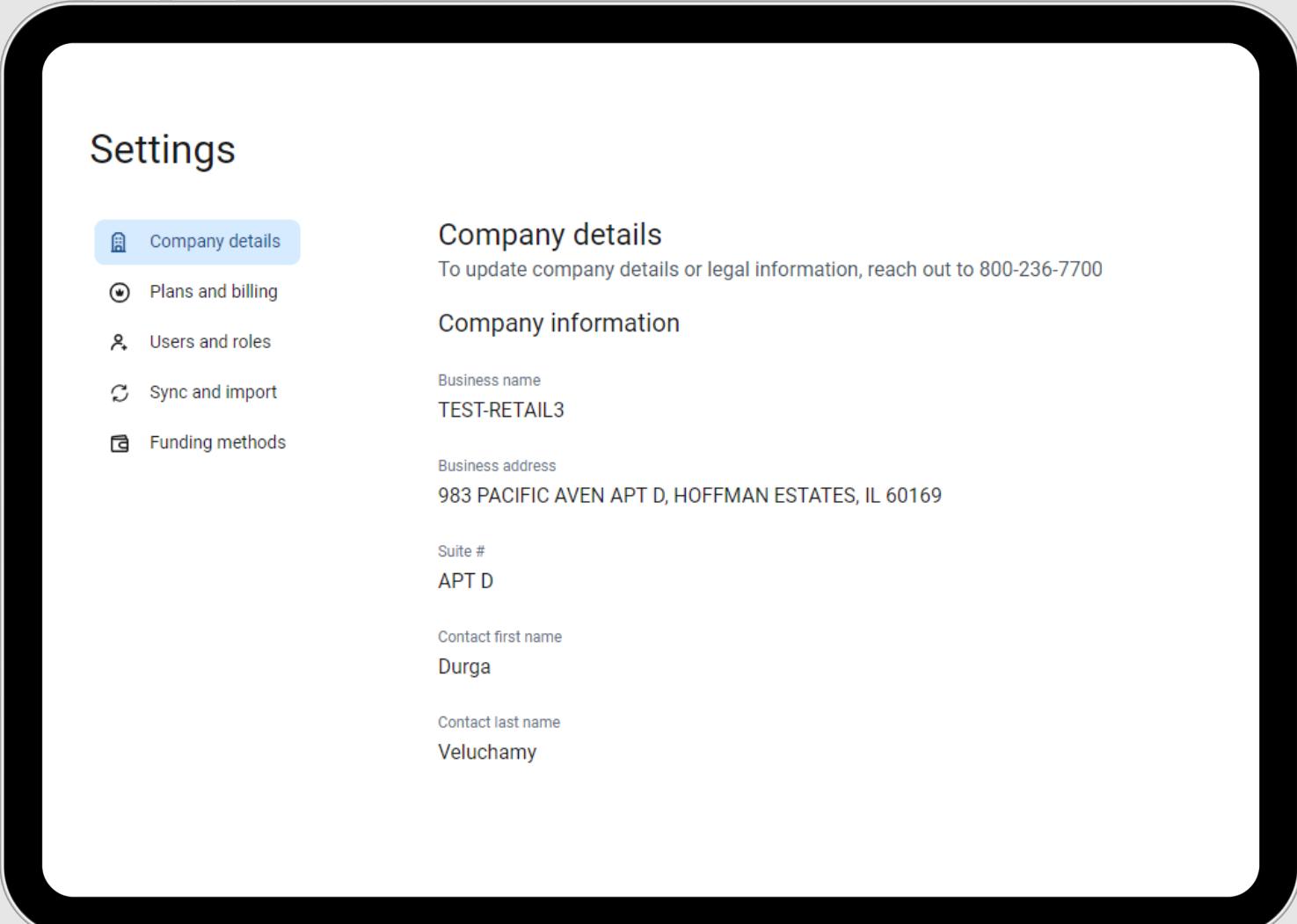


Settings



The image shows a smartphone displaying a mobile application's settings screen. The phone has a black frame and a white background. The app's header "Settings" is at the top. On the left is a vertical navigation menu with the following items:

