Managing Your Account: Upgrades, Downgrades, and Users

Admin · https://coreel.ai/help/managing-your-account-upgrades-downgrades-and-users/

This guide explains how to manage your coReel account, including changing plans and managing team members.

Who Can Manage Account Settings

Some actions are role-based:

- **Owner**: Full account control (billing, plan changes, user management)
- **Manager**: Can manage users and selected account settings
- **User**: Standard usage access, no billing/admin controls

Upgrade Your Account

Use an upgrade when you need more advanced features or higher limits.

1. Log in to coReel.
2. Go to **Settings** (or your account/billing area).
3. Select **Upgrade Plan**.
4. Choose your new plan.
5. Complete checkout/confirmation.

What Happens After Upgrade

- New plan features become available to your account.
- Your organization users inherit access based on the account’s plan/tier.
- If applicable, account level is synced from your subscription source.

Downgrade Your Account

Use downgrade when you want a lower tier.

1. Go to **Settings**.
2. Open **Billing / Plan**.
3. Select **Downgrade Plan**.
4. Confirm your change.

Important Notes

- Some higher-tier features may be removed after downgrade.
- Existing assets remain unless specifically restricted by policy.
- If a feature is no longer included in your new tier, it will be disabled.

Cancel or Reactivate Subscription

1. Go to **Settings > Billing**.
2. Choose **Cancel** (or **Reactivate** if your account is inactive).
3. Confirm the action.

If Account Is Inactive

Users may have limited access until reactivation.

Owners should reactivate the subscription to restore full functionality.

Add Users (Owner/Manager)

1. Go to **Users** (/users).
2. Click **Add User**.
3. Enter the new user’s details.
4. Assign role (Manager or User).
5. Send invite.

Invite Flow

- The invited person receives an email invitation.
- They click the link, set their password, and log in.
- Once accepted, they appear in your users list.

Remove Users (Admin)

1. Go to **Admin > Users** (or org users management page).
2. Find the user.
3. Click **Delete** in the Actions column.
4. Confirm removal.

Note

Removing a user from coReel removes their app access.

It does **not** delete their CRM contact record.

Trial vs Paid Status

If your account is currently in trial, admin views may show **Trial** status even if the tier maps to Premium capabilities.

When trial ends, an active paid subscription is required to keep full access.

Common Questions

Why can’t a user access certain features?

- Their role may not permit it, or
- The account tier may not include that feature, or
- The account/subscription may be inactive.

Why do users inherit plan restrictions?

coReel applies account-level tier rules across organization users for consistent access control.

Who should manage integrations and billing?

Best practice is to keep this with the **Owner** (and trusted **Managers** where allowed).

Need Help?

If plan changes or user permissions don’t look right, contact support with:

- Organization name
- User email(s)
- What action you took
- Screenshot of the page/error if available