

Pipeline AI Settings

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Choose who can use Pipeline AI, and limit what it costs once your monthly credit is used.

Introduction

Pipeline AI reads your documents for you. As docs land in *Unassigned*, it names each one, looks for the transaction it belongs to, and finds the separate documents inside a packet. When someone creates a transaction from a contract or updates one from new paperwork, it fills in the details for them to check.

The reading in *Unassigned* is included in your plan. So is a monthly credit for creating and updating, and your admins and staff can start using it right away. Use these settings to monitor your credits, set your limit, and choose who can use each part of Pipeline AI.

Your limit decides what happens when the credit runs out. It starts at \$0. At \$0, creating and updating pause until the credit resets, and nothing is added to your bill. Raise it, and your team keeps going past the credit. You pay only for what they use, up to the limit you set.

How It Works

What Comes With Your Plan

AI Assign and **AI Break Apart** run on every doc that lands in *Unassigned*. AI Assign names each one and looks for its transaction, and AI Break Apart finds the separate documents inside a packet.

AI Create and **AI Update** run on your monthly credit. AI Create fills in a new transaction from a contract, and AI Update brings one up to date from new paperwork. After your credits run out, each AI Create is \$1.00 and each AI Update is \$0.50, up to your set limit.

Your Plan Includes a Monthly Credit

Each billing period includes Pipeline AI credit based on your transaction plan. Your Pipeline AI settings show the credit amount and what's left of it. The credit arrives when your bill processes each month, and whatever's left when the billing period ends does not carry over.

A Limit Lets Your Team Go Past the Credit

The monthly spending limit starts at \$0, so once the credit is used, AI Create and AI Update pause for everyone until the next billing period. Set a higher limit, and your team can keep going. Anything used past the credit is charged on your next bill, and never more than the limit you set.

You Choose Who Can Use Each Action

AI Create and AI Update each get their own row under *Who Can Use AI?*, so you can open each one to whoever you wish. Both start at Admins / Staff.

- **Master Admins:** only master admins.

- **Admins / Staff:** master admins, and admins with the View All Transactions permission.
- **Anyone:** everyone who can already do the same thing without Pipeline AI.
- **Disabled:** no one.

AI Assign and AI Break Apart share the Assign & Break Apart row. Set it to Enabled or Disabled for your whole office.

See Your Free Credits and Limit

Shows this billing period's free credit, what's left of it, the day it resets, and the monthly limit you've set.

Who Can Do This: Master admins.

To see your free credits and limit:

- 1 Click the **[Gear]** in the upper-right corner, then **[Admin / Settings]**.
- 2 Under *Add-On Modules*, click **[Pipeline AI]**.
- 3 Read the line at the top of the right-hand column, such as *Your plan includes \$5.00 of free Pipeline AI each billing period. \$3.00 is left, resetting Nov 21, 2026.*

If you've set a limit, the page also shows it, such as *Pipeline AI has a \$125 monthly limit.*


Pipeline AI

Say goodbye to data entry.

AI reads your contracts from listing to closed and fills in the fields for you.
Save your brain for the important work.

 Your plan includes \$5.00 of free Pipeline AI each billing period. \$3.00 is left, resetting Nov 21, 2026.

Pipeline AI has a \$125 monthly limit.

Set Your Monthly Spending Limit

Lets your team keep using AI Create and AI Update once the month's credit is used, up to the amount you choose.

Who Can Do This: Master admins.

To set your monthly spending limit:

- 1 Click the **[Gear]** in the upper-right corner, then **[Admin / Settings]**.
- 2 Under *Add-On Modules*, click **[Pipeline AI]**.
- 3 Under *Set your monthly limit*, drag the slider to the most you want to spend past the credit in a month.
- 4 Click **[Set Monthly Limit]**, or **[Update Monthly Limit]** if you've set one before.

Set your monthly limit

\$125 / month max

\$0

\$375

\$750

\$1125

\$1500

covers up to

125 Transaction Creates

this billing cycle

↑

Set a monthly limit for Pipeline AI, only used when you've exhausted your free credits.

\$

AI Create is \$1.00, AI Update is \$0.50.
AI Assign & Break Apart are included for free.

↑

You set the limit. Billed only for what you use.
Nothing beyond it unless you choose to raise the limit.

Set Monthly Limit →

Have a question? [Contact support](#).

Your monthly limit applies right away.

Set Who Can Use Pipeline AI

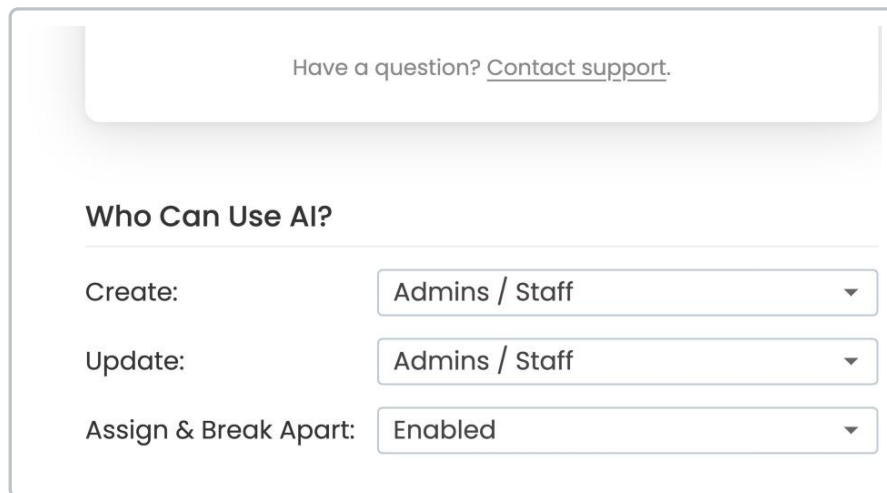
Chooses which roles can use AI Create and which can use AI Update, and whether AI Assign and AI Break Apart read your incoming docs.

