Brokers**.
Loads	Add or import loads in **Freight › Loads**.
Fuel Receipts	Add fuel receipts in **Compliance & Records › Fuel Receipts** (or scan them).
IFTA Miles	Add miles by state in **Compliance & Records › IFTA** (or let the IFTA worksheet estimate them).
Documents	Track PODs, BOLs, insurance and permits in **Compliance & Records › Documents**.
Payroll	Create a settlement for a driver in **Settlements & Payroll › Owner Operators** or **Settlements & Payroll › Company Drivers**.
Backup	Open **Admin › Backup Center** once so you know where your backups are.

GOOD TO KNOW DISPATCHER Company Profile, Payroll and Backup are owner and accountant jobs. Those pages may not be in your menu.

TIP You don't have to finish everything on day one. Do Company Profile, Trucks, Drivers, Brokers and your first load, and you are already useful.



The Setup Checklist shows what is Complete and what is Needed.

CHAPTER 2

Set up your company, trucks, drivers and brokers

Add the basics once. Import lists from a spreadsheet if you have them.

Company profile and defaults OWNER

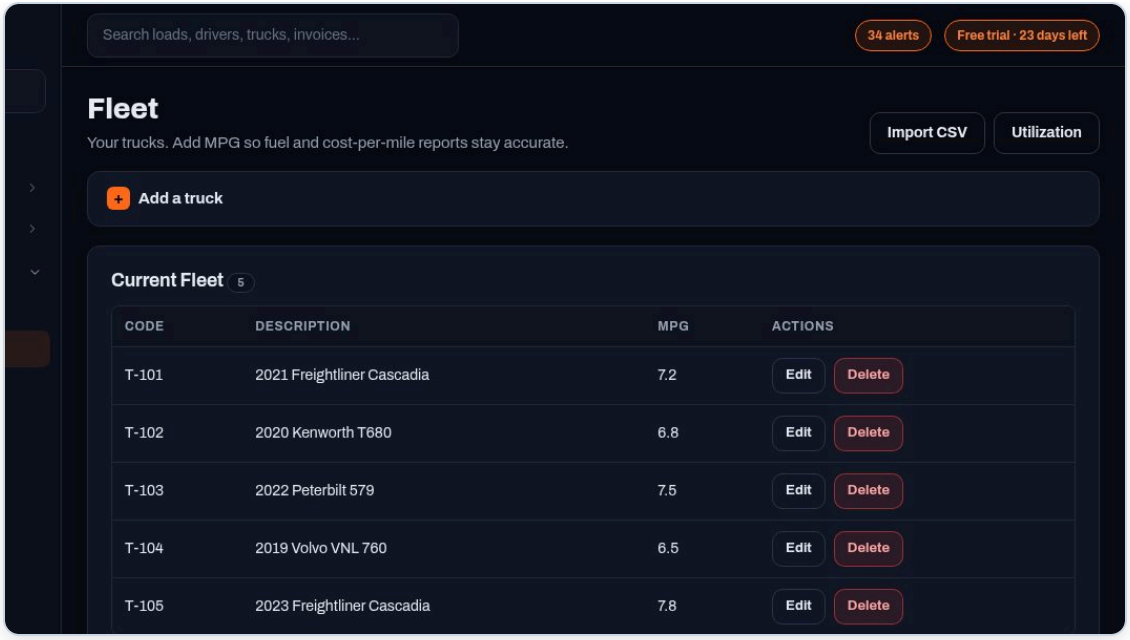
1. Open **Admin › Settings** (owner only).
2. Fill in **Company Name**, **MC Number**, **DOT Number**, phone, email and address.
3. Under Defaults set **Invoice Due Days** (how long brokers have to pay you), the default **Owner-Op Percent** and **Company Mileage Rate ($/mi)** for driver pay, and your usual **Default Fuel State** and **Default IFTA State**.
4. Add an **Invoice Footer** (for example how to pay you) and a **Settlement Footer**. They print on your documents.
5. Tap **Save Settings**.

Add trucks

1. Open **Fleet & Drivers › Trucks**. The page is called Fleet.
2. Open **Add a truck**.
3. Enter a **Truck Code** (like T1), a **Description** (like 2020 Freightliner Cascadia) and, if you know it, the **MPG (optional)**.
4. Tap **Save Truck**.

> **TIP** Adding MPG makes the fuel and cost-per-mile reports more accurate.

To change a truck later, tap **Edit** on its row. **Utilization** (top right) shows how busy each truck has been.



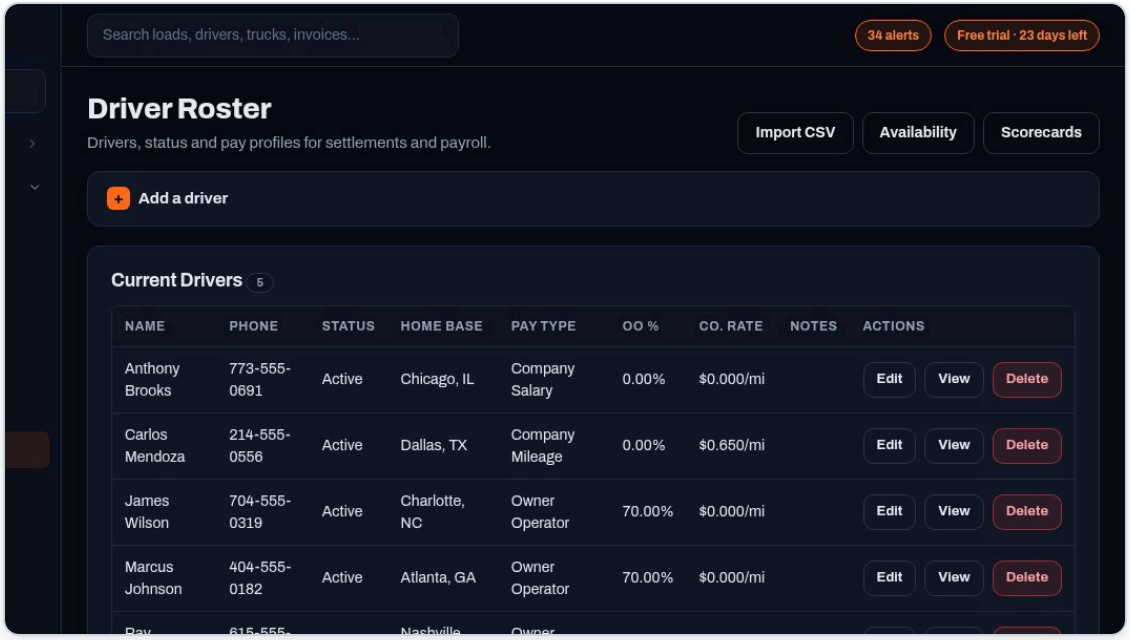
Trucks: add each truck with a unit code.

Add drivers and how they are paid

1. Open **Fleet & Drivers › Drivers**. The page is called Driver Roster.
2. Open **Add a driver** and type the driver's **Name**, **Phone**, **Status** (for example Available) and **Home Base**.
3. Under **Pay Profile** choose the **Driver Type**: Owner Operator, Company Driver or Both.
4. Enter the **Owner-op Percent** (the share of the load an owner-operator keeps, like 80) and/or the **Company Mileage Rate ($/mi)** (like 0.65 for a company driver).
5. Tap **Save Driver**.

The **View** button on a driver's row opens a phone-friendly list of that driver's loads. **Fleet & Drivers › Driver Availability** shows who is free and who is on a load.

> **GOOD TO KNOW** Adding a driver here does not give them a login. To let a driver use the driver app, add them in Team Access (see the Team Access topic).

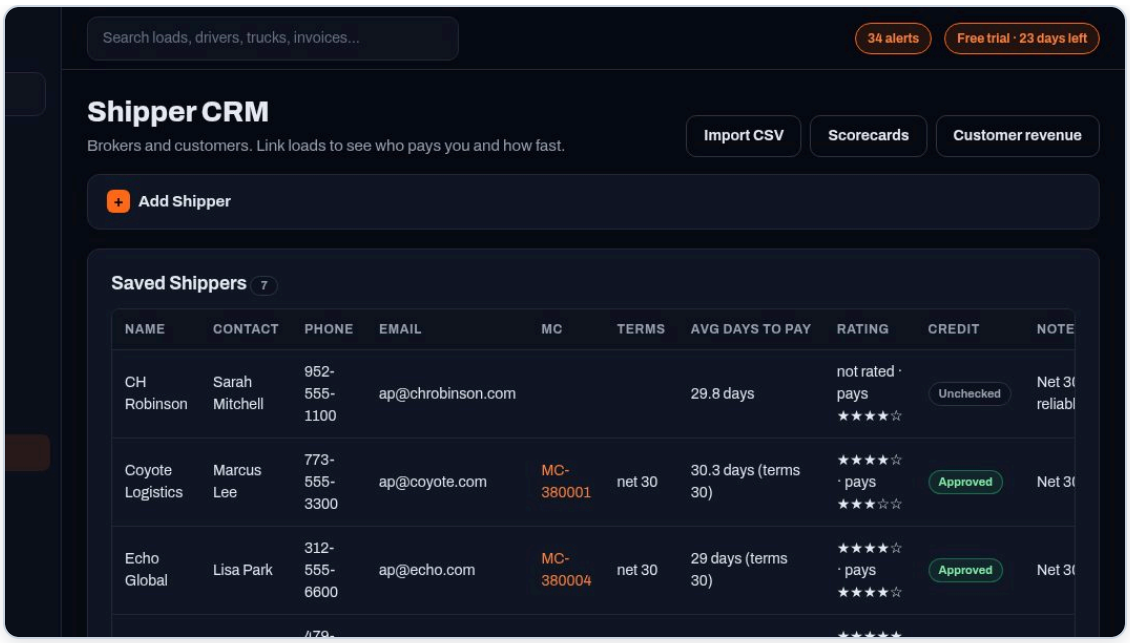


Drivers: add each driver and how they are paid.

Add shippers and brokers

1. Open **Fleet & Drivers › Shippers / Brokers**. The page is called Shipper CRM.
2. Open **Add Shipper** and enter the **Name**, contact name, phone and **Email**. The email is used to fill in the To box when you email an invoice.
3. Under Broker credit and payment, fill in the **MC number**, the **Payment terms (days)**, a **Credit status** (Unchecked, Approved, Caution or Do not haul) and, if you like, **Your rating (1-5)**.
4. Tap **Save Shipper**.

The list shows how fast each broker really pays (average days to pay), so you can see who is slow. Payment terms you enter here are used instead of your company default when an invoice is created for that broker's loads.



Shippers / Brokers: the companies you haul for and invoice.

Import a list from a spreadsheet

Every list can be imported: trucks, drivers, shippers, loads, quotes, invoices, expenses, fuel, IFTA miles, documents, compliance, maintenance, safety incidents and more. They all work the same way. Look for the menu items that start with **Import**.

1. Open the Import page, for example **Fleet & Drivers › Import Trucks**. (All import pages are listed in **Reports & Audit › Import Templates**.)
2. Tap the **Download … Template** button to get a sample spreadsheet with the right columns. Fill it in with Excel or Google Sheets and save it as CSV.
3. Open your CSV file in any text editor, copy everything, and paste it into the big box.
4. Tap **Preview Import**. The page shows what it understood and lists any lines it could not use, with the line number and the reason.
5. Fix the problems in your file, paste again and preview again. When it looks right, tap the create button (for example **Create Trucks**).

CAREFUL Import in this order so names can be matched: Trucks, Drivers, Shippers / Brokers, then Loads. A load line that names a driver or truck that doesn't exist yet is rejected.

TIP Imports are all-or-nothing per preview: nothing is saved until you tap the create button.

CHAPTER 3

Team Access and roles

Give dispatchers, accountants and drivers their own logins. Each person sees only what they need.

The four roles

Every login has a role. The person who signed up is the **Owner**. The owner adds everyone else in **Admin › Team Access** (Admin group, owner only). Everyone works inside the same company, so they all see the same company's data, but only the parts their role allows.

ROLE	WHAT THEY CAN DO	WHAT THEY NEVER SEE
Owner	Everything, including billing, settings, team, integrations, backups and the office assistant settings.	Nothing is hidden.
Dispatcher	Loads, quotes, dispatch, drivers, trucks, brokers, documents, compliance, maintenance, HOS board, AI tools and the assistant inbox.	Invoices, expenses, payroll and settlements, billing, settings, team, integrations and exports.
Accountant	Invoices, collections, factoring, expenses, payables, payroll and settlements, IFTA and fuel, reports and the assistant inbox. Can look at loads, brokers and documents.	Dispatching and fleet admin, billing, settings, team and integrations.
Driver	A phone-friendly view of their own loads: start a trip, mark delivered, upload BOL / POD photos, and the voice assistant.	Rates, pay, other drivers' loads, and every office page.

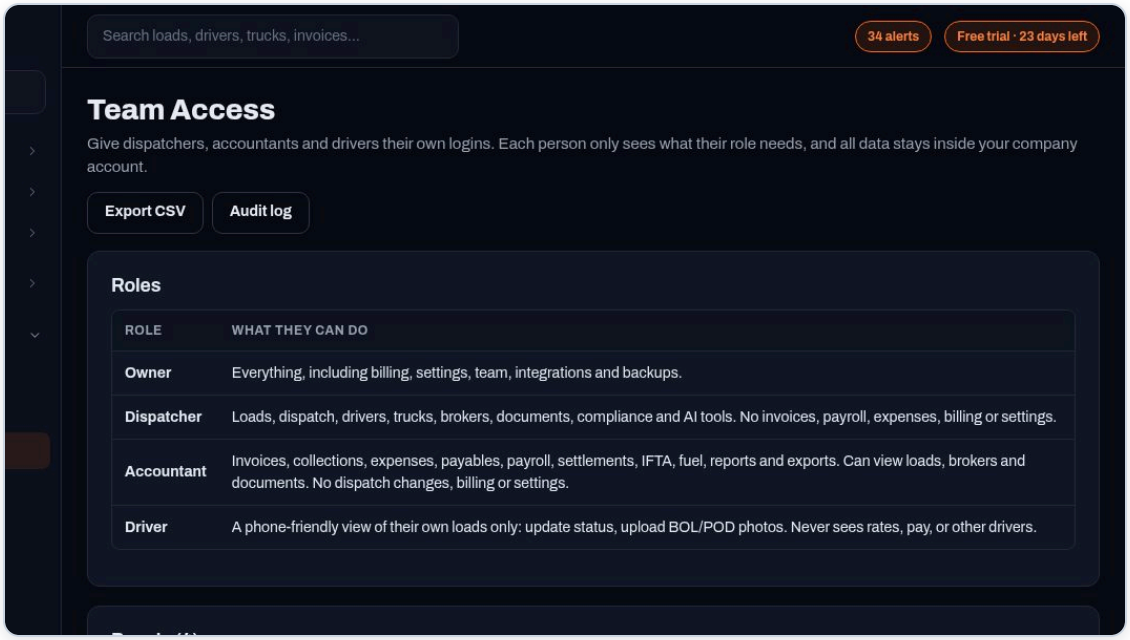
GOOD TO KNOW Anyone who tries to open a page their role can't use sees a friendly "not allowed" page. Nothing breaks and nothing is shown.

Add a person

1. Open **Admin › Team Access**.
2. Under **Add a person**, enter their **Email (their login)** and optionally their name.
3. Choose a **Role**.
4. For a driver, also pick the **Driver record (drivers only)**. Add the driver in Drivers first. Each driver record can have one login.
5. Type a **Temporary password** of at least 8 characters and tap **Add person**.
6. Send them the email and temporary password privately. They can change it on their My Account page.

> **TIP** Use a real email the person owns. A driver with no email can use a simple one you create for them, as long as it's unique.

You can add up to 25 people.



Team Access: add a person, choose their role and give them a temporary password.

Change, disable or remove someone

- **Disable** stops them logging in. **Re-enable** turns it back on. Their history stays.
- **Reset password** sets a new password for them. Type it first, then tap the button.
- **Change role** switches between Dispatcher and Accountant. To change a driver login, remove it and add it again.
- **Remove** deletes the login for good (it asks you to confirm).

