Roll Out Pipeline AI Without Losing Control of the Spend

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You pay the bill, so you decide what Pipeline AI can cost and who can spend it. Try it yourself first, set the Monthly Spending Limit, then open it to the team.

Introduction

Pipeline AI is an add-on with its own Monthly Spending Limit, and that changes how you introduce it. The question brokers ask first isn't *what does it do*. It's *what happens to my bill when twelve agents discover it*.

The answer is that you're never handing anyone an open tab. Nothing in Pipeline AI runs on its own; a person chooses every single run. On top of that you set a Monthly Spending Limit, and you decide separately which roles can run each AI action. This article puts those pieces in the order a rollout actually happens — quiet test first, limit second, team last.

When to Use This

- You want to try Pipeline AI on a real contract yourself before anyone else in the office can touch it.
- You pay the account bill and you don't want charges appearing from runs you didn't authorize.
- You'd open AI Create to the whole office but keep AI Update to your admins.
- Your agents say they see no AI options at all, and you're not sure whether that's a bug or a setting.
- Someone asked what Pipeline AI will add to the bill, and you want to set that answer yourself before you commit.

Why This Beats Leaving It Switched Off

The first instinct, when a feature adds to the bill, is to keep it off until you're certain. It's a reasonable instinct and it quietly costs you the thing you were protecting: the office keeps doing the data entry by hand, and you never find out whether the trade was worth making, because you never made it.

You don't have to choose between off and open. The Monthly Spending Limit and the access settings are two different controls, and using both is what turns an open-ended new charge into a line item you sized yourself — a number you picked, on runs your team chose to make, that you can lower any day of the month.

1. Try It on a Real Contract Before Anyone Else Can

Before Pipeline AI is switched on for the account, the AI options appear for master admins alone — so you can run it on a live document and see the result without a single agent knowing the feature is there. Your account's starter credits cover that first look.

Use a contract you know well, so you can judge the result against what you'd have typed yourself.

Upload a signed contract and a filled-in transaction comes back — *AI Create* does the typing, so you review what Pipeline pulled, add what's missing, and save.

See Pipeline AI Create

> This is also why a Pipeline AI link in an announcement email works for you and errors for everyone else on your team. Nothing is broken — the feature isn't on yet.

2. Decide What a Month of AI Is Worth to You

Pick the number before you open the settings, and pick it the way you'd budget any other line: how many files does the office open in a month, and how many of those are worth handing to AI? The settings page shows how many runs a limit would cover, so a rough count of documents tells you where to set it.

> Whatever you set, the limit is the most you can be charged. It never creates a charge.

3. Set the Monthly Spending Limit

Setting your first limit is the same act as turning Pipeline AI on, which is deliberate: there's no way to switch the feature on without naming the most it can cost you.

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.

See Pipeline AI Settings

> Only a master admin can set this, and support can't do it on your behalf — not on a call, not by request. If you own the bill, you own this slider.

4. Choose Who Can Run Each AI Action

The limit controls *how much*. This controls *who*, and it's set for the two AI actions separately — which is what lets you open AI Create to the office while holding AI Update to your admins, or the reverse.

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> Both actions start at **Anyone**. If you want a narrower rollout than that, change these settings in the same sitting as you set the limit — turning Pipeline AI on and leaving them alone opens both actions to everyone who could already do that work by hand.

5. Watch the Meter, and Know What a Pause Looks Like

Once the team is using it, your limit and the current cycle's spend sit together on the *Current Usage* panel — visible to master admins only, so checking that number is your job and nobody else's.

If a month runs hot, you don't have to wait for the bill. Lowering the limit takes effect right away, and $0 stops all AI spend until you raise it again.

> A pause isn't a failure state, and nothing is lost in one — transactions, documents, and everything already saved carry on exactly as before. Only the AI options stop being available.