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 Settings is the one page where a master admin decides how Pipeline AI works for your office. Pipeline AI works with nothing to set up: AI Assign and AI Break Apart are on, and admins and staff can use AI Create and AI Update.

AI Assign and AI Break Apart are included with your plan. AI Create and AI Update use a monthly AI credit sized to your plan, and this page shows what's left of it.

Your limit decides what happens when the credit runs out. It starts at $0, so AI Create and AI Update pause until next month's credit arrives, 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

Included With Your Plan

AI Assign included
Renames and pre-assigns docs as they're added to *Unassigned*.

AI Break Apart included
Detects doc packets in *Unassigned* and marks where to break them apart.

Both run on their own on every doc that lands in *Unassigned*, so each one is ready for you to assign or break apart.

Uses Your Monthly Credit First

AI Create $1.00 after monthly credit
Creates an autofilled *Add Transaction* form from a contract.

AI Update $0.50 after monthly credit
Updates the *Edit Transaction* form using a counteroffer or addendum.

Both use your monthly credit first, and each fills in a form for you to review and save. After your credit runs out, each one costs the price shown, 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 next month's credit arrives. 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 set the limit, and you're billed only for what you use.

Pipeline Tells You When Your Monthly Limit Is Running Low

If you've set a monthly limit, Pipeline emails your office's master admins when 10% of it is left. The email says it resets on your next billing date, with a link to raise it. From then on, the *Create Transaction* window shows what each create will use from what's left, such as *This will use $1.00 of your remaining budget of $8.50.*

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 Credit and Limit

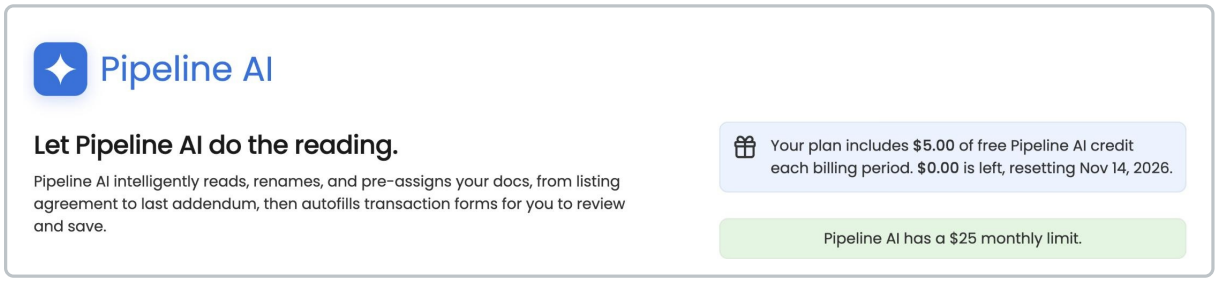
Shows this billing period's credit, what's left of it, the day it resets, and the monthly limit you've set.

Who Can Do This: Master admins.

To see your credit 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 credit 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.*