The **Audit log** button at the top shows who added or changed people. **Export CSV** downloads the list.

What each role sees in the menu

MENU GROUP	OWNER	DISPATCHER	ACCOUNTANT	DRIVER
Overview	Everything	Most pages (not Go-Live Handoff, App Readiness or Launch Dashboard)	Command Center, Assistant Inbox, Executive, Day Close, Weekly Review, Month-End Close and the guides	No (only their own loads page)

MENU GROUP	OWNER	DISPATCHER	ACCOUNTANT	DRIVER
Freight	Everything	Everything	Loads, Load Pipeline, Forecast	Their own loads, in the driver app
Fleet & Drivers	Everything	Everything except Import Pay Profiles	Pay-profile import, shippers / brokers and customer pages	No
AI Tools	Everything	Copilot, AI Dispatcher, fuel and rate con scans	The three scan pages	Voice assistant only
Dispatch & Ops	Everything	Everything	No	No
Compliance & Records	Everything	Everything	Documents, files, fuel and IFTA	No
Finance	Everything	Load Profit only	Everything	No
Reports & Audit	Everything	Most reports (no Export Center or Audit Log)	Reports, Export Center, Data Dictionary, Import Templates	No
Billing & AR	Everything	No	Everything	No
Settlements & Payroll	Everything	No	Everything	No
Admin	Everything	Only the guides and Support Tools	Only the guides and Support Tools	No

Your own menu only ever shows pages you can open, so if something in this guide isn't in your menu, it belongs to a different role.

CHAPTER 4

Loads, quotes and the pipeline

Add a load, fill in the broker details and dates, assign a driver, and follow it to the finish.

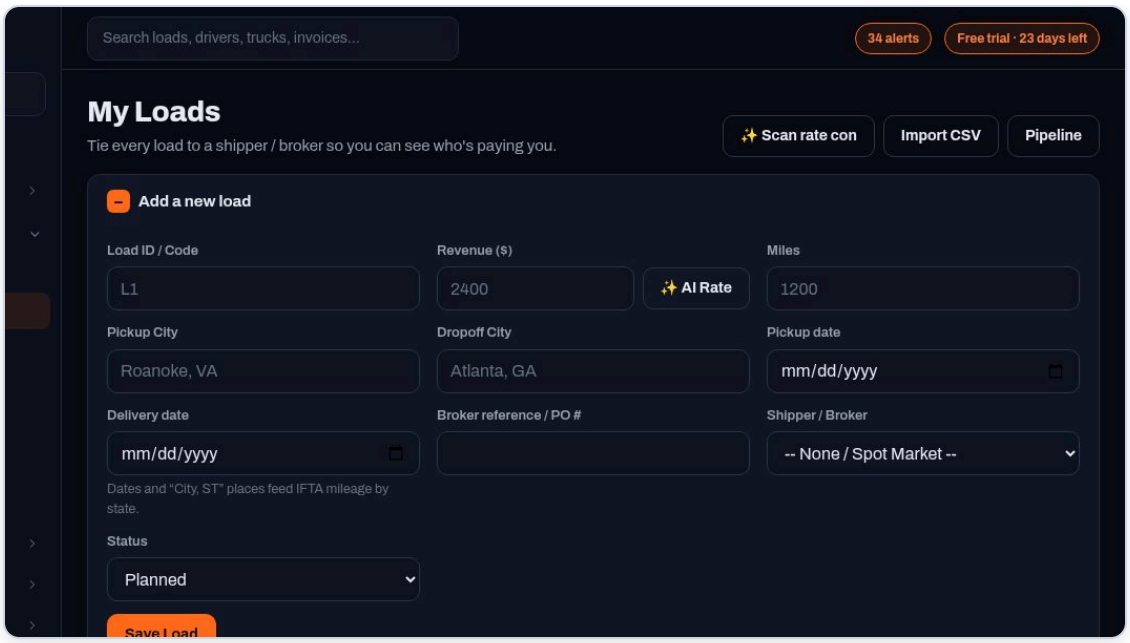
Add a load OWNER, DISPATCHER

1. Open **Freight › Loads**. The page is called My Loads.
2. Open **Add a new load**.
3. Fill in the **Load ID / Code** (any name you like, like L1 or the broker's number), **Revenue ($)** (what the broker pays you), **Miles**, **Pickup City** and **Dropoff City**. Type cities as **City, ST** (for example Roanoke, VA) so IFTA can figure out the states.
4. Pick the **Shipper / Broker**. If it was a one-off, leave it on None / Spot Market.
5. Set the **Pickup date** and **Delivery date**, and type the broker's **Broker reference / PO #** if there is one.
6. Leave **Status** on Planned for now and tap **Save Load**.

> **TIP** Not sure what to charge? Fill in pickup, dropoff and miles, then tap **AI Rate**. It suggests a total and a rate per mile based on the lane and your past loads. It is only a suggestion.

The list below shows each load's rate per mile (RPM). Rates under $2 a mile show in red so weak loads stand out. Use the Status, Shipper / Broker and RPM filters above the list to narrow it down.

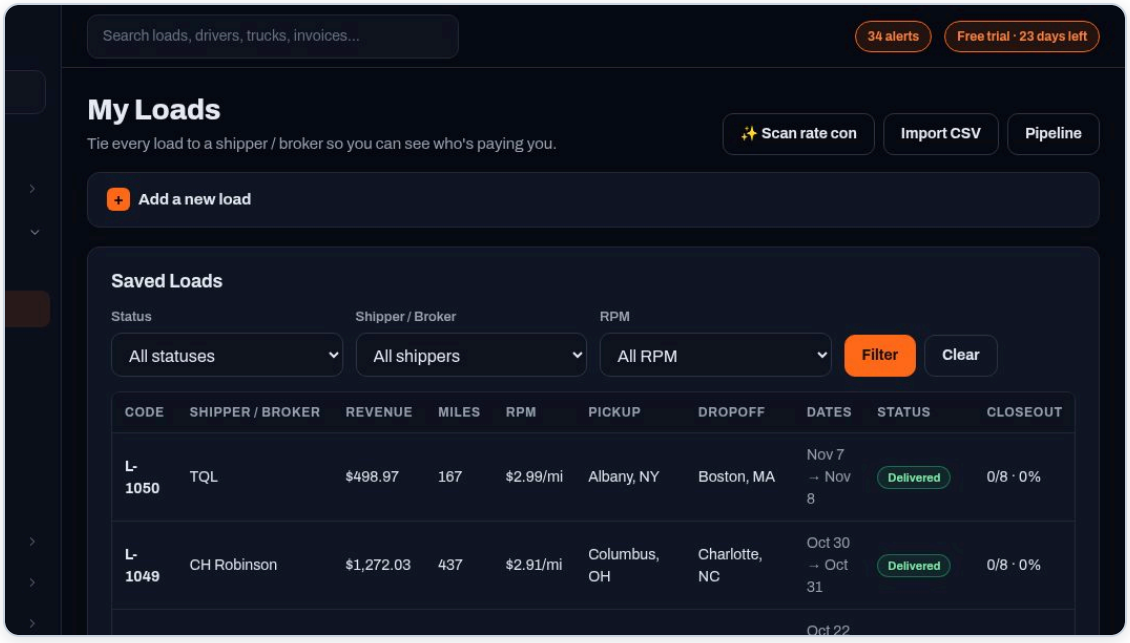
Have a rate confirmation on your phone? Skip the typing: tap **Scan rate con** and AI fills most of this in for you (see AI Tools).



Add a new load: shipper, dates, miles, revenue and driver.

Look at a load (accountants) ACCOUNTANT

Accountants can open **Freight › Loads** to look up a load and its files. Dispatch normally adds and updates loads, so check with the owner before changing one. Use the load's page to see the broker, dates, files, closeout checklist and any invoice or settlement.



My Loads shows every load with its revenue, RPM and status.

The load page OWNER, DISPATCHER

Tap **Open** on any load to see everything about it in one place:

- The top shows revenue, miles, RPM, status, driver, truck, broker, closeout progress, the pickup and delivery dates and the broker reference.
- **Files (rate con, BOL, POD)** lists attached paperwork. Tap **+ Attach file** to add one, or **Scan a document** to have AI read it.
- **Closeout Checklist** has eight boxes: Rate Con, BOL, POD, Fuel Receipt, Lumper, Invoice Sent, Payment Received and Settlement Ready. Tick them as they happen and tap **Save Closeout**. Attaching a rate con, BOL or POD tick its box for you.
- **Assignment** is where you pick the driver and truck and change the status. Tap **Save Assignment**. If you assign a new driver, they get a phone notification when the app's alerts are on.
- **Add Note** keeps a running diary for calls with the broker, detention, lumper and so on. Notes, status changes and files all show in the **Timeline** at the bottom.

Buttons to create the money paperwork also live here: **Create Invoice From Load**, **Create Owner-Op Settlement** and **Create Company Settlement**. A settlement needs a driver to be assigned first.

Statuses and the pipeline

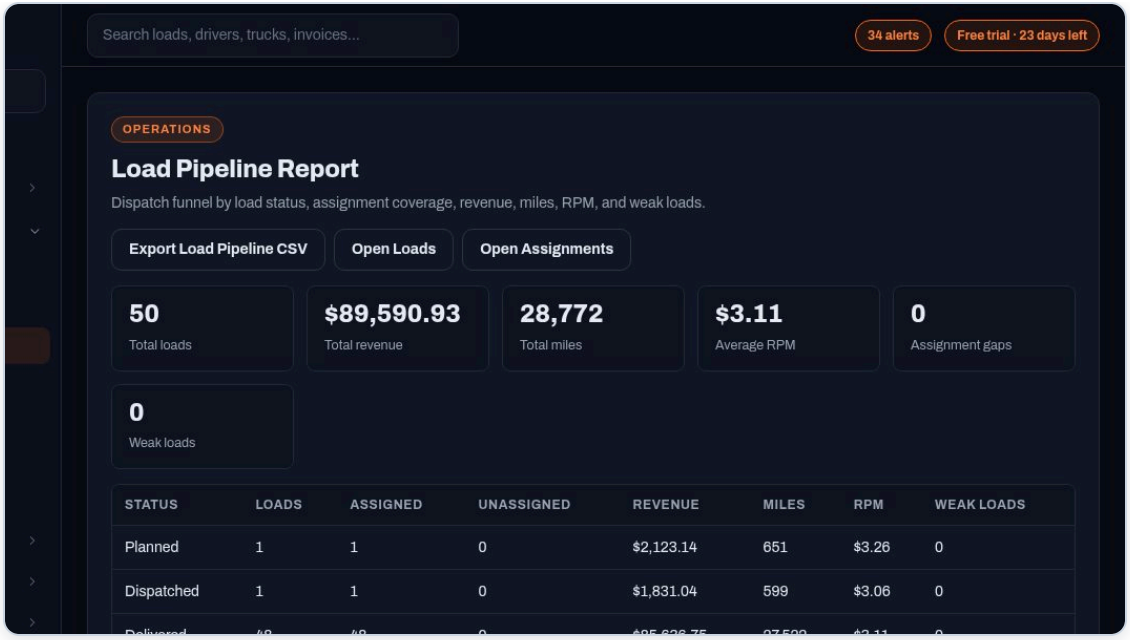
A load moves through three statuses:

STATUS	MEANING
Planned	Booked, not rolling yet.
Dispatched	Assigned and on the way.
Delivered	Done. Time for paperwork, invoice and driver pay.

Freight › Load Pipeline counts your loads by status, shows how many have a driver and truck, and flags weak loads.

OWNER, DISPATCHER **Dispatch & Ops › Dispatch Board** groups loads that still need a driver, loads on the road and finished loads. **Dispatch & Ops › Assignments** lets you change status, driver and truck for many loads from one table.

Drivers can also move their own load forward from their phone: Start trip sets it to Dispatched and Mark delivered sets it to Delivered.



Load Pipeline counts loads by status.

Closeout: finish the paperwork OWNER, DISPATCHER

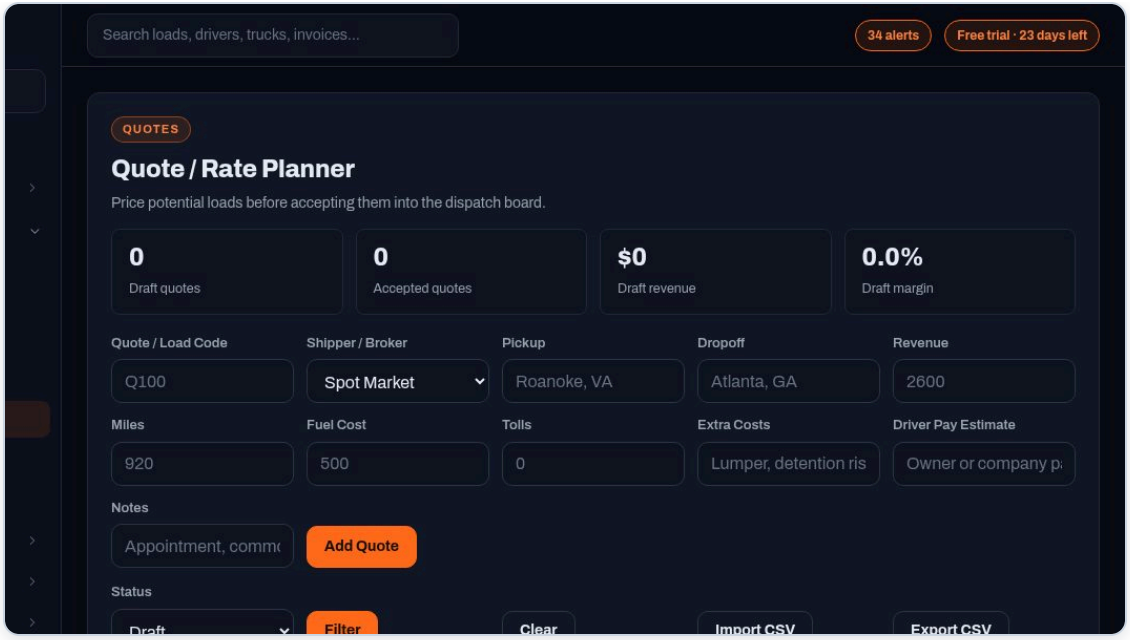
A load isn't really done until its paperwork is in. **Dispatch & Ops › Closeout** shows every load's checklist progress in one board, so you can see what is missing (for example a delivered load with no POD). Each load's **Save Closeout** on its own page updates the same checklist.

Quotes: price a load before you take it OWNER, DISPATCHER

1. Open **Freight › Quotes** (the page is called Quote / Rate Planner).
2. Fill in the **Quote / Load Code**, the broker, pickup, dropoff, **Revenue**, **Miles**, and your guesses for **Fuel Cost**, **Tolls**, **Extra Costs** and **Driver Pay Estimate**.
3. Tap **Add Quote**. The list shows your estimated profit and margin so you can decide whether the load is worth it.

- Tap **Accept** to turn a quote into a real load. It is created as Planned with the same code, lanes, miles and rate.
- Tap **Reject** if you pass on it.

Freight › Quote Conversion shows how many quotes you win and how much margin you expect. **Freight › Forecast** adds quotes, active loads, delivered loads that aren't invoiced yet and open invoices into a look-ahead of money coming in.



Quotes: price a lane before you book it.

Import loads OWNER, DISPATCHER

Moving from a spreadsheet? Use **Freight › Import Loads**. The columns are code, shipper, pickup, dropoff, miles, revenue, status, driver, truck and notes. See Set up your company for the import steps. Quotes have their own **Freight › Import Quotes**.

CHAPTER 5

AI Tools: scans, Copilot and Dispatcher

Take a photo of a rate con or receipt and let AI read it. Ask Copilot about your numbers.