- Company details** (selected, highlighted in blue)
- Plans and billing
- Users and roles
- Sync and import
- Funding methods

The main content area is titled "Company details" and contains the following information:

To update company details or legal information, reach out to 800-236-7700

Company information

Business name
TEST-RETAIL3

Business address
983 PACIFIC AVEN APT D, HOFFMAN ESTATES, IL 60169

Suite #
APT D

Contact first name
Durga

Contact last name
Veluchamy

Downgrade Plan Through Settings Tab

The image consists of three numbered screenshots (1, 2, 3) illustrating the process of downgrading a plan through the Settings tab. Each screenshot is enclosed in a black rounded rectangle with an orange number in the top-left corner.

- Screenshot 1:** Shows the 'Manage plan' screen. It displays two plan options: 'AP Base (Free)' and 'AP Pro'. The 'AP Base (Free)' plan is \$0 and includes features like 'Pay any biller or vendor', 'Sync with accounting software', and '3 user seats'. The 'AP Pro' plan is \$10/month and includes all AP Base features plus 'Batch scheduling'. A button 'Switch to AP Base' is visible on the AP Pro card.
- Screenshot 2:** Shows a 'Switch plan' confirmation dialog. It states: 'This plan supports 1 active user user. To switch plans, first deactivate any excess user accounts in Users and roles settings.' It includes a note: 'Changes will take effect at the start of your next billing cycle.' Two buttons are present: 'Go to Users and roles' and 'Keep existing plan'.
- Screenshot 3:** Shows the 'Users and roles' screen. It lists two active users: 'Shiran Marco (You)' and 'Yuliya LVL3'. Each user has a 'Level' indicator (Level 1 for Shiran, Level 3 for Yuliya), a 'Role' column, an 'Approval required' column (None for Shiran, Above \$10.00 for Yuliya), and an 'Actions' column with a 'View' and 'Edit' link.

From Settings, navigate to Plans and billing. To downgrade from **AP Pro** to **AP Base**, click Switch to AP Base.

See popup message above if you have additional user seats activated. Choose Go to Users and roles.

Click Edit next to each additional user.

Downgrade Plan (continued)

Through Settings Tab

4

User details

Personal details

First name
Yuliya

Last name
LVL3

Email address
y.andrushenkova+lvl3stage@melio.com

Account activation

On

Allows other users access to make payments.

5

User details

Personal details

First name
Yuliya

Last name
LVL3

Email address
y.andrushenkova+lvl3stage@melio.com

Account activation

Off

Allows other users access to make payments.

6

User Yuliya LVL3 updated

Settings

Company

- Company details
- Plans and billing
- Billing statements
- Users and roles**
- Syms and import

Bill pay

- Funding methods

Invoicing and getting paid

- Invoice items
- Invoice settings
- Invoice reminders

Users and roles

Activate users, set payment limits, and control actions.

Active users: 1 / All users: 2

User	Role	Approval required	Actions
Shiran Marco (You) y.andrushenkova-test01@melio.com	Level 1	None	View
Yuliya LVL3 y.andrushenkova+lvl3stage@melio.com	Inactive		Edit

Toggle Account activation to Off and click Save.

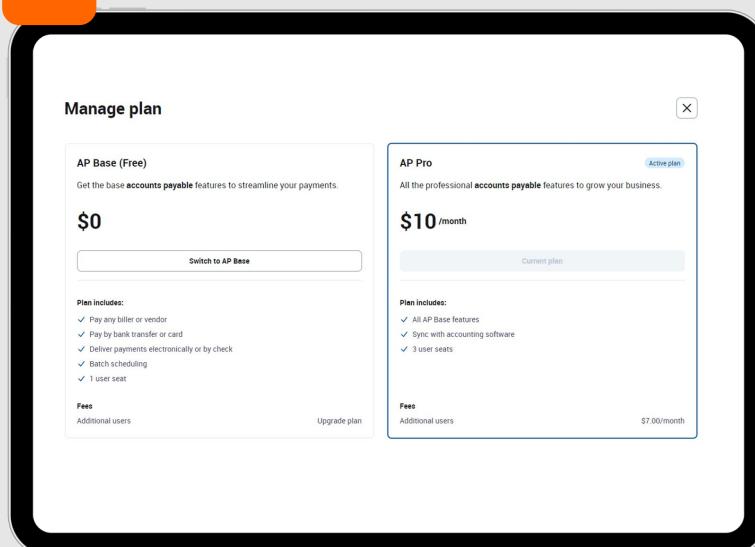
If there are additional users, turn Account activation to Off until one active user is remaining.

