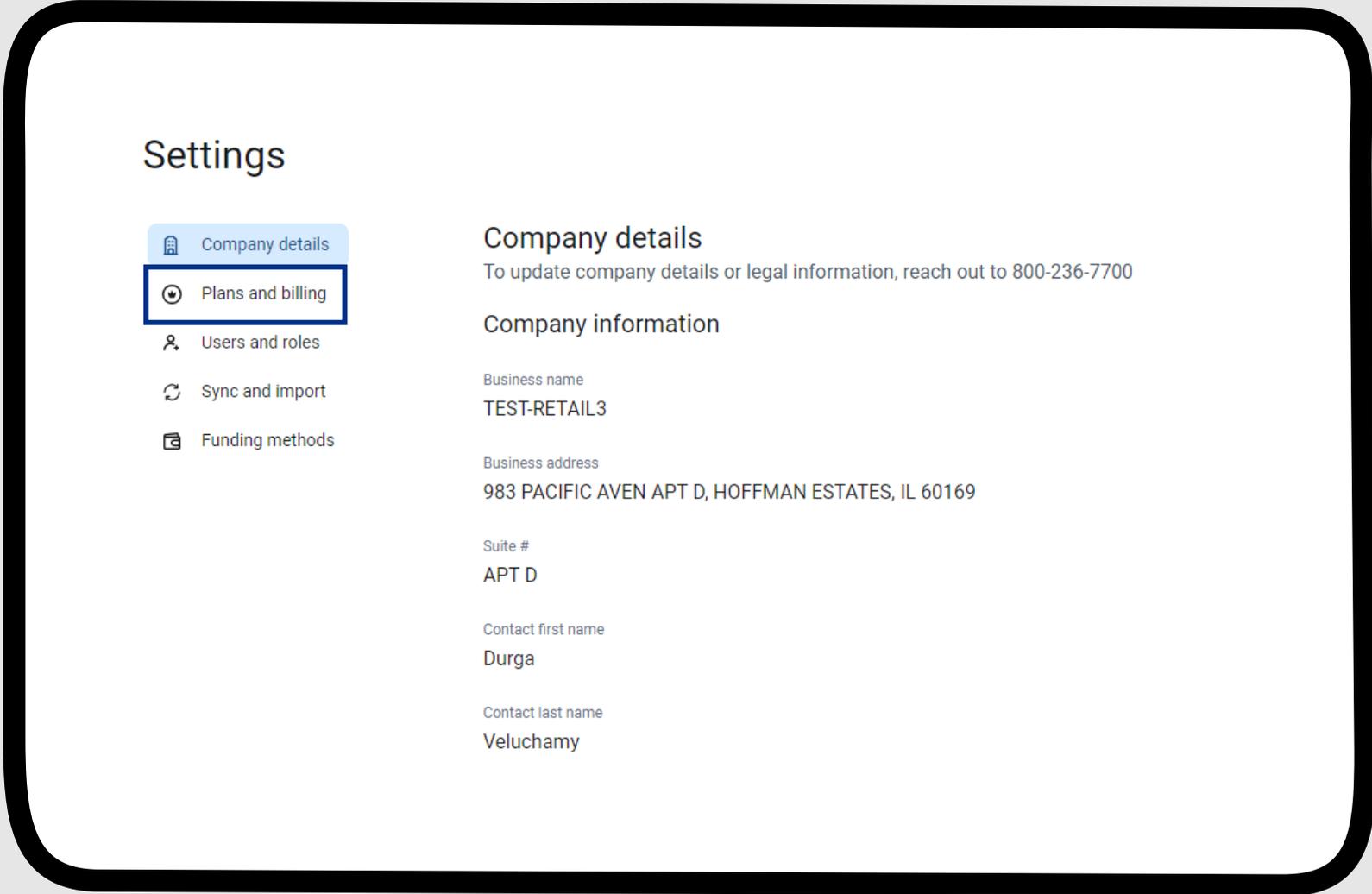


# Package Management: Downgrade Your Plan Through Settings Tab

From Settings, navigate to Plans and billing.



The screenshot shows a 'Settings' page with a sidebar on the left and a main content area on the right. The sidebar contains five menu items: 'Company details' (highlighted in light blue), 'Plans and billing' (highlighted with a dark blue border and a downward arrow icon), 'Users and roles' (with a person icon), 'Sync and import' (with a refresh icon), and 'Funding methods' (with a document icon). The main content area is titled 'Company details' and includes a sub-section 'Company information' with the following fields: Business name (TEST-RETAIL3), Business address (983 PACIFIC AVEN APT D, HOFFMAN ESTATES, IL 60169), Suite # (APT D), Contact first name (Durga), and Contact last name (Veluchamy). A note at the top of the main content area says 'To update company details or legal information, reach out to 800-236-7700'.