Good to know before you use AI

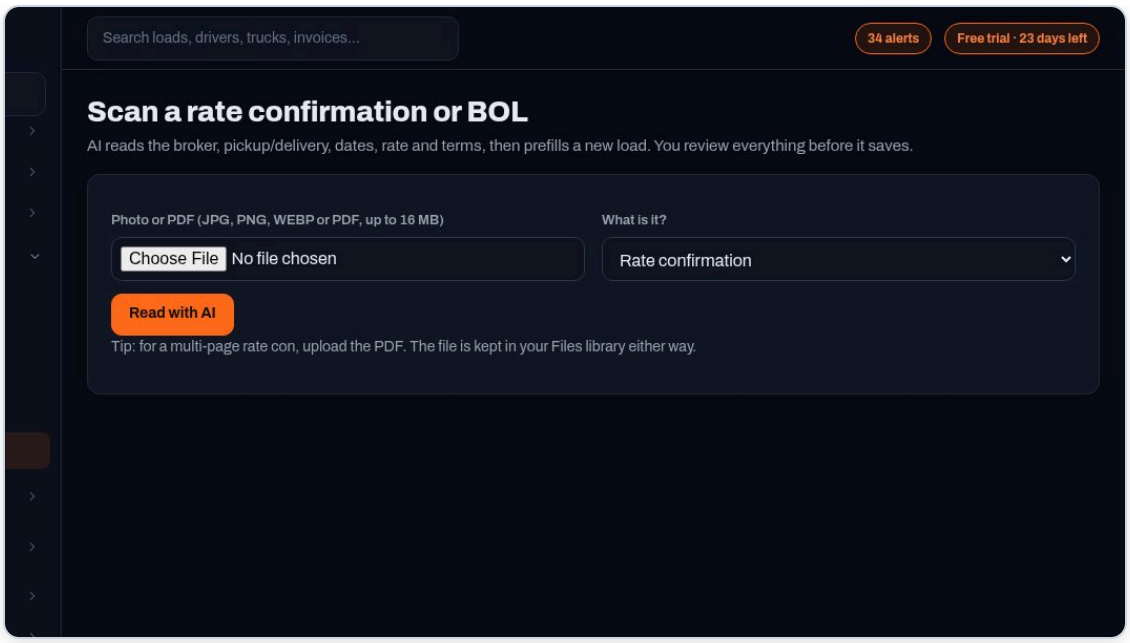
- AI tools are in the **AI Tools** menu group. They work during your free trial and while you're subscribed.
- **AI can be wrong.** Every scan shows you what it read and asks you to check it before anything is saved. Look at the numbers.
- There's a limit on how many AI requests one account can make in an hour, to keep things fair. If you hit it, wait a bit and try again.
- If AI says it can't read a file, you can always type the details in by hand.

Scan a rate confirmation or BOL

1. Open **AI Tools › Scan Rate Con / BOL** (or tap **Scan rate con** on the Loads page).
2. Tap the file box and take a photo, or choose a photo or PDF (JPG, PNG, WEBP or PDF). For a rate con with several pages, upload the PDF.
3. Under **What is it?** choose Rate confirmation, Bill of lading or Proof of delivery.
4. Tap **Read with AI**.
5. You see **What the AI found**: broker, MC, reference number, pickup and delivery places and dates, rate, miles, payment terms and commodity. Anything it couldn't find says not found.
6. Check it against the paper. Then tap **Create a load from this** to open a new load with the boxes filled in, or choose a load and tap **Attach** to file it on a load you already have.

> **GOOD TO KNOW** If the broker isn't in your Shippers / Brokers yet, it's added for you when you save the load. Leave the Shipper / Broker box on None.

Attaching a rate con, BOL or POD ticks the matching box on the load's closeout checklist. Every scanned file is also kept in **Compliance & Records › Files & Uploads**.

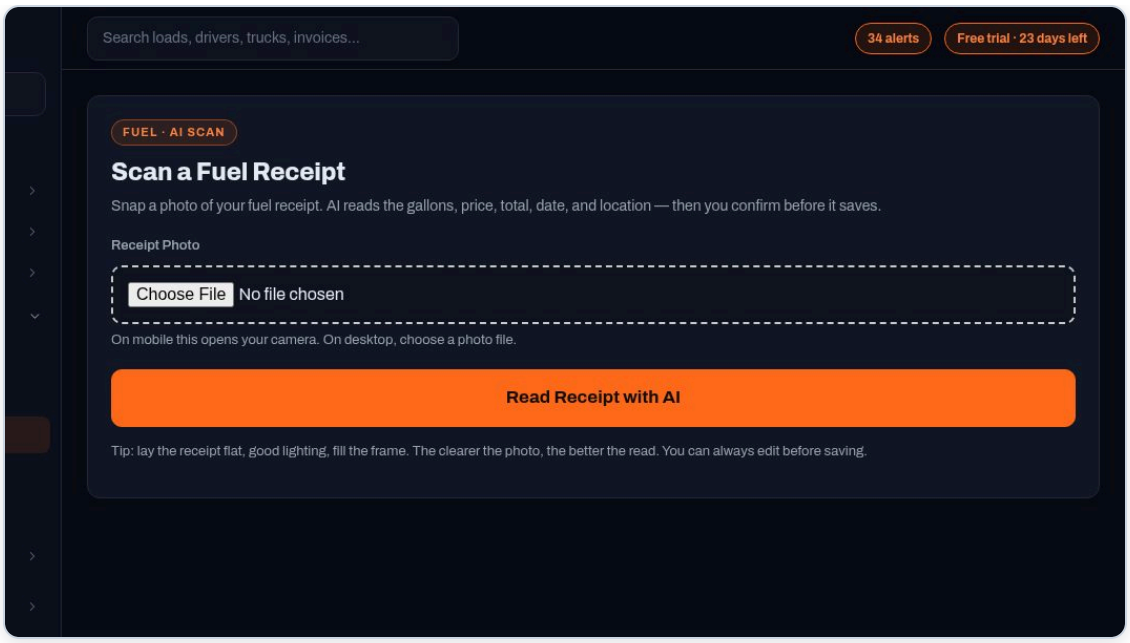


Scan a rate confirmation or BOL: upload a photo or PDF, then check what AI read.

Scan a fuel receipt

1. Open **AI Tools › Scan Fuel Receipt**.
2. Tap the photo box. On a phone it opens the camera. Lay the receipt flat with good light and fill the frame.
3. Tap **Read Receipt with AI**.
4. On the **Confirm the details** page, check the vendor, **Gallons**, **Total Amount ($)**, **Date** and **State**. Gallons, total and state are required. Add the odometer and truck if you want.
5. Tap **Save Receipt**. The receipt photo is saved with it.

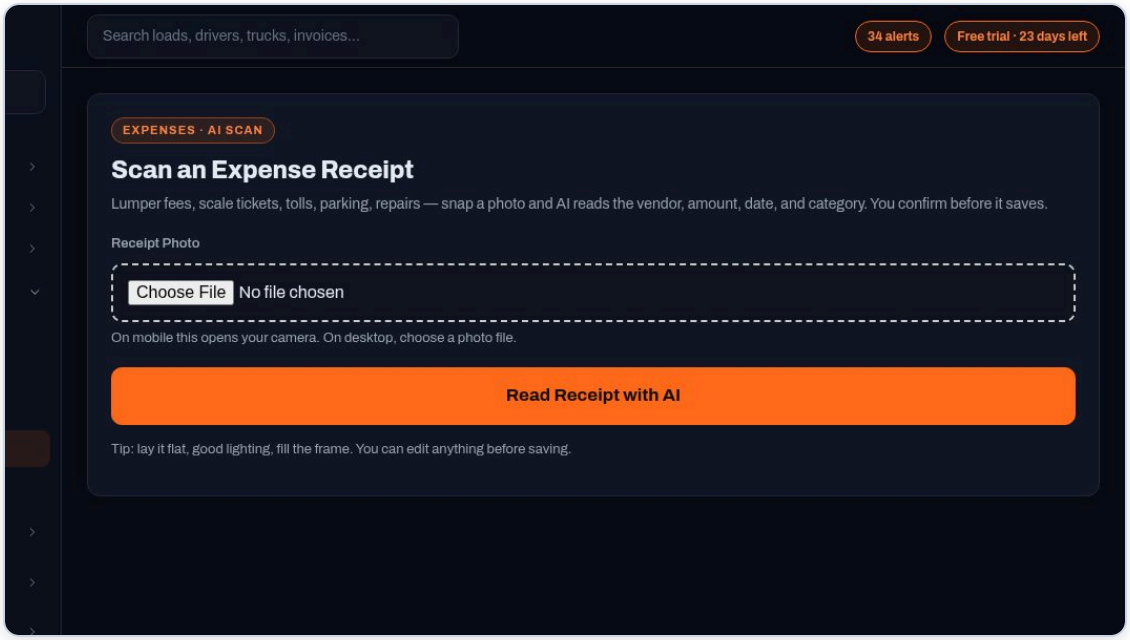
Saved fuel receipts feed **Compliance & Records › Fuel Efficiency**, cost per mile and your IFTA worksheet.



Scan Fuel Receipt.

Scan an expense receipt OWNER, ACCOUNTANT

Use **AI Tools › Scan Expense Receipt** for lumper fees, scale tickets, tolls, parking and repairs. It works just like the fuel scan. Tap **Read Receipt with AI**, check the **Vendor**, **Amount ($)**, **Category** and **Date** (amount and category are required), then tap **Save Expense**. The expense shows up in **Finance › Expenses**.



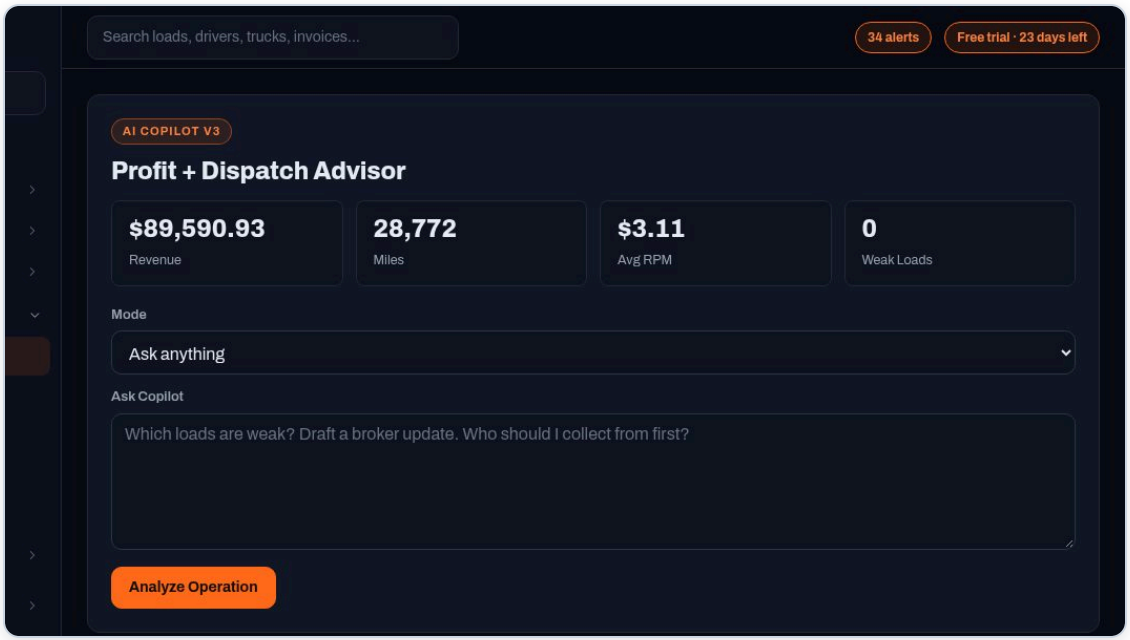
Scan Expense Receipt.

AI Copilot OWNER, DISPATCHER

AI Tools › AI Copilot answers questions about your own business using the loads, expenses, invoices and fuel you've entered. It only knows what's in FleetDesk, and it says so when data is missing.

1. Open **AI Tools › AI Copilot** (called Profit + Dispatch Advisor).
2. Pick a **Mode**: Ask anything, Profit audit, Dispatch review, Collections / AR, IFTA + fuel audit or Broker message.
3. Type your question, for example "Which loads are weak?", "Draft a broker update" or "Who should I collect from first?"
4. Tap **Analyze Operation**. The answer has a bottom line, what the numbers show, risks and recommended next steps.

> **TIP** The more complete your loads, fuel and invoices are, the better Copilot's answers are.



AI Copilot answers questions about your own numbers.

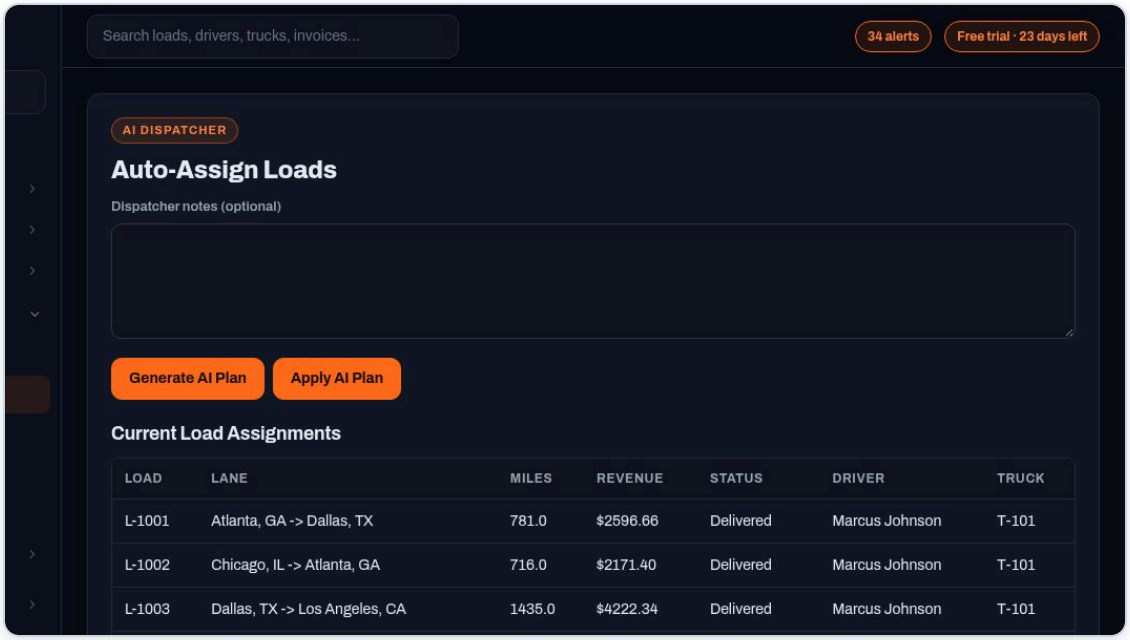
AI Dispatcher OWNER, DISPATCHER

AI Tools › AI Dispatcher suggests which driver and truck should take each load. You are always in charge: nothing changes until you tap Apply.

1. Make sure you have loads, drivers and trucks added.
2. Open **AI Tools › AI Dispatcher** (called Auto-Assign Loads). Add **Dispatcher notes (optional)** such as "Marcus is off Friday".

3. Tap **Generate AI Plan** and read the plan.
4. If you like it, tap **Apply AI Plan**. The page tells you how many assignments were applied.

> **CAREFUL** Apply AI Plan sets the driver, truck and status for every load in the plan. Read it first, and fix anything you disagree with on the load page afterward.



AI Dispatcher suggests which driver and truck fit a load.

Other places AI helps

- **AI Rate** on the load form suggests a price (see Loads).
- **AI Draft Notes** on an invoice writes friendly payment notes.
- **AI IFTA Analysis** on the IFTA page looks for gaps before quarter end.
- Collections can draft a follow-up email for a late invoice.

You always read and send these yourself. AI never sends anything on its own.

CHAPTER 6

Invoices, reminders and factoring

Bill the broker, email a PDF, chase late payments, and track factoring.