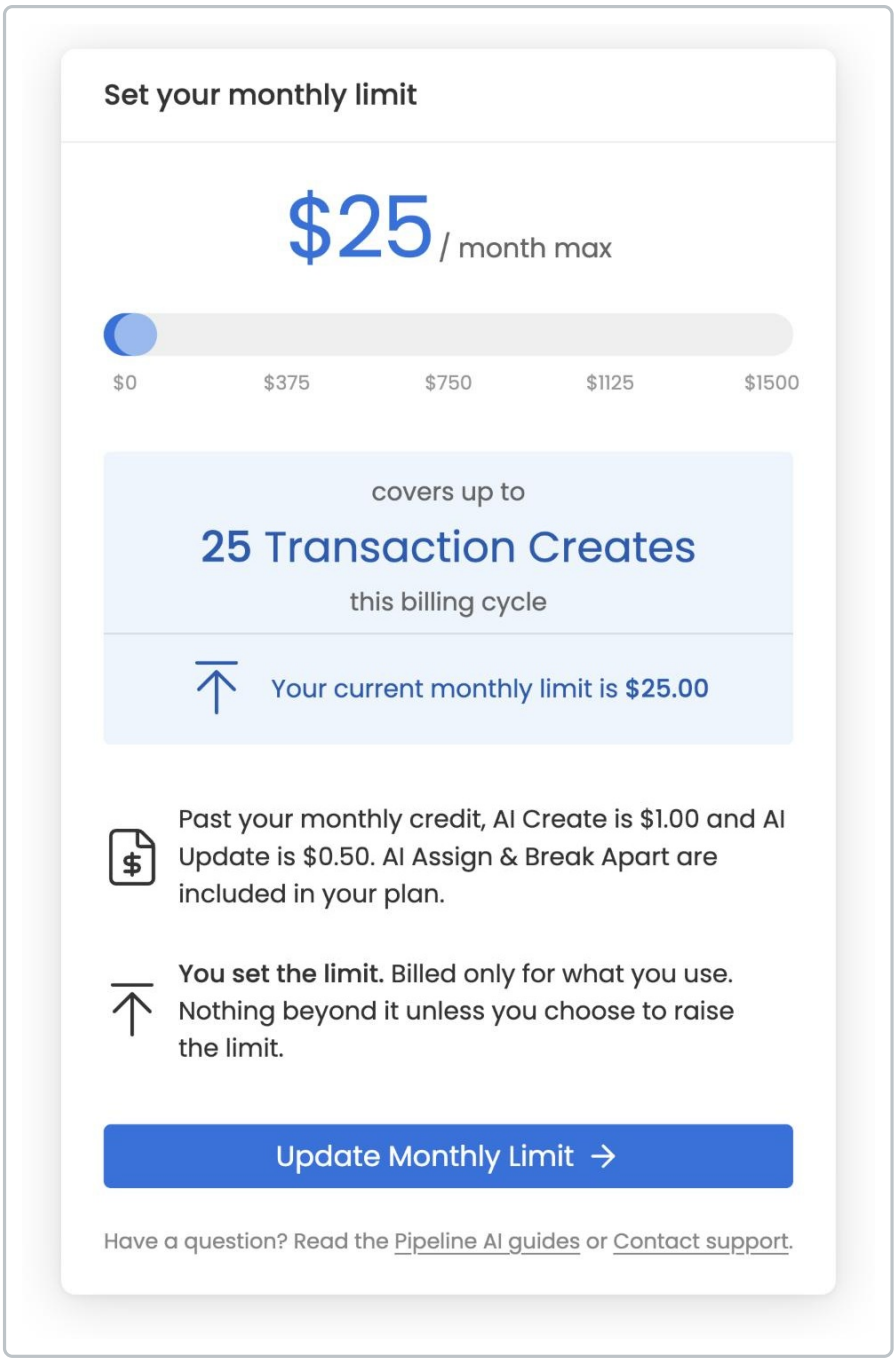
Set Your Monthly Spending Limit

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. The panel shows how many AI Creates that covers, such as *covers up to 125 Transaction Creates this billing cycle*.
4. Click **[Set Monthly Limit]**, or **[Update Monthly Limit]** if you've set one before.



Your monthly limit applies right away. The panel then shows it, such as *Your current monthly limit is $125.00.*

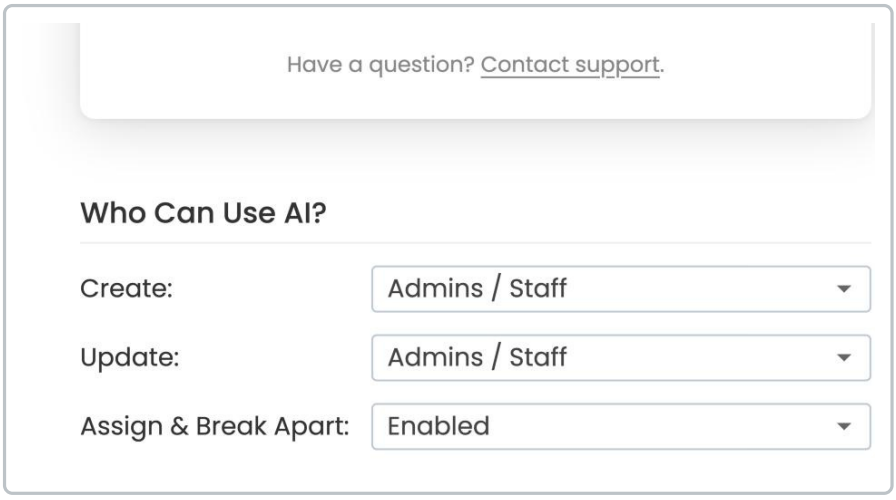
Set Who Can Use Pipeline AI

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**.



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.