# Package Management: Downgrade Your Plan (Continued)

## Through Settings Tab

1

The screenshot shows the 'Manage plan' interface. On the left, the 'AP Base (Free)' plan is selected, with a 'Switch to AP Base' button. On the right, the 'AP Pro' plan is shown with a 'Downgrade plan' button. The AP Pro plan includes features like 'All AP Base features', 'Sync with accounting software', and '3 user seats'. The AP Base plan includes features like 'Pay any biller or vendor', 'Pay by bank transfer or card', 'Deliver payments electronically or by check', 'Batch scheduling', and '1 user seat'.

From [Settings](#), navigate to [Plans and billing](#). To downgrade from [AP Pro](#) to [AP Base](#), click [Switch to AP Base](#).

2

The screenshot shows a 'Switch plan' popup message. The message states: 'This plan supports 1 active user user. To switch plans, first deactivate any excess user accounts in Users and roles settings.' Below the message is an information icon and a note: 'Changes will take effect at the start of your next billing cycle.' At the bottom, there are two buttons: 'Go to Users and roles' and 'Keep existing plan'.

See popup message above if you have additional user seats activated. Choose [Go to Users and roles](#).

3

The screenshot shows the 'Users and roles' interface. The interface shows a table of users with columns for User, Role, Approval required, and Actions. The 'Edit' button next to the user 'Yufiya LVL3' is highlighted.

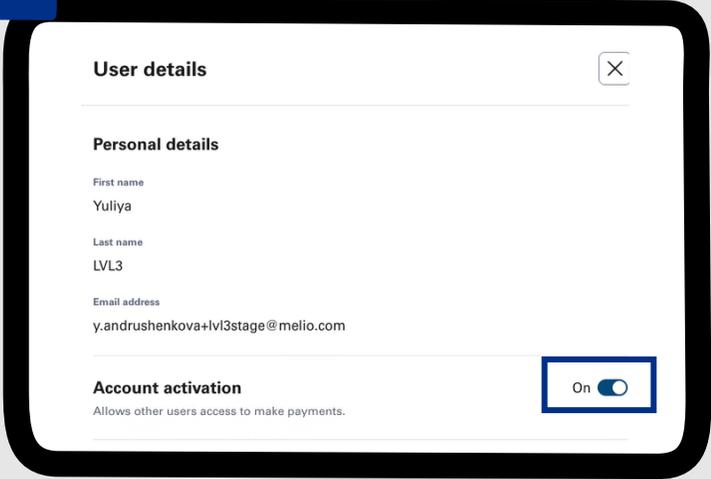
User	Role	Approval required	Actions
Shiran Marco (You) y.andrushenko@st03@mello.com	Level 3	None	View
Yufiya LVL3 y.andrushenko@st03@mello.com	Level 3	Above \$10.00	Edit

Click [Edit](#) next to each additional user.

# Package Management: Downgrade Your Plan (Continued)

## Through Settings Tab

4



**User details** [Close]

**Personal details**

First name  
Yuliya

Last name  
LVL3

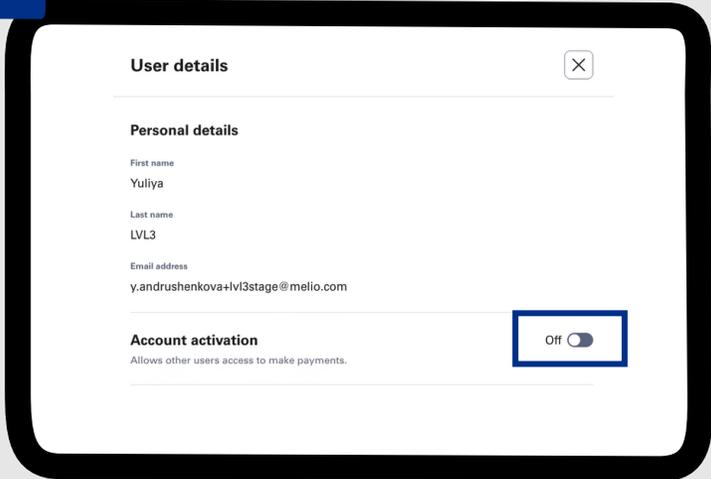
Email address  
y.andrushenkova+lv13stage@melio.com

**Account activation** [On]

Allows other users access to make payments.

Toggle Account activation to Off and click Save.

5



**User details** [Close]

**Personal details**

First name  
Yuliya

Last name  
LVL3

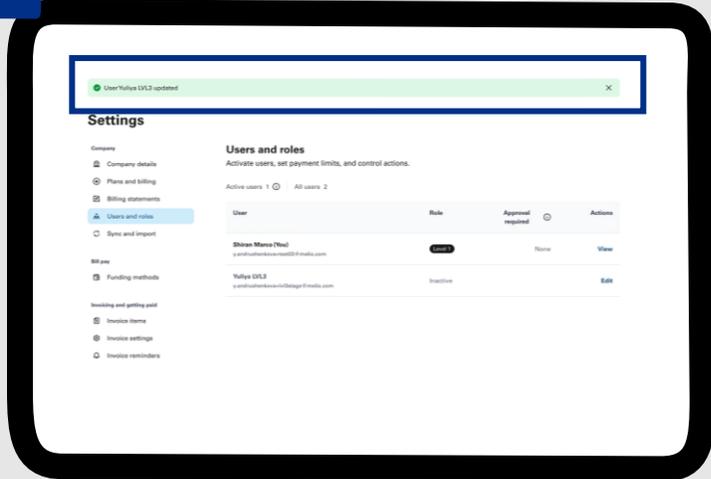
Email address  
y.andrushenkova+lv13stage@melio.com

**Account activation** [Off]

Allows other users access to make payments.