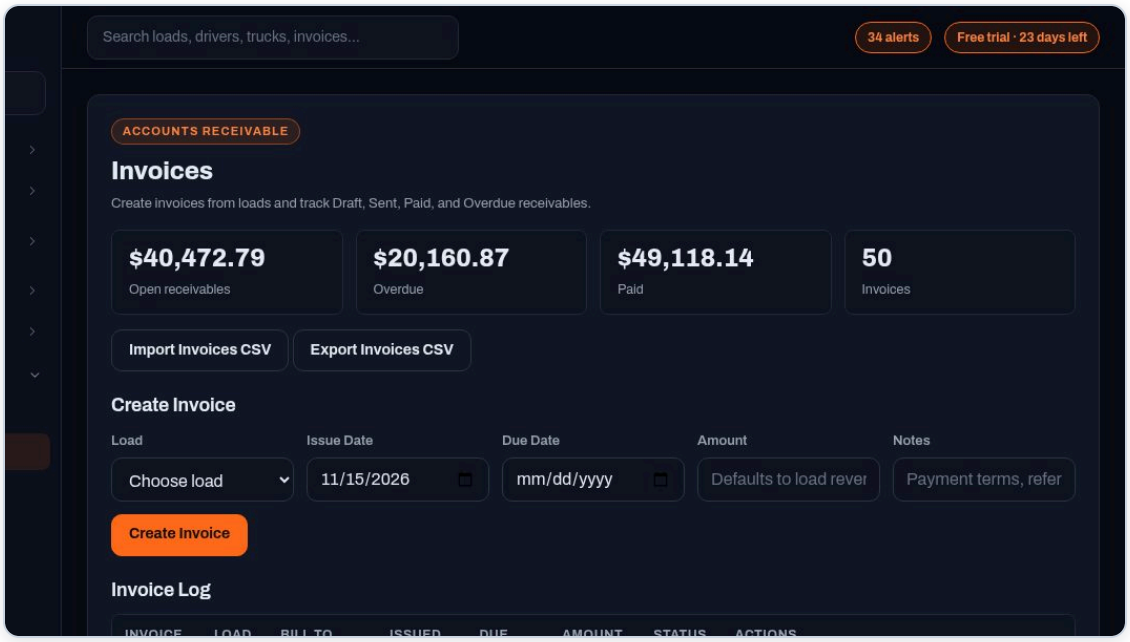
Create an invoice

The quickest way is from the load. Open the load and tap **Create Invoice From Load**. It makes an invoice for the load's revenue and uses the broker's payment terms for the due date (or your company default of Invoice Due Days). A load only gets one invoice.

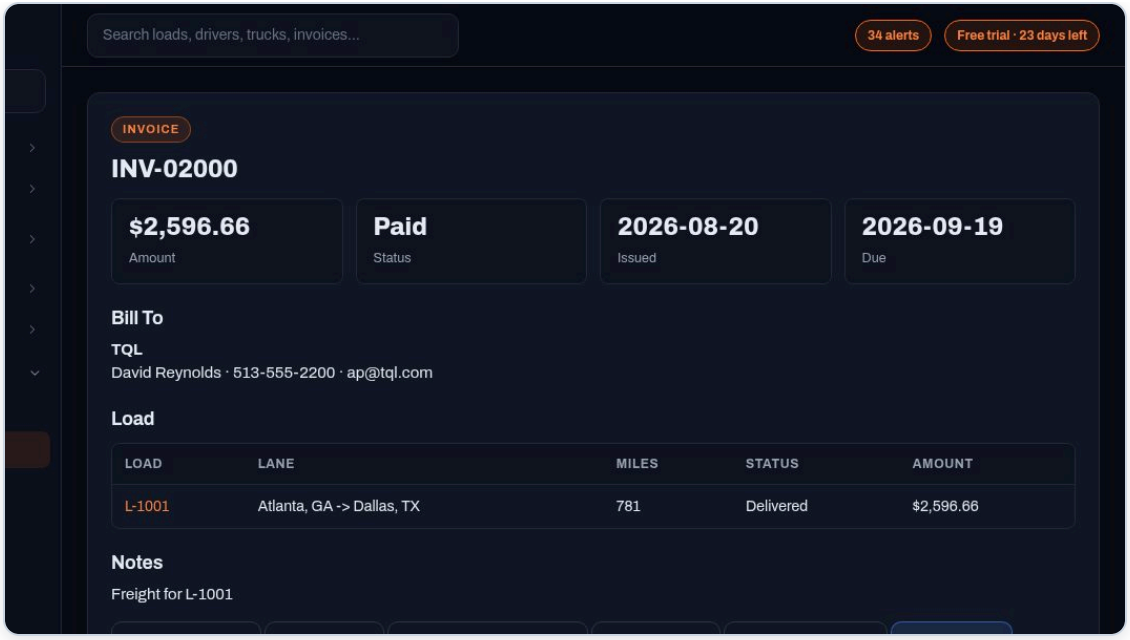
Or do it from **Billing & AR › Invoices**:

1. Under **Create Invoice**, choose the **Load**.
2. Check the **Issue Date** and **Due Date**. The amount defaults to the load's revenue. Type a different **Amount** if needed and add **Notes** such as a reference number.
3. Tap **Create Invoice**. It is numbered like INV-00001.

The invoice log shows each invoice's status: **Draft**, **Sent**, **Paid**, or **Overdue** (when the due date has passed and it isn't paid). Change the status in the row's drop-down and tap Save. FleetDesk doesn't mark an invoice Paid on its own, so do it when the money arrives.



Invoices: create one from a load and watch its status.



One invoice, with the buttons for PDF, email and factoring.

PDF and email

Open an invoice for its page. From there:

- **Download branded PDF** gives you a clean invoice with your company name and footer. **Print packet** opens a print view.
- **Email invoice** opens a short email form: the To box (filled in from the broker's email if you saved one), the subject and the message. The PDF is attached for you. Tap **Send invoice**.
- Every email is listed under **Email history**, including whether it was sent or failed.

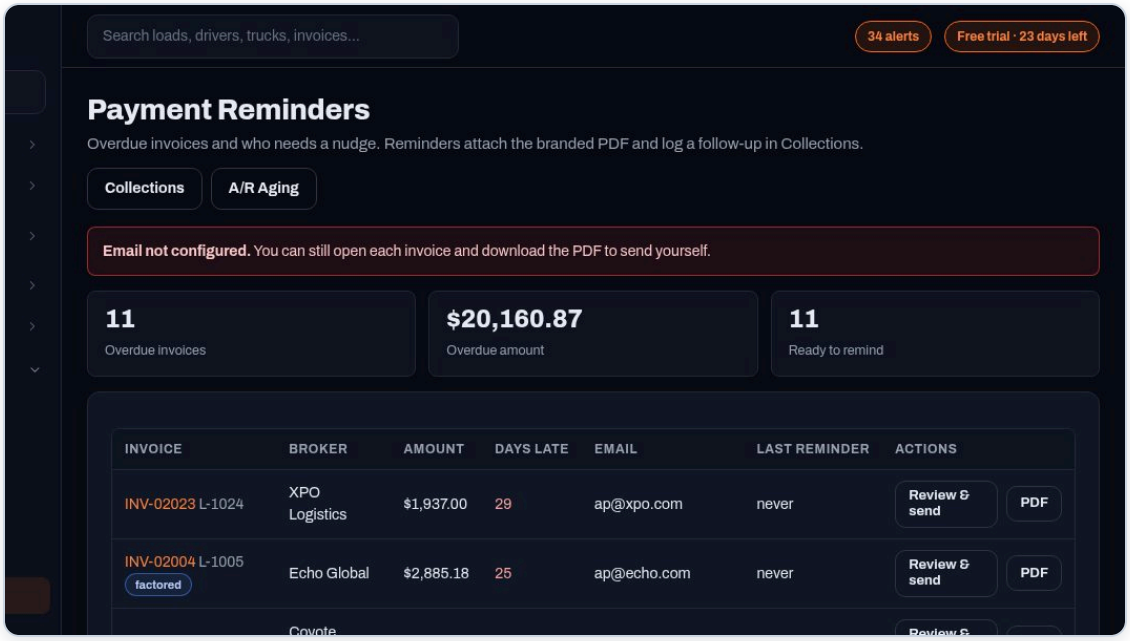
> **GOOD TO KNOW** If the page says **Email not configured**, sending isn't switched on for your account yet. Download the PDF and send it from your own email, or ask hello@fleetdeskpro.com to turn email on.

Chase late payments

1. Open **Billing & AR › Payment Reminders**. It lists overdue invoices, who owes you, how many days late and when you last reminded them.
2. Tap **Review & send** on one invoice, check the message and tap **Send reminder**. The branded PDF is attached.
3. To send many at once tap the **Send** button at the top. It skips invoices with no broker email and ones you reminded in the last 7 days, and sends at most 20 per click.

Each reminder is logged as a follow-up in **Billing & AR › Collections**, where you can also note who you talked to, a **Promise To Pay** date and a next follow-up date. **Billing & AR › A/R Aging** shows what each customer owes in buckets: Current, 1-30, 31-60, 61-90 and 90+ days.

You can also let the office assistant prepare reminder drafts for you each day. It never sends them by itself unless you turn that on (see Office assistant).



Payment Reminders lists overdue invoices that need a nudge.

Factoring

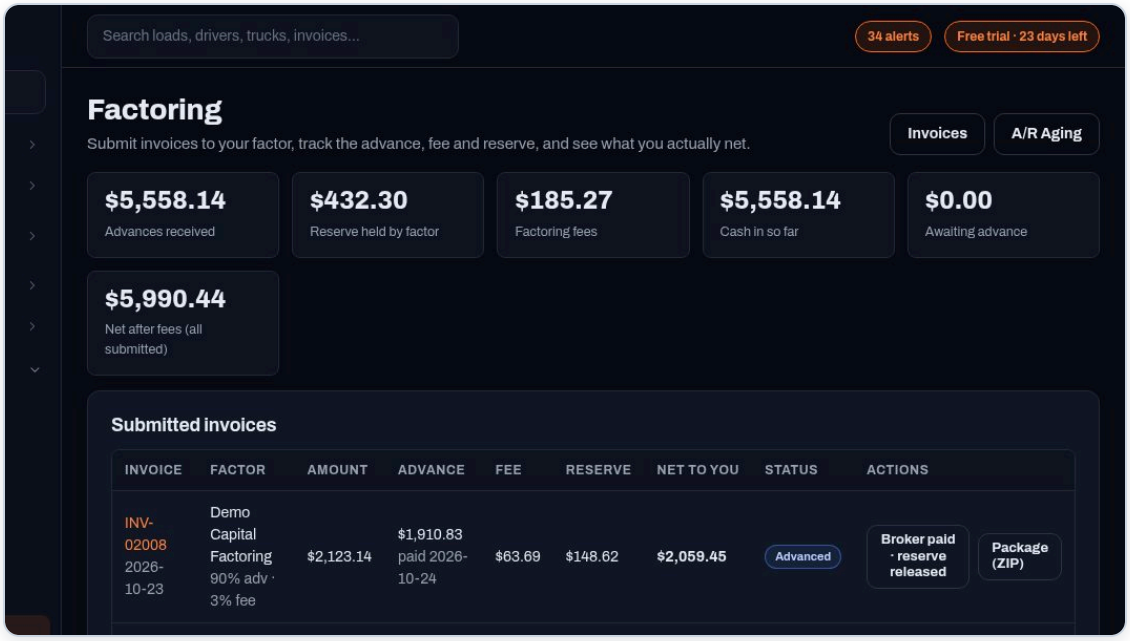
If you sell your invoices to a factoring company, **Billing & AR › Factoring** keeps track of the advance, the fee and the reserve so you know what you really net.

1. First tell FleetDesk about your factor. At the bottom of the page, under **Factoring companies**, enter the **New factor name**, **Advance %**, **Fee % of invoice** and their **Submission email**. Tap **Add factor**. Use the numbers from your own contract. The starting values (90% and 3%) are only placeholders.
2. Under **Invoices you could factor**, pick the factor next to an invoice and tap **Submit**. You see an estimate of the advance and fee first.
3. When the factor pays your advance, tap **Advance received**.
4. When the broker pays the factor and the reserve is released to you, tap **Broker paid · reserve released**. The invoice is marked Paid.

- **Package (ZIP)** downloads the invoice PDF together with the BOL, POD and rate con, ready to send to your factor.
- **Email to factor** sends that package to your factor's submission email (only when email is set up).

- **Rejected** records that the factor said no. **Undo** takes an invoice out of factoring if you submitted it by mistake.

The numbers at the top show advances received, reserve held by the factor, fees paid, cash in so far, money awaiting an advance, and what you'll net after fees. The fee is an estimate from your factor's rate, so check it against their statement.



Factoring: submit invoices to your factor and track the reserve.

CHAPTER 7

Expenses, fuel receipts, bills and driver pay

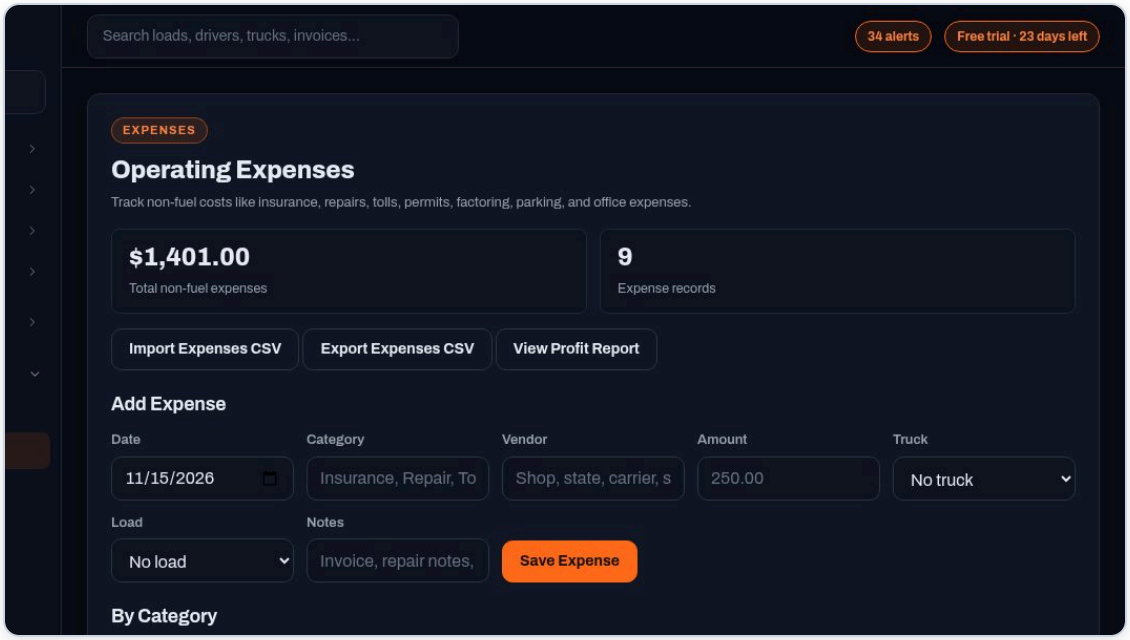
Record what you spend, see your profit, and pay your drivers.

Expenses

1. Open **Finance › Expenses** (called Operating Expenses).
2. Under **Add Expense** pick the **Date**, type a **Category** (like Insurance, Repair or Toll), the **Vendor** and the **Amount**.
3. Optionally pick the **Truck** and **Load** it belongs to, and add **Notes**.
4. Tap **Save Expense**.

The **By Category** table shows where your money goes. Fuel is tracked separately in Fuel Receipts, so don't enter it twice.

> **TIP** Got a paper receipt? Use **AI Tools › Scan Expense Receipt** and let AI read it for you (see AI Tools).



Expenses.

Fuel receipts

1. Open **Compliance & Records › Fuel Receipts** (called Fuel Purchases).
2. Fill in the **Date**, **State**, **Vendor**, **Gallons**, **Total Amount** and optionally the **Odometer**, **Truck** and **Load**.
3. Tap **Save Receipt**.

Fuel receipts are used for IFTA (gallons bought in each state), for miles per gallon and for cost per mile. **Compliance & Records › Fuel Efficiency** compares trucks and states. You can also scan a receipt with your camera (see AI Tools).

