Pipeline AI Activation FAQ

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Pipeline AI stays off until a master admin turns it on, and an account that leaves it off is unchanged in every way. Answers to the common questions about opting in, who can flip the switch, and what your team sees before anyone does.

Will Pipeline AI be turned on for my account automatically?

No. Pipeline AI is an add-on module a master admin opts into. Nothing switches on because a feature launched, and nothing reaches your bill unless somebody on your team chooses to run it.

Is Pipeline AI part of what I already pay every month?

No — it sits outside your subscription. Pipeline AI is billed per use, on your regular bill, for the runs your team actually makes. It isn't included in a plan and it's never added to one on your behalf.

Can I say no and keep running my account exactly the way I do today?

Yes, and there's nothing to decline. An account with Pipeline AI switched off works the way it always has. Adding transactions, updating them, uploading and filing documents, checklists, messaging — all unchanged, and none of it costs anything extra.

Then why can I already see AI Create and AI Update?

Because you're a master admin. Before Pipeline AI is switched on for the account, the two AI actions appear for master admins alone, spending the account's starter credits. It's there so you can try it on a real contract before anyone else in the office knows it exists.

Can we trial Pipeline AI off to one side before the whole office gets it?

There's no separate place to trial it, and there doesn't need to be. The master-admin preview is the trial. After that, enabling it is live straight away and account-wide, and you narrow who can run each AI action rather than staging a test.

My agents were shown something about an AI trial. Can they sign up or pay for it themselves?

No. Agents can't try, activate or pay for Pipeline AI at any point. What they saw is a one-time informational box on the Add Transaction page, shown once after Pipeline AI launched and gone afterwards. Activating it and spending on it stay with master admins.

Can support turn Pipeline AI on for us?

No — activation sits with your account's master admin. We can't switch it on at your request, on a call or otherwise. You'll find your admins under *Admin & Support* in the left menu of your Home page.

Our account is part of an Enterprise. Who decides whether we get Pipeline AI?

Your Enterprise Admins. Add-on modules for a member account are decided at the Enterprise level, so that request goes to them rather than to us.

How do I find out how many AI credits we have left?

Write to us and we'll look it up. Credits granted beyond an account's starter balance aren't counted anywhere in the app, and only master admins can spend them. Email **help@paperlesspipeline.com** and we'll tell you the balance. Offices have asked us for a counter they can read themselves, so it's a request we're hearing.

I turned Pipeline AI on and someone on my team still can't see it.

Their role probably isn't included for that action. *AI Create* and *AI Update* carry separate access settings, and neither widens a permission somebody doesn't already have. Check both under *Who Can Use AI?* on the Pipeline AI page.

AI Create or AI Update isn't where you expected it, or a Pipeline AI link from an email returns an error. It's almost always an access gate rather than a fault.

See Why Can't I See Pipeline AI?

Learn More

Nobody is enrolled in Pipeline AI. It stays off until a master admin turns it on, so until that happens your bill, your team's screens, and the way you work are all exactly as they were.

See Pipeline AI Activation

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.