Billing Basics

SUMMARY
Securely manage your billing information directly in Paperless Pipeline.

IN THIS ARTICLE

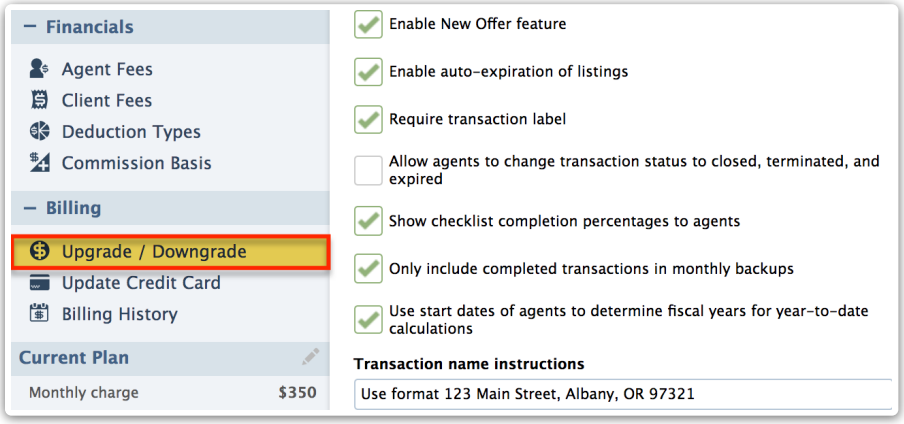
Upgrade / Downgrade Your Account
Monthly Limit / Transaction File Quota
Update Credit Card
Cancelling Your Account
FAQ

Upgrade / Downgrade Your Account

Paperless Pipeline is offered free of long-term contracts, lock-in, sign up fees, or termination fees. Just pay as you go with a debit or credit card, and cancel if you no longer want to use the application. To keep our billing simple, we do not allow payment by check or any other alternate arrangement.

Master admins may upgrade or downgrade their account by:

1. **Click [Upgrade / Downgrade] from the left menu of their dashboard.** From there, click an account option to upgrade or downgrade your plan.



Your account will be charged the new plan amount on your next bill date, then will continue to bill at that amount each month on your monthly bill date as long as you stay at that plan level. Your billing cycle begins on the date you signed up.

You are never billed more than once every 30 days, regardless of any upgrades or downgrades made to your account mid-cycle. If you upgrade your plan, you'll be granted additional transaction

files immediately and billed the new total on your next billing date, which is shown on the Current Plan section of your admin's Dashboard.



You can only downgrade to a lower plan if you have created fewer transaction files than allowed for that lower plan in the current billing month. If you've exceeded the amount allowed by your desired plan, you will need to wait until next month for your transaction limit to reset.

Monthly Limit / Transaction File Quota

A transaction file is any newly created transaction in your account. You may add only as many transactions as your plan allows in any billing period. Transaction updates, such as changing the status of a single transaction from "Working" to "Closed", do not count against your monthly transaction limit.

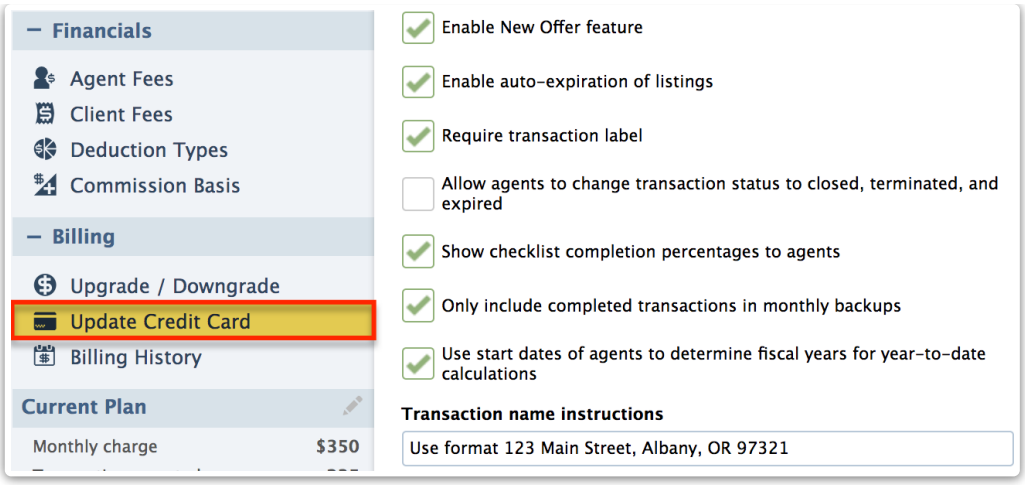
When you create a transaction file, it counts against your quota for the current monthly cycle. Your transaction quota is reset at the start of each month and any open transaction files you created in previous months will not count against your new quota.

If you need to add more transactions in a billing period than your plan allows, you'll need to upgrade to a higher plan level. You can downgrade back to your previous plan once you are billed and your quota resets.

Update Credit Card

To update a credit or debit card on file:

1. **Go to Admin / Settings**
   - Click your name in the upper right corner, then [Admin / Settings].
2. **Click [Update Credit Card] from the left menu.**
3. **Enter a valid credit card number, expiration date, and billing zip code.**
4. **Click [Update Credit Card].**



To validate your credit card, we will make a small authorization between $.00 and $1.00 on your card. This is not a charge and this authorization will automatically disappear from your credit card statement within 3 to 8 business days.

