EZ360PM Stripe Subscription Setup Guide

1. Products & Pricing Structure

Starter Plan – $19/month or $190/year (2 months free)

Includes: 1 user, Clients & Projects, Time Tracking, Convert Time → Invoice, Stripe Payments, Revenue by Client, A/R Aging.

No accounting engine included.

Professional Plan – $49/month or $490/year (2 months free)

Includes everything in Starter plus: Up to 5 users, Full Accounting Engine (Chart of Accounts, Journal Entries, P&L;, Balance Sheet, Trial Balance, General Ledger), Expense Tracking, Time Approval Workflow, Financial Audit Logs.

Premium Plan – $99/month or $990/year (2 months free)

Includes everything in Professional plus: 10 users included, Advanced Reporting, Custom Dashboards, Advanced Audit Logs, API Access (future), Dropbox Integration (future), Priority Support.

2. Extra Seat Add-On

Extra Seat – $10/month per seat or $100/year per seat.

Create as separate Stripe product.

Use quantity-based subscription item to track number of seats purchased.

3. Stripe Dashboard Setup Steps

Go to Dashboard → Product Catalog → Add Product.

Create separate products for Starter, Professional, Premium, and Extra Seat.

Each product must include two recurring prices: Monthly and Annual.

Set billing period correctly (monthly or yearly).

Add metadata: plan=starter/professional/premium.

Use lookup_keys for stable integration references.

Enable Stripe Customer Portal for plan changes and payment updates.

4. Plan Logic Inside EZ360PM

Base plan = exactly one of Starter, Professional, or Premium.

Included seats: Starter (1), Professional (5), Premium (10).

Extra seats = additional subscription item with quantity.

Accounting features enabled only for Professional and Premium.

Annual subscriptions provide ~2 months free discount.

5. Testing Before Launch

Use Stripe Test Mode first.

Create test customers and subscriptions for each tier.

Test upgrades, downgrades, and monthly $\leftrightarrow$ annual switches.

Verify invoices and portal behavior.

Once validated, replicate setup in Live Mode.