Archive Plan

Last Modified on 11/10/2026 12:22 pm EST

The Archive Plan keeps your Pipeline data online and read-only for a low monthly rate, so you can step away from the service without leaving your records behind.

Introduction

Most offices that stop using Pipeline don't stop needing what's in it. A state commission wants five years of files. A referral dispute surfaces on a deal that closed years ago. An attorney asks for paperwork on a property you sold before you retired. The business is over; the record-keeping isn't.

The Archive Plan exists for exactly that gap. It takes an account that isn't doing new business any more and keeps it online in a read-only form, so the transactions, the documents, and the history stay where they've always been and stay searchable. That's a different thing from a backup. A backup is a copy you download and then have to store, organize, and dig through years later. The Archive Plan leaves the account itself standing, so finding a document is the same job it was when you were trading.

You can step back from Pipeline without your records stepping back with you. It's worth weighing before you cancel outright, because canceling and archiving lead to very different places, and coming back from one of them is far harder than the other. If you're not certain which one your situation calls for, ask before your next bill date rather than after it.

How It Works

The Archive Plan replaces your regular Transaction Plan with a read-only, storage-only version of your account.

How It's Billed

The Archive Plan is billed monthly like any Pipeline plan. Archive pricing only takes effect once you've canceled your normal plan.

What You Can Still Do

All of your existing transactions, documents, and other data stay available online — this is an online service, not an offline export. You can view and search everything you had.

What Changes

New transactions can't be created, and for security and privacy, only master admins are able to log in. Monthly offline backups are not generated under this plan.

Backups vs. the Archive Plan

Downloaded monthly backups give you an offline copy you manage yourself; the Archive Plan gives you continued online access with nothing to manage. Many companies pick one or the other when they leave — some do both.

Switch to the Archive Plan

Ask our team to move your account to the Archive Plan when you're ready to stop actively using Pipeline.

Who Can Do This: Master admins.

To switch to the Archive Plan:

1. Email help@paperlesspipeline.com from your master admin login email and ask to switch to the Archive Plan.
2. Tell us if you'd like the switch made before your next bill.
3. Our Billing Team schedules the change and confirms once your account is on the Archive Plan.

After the switch, your data stays online at the Archive rate, and there's nothing further for you to download or maintain.

Pull an Offline Copy Before You Switch

Monthly backups aren't generated once an account is on the Archive Plan, and each month's file is only downloadable for a limited window. If you want a copy on your own drive as well as online access, the months to collect are the ones still available now.

Every month, Pipeline builds a downloadable copy of your account so you always have an offline record of your transactions and documents — yours to keep, whether you're just being cautious or planning ahead.

See Monthly Backups

Frequently Asked Questions

How is the Archive Plan billed?

Monthly, like any Pipeline plan. The Archive rate only takes effect once you've canceled your normal Transaction Plan.

What can I do on the Archive Plan?

View and search all of your existing data online. Everything you had — transactions, documents, and history — stays accessible. You just can't create new transactions.

Who can log in on the Archive Plan?

Only master admins. For security and privacy, other users can't log in once an account is on the Archive Plan.

Do I still get monthly backups on the Archive Plan?

No. Offline monthly backups aren't generated under this plan. Its value is continued online access, with nothing for you to download or store.

How is the Archive Plan different from just downloading my backups?

Backups are an offline copy you manage; the Archive Plan is ongoing online access you don't. Downloaded monthly backups live on your own computer, while the Archive Plan keeps your data searchable inside Pipeline.

How do I switch to the Archive Plan?

Ask us. Email help@paperlesspipeline.com from your master admin login email when you're ready, and our Billing Team will schedule the switch and confirm it.