By updating your credit card, you agree to the following:

Terms of Service →

Privacy Policy →

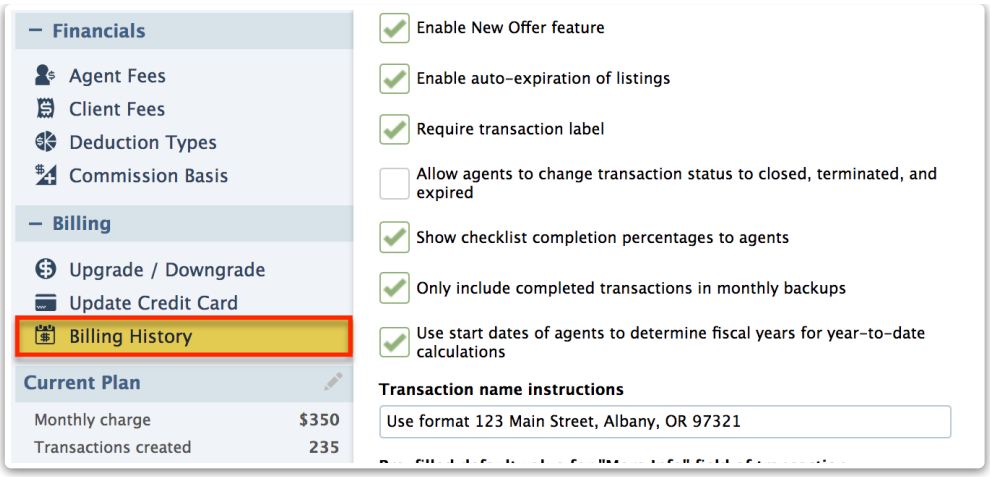
Billing Policy →

Billing History

The billing history page allows you to review and download your Pipeline billing history, including billing date, amount paid, transactions per month, and the paid until date.

To access your billing history:

1. **Go to Admin / Settings**
   - Click your name in the upper right corner, then [Admin / Settings].
2. **Click [Billing History] from the left menu.**
3. **View the billing history listed on the page or click [Download Billing History]** to download a CSV file of your billing history.



Cancelling Your Account

To cancel your account, contacthelp@paperlesspipeline.com. Once your account is cancelled, all your transactions and other data will be immediately and permanently deleted. You will be responsible for any existing charges on your account at the time of cancellation.

Requests to cancel an account should be sent seven days in advance of your next billing date to allow sufficient time to grant your request.

Once you cancel you will not be charged again. However, you forfeit the remainder of your current month and all past charges are non-refundable. No pro-rated or partial refunds will be given. In order to treat everyone equally, no exceptions will be made.

FAQ

Q: How much will I pay to use your service?

A: Paperless Pipeline offers flexible pricing to suit any office size. And there are no long-term contracts. Pay month to month and upgrade, downgrade, or cancel any time. The pricing plans are listed here →

Q: What is considered a transaction for billing purposes?

A: A transaction is anything from listing to pending to closed. For billing purposes, a transaction is counted only once - in the billing cycle in which it was created. Once a transaction is created, you can change its status and other data at any time, and it will continue to count as just a single transaction.

Q: Will I need to sign a long-term contract with you?

A: No. All plans are month-to-month. You can cancel, upgrade, or downgrade at any time.

Q: Are there any setup fees?

A: No. There are no setup fees.

Q: When will I be billed each month?

A: The calendar day of the month when you first upgrade to a paid account will become your billing date. For example: if you upgraded from free trial to a pricing tier on March 5th, you'll be billed on the 5th of each month. You can change your billing date by emailing help@paperlesspipeline.com.

Q: What happens if I exceed my pricing plan's transaction allotment?

A: If you have created as many transactions as your pricing plan allows before your next bill date, you can upgrade to a higher plan in order to continue creating new transactions in the same billing period. When you upgrade to a higher plan, you will be billed at the plan you upgraded to starting with your next bill date.

Q: Will I pay more even when business is slow?

A: No. You can just downgrade to a lower plan during slow months. Then upgrade back when business picks up.

Q: What happens if I want to cancel my service? How do I get a copy of my transactions?

A: You can cancel the service at any time by emailing help@paperlesspipeline.com. In the first week of each month, you will be provided with a backup file of all your transaction data from the past month. Download this backup file each month and store it anywhere you want.

Q: Why am I unable to downgrade my account?

A: You can only downgrade to a lower plan if you have created fewer transaction files than allowed for that lower plan in the current calendar month. If you've exceeded the amount allowed by your desired plan, you will need to wait until next month for your transaction limit to reset.

Q: How do I cancel my account?

A: To cancel your account, send an email from your admin email address to help@paperlesspipeline.com. Requests to cancel an account should be sent seven days in advance of your next billing date to allow staff sufficient time to grant your request.

Q: Once I cancel my account, can I get a refund?

A: Once you cancel you won't be charged again. However, you forfeit the remainder of your current month and all past charges are non-refundable. No pro-rated or partial refunds will be given. In order to treat everyone equally, no exceptions will be made.



Still got questions? Email us at help@paperlesspipeline.com