Bills you owe (payables)

Use **Finance › Payables** (Accounts Payable) for insurance, truck payments, permits and other bills. Fill in the **Vendor**, **Category**, **Bill Date**, **Due Date**, **Amount** and **Status**, then tap **Add Bill**. For bills that come every month, use **Recurring Bills** and tap **Add Recurring**. Bills that are due show up on the Day Close and Weekly Review pages.

See your profit

- **Finance › Profit** is your profit and loss for any dates. Pick a start and end date and tap **Run P&L**.
- **Finance › Load Profit** shows the margin on each load after fuel, expenses and driver pay.
- **Finance › Cash Flow** looks ahead at money coming in (invoices) against money going out (fuel, expenses, payroll, maintenance, compliance).
- **Finance › Vendor Spend** adds up what you spend with each vendor.
- **Finance › Bank Reconcile** helps you match paid invoices and payments to your bank statement.

Pay your drivers (settlements)

A **settlement** is the pay sheet for one load. Owner-operators are paid a percentage of the load (their **Owner-op Percent**). Company drivers are paid by the mile (their **Company Mileage Rate**). Set these on the driver, in Drivers.

1. After the load is delivered, open it and tap **Create Owner-Op Settlement** or **Create Company Settlement**. The driver must be assigned to the load.
2. Open the settlement. Add deductions (like fuel advances, escrow or insurance) or reimbursements under **Add Line Item** and tap **Add Item**.
3. Change the status from **Draft** to **Ready** when it has been checked, and to **Paid** when you've paid the driver. Tap **Save Status**.
4. Use **Print / Save PDF** to give the driver a copy.

Settlements & Payroll › Approval Queue lists every settlement waiting to be approved or paid, with **Approve** and **Mark Paid** buttons. **Settlements & Payroll › Pay Statements** gives each driver a statement, and **Settlements & Payroll › Final Payroll** is the full list of payroll.

> **GOOD TO KNOW** FleetDesk keeps track of what you owe each driver. It doesn't move money. You still pay your drivers yourself.

CHAPTER 8

IFTA worksheet

Get your quarterly fuel tax numbers ready from your loads and fuel receipts.

What it does

IFTA is the quarterly fuel tax you file with your home state. It needs three things for each state you drove in: the miles you drove there, the gallons of fuel you bought there, and that state's tax rate. FleetDesk builds the table for you from your loads and fuel receipts.

> **GOOD TO KNOW** The worksheet is a tool to help you prepare. Check it against your ELD or trip sheets before you file.

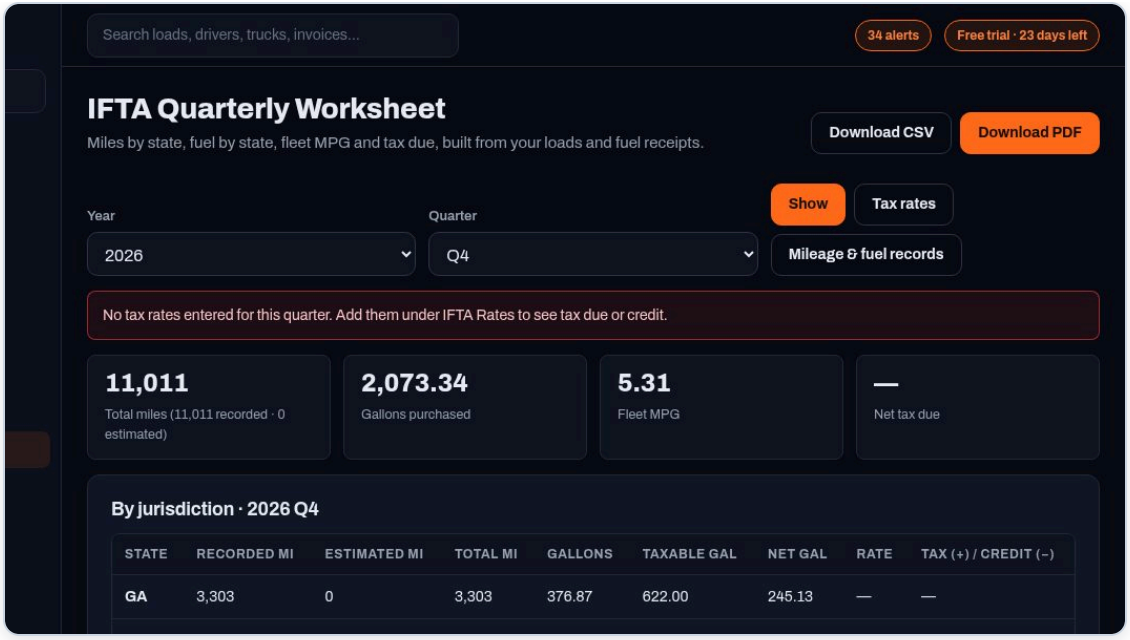
Get it ready, step by step

1. Enter your fuel. Add fuel receipts in **Compliance & Records › Fuel Receipts** (or scan them). Be sure each one has the right **State**.
2. Enter your miles. Either add miles by state in **Compliance & Records › IFTA** with **Add Jurisdiction Miles** and **Save Miles**, or just add pickup and dropoff as **City, ST** with dates on your loads. FleetDesk estimates miles for delivered loads that have none.
3. Enter the tax rates. Open **Compliance & Records › IFTA Worksheet**, tap **Tax rates**, and paste one **STATE,RATE** per line for the quarter (for example one line per state). FleetDesk doesn't guess rates because they change every quarter. Get the diesel rates from the IFTA, Inc. rate table (iftach.org) or your home state. Tap **Save rates**.
4. Open **Compliance & Records › IFTA Worksheet**, choose the **Year** and **Quarter** and tap **Show**.

The page shows total miles (split into recorded and estimated), gallons bought, fleet miles per gallon and the net tax due (or a credit). The **By jurisdiction** table has a row per state.

Loads whose miles were only estimated are listed under **Estimated from loads**. Their miles are spread across the states between pickup and dropoff, which is a guess. Tap **Save these as editable mileage records** to keep them, then replace them with real miles when you have them.

> **TIP** Warnings at the top of the worksheet tell you what is missing, such as a state with no tax rate.



The IFTA quarterly worksheet.

Download and file

Tap **Download PDF** for a printable worksheet or **Download CSV** for a spreadsheet. FleetDesk does not file your IFTA return for you. Use the numbers when you file with your state. Interest and penalties are not included.

The older **Compliance & Records › IFTA** page also shows a state summary and the mileage log, and has an **AI IFTA Analysis** button that looks for gaps. **Compliance & Records › Import IFTA** imports miles from a spreadsheet.

CHAPTER 9

Compliance, documents and files

Keep paperwork, permits and inspections in one place, with reminders before they expire.

Files and uploads

Compliance & Records › Files & Uploads is your paperwork library. Keep receipts, rate confirmations, BOLs and PODs next to the loads they belong to.

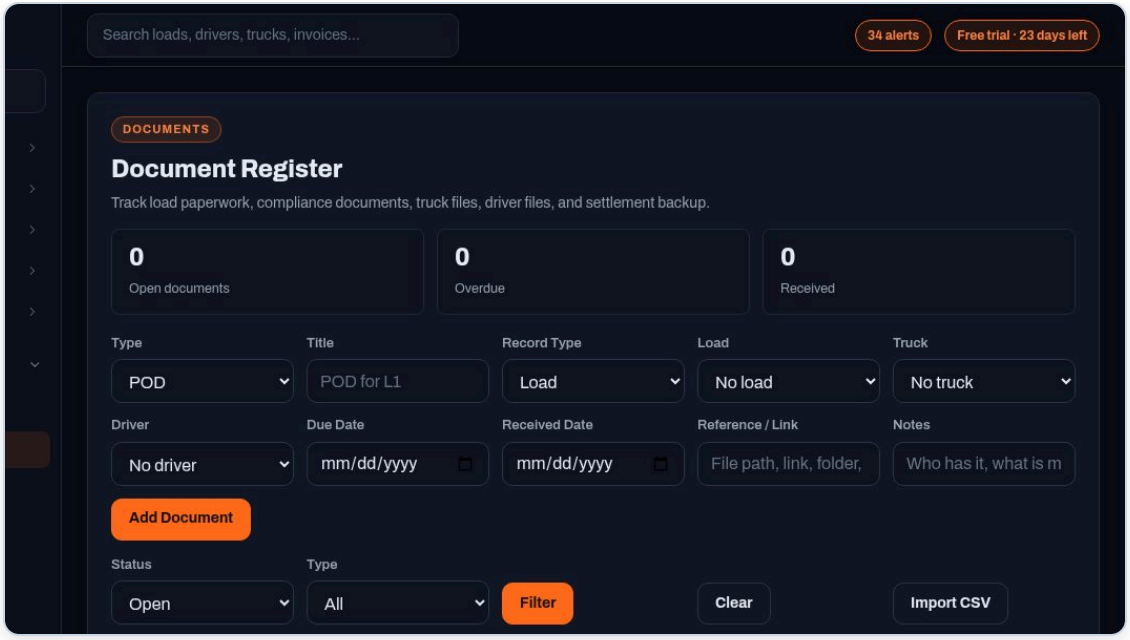
1. Open **Compliance & Records › Files & Uploads** and open **Upload a file**.
2. Choose a file (JPG, PNG, WEBP or PDF, up to the size shown on the page).
3. Pick the **Type** (Receipt, Rate confirmation, Bill of lading, Proof of delivery, Lumper receipt or Other) and, if it belongs to a load, choose the load.
4. Tap **Upload**.

Attaching a rate con, BOL or POD to a load ticks its closeout checkbox. Use **Type** and the filter to find things later. Files that were read with AI have an **AI details** button.

Document register OWNER, DISPATCHER, ACCOUNTANT

Compliance & Records › Documents is a list of the paperwork you need to track, with due dates. Add things like PODs, insurance, permits, registration and inspections. Fill in the **Type**, **Title**, what it's for (**Record Type**), any load, truck or driver, the **Due Date** and **Received Date**, and a **Reference / Link** such as where the file is. Tap **Add Document**.

Compliance & Records › Attachments (Attachment Control) shows records with no file reference, and **Compliance & Records › Doc Expirations** shows what is expiring soon.

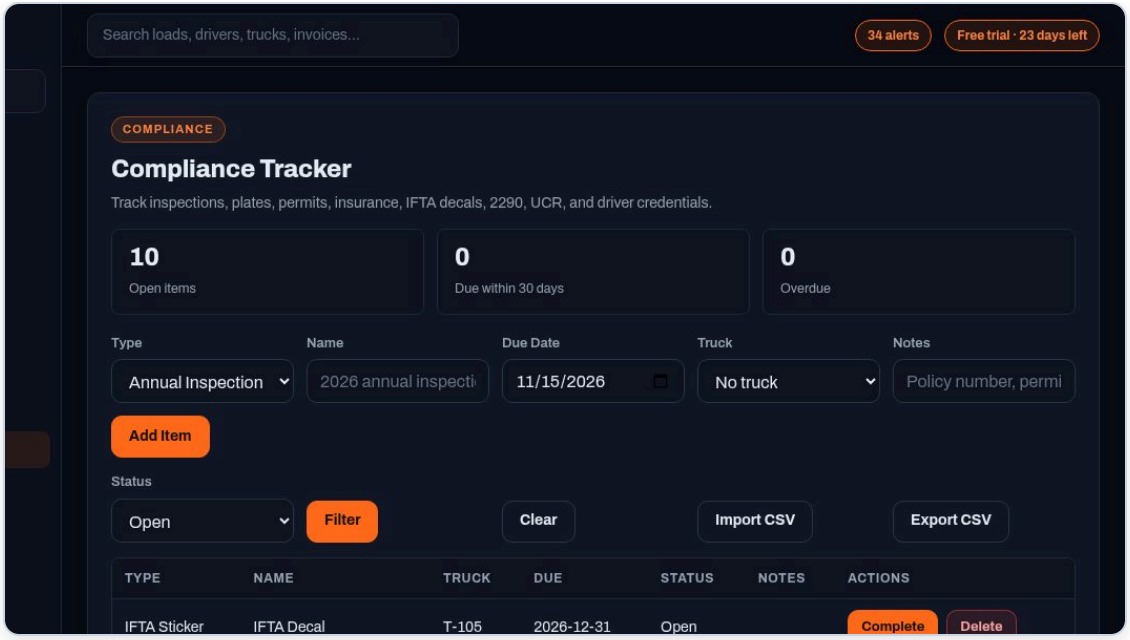


Documents: track PODs, BOLs, insurance and permits.

Compliance tracker OWNER, DISPATCHER

Compliance & Records › Compliance tracks the things the DOT cares about: annual inspections, registration, insurance, IFTA decals, 2290, UCR, permits, medical cards and driver licenses. Pick the **Type**, give it a **Name**, set the **Due Date**, pick a truck if it applies and tap **Add Item**.

Compliance & Records › Compliance Risk ranks what is overdue or due soon. **Compliance & Records › DOT Audit Binder** pulls documents, compliance, maintenance and safety records into one inspection-ready view. **Compliance & Records › Driver Qual Files** and **Compliance & Records › Equipment Files** gather the records for each driver and truck.



Compliance items and their due dates.

Maintenance and safety OWNER, DISPATCHER

Compliance & Records › Maintenance records service due by date or miles. Pick the truck and service, set what's due and tap **Add Service**. **Compliance & Records › Maintenance Costs** shows what you've spent on repairs.

Compliance & Records › Safety Incidents logs accidents, violations and inspections. Fill the form and tap **Add Incident**.

Calendar and reminders OWNER, DISPATCHER

Dispatch & Ops › Calendar puts due dates for compliance, maintenance, bills, collections and active loads on one calendar list. **Dispatch & Ops › Reminders** (the Reminder Center) lists what is overdue or coming up soon. The office assistant also watches expiring items for you (see Office assistant).

CHAPTER 10

ELD, HOS board and load boards

Connect your ELD to see drivers' hours. Connect a load board for rate checks.

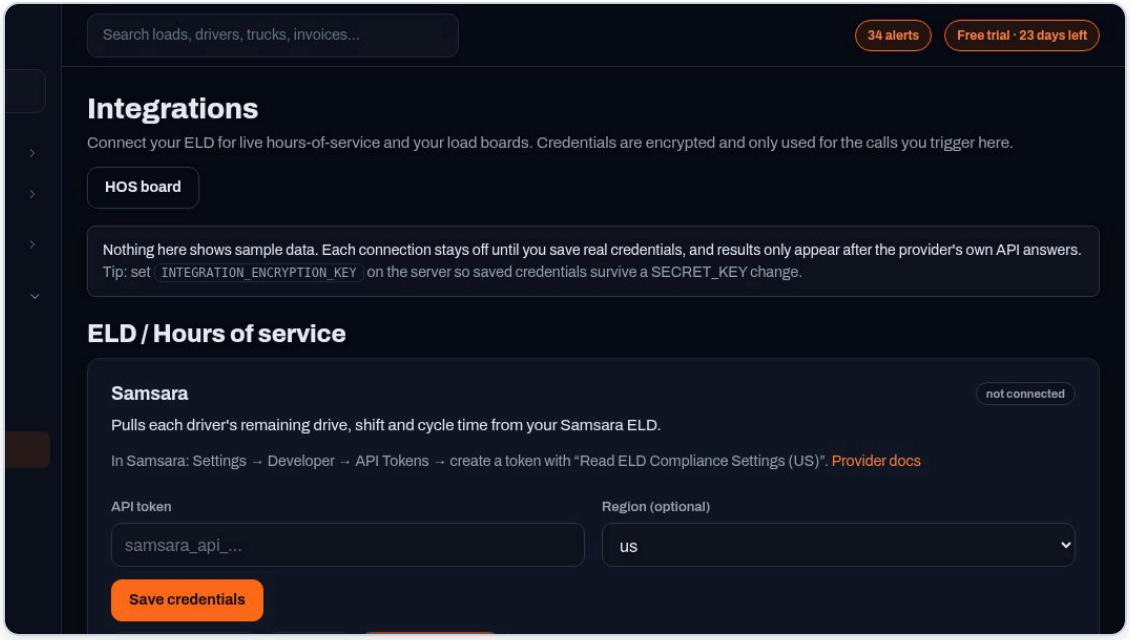
How integrations work here

- Only the **owner** can connect things in **Admin › Integrations** (Admin group). Dispatchers can read the HOS board.
- FleetDesk never shows made-up data. Nothing appears until you save real credentials and the provider answers.
- Your credentials are stored encrypted and only used when you press a button.

