AI Permissions

Last Modified on 09/04/2026 11:19 am EDT

Two switches decide who can spend on AI: a master admin turns Pipeline AI on for the account, then chooses who can run AI Create and who can run AI Update.

Introduction

Every other feature in Pipeline is free to use once you can reach it. Pipeline AI costs money each time it runs, which changes what access has to mean. The question isn't only who's allowed to do the work, it's who's allowed to spend on it.

So access is set in two stages: the account is switched on once, and then each of the two AI actions gets its own audience. Splitting them apart was the thing offices asked for most after launch, because Create and Update sit at different points in a deal and often belong to different people. Underneath both, the permissions you already have still apply. AI is a faster route to work someone can do by hand, never a way past a rule about what they can reach.

If the bill comes to you, you can say exactly who's able to add to it, and open that up further whenever you're ready. Leaving the settings alone changes nothing about your team's current access, so there's no rush and nothing breaks while you decide.

How It Works

Who Turns Pipeline AI On

Only a master admin, and support can't do it on your behalf. Until it's on, *AI Create* and *AI Update* don't appear for anyone. Before rollout the AI options show for master admins alone, spending the account's starter credits.

Who Can Run Each Action

Under *Who Can Use AI?*, *AI Create* and *AI Update* each carry their own setting — so you can open Create to the whole office while holding Update to your admins, or the other way round. Both start at **Anyone**, so leaving them alone keeps your team's current access exactly as it is.

Who Can See What It Costs

Giving someone access to run AI doesn't show them what it costs. **AI budget** and **AI usage (current)** stay with master admins.

Set Who Can Use Pipeline AI

> Choose which roles can run *AI Create* and which can run *AI Update*, each set on its own.

> **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 **AI Create** and a level for **AI 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. Master admins keep both actions whatever you choose, and nobody gains access to work they couldn't already do.

Check What Someone Can Already Reach

Opening *AI Create* to **Anyone** widens nobody's reach on its own. The person still has to be able to create a transaction by hand, and *AI Update* still needs access to that file and its documents — so the real audience for AI is settled a level below this page.

Decide exactly what each person can see and do in Pipeline, location by location.

See [User Permissions]

AI Permissions FAQ

Pipeline AI is off until a master admin turns it on, and each AI action carries its own access setting. Answers to the common questions about who can enable it and who can run it.

See [AI Permissions FAQ]

AI Permissions Troubleshooting

Running into a problem? Start here.

- [Why Can't I See Pipeline AI?]