

# Pipeline AI Activation

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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.

## Introduction

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An announcement lands, or an agent mentions it in passing, and the first question is rarely what the thing does. It's whether you're about to be signed up for it.

You aren't. Pipeline AI is an add-on module, billed per use and only when someone on your team chooses to run it. It's never added to an account on its own, and there's nothing to decline: an account with Pipeline AI switched off behaves like an account that has never heard of it.

That leaves one decision, and it belongs to a master admin. Everything else about Pipeline AI follows from that single switch, starting with what your team can see.

## How It Works

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### Nothing Turns On by Itself

Pipeline AI is opt-in. An account is never enrolled in it, a launch never changes what you pay, and an office that leaves it off keeps working the way it works today. Nobody has to be told and no setting has to be saved — leaving it off is the whole action.

### What Your Team Sees Before It's On

While Pipeline AI is off, *AI Create* and *AI Update* appear for master admins alone, who can run them against the account's starter credits. That's the trial: a master admin tries it on a real contract before anyone else knows it's there. Everyone else sees Pipeline exactly as they always have, and agents can't try, buy or turn on Pipeline AI at any point.

### What Changes the Moment You Enable It

Enable Pipeline AI and it's live straight away, for everyone your access settings include, working within the permissions each person already has. There's no separate place to trial it first. Adding and updating transactions by hand stays exactly where it is, and the switch turns back off as fast as it went on.

## Check Whether Pipeline AI Is On for Your Account

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Find out in one place whether Pipeline AI is switched on, and who on your team can reach it if it is.

**Who Can Do This:** Master admins. The Pipeline AI page is master-admin-only, which is also why a Pipeline

AI link in an announcement email returns an error for anyone else.

To check whether Pipeline AI is on for your account:

1. Click the **[Gear]** in the upper-right corner, then **[Admin / Settings]**.
2. Under *Add-On Modules*, click **[Pipeline AI]**.
3. Look under the monthly limit slider. An **[Enable Pipeline AI]** button means Pipeline AI is off and waiting on you.
4. A *Who Can Use AI?* section under the slider means it's already on. The setting beside *AI Create* and the setting beside *AI Update* tell you who can run each one.

You know which state your account is in, and who can spend on AI if it's live.

## Turn Pipeline AI On for Your Team

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When you're ready, the switch and the budget are the same control. You can't turn Pipeline AI on without first naming the most it's allowed to cost you in a month, which is why there's no version of this that starts with an open tab.

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](#)

## Decide Who Can Run Each AI Action

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Turning Pipeline AI on opens both AI actions to everyone who can already do that work by hand. If you'd rather start narrower than that, set it in the same sitting as the limit.

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](#)

## Step Back Out Without Losing Anything

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Trying it and deciding against it isn't a teardown. The same slider that switched Pipeline AI on takes it back out of your team's hands, and every setting stays where you left it in case you change your mind.

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](#)

## When Your Account Belongs to an Enterprise

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A member account inside an Enterprise doesn't make this call on its own. Add-on modules are decided at the Enterprise level, so a request to add Pipeline AI goes to your Enterprise Admins rather than to us.

An Enterprise Admin is the one role that reaches across account boundaries — full authority in every account in the Enterprise, from a single sign-in.

See [Enterprise Admins](#)

## 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.

See [Pipeline AI Activation FAQ](#)

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