



BOOKS

Plans & Billing

Books' four plans (Individual / Founder / Growth / Pro), what each includes, how billing works, upgrading and downgrading.

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Books offers four subscription plans. You can change plans at any time, and upgrades are prorated automatically. This guide covers what each plan unlocks and how billing works.

ADVISOR TIP

See current pricing on the Books plans page in your account. We don't document prices in this guide so they're never out of date.

Available Plans

Books Individual

Free tier. Designed for solo agents getting started with bookkeeping.

- 1 user
- 1 company
- 100 MB attachment storage
- Full bookkeeping & reports
- 25 transactions per month
- Standard email support

Not included on Individual: Plaid bank feeds, multi-user, multi-company, accountant access.

Books Growth

For active travel agents managing real volume.

- 2 users + 1 accountant

- 2 companies
- 1 GB attachment storage
- 750 transactions per month
- Plaid bank feeds (1 connected account)
- Standard email support

Books Pro

Unlimited transactions, multi-company, unlimited bank feeds.

- 5 users + 2 accountants
- 5 companies
- 10 GB attachment storage
- Unlimited transactions
- Unlimited Plaid bank feeds
- Priority email support

Monthly vs. Yearly Billing

Growth and Pro both offer monthly or yearly billing. Yearly saves roughly 20% compared to monthly — the equivalent of getting about two months free per year. Switch between monthly and yearly any time from the billing dashboard; Stripe prorates automatically.

Upgrading or Downgrading

1. Go to **Settings** → **Billing**.
2. Click **Change Plan** and pick the tier you want.
3. Stripe Checkout opens for new subscriptions, or applies the change immediately for existing ones.
4. Upgrades take effect right away. Downgrades take effect at the end of your current billing period to make sure you keep what you've already paid for.

If you downgrade past your current usage (e.g., you have 5 users on Pro and downgrade to Growth which allows 2), Books does NOT delete data — but you'll need to bring usage under the new limit before the downgrade fully completes.

What Happens at Plan Limits

If you try to do something your current plan doesn't allow (add another user, connect another bank feed, exceed monthly transactions), Books shows an **upgrade page** explaining which limit you hit and what plan unlocks the feature. **No data is ever lost or hidden** — you just can't add more until you upgrade.

Managing Your Billing

From **Settings** → **Billing** you can:

- View your current subscription, next renewal date, and amount
- Update your payment method
- Download invoices and receipts for any past charge
- Cancel your subscription — you keep access until the end of the period you've paid for, then revert to Books Individual automatically

All checkouts and payment management run through **Stripe**, the same payment processor used by Shopify, Lyft, and most modern SaaS products. UrTravelPro Books never sees or stores your card details.

ADVISOR TIP

Promo codes: All paid plans accept promo codes at checkout. If you have one, enter it on the Stripe checkout page before completing your subscription.

Refunds

Subscription charges are non-refundable except as required by law. If you downgrade or cancel, your remaining time on the current period is honored — you don't lose what you paid for, but you don't get a partial refund for unused time either.

Exceptions: if you were billed in error, billed during a service outage of more than 24 hours, or fraudulently charged, [submit a ticket](#) and we'll make it right.