Account Cancellation

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Ready to close your Paperless Pipeline account? Our team handles cancellation, and your master admin starts it with a single message.

Introduction

Offices close. Brokers retire. A transaction business winds down, or a team decides on something else. Closing a Pipeline account is a normal end to a normal arrangement, and it doesn't take a negotiation.

Canceling stops the billing and closes the account. It isn't a button you press, and that catches out people who expected to end it the same way they started it. The reason is that canceling removes a company's whole record from Pipeline, and that's not something to put behind a single click on a page someone might wander onto by accident. So a person handles it, and there's a short exchange to settle the date and what you want to do about your data before anything is final.

The date and the data are the two things worth deciding on purpose rather than by default. Timing the close around your bill date is what keeps you from paying for a month you won't use, and whatever you've built up in the account, there are ways to take it with you or keep it reachable without an active plan. If you're leaving because the cost stopped matching the volume you're doing, say so before you go. A smaller plan sometimes solves that.

How It Works

Cancellation runs through support: the master admin requests it, we schedule it, and the account closes on the agreed date.

Who Can Cancel

Only the account's **master admin** can authorize a cancellation. If the request comes from anyone else, we'll ask the master admin to confirm it before we proceed.

When It Takes Effect

You choose the timing. Cancel **immediately**, or schedule it for the business day before your next bill so you keep the full period you already paid for and are never charged again.

What Happens to Your Data

Once the cancellation processes, the account is removed from our systems and is no longer accessible, and data for canceled accounts isn't retained. There's no grace period after the account closes, so save anything you need beforehand.

Keep Your Data or Pause Instead

Before you cancel you can download your Monthly Backups, order any past backups you're missing, or switch to the **Archive Plan** to keep online access to your existing data without actively using the service.

Request to Cancel Your Account

Send us your cancellation request as the master admin, and we'll confirm the date and your data options.

Who Can Do This: The account's master admin.

To request to cancel your account:

1. Sign in to Pipeline as the account's master admin.
2. Click [Help] in the top-right corner, then [Get Help].
3. Choose [Contact] and send us your request to cancel — or email help@paperlesspipeline.com from your master-admin email address.
4. Tell us whether you'd like to cancel immediately or on your next bill date.

We'll reply to confirm your cancellation date, walk you through keeping your data, and let you know once it's scheduled. On the cancellation date the account closes and is removed from our systems.

Take a Copy With You First

There's no grace period once the account closes, so anything you want in hand has to come out beforehand. Each month's file is only downloadable for a limited window, which is worth checking against the date you've picked.

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

Keep the Records Reachable Instead

Some offices are done with the service but still have to produce a file years later, for a state audit or a dispute on a deal that closed long ago. That's a different decision from closing, and it doesn't end with the account being removed.

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.

See Archive Plan

Frequently Asked Questions

How do I cancel my account?

Have your master admin send us the request. They can email help@paperlesspipeline.com from the master-admin address, or sign in and use [Help] → [Get Help] → [Contact]. We'll confirm the date and handle the rest.

Who is allowed to cancel the account?

Only the master admin. For security we need the cancellation request to come from the master admin; if someone

else asks, we'll check with them before proceeding.

When will my cancellation take effect?

Immediately, or the business day before your next bill — your choice. Scheduling it just before the next bill lets you use the full period you already paid for while making sure you're never charged again.

What happens to my data after I cancel?

The account is removed and no longer accessible. Data isn't retained for canceled accounts, so download your Monthly Backups — or switch to the Archive Plan — before your cancellation date.

Can I pause or put my account on hold instead of canceling?

There's no hold feature, but there are two ways to pause. You can downgrade to the lowest plan, or switch to the Archive Plan to keep online access to your existing data without actively using the service.

Will I get a refund when I cancel?

Past bills aren't refunded, but ask us. If you cancel immediately right after a charge, we can submit a refund request to our Billing Team to consider — reach out and we'll look into it.