Credit Card on File

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Pipeline keeps one credit card on file and charges it automatically each billing cycle — update it anytime from your account settings.

Introduction

Cards expire. They get reissued after a fraud alert, or they belong to someone who's left the company. Whichever it is, the first sign that the card Pipeline bills has gone stale is usually a declined payment rather than a reminder.

Pipeline bills automatically. Your plan is charged on your billing date each cycle to the card the account holds, so there's nothing to send in and no invoice waiting in an inbox. That's the arrangement most offices want, right up until the card behind it changes. When it does, the replacement gets entered in the account settings rather than read out over the phone, which is also why nobody at Pipeline can put a card on for you.

Doing it yourself is the fastest way back: saving a working card is what gets a past-due account moving again, with nobody in the middle. And if a payment has already failed, that isn't a mark against you or against the account. Enter the current card, and if it still won't take, tell support what your bank or card provider said so someone can look at it with you.

How It Works

One card, charged automatically, updated by a master admin from your account settings.

One Card Per Account

Pipeline stores a single card per account and charges it on your billing date every cycle. A debit or a credit card both work. Entering a new card replaces the one that was there before.

The Verification Authorization

When you save a new card, Pipeline runs a small verification authorization of up to $1 through our payment processor, Stripe. It's not a charge — it confirms the card is valid and then drops off your statement on its own within 3 to 8 business days. It may appear as `STRIPE` or `PAPERLESS PIPELINE`.

When the New Card Takes Over

The card you enter is used for billing starting with your next monthly bill. If your account was past due when you updated it, allow up to 10 minutes for Pipeline to process the outstanding balance and refresh your plan details.

Update the Credit Card on File

Replace the card on file from Admin / Settings — a master admin, a valid card, and a moment for the verification hold to clear.

Who Can Do This: Master admins only.

To update the credit card on file:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Update Credit Card] under Billing in the left menu.
3. Enter the new credit card number, expiration date, and billing zip code. Type these in yourself rather than relying on browser auto-fill, which can populate an old or wrong card.
4. Review the Terms of Service, Privacy Policy, and Billing Policy.
5. Click [Update Credit Card].

The new card is saved and will be billed starting with your next monthly bill. You'll see a verification authorization of up to $1 appear and then disappear from your statement within a few business days.

Frequently Asked Questions

Who can update the credit card on file?

Only a master admin. Viewing or changing the card is limited to the master admin so your billing details stay with the account owner.

How many cards can I keep on file?

One per account. Entering a new card replaces the one that was there before — Pipeline bills a single card each cycle.

What is the small charge of about $1 on my statement?

It's a verification hold, not a charge. When you save a new card, Pipeline authorizes up to $1 to confirm the card is valid, and it drops off your statement on its own within 3 to 8 business days.

Why does the authorization show as "STRIPE" or "PAPERLESS PIPELINE"?

That's our payment processor. Pipeline processes cards through Stripe, so the verification authorization can appear under either name. It isn't a duplicate charge.

When does the new card start getting billed?

On your next monthly bill. The card you enter is used going forward, starting with your next billing date. If your account was past due, allow up to 10 minutes for the outstanding balance to process.

My payment failed — how do I get it to retry?

Re-enter your card and Pipeline retries automatically. After you save the card, the system attempts billing again within about 10 minutes. Type the card details in yourself rather than using browser auto-fill, which can fill in an old card.