

# CRM Pro Billing Information

*Transparent Pricing for Growing Businesses*

## Subscription Plans

### **Starter Plan - \$29/month per user**

**Perfect for small teams getting started**

- Up to 1,000 contacts
- 100 deals per month
- Basic reporting (5 standard reports)
- Email integration
- Mobile app access
- Standard support (email, 48-hour response)

### **Professional Plan - \$49/month per user**

**Ideal for growing businesses**

- Up to 10,000 contacts
- Unlimited deals
- Advanced reporting (unlimited custom reports)
- Automation workflows (up to 10 active)
- Calendar integration
- Priority support (phone + email, 24-hour response)
- Data export capabilities

### **Enterprise Plan - \$99/month per user**

**For established businesses with complex needs**

- Unlimited contacts
- Unlimited deals
- Advanced analytics and forecasting
- Unlimited automation workflows
- API access
- Custom integrations
- Dedicated account manager
- Premium support (phone + email, 4-hour response)
- Advanced security features

## Usage-Based Billing

### **Contact Storage**

- **Starter:** Included up to 1,000 contacts
- **Professional:** Included up to 10,000 contacts

- **Enterprise:** Unlimited contacts included
- **Overage:** \$0.10 per additional contact per month (Starter/Professional only)

## Email Sending

- **All Plans:** 1,000 emails per user per month included
- **Additional Emails:** \$0.02 per email sent above quota
- **Bulk Email Campaigns:** \$0.05 per recipient for mass communications

## Data Storage

- **All Plans:** 5GB per user included for file attachments
- **Additional Storage:** \$2 per GB per month
- **File Size Limit:** 25MB per individual file attachment

## API Calls (Enterprise Only)

- **Included:** 10,000 API calls per month
- **Additional:** \$0.001 per API call above quota

# Billing Cycle and Payment

## Billing Frequency

**Monthly Billing:** Charged on the same day each month as your signup date. Usage overages calculated monthly and added to next bill.

**Annual Billing:** Pay annually and save 15% on subscription fees. Usage overages still billed monthly.

## Payment Methods

- Credit cards (Visa, MasterCard, American Express)
- ACH bank transfers (US accounts only)
- Wire transfers for Enterprise customers
- PayPal for international customers

## Invoicing

**Monthly Customers:** Automatic charges on billing date with email receipt **Enterprise Customers:** Net-30 invoicing available with credit approval

# Usage Monitoring

## Account Dashboard

Monitor your usage in real-time through your account settings:

- Current contact count vs. plan limit
- Email sends remaining this month
- Storage usage by user

- API call consumption (Enterprise)

## Usage Alerts

Automatic notifications when you reach:

- 80% of contact limit
- 90% of email quota
- 100% of any usage limit (with 24-hour grace period)

## Overage Prevention

**Soft Limits:** System warns before overages but continues service **Hard Limits:** Contact import disabled when limit reached (can be removed by upgrading plan)

## Plan Changes and Upgrades

### Mid-Cycle Changes

**Upgrades:** Immediate access to new features with prorated billing **Downgrades:** Changes take effect at next billing cycle **User Changes:** Add users anytime with prorated charges; removed users credited to next bill

### Enterprise Migration

Businesses requiring custom solutions can migrate to Enterprise with:

- Custom contract terms
- Volume discounts for 50+ users
- Dedicated implementation support
- Service level agreements

## Billing Support

### Account Management

**Self-Service:** Update payment methods, view usage, and download invoices through your account portal **Billing Questions:** Contact [billing@crmpo.com](mailto:billing@crmpo.com) for invoice inquiries and payment issues

**Dispute Resolution:** 30-day window for billing disputes with full investigation support

### Failed Payments

**Grace Period:** 5-day grace period for failed payments with email reminders **Service Suspension:** Account access restricted after grace period until payment resolved **Data Retention:** Account data preserved for 30 days during suspension period

### Cancellation Policy

**Monthly Plans:** Cancel anytime with 30-day notice; access continues until end of current billing period **Annual Plans:** No refunds for unused portions; account remains active until contract end

**Data Export:** 90 days to export data after cancellation before permanent deletion

# Tax Information

## Sales Tax

Applied based on customer billing address according to local regulations. Tax-exempt organizations can submit documentation for exclusion.

## International Customers

**VAT:** Applied for EU customers based on billing country **GST:** Applied for Australian and Canadian customers **Currency:** All prices in USD; international cards charged in local currency by issuing bank

## Cost Optimization Tips

**Right-Size Your Plan:** Regularly review usage to ensure you're on the optimal plan for your needs  
**Annual Savings:** Switch to annual billing for automatic 15% discount **User Management:** Remove inactive users promptly to avoid unnecessary charges **Email Efficiency:** Use automation to reduce manual email sends and stay within quotas **Storage Cleanup:** Regularly remove unnecessary file attachments to minimize storage costs