

Transaction Plans FAQ

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Plans are a monthly ladder you move up and down yourself, and only newly created transactions count against your quota. Answers to the common questions about upgrading, downgrading, and what happens when you hit your limit.

What counts against my transaction limit?

Only newly created transactions. Updating an existing transaction — changing its status, adding docs, editing details — never counts against your quota.

What happens if I reach my plan's limit?

By default, Pipeline stops you at your limit and won't bill you for a higher plan on its own. You'll be notified as you approach it. To keep creating transactions, upgrade to a higher plan — or turn on Transaction Overages to go past your quota at a flat per-transaction rate.

Does my plan ever upgrade or downgrade automatically?

No. Pipeline never changes your plan for you. You adjust it month to month yourself under Admin / Settings.

When does an upgrade take effect?

Immediately. The extra transaction files are available right away, and you're billed the new plan amount on your next bill date.

When does a downgrade take effect?

Right away for your quota; on your next bill for the price. Your quota drops the moment you downgrade, and your next bill reflects the lower plan.

Can I upgrade for one busy month and then drop back down?

Yes. Upgrade for the month you need the room, and once your bill processes and your quota resets, downgrade back to your usual plan.

Why can't I downgrade to the plan I want?

You've likely already created more transactions this cycle than that lower plan allows. A plan you've outgrown for the month is blocked until your quota resets. See [Why Can't I Downgrade My Plan?](#) for the full picture.

Learn More

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

See [Transaction Plans](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