See green confirmation banner that user changes were saved.

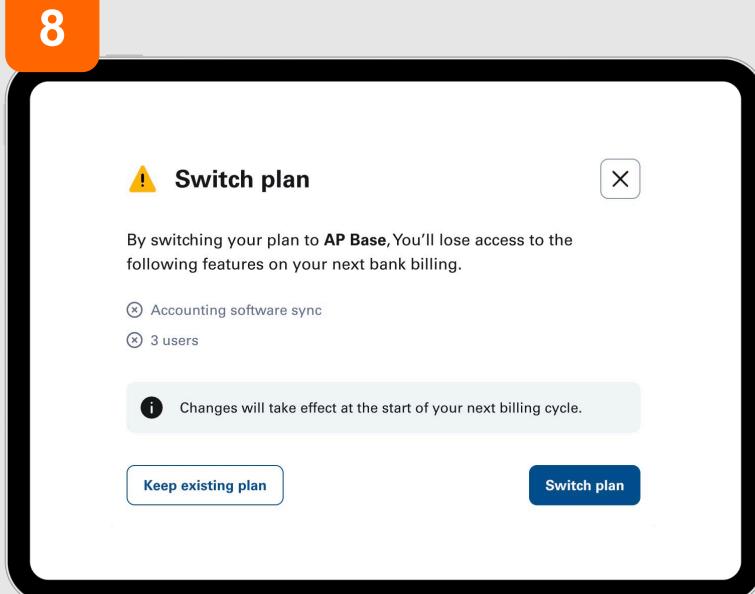
Downgrade Plan (continued)

Through Settings Tab

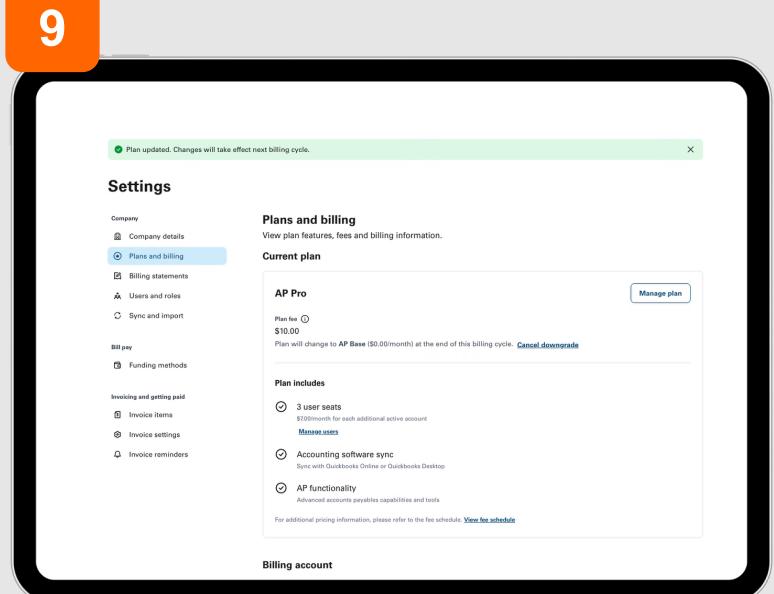
7



8



9



Navigate back to Plans and billing. To downgrade from AP Pro to AP Base, click Switch to AP Base.

Choose Switch plan to downgrade to AP Base.

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