Connect your ELD (Samsara or Motive) OWNER

1. Get an API token from your ELD provider. The Integrations page says exactly where to find it. In Samsara it is Settings, Developer, API Tokens (with read access to ELD compliance settings). In Motive an admin creates an API key under Settings, Developers with hours of service read access.
2. Open **Admin › Integrations** and find your provider card. Fill in the fields and tap **Save credentials**.
3. Tap **Test connection** to check the token works.
4. Tap **Enable**.
5. Tap **Sync HOS now**. You land on the HOS board with your drivers' hours.

The button on each card also shows the last result, such as when it last synced. **Disable** pauses it and **Disconnect** deletes the saved credentials.



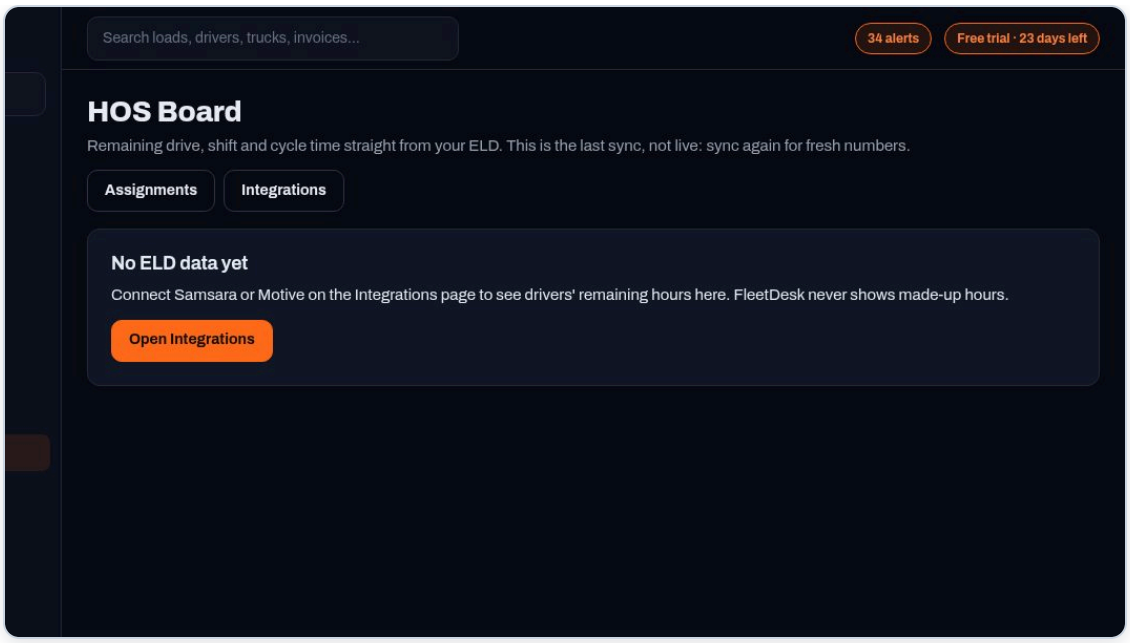
Integrations: connect your ELD and load boards (owner only).

HOS board

Fleet & Drivers › HOS Board shows each driver's remaining **Drive left**, **Shift left** and **Cycle left**, their duty status and when the number was fetched.

- It is the **last sync, not live**. The owner can tap **Sync HOS now** on the Integrations page for fresh numbers.
- Drivers are matched to your FleetDesk drivers by their **exact name**. If one shows **not matched**, rename the driver in FleetDesk to match the ELD.
- Drive left under 2 hours is shown in red.
- Your ELD is always the official record. FleetDesk only shows what the ELD last reported.

If you haven't connected an ELD, the board says No ELD data yet. That is normal.



The HOS Board shows the last sync from your ELD.

Load boards OWNER

Three load board cards are available. Be aware of what works today:

PROVIDER	WHAT YOU CAN DO NOW
Truckstop	Save your Truckstop API credentials, test, enable and run a **Lane rate check** (origin, destination and equipment). It shows an estimated rate and range.
DAT One	Save and verify your DAT service account. Load search is not switched on yet; it needs DAT's approval.
123Loadboard	Save your credentials once they approve your application. Testing and search are not available yet.

The rate check is under the Truckstop card once it's connected and enabled. Type the cities and states, pick the equipment and tap **Check rate**.

GOOD TO KNOW Each card explains what the provider requires, usually an application with the provider. FleetDesk can't load-search on DAT or 123Loadboard until they approve it.

CHAPTER 11

Reports and your daily, weekly and month-end routine

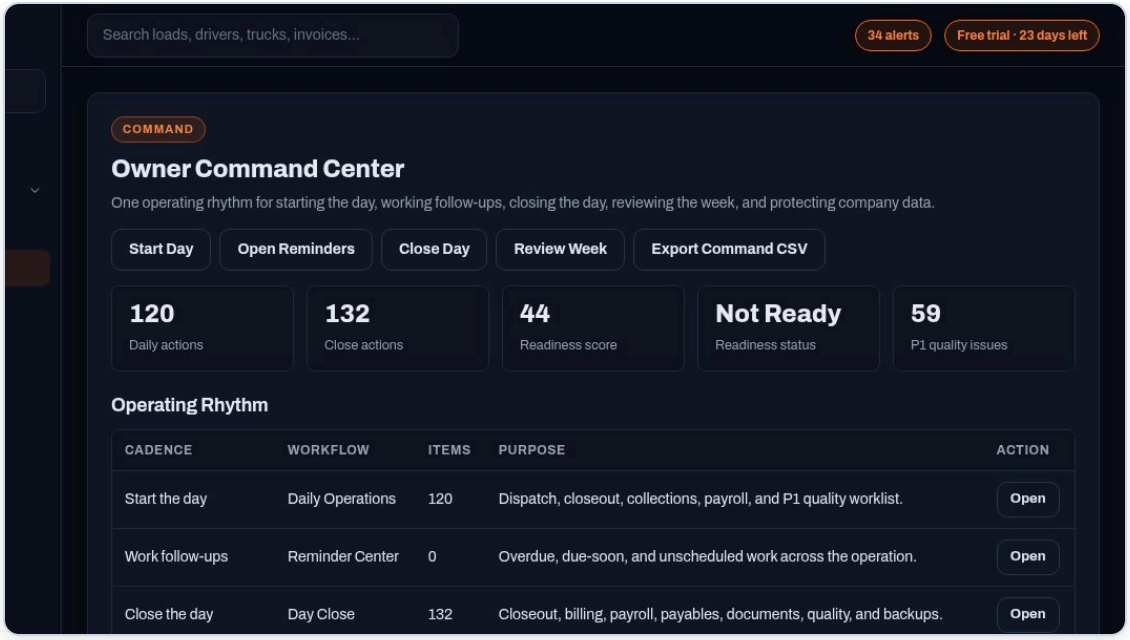
A simple routine that keeps the books and the paperwork clean.

The routine in one glance

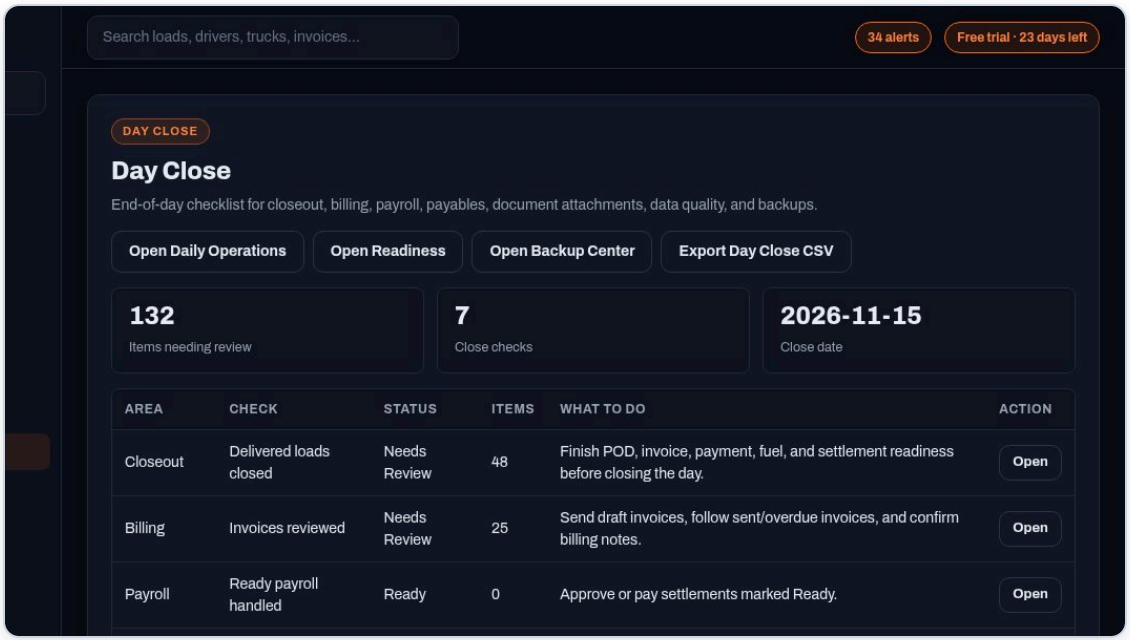
WHEN	PAGE	WHAT IT'S FOR
Every morning	**Overview › Daily Operations**	A worklist of loads to dispatch, loads on the road, closeouts, overdue invoices, payroll ready to pay and data problems.
Through the day	**Dispatch & Ops › Reminders**	Overdue and coming-soon work.
Every evening	**Overview › Day Close**	Seven checks: closeout, billing, payroll, payables, documents, data quality and backup.
Every week	**Overview › Weekly Review**	Revenue, money owed to you, payroll, bills due in 7 days, paperwork gaps and backups.
Every month	**Overview › Month-End Close**	Ten checks: revenue, receivables, payables, payroll, fuel, IFTA, expenses, documents, data quality and a backup.

Overview › Command Center pulls all five into one page with a count next to each, so you can start there. Each row has an **Open** button.

> **TIP** Dispatchers mostly live in Daily Operations and Day Close. Accountants use Day Close, Weekly Review and Month-End Close (their menu doesn't include Daily Operations or Reminders).



Command Center: your daily, weekly and month-end work in one place.



Day Close: seven end-of-day checks.

Reports

Reports & Audit › Reports (Company Reports) shows revenue, fuel, expenses, payroll, profit, margin, open and overdue invoices and open closeouts for any dates. Pick the dates, tap **Run Report** and use **Export Report CSV** to open it in a spreadsheet. Lower down it lists weak loads, closeout gaps and an invoice snapshot.

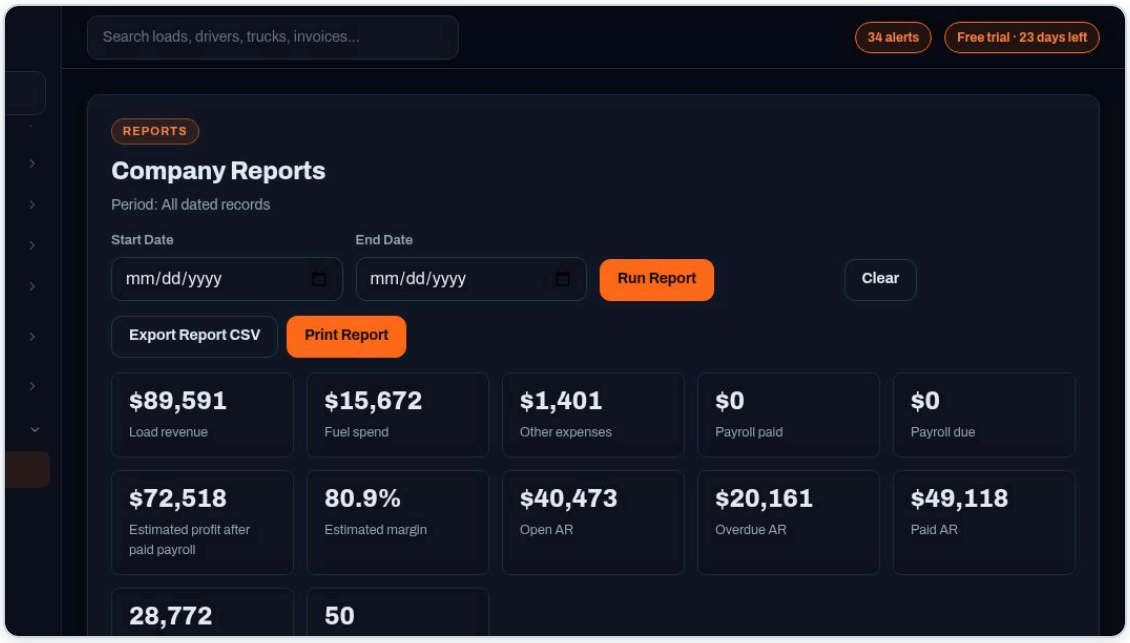
- **Overview › Executive** is a one-page owner summary.

OWNER, DISPATCHER

- **Reports & Audit › Exceptions** lists gaps such as loads missing a driver or truck, delivered loads with no POD, no invoice or no settlement.
- **Reports & Audit › Data Quality** and **Reports & Audit › Fix Queue** list records with missing or odd data, ranked P1 (fix first) to lower. A clean score means billing, payroll and reports can be trusted.
- **Reports & Audit › Print Packets** lists your recent invoices and settlements with an **Open Packet** button for a print-ready copy.
- **Reports & Audit › Global Search** finds loads, drivers, trucks and invoices.

OWNER, ACCOUNTANT **Reports & Audit › Export Center** downloads almost anything as a CSV spreadsheet.

OWNER Owners also have **Reports & Audit › Audit Log** to see who did what, and **Admin › Backup Center** for backups.



Company Reports.

What the numbers mean

Overview › KPI Glossary explains every number in plain words, such as Revenue / Mile, Estimated Profit, Margin, Purchased MPG, IFTA Gap, Open AR, Overdue AR and Payroll Due. **Overview › Workflow Guide** is a one-page map of which page to use for which job.

Backups OWNER

Open **Admin › Backup Center** to download your backup manifest, the export index, the audit log and the CSV spreadsheets that protect your data. Do this at the end of each week or month. **Admin › Restore Drill** is

an eight-step checklist for confirming your backup files are complete.

CHAPTER 12

Driver guide: your loads on your phone

See your loads, start a trip, mark it delivered and upload your POD.

Log in

1. Your company gives you an email and a temporary password. Open fleetdeskpro.com in your phone's browser, or open the FleetDesk Pro app.
2. Log in. You go straight to **My loads**.
3. Change your password: tap **Account** at the top, then **Change password**. Use at least 8 characters.

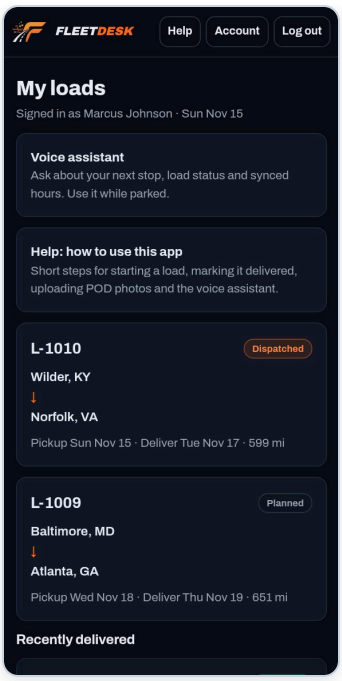
> **TIP** Save the page to your phone's home screen, or use the FleetDesk Pro app, so it's one tap away.