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 **Create** and a level for **Update**.

- 4 Next to **Assign & Break Apart**, choose **Enabled** or **Disabled**.



Have a question? [Contact support.](#)

Who Can Use AI?

Create: Admins / Staff ▼

Update: Admins / Staff ▼

Assign & Break Apart: Enabled ▼

Access to Pipeline AI changes right away.

Disable Pipeline AI

Stops everyone in your office from using any part of Pipeline AI.

Who Can Do This: Master admins.

To disable 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?*, set **Create**, **Update** and **Assign & Break Apart** to **Disabled**.

No one in your office can use Pipeline AI until you change these back.

Track Company Usage for This Month

Shows how much free credit your company has left this billing cycle, and what's been charged past it.

Who Can Do This: Master admins.

To track company usage for this month:

- 1 Click the **[Gear]** in the upper-right corner, then **[Admin / Settings]**.
- 2 In the left menu, under *Current Usage*, find **AI remaining** and **AI usage (current)**.

– Add-On Modules

Commission Module

Pipeline AI

Pipeline eSign

+ Integrations

Current Usage

Transaction quota	5
Transactions created	2
Transactions remaining	3
AI remaining	\$130
AI usage (current)	\$0
Next bill date	11/21

- **AI remaining** is what Pipeline AI can still spend this cycle: the free credit you haven't used, plus any room left under your limit.
- **AI usage (current)** is what's been spent past your free credit this cycle, against your limit. It's added to your bill on the **Next bill date** shown below it.

Track Usage by User for Your Desired Period

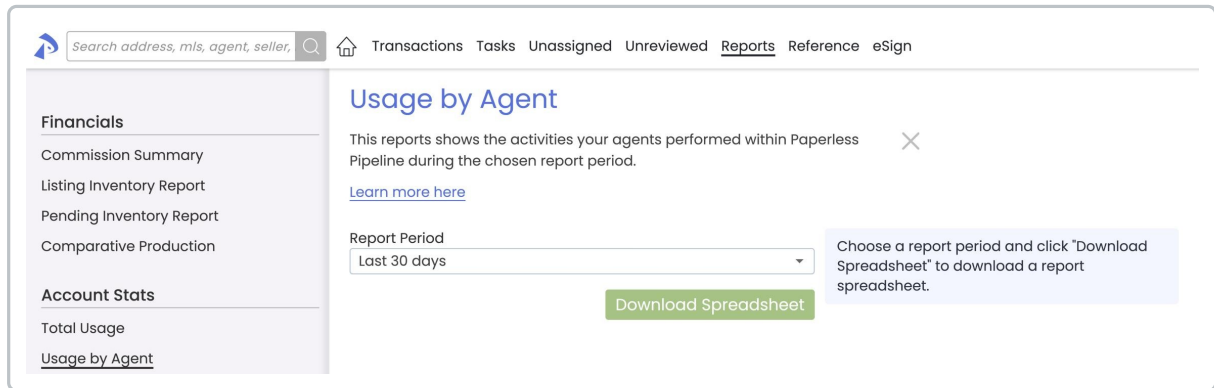
Shows how many AI Creates and AI Updates each person ran, over any period you choose.

Who Can Do This: Master admins.

To track usage by user:

- 1 Click **[Reports]** in the top menu.

- 2 In the left menu, under *Account Stats*, click [**Usage by Agent**].
- 3 Choose a **Report Period**: the last 30, 60 or 90 days, a full calendar year, or a date range you set.
- 4 Click [**Download Spreadsheet**].



The spreadsheet lists everyone in your account. The AI Creates and AI Updates columns show how many times each person ran them in that period.

Frequently Asked Questions

Is Pipeline AI included in what we already pay?

Part of it is. Your plan includes a monthly credit, and AI Assign and AI Break Apart cost nothing. Past the credit, AI Create is \$1.00 per transaction and AI Update is \$0.50 per update, up to the limit you set.

How much credit does my plan include?

It grows with your transaction plan. The more transactions in your plan, the more credit you get. Your Pipeline AI settings show the amount, such as *Your plan includes \$5.00 of free Pipeline AI each billing period.* What's left at the end of a billing period does not carry over.

If I keep the limit at \$0, can my team still use Pipeline AI?

Yes, on the month's credit. A \$0 limit only stops spending past the credit. Set a limit when you want your team to keep going once the credit is used.

Are we charged for docs that land in Unassigned?

No. AI Assign and AI Break Apart read them at no charge. AI Create and AI Update run only when someone starts one.

Can my agents run up charges?

Only if you let them. An agent can run an action only when a master admin sets it to **Anyone**. Every run uses the month's credit first, and only a master admin can set a limit past it.

Can I allow AI Create and hold back AI Update?

Yes. Each action has its own setting under *Who Can Use AI?*

What counts as one AI run?

One create or one update. A create from multiple docs is still one run, up to 50 pages and 40 MB across the docs you select.

Does a free trial include Pipeline AI?

A small part of it. A free trial includes a small credit to try AI Create and AI Update. Who can use them, the limit, and AI Assign and AI Break Apart start once you're on a paid plan.

Am I billed my full monthly spending limit?

No. The limit is the most you can be charged past the credit, and you're billed only for what your team uses.
