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 ceiling, then open it to the team.

Introduction

Pipeline AI is the one part of Pipeline that costs money each time somebody uses it, 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 ceiling, 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, ceiling 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 you what Pipeline AI will cost per month and you need a number before you commit.

Why This Beats Leaving It Switched Off

The first instinct, when a feature bills by usage, 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 ceiling 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.

Pipeline AI is priced by the run: one pass over one document, one dollar, and only when someone on your team chooses to use it.

See AI Runs

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? A run is charged per document, so a rough count of documents is a rough count of dollars.

Before you commit to a number, the Pipeline AI page shows how many AI runs a limit would cover, sized to the plan you're already on.

See Usage Estimator

> Whatever you set, an unused limit costs nothing. Put the ceiling at $250, use $40 of it, and $40 is what you're billed — the limit caps the charge, it never creates one.

3. Set the Monthly 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.

Your monthly limit is the ceiling on what Pipeline AI can cost your account — set it once, change it whenever you like, and you're only ever billed for the runs your team actually makes.

See AI Monthly Limit

> 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 ceiling 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.

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.

See AI Permissions

> 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.

When the month's AI spend reaches your limit, Pipeline AI pauses for everyone until the cycle resets or a master admin raises the ceiling. Nothing else about Pipeline changes.

See Budget-Exhausted Pause

> 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.