My loads

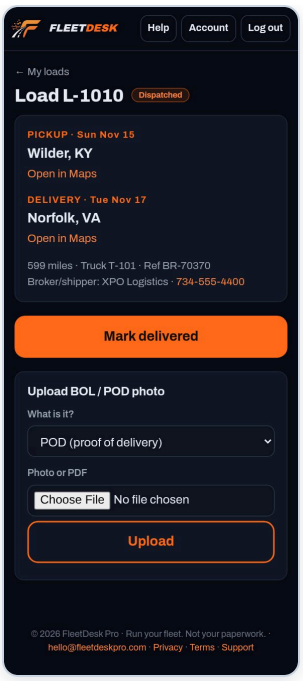
The home screen shows your active loads. Each card shows the load number, whether it is Planned or Dispatched, the pickup and delivery places, the dates and the miles. Under it, **Recently delivered** shows your last finished loads.

If you see **No active loads**, dispatch hasn't assigned you one yet. It shows up here as soon as they do. You only ever see **your own loads**. You never see rates, pay or other drivers.

The first card on the screen is the **Voice assistant** (see the next guide).



My loads



One load, with Mark delivered and the BOL / POD upload

Open a load

Tap a load to see:

- The **pickup** and **delivery** places and dates, each with an **Open in Maps** link to open your map app.
- The miles, your truck, the broker's reference number, and the broker's name and phone number. Tap the phone number to call.
- A big button to move the load forward, and a place to upload photos.

Start the trip and mark delivered

1. When you're ready to roll, open the load and tap **Start trip**. The load changes from Planned to Dispatched.
2. After you unload, tap **Mark delivered**. The load changes from Dispatched to Delivered, and dispatch is told.

> **GOOD TO KNOW** There is one button at a time, and it only moves a load forward one step. If you tapped by mistake, tell dispatch. They can fix it.

Upload your BOL or POD

1. Open the load and find **Upload BOL / POD photo**.

2. Under **What is it?** choose BOL (bill of lading), POD (proof of delivery) or Other. POD is already chosen for you.
3. Tap the file box. Your phone opens the camera. Take a clear, flat photo with the whole page in the picture. You can also choose a photo or PDF you already have. In the FleetDesk Pro app there is a **Take photo with camera** button.
4. Tap **Upload**. You'll see **Uploaded. Dispatch can see it now.**

The file shows under **Files on this load**. Your office is told the POD is in, so they can bill the broker faster.

> **TIP** Take the photo in daylight or good light and hold the phone still. A blurry POD can delay your pay.

CHAPTER 13

Voice assistant (use only while parked)

Ask about your next stop or hours, or say "start trip" or "mark delivered". Parked only.

Safety first

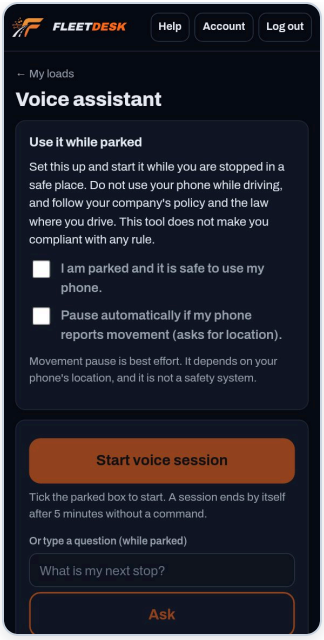
CAREFUL Use the voice assistant **only while you are parked** in a safe place. Don't use your phone while driving, and follow your company's rules and the law where you drive. This tool does not make you compliant with any rule.

The assistant is for **driver logins only**. Owners, dispatchers and accountants don't see it.

Start a voice session

1. On your home screen tap **Voice assistant**.
2. Read the safety note and tick **I am parked and it is safe to use my phone.** You can also tick the box to pause automatically if your phone reports movement. That asks for your location and is best effort only.
3. Tap **Start voice session**. Allow the microphone if your phone asks.
4. Say your question. The assistant answers on the screen and out loud if your phone supports it.
5. Tap **End session** when you're done. A session also ends by itself after 5 minutes without a command.

Prefer to type? Use the box **Or type a question (while parked)** and tap **Ask**. Typing always works, even if voice doesn't.



The voice assistant: tick the parked box first.

What you can say

SAY SOMETHING LIKE	WHAT YOU GET
"What is my next stop?"	Your next pickup or delivery place and the date on file.
"What is the status of my load?"	Which of your loads are Planned or Dispatched.
"How many hours do I have left?"	Your drive, shift and cycle time left from the last ELD sync, with the time of that sync.
"Start trip" or "I'm rolling"	Offers to set your load to Dispatched. You must say yes to confirm.
"Mark load delivered"	Offers to set your load to Delivered. You must say yes to confirm.

If you have more than one active load, say the load number, for example **mark load L101 delivered**.

When it asks you to confirm, say **yes** or tap **Yes, confirm**. Say **no** or tap **No, cancel** to stop. A confirmation runs out after 90 seconds.

What it cannot do

- It can't change your hours of service or logs. Use your ELD.
- It can't give directions, routes or ETAs. Use your navigation app and dispatch.
- It won't tell you rates or pay, and it never talks about other drivers or their loads.
- Hours are the **last sync from your ELD provider**, not live. If the sync is old it tells you to check your ELD. If your company hasn't connected an ELD, it says no hours are available.

- It only listens while the page is open and your screen is on. It is not an always-on listener.

How it works on your phone

Your phone's browser turns your speech into text. That's done by your phone maker's speech service, which may send audio to them. FleetDesk only receives the text and doesn't store it. At the bottom of the page, **What works on this phone** shows a checklist: secure connection, speech input, spoken replies, location and typing. If speech input says no, use typing.

Voice won't hear you? In your phone's Settings, allow **Microphone** and **Speech Recognition** for FleetDesk Pro (or for your browser, if you're not using the app).

CHAPTER 14

Office assistant: inbox, alerts and drafts

A helper that watches for late invoices, missing PODs and expiring paperwork. It never sends anything by itself unless you turn that on.

What it does and doesn't do

- Once a day it looks through your FleetDesk data for three things: **overdue invoices**, **delivered loads with no POD**, and **compliance items or documents that are expiring**.
- It leaves **alerts** in your inbox and can prepare **draft payment reminders** for you to review.
- It **never** books loads, moves money, submits to factoring, changes bank details, deletes data or signs anything.
- It **does not send emails on its own** unless the owner turns that on in Assistant Settings. That switch is **off by default**.
- It only knows what is in FleetDesk. If a broker paid you but you never marked the invoice Paid, it will still say overdue.

The Assistant Inbox

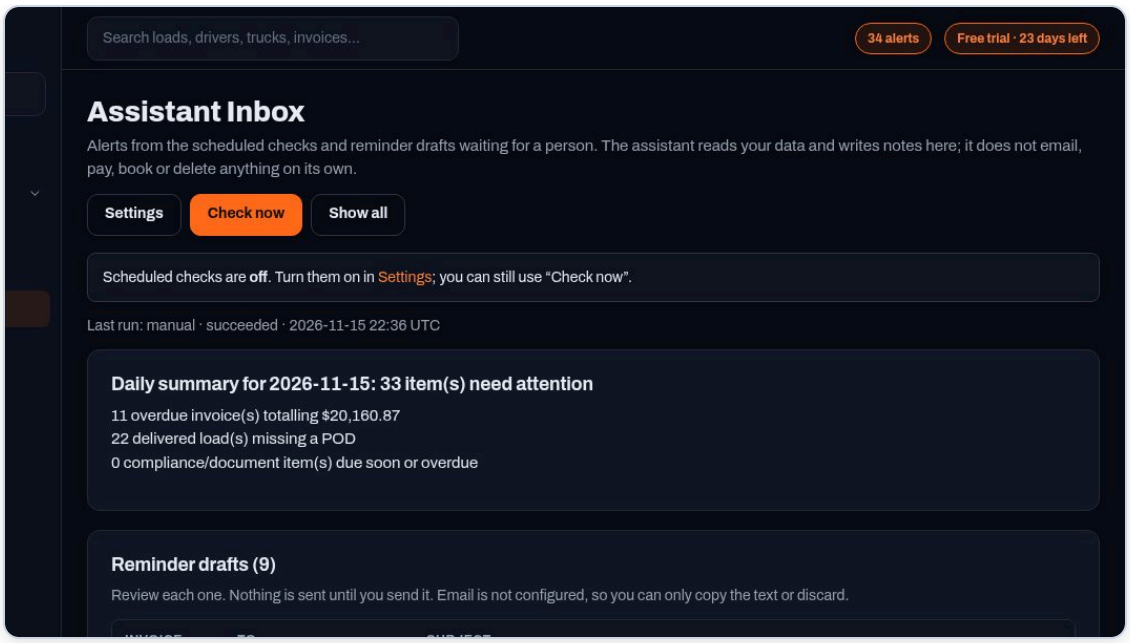
Open **Overview › Assistant Inbox** (first group, Overview). If any alerts are open, you also see a badge such as **2 alerts** at the top of every page. Tap it to jump here.

- **Alerts** show a type (Overdue invoice, Missing POD, Compliance / documents or Daily summary), what's wrong, and when it was last seen. Tap the title to go to the record.
- **Dismiss** hides an alert you have handled or don't care about. **Show all** also shows dismissed and resolved ones; **Open only** goes back.
- A banner tells you if scheduled checks are off, or if the scheduler hasn't reported in.

Each role sees its own alerts:

ALERT	WHO SEES IT
Overdue invoice	Owner, Accountant
Missing POD	Owner, Dispatcher
Compliance / documents expiring	Owner, Dispatcher
Daily summary	Owner

If you use the phone app and allowed notifications, you get one notification per check summarising any new alerts.



The Assistant Inbox: daily summary, alerts and reminder drafts.

Reminder drafts OWNER, ACCOUNTANT

When the assistant finds a late invoice (one that isn't factored) with a broker email on file, it can prepare a **draft** reminder. Drafts are listed in the inbox under **Reminder drafts**. Owners and accountants see them.

1. Tap **Review & send** on a draft.
2. Read and edit the **To**, **Subject** and **Message**. The invoice PDF is attached.
3. Tick **Yes, send this email to ... now** and tap **Send**. Nothing goes out until you do both.

Tap **Discard** to throw a draft away. If email isn't set up for your account you can download the PDF and send it yourself.

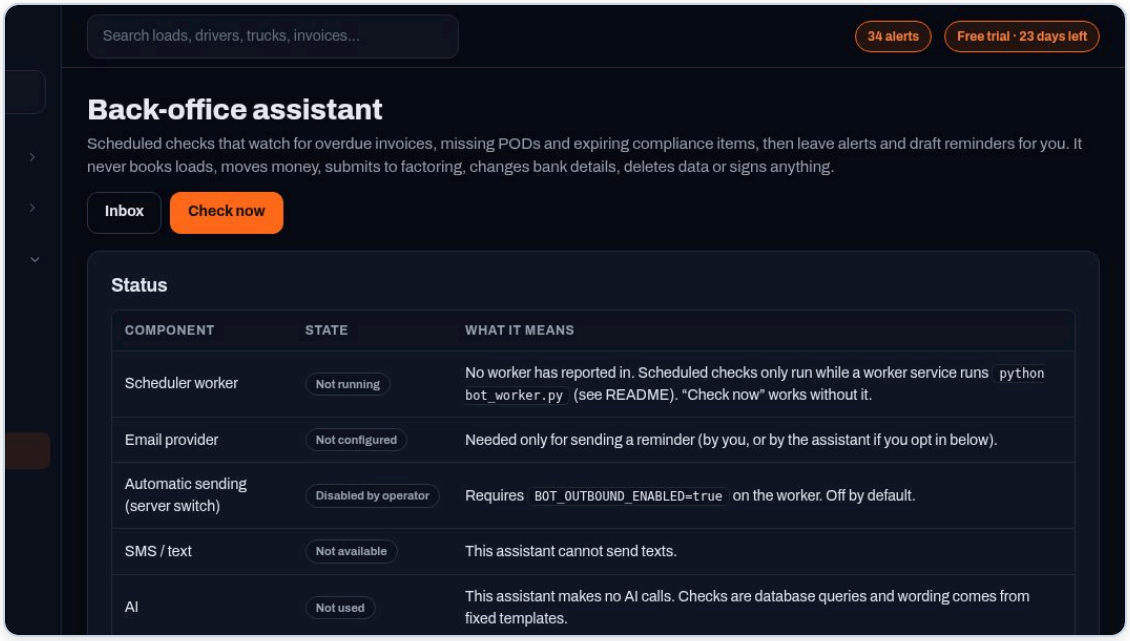
Assistant Settings (owner) OWNER

Open **Admin › Assistant Settings** (Admin group). It begins with a **Status** table showing whether the scheduler is running, whether email is set up and whether automatic sending is allowed.

1. Tick **Run the checks automatically every day**. It starts off.
2. Choose what to check: overdue invoices (and how many days to wait after the due date), delivered loads missing a POD (days to wait, and how far back to look), and compliance items expiring (how many days ahead).
3. Choose whether you want a **Daily summary** and **draft reminders**, the hour it should run and your timezone.
4. Tap **Save settings**.

The inbox and this page both have a **Check now** button (owners only) that runs the checks right away. You don't need to wait for the daily run.

> **TIP** Scheduled checks only run while FleetDesk's background worker is running. If Settings says **Not running**, **Check now** still works. Email hello@fleetdeskpro.com if you think the worker is down.



Assistant Settings: what to check, and the auto-send switch (off by default).

Automatic reminder emails (off by default) OWNER

> **CAREFUL** By default the assistant **never emails anyone**. Turning this on means brokers can receive emails from your company without you reviewing them first.

To turn it on, the server must allow it and then the owner must opt in:

1. In Assistant Settings the status line **Automatic sending (server switch)** must say it's allowed. If it says Disabled by operator, ask support to enable it.
2. Set the limits: **Max emails per day**, **Days between reminders for one invoice**, and **Only when at least this many days overdue**.
3. Tick **Allow the assistant to email these reminders automatically** and tick the box confirming you understand. Tap **Save settings**.

- It only emails overdue invoices that are not factored, to the broker email you saved, using the standard reminder with the invoice PDF.
- Each invoice gets at most one automatic email per day, and never more often than your cool-down.

- **Recipient preview** shows exactly who would get an email on the next run.
- Tap **Turn off automatic sending now** at any time to stop it.

Everything the assistant does is recorded under **Recent runs** and **Action log** at the bottom of Settings.

CHAPTER 15

Your account and password

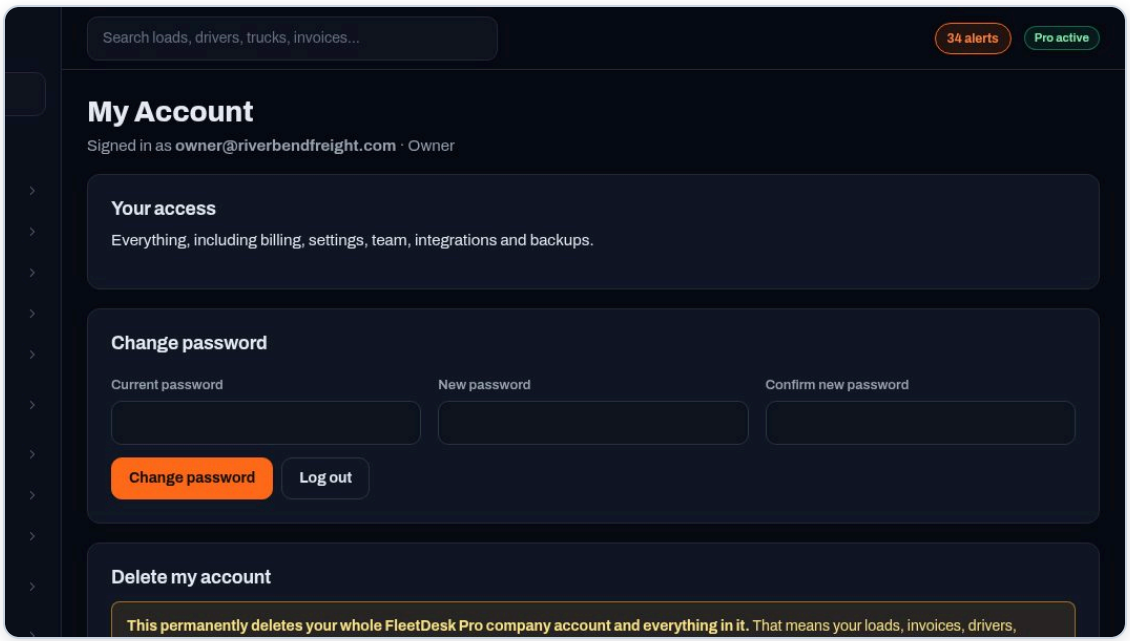
Change your password, log out, delete your account, and what to do if you're locked out.

