Zapier

Briefly explain the main action and benefit to provide an action-oriented summary that highlights what you can do and the benefits you will gain.

Introduction

Through the **Long Introduction**, the reader will get a detailed overview of the topic, starting with a description of the feature or function. It aims to give a comprehensive understanding of what to expect and how it works.

The Long Introduction provides an in-depth explanation of the benefits and how it helps the user. It highlights the advantages and practical applications, making it clear why this feature is valuable. Sentences are kept concise and maintain a conversational tone, making the information easy to understand and follow.

By providing this detailed overview, users gain a better grasp of the topic, enabling them to fully leverage the feature's capabilities and benefits for their needs.

Sign Up for Zapier

Zapier offers several different plan options starting at a limited Free level. Review Zapier plans and pricing →

To sign up for Zapier:

> Go to Zapier.com.

> Click [Sign up] to start a free trial.

Learn more from Zapier about getting started with your free Zapier trial →

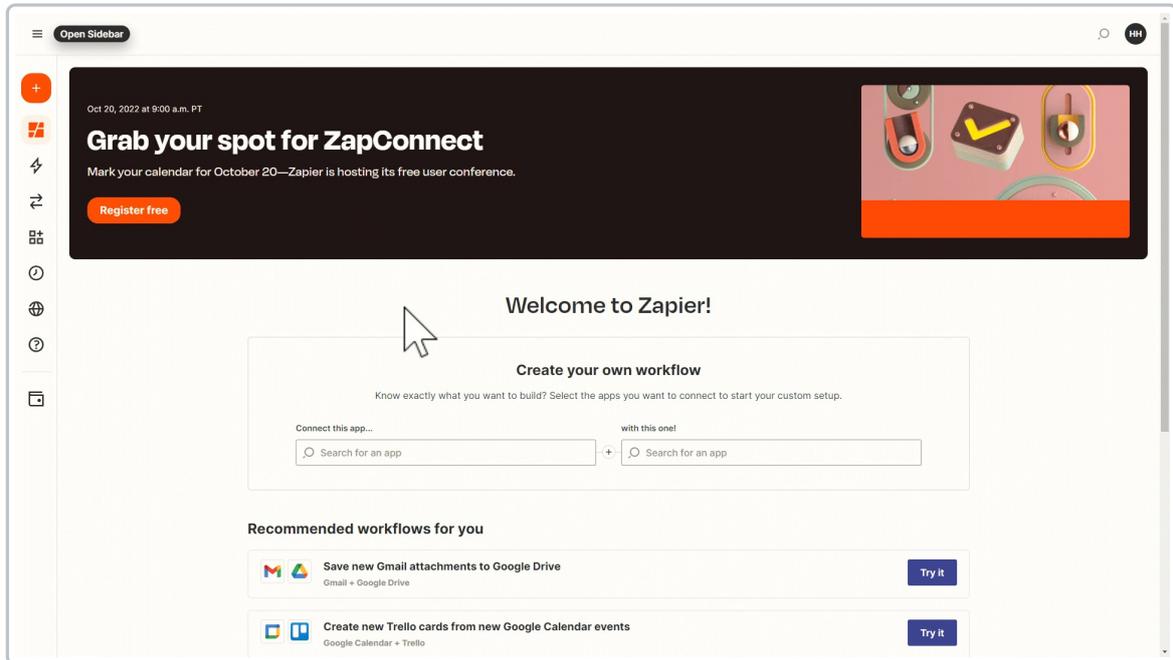## Connect Paperless Pipeline to Zapier

Connect Paperless Pipeline to Zapier.

To connect to Paperless Pipeline on Zapier:

> In Zapier, **go to [My Apps].**

> **Click [+ Add connection].**

Search for and select "Paperless Pipeline."

