Right-Size Your Plan to Your Season

Last Modified on 09/04/2026 11:04 am EDT

Deal flow moves in seasons. Your plan can move with it, and most of the savings are in the timing.

Introduction

Spring gets loud and December goes quiet. If you're paying all year for the volume you only hit in June, you're paying for months you never used.

Pipeline prices on the transactions you create each month, so the plan you sit on is meant to move. There's no contract and no penalty for changing it. But Pipeline will never change it for you — it'll prompt you as you approach your quota, and the move stays yours to make.

Nothing you've already built is at risk here. Moving down a plan only limits how many *new* transactions you can create; the transactions, documents, and history already in your account stay exactly where they are.

When to Use This

- Your busy season is coming and you'll run past your quota.
- Your market's gone quiet and you're paying for volume you're not using.
- Your volume swings month to month and you've never been sure which plan to sit on.
- You need to load a batch of past transactions in a single month.

> Not a slow season but a full stop — done creating new transactions and just need your records to stay reachable? Skip the ladder and see Archive Plan.

1. Check What Your Volume Actually Was

Start with your real numbers rather than your sense of a normal month — offices routinely guess high. Search your transactions by **Added On** using a custom date range that matches one billing cycle rather than a calendar month, and the result count at the top of the page is that cycle's usage. Run it for the last few cycles and your pattern shows up on its own.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

For where you stand right now — transactions used, transactions left, and the day your quota resets — see Current Usage

2. Upgrade Before Your Busy Month Starts

An upgrade grants the extra transactions immediately and bills at the new amount on your next bill date, so you can move up the moment you need the room.

Time it for the month you'll actually use it. Quota doesn't roll over — transactions you don't create this cycle don't join next cycle's allowance, so upgrading early only buys room you'll lose at the reset.

If you're a transaction or two short and your bill date is close, waiting is free: your quota resets on that date and you can keep going.

Pipeline bills on a simple monthly transaction plan — a ladder you move up or down as your deal volume changes.

See Transaction Plans

3. Downgrade Before Your Bill Date

This is where the money is. Your bill date is what your charge is based on, so a downgrade that lands after it saves you nothing that cycle — move down while the slow month is still ahead of you, not once it's behind you.

One rule governs how far down you can go: you can only drop to a plan that still covers what you've already created this cycle. Create eight transactions and a five-transaction plan is out until your quota resets.

Your plan renews on a monthly cycle: your transaction quota resets, and Pipeline charges your card on your bill date.

See Billing Cycle

If the plan you want won't select, see Why Can't I Downgrade My Plan?

4. Ask Us About a Refund If You Upgraded for One Month

Moving up for a single busy month or a one-time backfill, then straight back down, is a normal thing to do — upgrade, create what you need inside that cycle, then downgrade once the bill processes and your quota resets.

When you've done that, email us and tell us which plans you moved between and when. Refunds for the difference are decided case by case by our billing team, and we've issued them for exactly this pattern.

Write to help@paperlesspipeline.com after your bill goes through.

5. Turn On Overages Instead If You Rarely Run Over

If your quiet months are genuinely quiet and you just clip your limit once or twice a year, carrying a bigger plan all year to cover it is the expensive way. Overages let you go past your quota at a flat rate per extra transaction without moving up a rung.

If you run over most months, the plan above you is usually the better value.

Overages let you go past your monthly quota without a full upgrade — Pipeline bills each extra transaction at a flat rate.

See Transaction Overages

6. Park the Account for a Long Quiet Stretch

When the slow stretch is a season rather than a month — a market that's stopped, an office winding down, a licence parked — the bottom of the ladder isn't the cheapest answer. The Archive Plan holds your data online and read-only at a lower monthly rate, with new transactions switched off until you come back.

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]