My Account

Tap your email at the bottom of the menu (or **Account** at the top if you're a driver) to open **My Account**. It shows who you're signed in as, your role and what your role can do.

1. Under **Change password** type your **Current password**.
2. Type your **New password** (at least 8 characters) twice.
3. Tap **Change password**.

> **TIP** Use a password you don't use anywhere else. FleetDesk never asks for your password by email or phone.



My Account.

Forgot your password or locked out

After 8 wrong tries in a row, log in is paused for about 15 minutes. Wait, then try again. If you forgot your password, email hello@fleetdeskpro.com from the address on your account with the subject **Password Reset**. You'll get a temporary password. Log in with it and change it right away.

Team members (dispatchers, accountants and drivers) can ask the company owner to use **Reset password** in Team Access instead.

Delete your account

You can delete your account yourself, on the website or in the phone app. It takes about a minute and **it cannot be undone**.

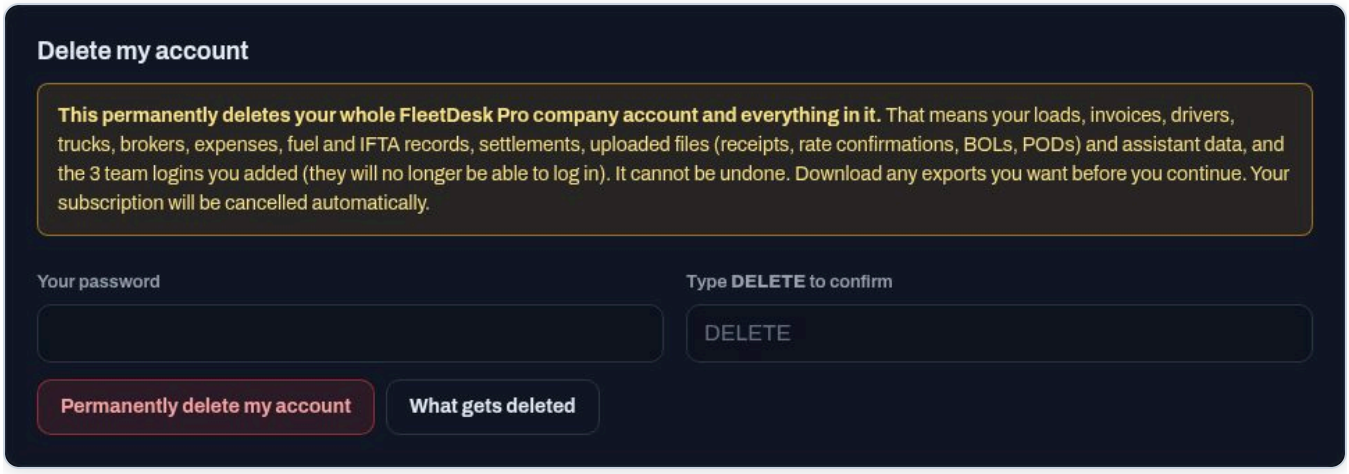
1. Open **My Account** and scroll down to **Delete my account**.
2. Read the warning. Type your password, then type **DELETE** in the confirmation box.
3. Tap **Permanently delete my account**. You are signed out and see a confirmation page.

OWNER **If you are the owner,** this deletes the **whole company account**: all loads, invoices, drivers, trucks, expenses, uploaded files, assistant data and every team login you added. If you pay for FleetDesk Pro, your subscription is cancelled automatically. If we can't cancel it, the confirmation page tells you and gives you a reference to email us. Download any exports you need first.

DISPATCHER, ACCOUNTANT, DRIVER **If you are a dispatcher, accountant or driver,** this deletes only **your own login**. The company's records stay with the company.

Can't log in? Email hello@fleetdeskpro.com from your account address and we'll delete it for you.

The public page **Account deletion page** explains what is deleted and what we keep. You can share its address with anyone who asks.



Delete my account is at the bottom of My Account. Enter your password and type DELETE.

CHAPTER 16

Billing and your plan

How the free trial works, how to subscribe, and how to cancel.

One simple plan

FleetDesk Pro has **one plan: $20 a month**. Every feature is included: unlimited trucks, drivers and loads, the AI tools, the driver voice assistant, the office assistant, invoicing, factoring, IFTA, payroll and reporting. There are no tiers and nothing is locked.

Your team doesn't pay extra. Dispatchers, accountants and drivers you add use your company's plan.

The apps don't show prices. To see your plan or subscribe, go to fleetdeskpro.com in a web browser.

The 30-day free trial

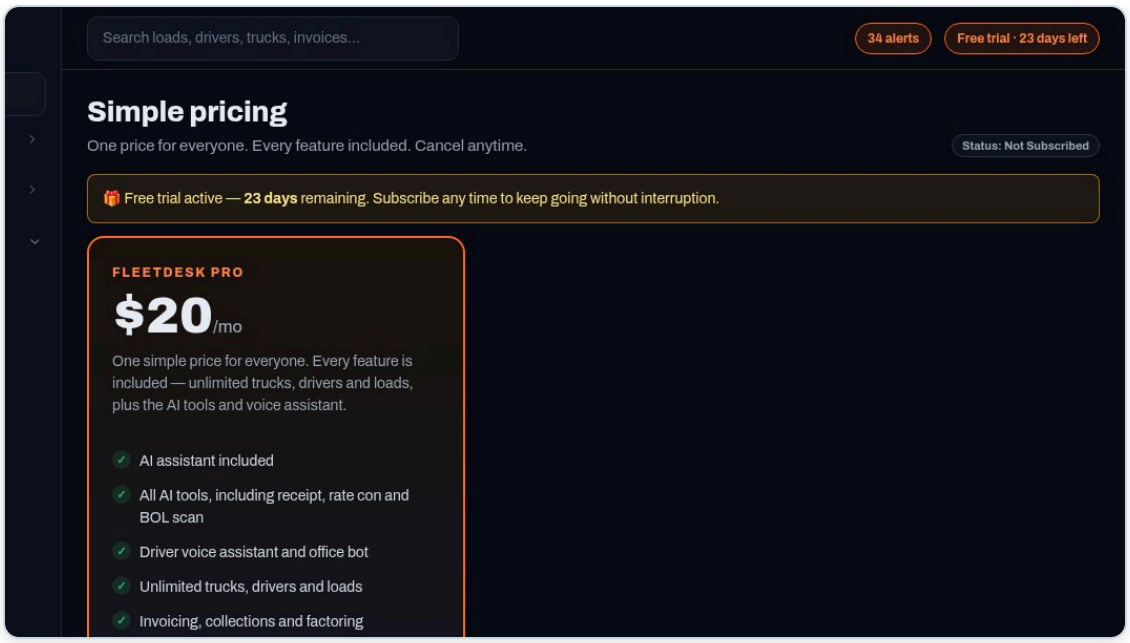
- The trial starts the day you sign up and lasts 30 days. No credit card is needed.
- The badge at the top right shows how many trial days are left.
- During the trial everything works, including the AI tools.
- When the trial ends, the AI tools (scans, Copilot, AI Dispatcher, AI Rate and AI drafts) and the assistant's daily checks need an active subscription. The rest of your data stays in your account.

Subscribe

1. Open **Admin › Billing** (Admin group) or tap the badge at the top right.
2. Tap **Subscribe — $20/mo**. You go to Stripe's secure payment page.
3. Enter your card and pay. You come back to FleetDesk and see **You're all set**. Your account switches to **Pro active** within a few seconds.

> **GOOD TO KNOW** Billing starts when you subscribe, and the trial days you have left are not added on. If you'd like to use all 30 free days first, wait until the end of your trial to subscribe.

Payments are handled by Stripe. FleetDesk never sees or stores your card number.



The Billing page: one plan, $20 a month.

Cancel, change your card, get a receipt

There is no cancel button inside FleetDesk. To cancel, change your card or ask about a charge, email hello@fleetdeskpro.com from your account email. Payments go through Stripe, which can email you a receipt. If a payment fails, Stripe keeps retrying the card and your access continues while it does.

If checkout says it isn't available right now, email us and we'll set you up.

CHAPTER 17

The iPhone and Android app

What the app adds, which permissions to allow, and what works without signal.

What the app is

The FleetDesk Pro app is the same FleetDesk Pro you use on the web, inside an iPhone or Android app. Everything you change in one place shows up in the other right away. Look for **FleetDesk Pro** in the App Store (iPhone) or Google Play (Android). You can also use fleetdeskpro.com in your phone's browser.

- **Sign up or log in.** Create your account in the app or on the website. Dispatchers, accountants and drivers log in with what the owner gave them.
- **Delete my account** is on the My Account page, in the app and on the web.
- **No prices or checkout in the app.** Billing is on fleetdeskpro.com. The Billing page in the app just says **Account status**.
- **Same role rules.** A driver login opens straight to My loads.

Camera

On every page that takes a photo (rate con and BOL scans, fuel and expense receipts, file uploads, driver BOL / POD upload) the app adds a **Take photo with camera** button. Tap it, take the photo, and you'll see **Photo ready**. Then tap the page's normal button to continue, such as **Read with AI** or **Upload**. If it says camera access is off, allow Camera for FleetDesk Pro in your phone's Settings.

Notifications

- **Office assistant alerts.** When a daily check finds new overdue invoices, missing PODs or expiring paperwork, you get one notification that summarises them.
- **New load assigned** goes to the driver when you assign them a load.
- Allow **Notifications** for FleetDesk Pro in your phone's Settings. If you don't get any, allow it and then log out and back in.

Notifications are off until FleetDesk's push service is set up for your account.

Voice assistant on the phone

Drivers can use the voice assistant in the app. It uses your phone's own speech recognition. Allow **Microphone** and **Speech Recognition** when asked. Use it only while parked. See the Voice assistant guide.

No signal

FleetDesk needs the internet. With no signal the app shows a friendly **You're offline** page with a **Try again** button instead of a blank screen. Photos you take after you reconnect upload normally.

CHAPTER 18

Troubleshooting and FAQ

Quick fixes for the things people run into most.

Common questions

I can't log in.

Check your email and password. After 8 wrong tries in a row, wait about 15 minutes. If you forgot your password, see Your account and password.

A page in the guide isn't in my menu.

Your menu only shows pages your role can open. Ask the owner if you need access (Team Access).

I see a "Not allowed" page.

Your role can't open that page. Go back, or ask the owner.

Everything's slow or a page looks broken.

Reload the page. If you're on a phone, check your signal. If it keeps happening, email support with what you were doing.

The page says "Email not configured".

OWNER, DISPATCHER, ACCOUNTANT Sending email from FleetDesk isn't switched on for your account. Download the PDF and send it from your own email, or ask hello@fleetdeskpro.com to turn email on.

AI says it couldn't read my photo.

OWNER, DISPATCHER, ACCOUNTANT Retake it flat, in good light, with the whole page in the frame. For multi-page rate cons upload the PDF. You can always type the details in by hand.

I get "You've hit the hourly AI limit".

OWNER, DISPATCHER, ACCOUNTANT Each account can make 60 AI requests an hour. Wait a while and try again.

I get "Your free trial has ended".

OWNER, DISPATCHER, ACCOUNTANT AI tools need an active trial or subscription. The owner can subscribe on the Billing page at fleetdeskpro.com.

My upload is rejected.

OWNER, DISPATCHER, ACCOUNTANT, DRIVER Use a JPG, PNG, WEBP or PDF up to the size shown on the page (16 MB by default).

An import line was rejected.

OWNER, DISPATCHER The Preview shows the line number and reason. The most common ones are an unknown driver name or truck code (add them first), a duplicate load code, or text where a number should be.

The IFTA worksheet shows dashes or a warning.

OWNER, ACCOUNTANT A dash means that state has no tax rate yet. Open Tax rates on the worksheet and paste the rates for the quarter. Also check each fuel receipt has a state.

An invoice is still Overdue after I was paid.

OWNER, ACCOUNTANT FleetDesk can't see your bank. Open the invoice list and set its status to Paid. For factored invoices tap Broker paid · reserve released on the Factoring page.

I can't create a settlement.

OWNER, ACCOUNTANT Assign a driver to the load first, then try again.

A driver shows "not matched" on the HOS board.

OWNER, DISPATCHER Rename the driver in FleetDesk so it matches the name in your ELD exactly.

The HOS board is out of date.

OWNER, DISPATCHER It only shows the last sync, not live hours. The owner can open **Admin › Integrations** and tap **Sync HOS now**.

The voice assistant can't hear me.

DRIVER Allow Microphone and Speech Recognition for FleetDesk Pro in your phone's Settings. You can always type your question instead.

I don't get notifications on my phone.

OWNER, DISPATCHER, ACCOUNTANT, DRIVER Allow Notifications for FleetDesk Pro in your phone's Settings, then log out and back in.

The assistant says the worker isn't running.

OWNER Scheduled daily checks need FleetDesk's background worker. The Check now button still works. If it stays down, email hello@fleetdeskpro.com.

I get an error about a date.

Dates must look like YYYY-MM-DD, for example 2026-03-31. Go back and check the date boxes.

I don't see my loads (driver).

DRIVER Dispatch hasn't assigned you one yet, or your login isn't linked to your driver record. Tell dispatch.

CHAPTER 19

Support and contact

How to reach us and what to include so we can help fast.

Contact us

Email **hello@fleetdeskpro.com**. We usually reply within one business day.

Include: the email you log in with, what you were trying to do, what you expected, and what happened. A screenshot helps a lot.

- **Password reset:** email from your account address with the subject Password Reset.
- **Delete my account:** open My Account and use Delete my account (see Your account and password). If you can't log in, email from your account address.
- **Cancel or billing questions:** email from your account address.
- **Turn on email sending, push notifications or the assistant's background checks:** email us.

Other pages that help

- **Overview › Help** is this guide, any time you need it.
- The public guide at **fleetdeskpro.com/guide** is the same guide and doesn't need a log in, so you can share it with a new driver or bookkeeper.
- The Privacy Policy, Terms of Use and Support pages are linked at the bottom of every page.

CHAPTER 20

Words you'll see

Trucking and FleetDesk words in plain English.

Plain-English glossary

WORD	WHAT IT MEANS
Load	One job: pick up here, deliver there, for a set price.
Broker / shipper	Who hires you for the load, and who you invoice.
Rate con (rate confirmation)	The paper from the broker that confirms the price and details of a load.
BOL (bill of lading)	The paper that lists what you picked up. The shipper signs it.
POD (proof of delivery)	The signed paper or photo that shows you delivered. Brokers usually want it before they pay.
Lumper	A fee paid to unload your truck at a warehouse.
ELD	The electronic logging device in the truck that records your driving hours.
HOS (hours of service)	The rules on how long you can drive. The HOS board shows time left from your ELD.

Office and money words OWNER, DISPATCHER, ACCOUNTANT

WORD	WHAT IT MEANS
RPM	Revenue per mile: what the load pays divided by its miles. Under $2 shows in red.
Closeout	The checklist of paperwork to finish after a delivery: rate con, BOL, POD, fuel, lumper, invoice, payment and settlement.
Settlement	A pay sheet for a driver on one load.
Factoring	Selling your invoices to a company that pays you most of the money right away for a fee.
Advance, fee, reserve	The part the factor pays up front, what they charge, and the rest they send you after the broker pays.
IFTA	The quarterly fuel tax report that splits tax between the states you drove in.
A/R (accounts receivable)	Money customers owe you. A/R Aging groups it by how late it is.
Payables	Bills you owe, like insurance and truck payments.



THANKS FOR USING FLEETDESK PRO

Questions? Email **hello@fleetdeskpro.com**
The same guide is always available at **fleetdeskpro.com/guide** and in the Help section of the app.