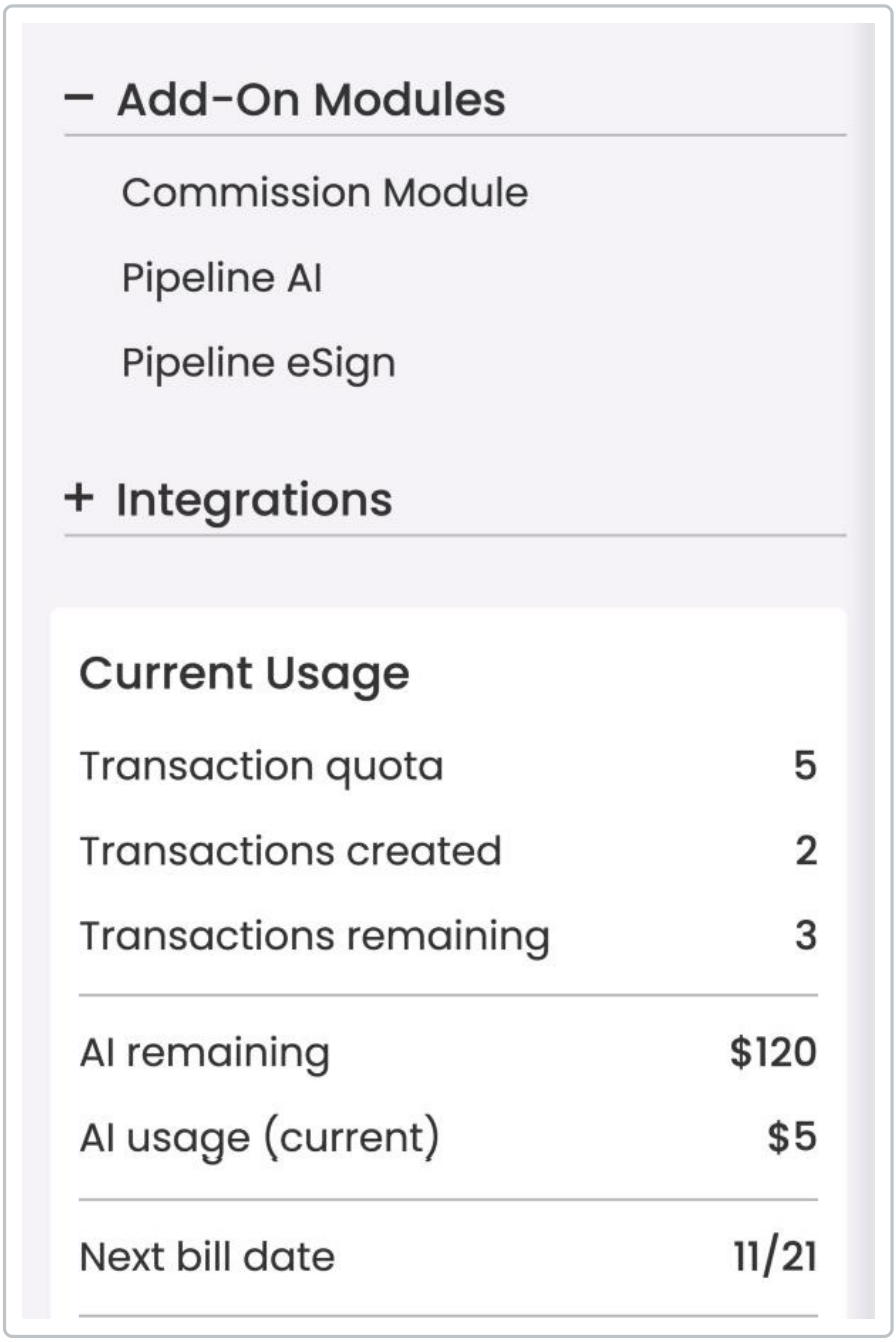
Track Company Usage for This Month

Shows how much 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)**.



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

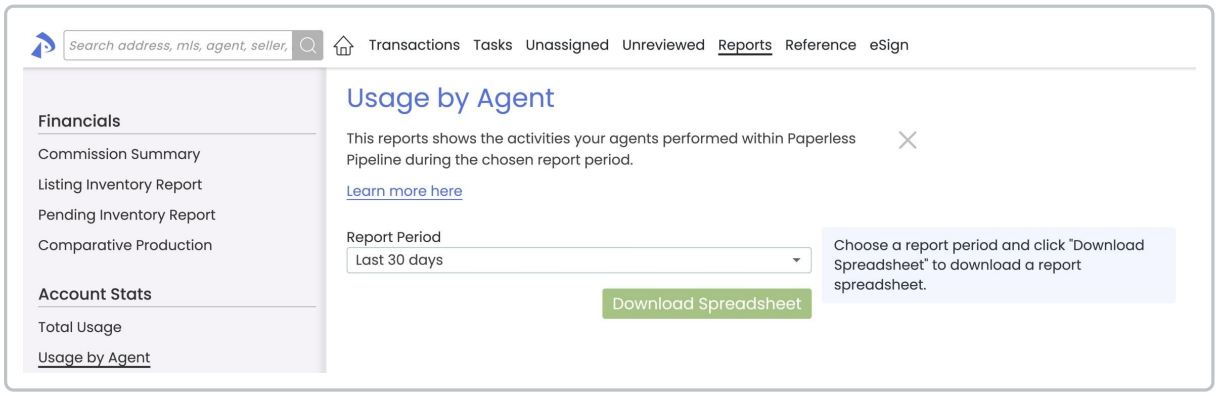
Track Usage by User for Your Desired Period

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?

Partly. AI Assign and AI Break Apart are included with your plan, and so is a monthly credit. Past the credit, AI Create is $1.00 per transaction and AI Update is $0.50 per update, up to the limit you set.

Who on my team can use it?

AI Create and AI Update start with Admins / Staff. Each one has its own setting, so you can open it to more of your team or fewer. AI Assign and AI Break Apart can be disabled company-wide.

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 credit each billing period.* What's left at the end of a billing period does not carry over.

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 covers only what's spent past your monthly credit, and you're billed only for what your team uses. At $0, your team still uses the month's credit and stops there.