If there are additional users, turn Account activation to Off until one active user is remaining.

6



**Settings**

Users and roles  
Activate users, set payment limits, and control actions.

Active users: 1 | All users: 2

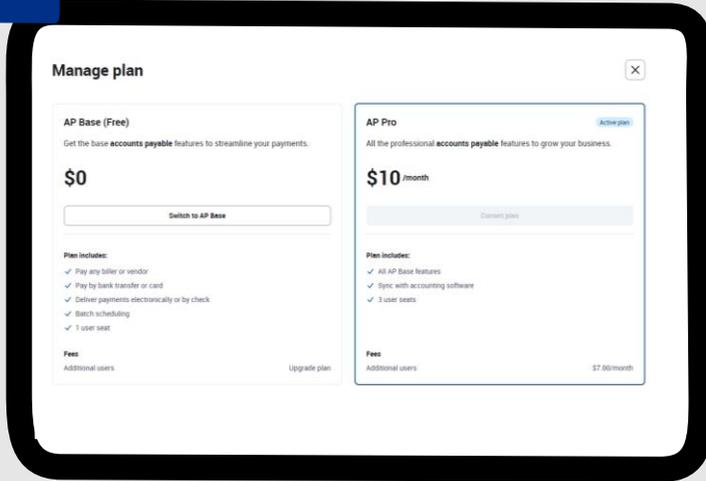
User	Role	Approval required	Actions
Shovan Manoj Das s.manojdas@melio.com	Admin	None	View
Yuliya LVL3 y.andrushenkova+lv13stage@melio.com	Inactive		Edit

See green confirmation banner that user changes were saved.

# Package Management: Downgrade Your Plan (Continued)

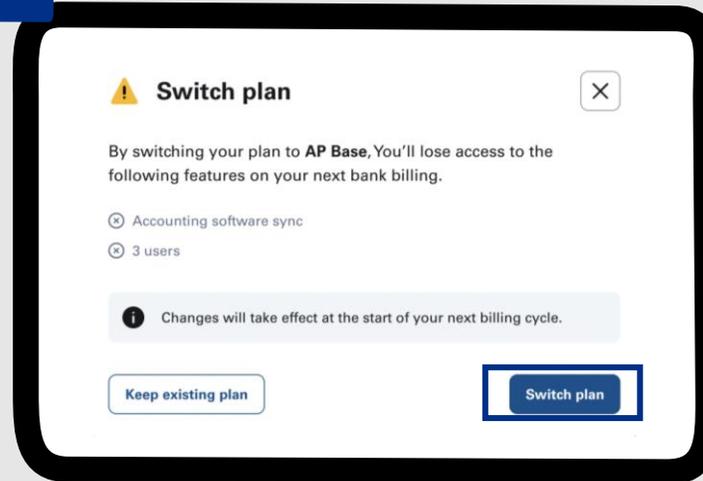
## Through Settings Tab

7



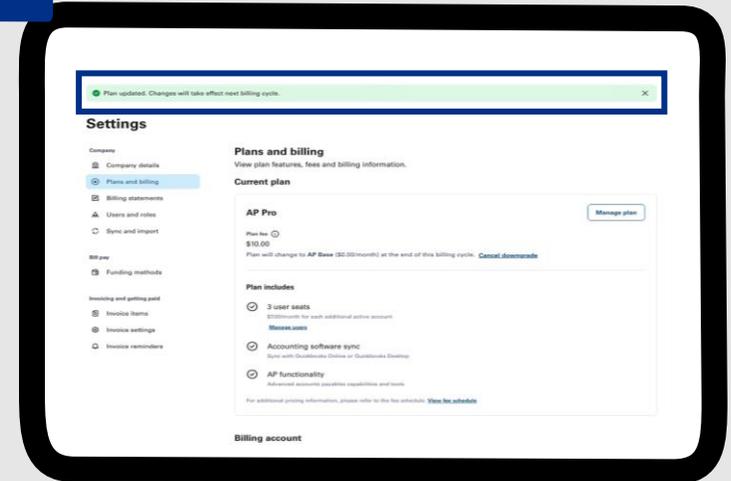
Navigate back to [Plans and billing](#). To downgrade from *AP Pro* to *AP Base*, click [Switch to AP Base](#).

8



Choose [Switch plan](#) to downgrade to AP Base.

9



See green confirmation banner. Changes will take effect next billing cycle.