Billing Control

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In an Enterprise, billing runs from one place. The Enterprise Admin controls the card on file for every member account, and can hand that control to a master admin whenever an office would rather manage its own.

Introduction

An office admin goes to update the card on file and the option isn't there. Nothing is broken and their permissions aren't wrong. The account sits inside an Enterprise, and payment details are held one level up.

That's the arrangement an Enterprise makes: one set of hands on the money across the whole organization, so payment details stay current without anybody signing into each account one at a time. What's centralized is the control, not the bills. Each member account keeps its own transaction plan and is charged separately every month, and the portal itself adds nothing to what you already pay. The authority over the card is shared; the invoice isn't.

It doesn't have to stay central. An office that would rather handle its own card can have it back, one account at a time, and it's a reasonable thing for an office owner to ask for. Until it's granted, the answer to where a bill gets paid is the Enterprise rather than the account, and that's the first thing to check when a card change won't go through.

How It Works

Billing control is centralized; the bills themselves are not. Here's what that means in practice.

Where Billing Lives

Payment details for member accounts live in the Enterprise Portal, under **Manage Accounts**. From there an Enterprise Admin can update the card on one account, on several at once, or on all of them — with no account-level login.

Each Account Keeps Its Own Plan

Centralizing control doesn't merge the bills. Each member account carries its own transaction plan and gets its own bill each month. What's shared is the authority over payment details, not the invoice.

The Portal Itself Costs Nothing Extra

There's no additional charge for the Enterprise Portal. You pay for each member account's transaction plan, the same as you did before the accounts were grouped.

Hand Billing to a Master Admin

By default, master admins on member accounts don't have billing permission, so **Update Credit Card** doesn't appear in their own Admin / Settings. An Enterprise Admin turns it on for a specific master admin, inside the account they manage. Only master admins can get it — there's no way to give billing access to someone who isn't one.

Who Can Change a Plan

Moving a member account up or down a transaction plan is the account's master admin or an Enterprise Admin. It isn't something our support team can change for you.

Update the Credit Card for a Member Account

> Change the card on file for a single account in your Enterprise, straight from the Portal.

> **Who Can Do This**: Enterprise Admins.

To update the credit card for a member account:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Accounts] under Enterprise Portal in the left menu.
3. Find the account you want to update.
4. Click the account's [Gear], then [Update Payment Info].
5. Enter the new credit card details and review the required terms and policies.
6. Click [Update Credit Card].

That account now bills to the new card — and you never had to log into it.

Update the Credit Card for Multiple Accounts

> Put the same card on several member accounts in one pass with a bulk update.

> **Who Can Do This**: Enterprise Admins.

To update the credit card for multiple accounts at once:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Manage Accounts] under Enterprise Portal in the left menu.

3. Check the box next to each account you want to update.
4. Click [Bulk], then select [Bulk Update Payment].
5. Enter the new credit card details and review the required terms and policies.
6. Click [Update Credit Card].

Every account you checked is now billing to the new card.

Let a Master Admin Update an Account's Card

> Hand day-to-day billing for one account to its master admin, so card changes don't have to come through you.

> **Who Can Do This**: Enterprise Admins. The permission can only be given to a master admin on the account.

To let a master admin update the credit card on their account:

1. Access the account you want to grant the permission on.
2. Click the [Gear] in the upper-right corner, then [Admin / Settings].
3. Click [Manage Users] under People in the left menu.
4. Find the master admin you want to grant the permission to.
5. Click the [Gear] to the right of their name, then [Allow Credit Card Update].

[Update Credit Card] now appears under Billing in that master admin's Admin / Settings, and they can change the card for their own account.

What Stays With the Account

Centralizing control moves the authority, not the record. Each member account still has its own plan, its own charges, and its own history of them — all documented in the core help guides.

Transaction Plans

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

See Transaction Plans

Credit Card on File

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

See Credit Card on File

Billing History

Your Billing History page is the record of every Pipeline charge — what you paid, when, and the date your account is paid through.

See Billing History

Billing Control FAQ

Billing for every account in an Enterprise runs through the Enterprise Admin, from the Enterprise Portal. Answers to the common questions about who can update a card, delegating billing to a master admin, and what each account is charged. See Billing Control FAQ, or Why Can't I Update the Credit Card on a Member Account? if the option isn't where you expect it.

Billing Control Troubleshooting

Running into a problem? Start here.

- Why Can't I Update the Credit Card on a Member Account?