Transaction Plans

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

Introduction

The first question most brokers ask about Pipeline's pricing is how many agents it covers. It isn't priced that way. What you pay for is how many new transactions you open in a billing month, so a twelve-agent office doing four deals sits lower than a two-agent office doing thirty.

The plans are a ladder. Each rung is a monthly quota, and you sit on whichever one matches the volume you actually work. Offices move around on it as the year moves: up through the spring, back down in the quiet months, up again when a team joins. That's the design rather than a workaround, which is why there's no contract to exit and no fee for changing your mind. You're committing to a month at a time.

What that gives you is a bill that tracks your business rather than leading it. If you're consistently leaving quota unused, drop a rung. If you're bumping the ceiling most months, moving up is usually easier than running out mid-deal. And if you're not sure which rung fits the year you're having, ask before you guess.

How It Works

The plan you're on controls one thing: how many transaction files you can create before your quota resets for the month.

What Counts as a Transaction File

A transaction file is any newly *created* transaction in your account. Updating an existing transaction — say, changing its status from *Working* to *Closed* — does not count against your quota.

Your Monthly Quota

You can create as many transactions as your plan allows in a billing month. When you create one, it counts against that month's quota. At the start of each cycle the quota resets, and open transactions you created in earlier months never count against the new quota.

Moving Up the Ladder

Upgrading grants the extra transaction files immediately, and your account bills at the new plan amount on your next bill date. Pipeline never upgrades or downgrades your plan for you — plan changes are always yours to make.

Moving Back Down

You can downgrade to a lower plan as long as you've created fewer transactions this cycle than that lower plan allows. If you've already passed a plan's limit for the month, you'll need to wait until your quota resets before dropping to it.

Change Your Transaction Plan

> Upgrade or downgrade from the Billing section of your account settings.

> **Who Can Do This**: Master admins.

To change your transaction plan:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Under **Billing** in the left menu, click [Upgrade / Downgrade].
3. Review the available plans and their monthly costs.
4. Click the plan you want to move to.

An upgrade takes effect right away and bills on your next bill date; a downgrade lowers your quota immediately and bills at the lower rate on your next bill date. Your next bill date is shown in the Current Plan section of your Dashboard.

Transaction Plans FAQ

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. See [Transaction Plans FAQ](), or [Why Can't I Downgrade My Plan?]() if the option is blocked or grayed out.

Transaction Plans Troubleshooting

Running into a problem? Start here.

- [Why Can't I Downgrade My Plan?]()

Ways to Use Transaction Plans

See Transaction Plans at work inside a bigger job:

- [Open a New Office — New Location or New Account?]()
- [Right-Size Your Plan to Your Season]()