

Pipeline AI Settings & Management

Pipeline AI stays off until a master admin turns it on, and the page that turns it on also sets the most it can cost in a month and who on your team can run it.

Introduction

Nothing in [Pipeline AI](#) runs until a master admin turns it on, and nothing is added to your bill before that. Turning it on means setting a monthly spending limit first, the most AI can cost your account in a month. The same page, *Pipeline AI* under *Add-On Modules* in *Admin / Settings*, then lets you choose who can run *AI Create* and who can run *AI Update*.

Master admins make all three calls, and that gives an office room to bring AI in at its own pace. Try it yourself on the account's starter credits, open it to a few people, watch what it spends, and widen it once it has earned that. The rest of Pipeline works the way it does now.

How It Works

Off Until a Master Admin Turns It On

Until it's on, *AI Create* and *AI Update* show for master admins alone, who can run them on the account's starter credits. That's the trial: a master admin tries it on a real contract before anyone else in the office sees it.

The Monthly Spending Limit Is the Most It Can Cost

One number covers the whole account, and it's the most you can be charged for AI in a billing cycle. When the month's spend reaches it, Pipeline AI pauses for everyone in the account until the billing cycle resets or a master admin raises the limit.

You Choose Who Runs Each Action

Under *Who Can Use AI?*, a master admin sets *AI Create* and *AI Update* separately, each to **Anyone**, **Admins / Staff** or **Master Admins**. The setting only narrows.

Turn On Pipeline AI

Setting your first monthly spending limit is what turns Pipeline AI on for the team.

Who Can Do This: Master admins.

To turn on Pipeline AI:

- 1 Click the [Gear] in the upper-right corner, then [Admin / Settings].
- 2 Under *Add-On Modules*, click [Pipeline AI].
- 3 Under *Set your monthly cap*, drag the slider to the most you want to spend in a month.
- 4 Click [Enable Pipeline AI →].
- 5 Read the confirmation, then click [Enable Pipeline AI].

Pipeline AI is on for your account. *AI Create* and *AI Update* are available to your team, within whatever you set under *Who Can Use AI*?

Set Who Can Use Pipeline AI

Chooses which roles can run *AI Create* and which can run *AI Update*, each set separately.

Who Can Do This: Master admins.

To set who can use Pipeline AI:

- 1 Click the [Gear] in the upper-right corner, then [Admin / Settings].
- 2 Under *Add-On Modules*, click [Pipeline AI].
- 3 Under *Who Can Use AI*?, choose a level for **Create** and a level for **Update**:
 - **Master Admins:** master admins only.
 - **Admins / Staff:** master admins, plus admins with the **View All Transactions** permission.
 - **Anyone:** anyone who can already do that work by hand.

Access changes right away.

Change Your Monthly Spending Limit

Raises or lowers the most Pipeline AI can cost, at any point in the month.

Who Can Do This: Master admins.

To change your monthly spending limit:

- 1 Click the [Gear] in the upper-right corner, then [Admin / Settings].
- 2 Under *Add-On Modules*, click [Pipeline AI].
- 3 Under *Set your monthly cap*, drag the slider to the new amount.
- 4 Click [Update Monthly Limit].

A notice across the top confirms the new limit, and it applies right away. Set it to \$0 and Pipeline AI pauses for the whole team until you raise it.

View What You've Spent on Pipeline AI

Shows your limit beside what the team has spent this billing cycle.

Who Can Do This: Master admins. Nobody else sees these two lines.

To view what you've spent on Pipeline AI:

- 1 Click the [Gear] in the upper-right corner, then [Admin / Settings].
- 2 Scroll to **Current Usage** in the left menu.
- 3 Read **AI budget**, your monthly spending limit, against **AI usage (current)**, what your team has spent this cycle.

You see how much of this cycle's limit is left, beside your next bill date.

Check What Each Person Can Already Do

Opening *AI Create* to **Anyone** widens nobody's reach. The person still has to be able to create a transaction by hand, and *AI Update* still needs access to that transaction and its docs.

See [Managing User Permissions](#).

Work Out When a Pause Lifts

A pause lifts by itself on your next bill date, when the month's AI spend resets. Your bill date is the day of the month your account started, not the first.

See [Billing Basics](#).

Frequently Asked Questions

Can we try it before the whole office gets it?

Yes. A master admin can run both actions on the starter credits first, then open AI to a few roles at a time.

Can I allow AI Create and hold back AI Update?

Yes. Each action has its own setting under *Who Can Use AI?*

What counts as one AI run?

One create or one update. A create from multiple docs is still one run, whatever the page count.

Am I billed my full monthly spending limit?

No. The limit is the most you can be charged, and you're billed for the runs your team makes.

Is Pipeline AI included in my Transaction Plan?

No. It's an add-on that shows on your regular bill, and only after a master admin turns it on.