From the pop-up window, log in to your master admin Pipeline account (if you aren't already), then **click [Authorize Zapier].** Zapier will confirm the new connection was added.
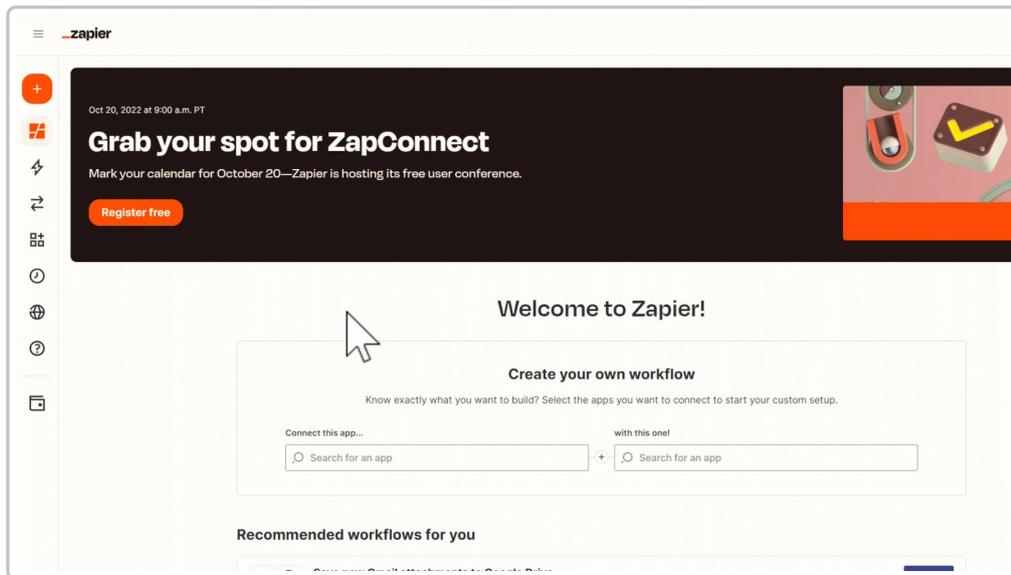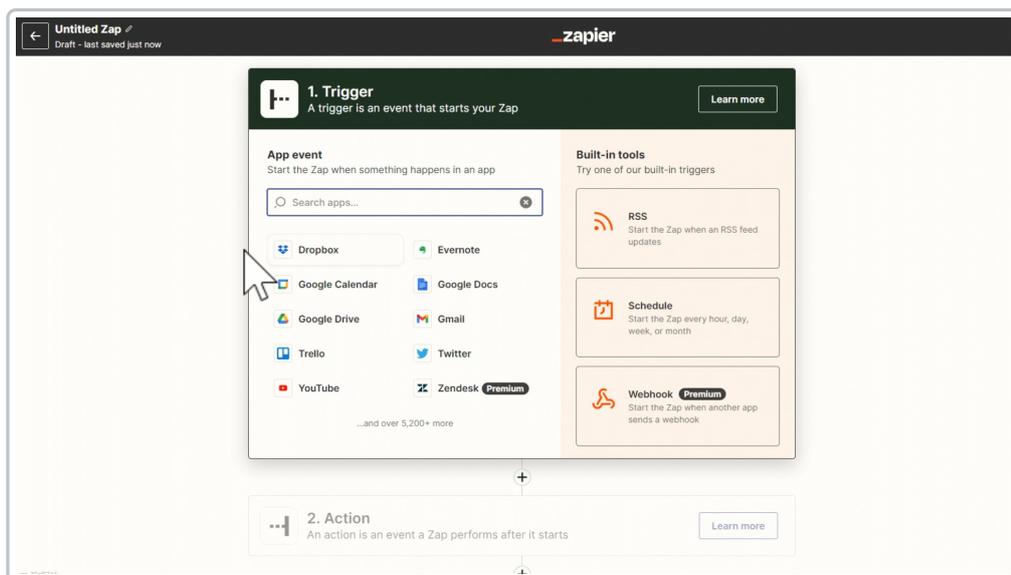

Create a Paperless Pipeline Zap

Create a Paperless Pipeline Zap.

To create a Paperless Pipeline Zap:

In Zapier, **click [+ Create Zap]**.

Name your Zap. From the upper-left corner, click the pencil icon and enter a name that describes your Zap.

Set Up a Paperless Pipeline Trigger

Choose app & event

Search for and select "Paperless Pipeline."

Click **"Choose an event,"** and **select "Transaction Status Changed."**

Click **[Continue].**

Choose account

Choose your Pipeline account. If you have already connected Paperless Pipeline to Zapier, **click "Choose an account,"** and **select your Paperless Pipeline account.**

If you have not connected Paperless Pipeline to Zapier, click [Sign In.] From the pop-up window, log into Pipeline and click [Authorize Zapier]. After that, the name of your Pipeline company connected to Zapier will appear as the selected account.

Click [Continue].

Set up trigger

Click **"Select a status,"** and **select your desired Transaction Status.**

Click **[Continue].**

Test trigger

Click [Test Trigger]. Zapier will pull in 3 sample transactions from Paperless Pipeline. By default, the latest transaction changed to the Status you set for this Zap will be displayed, "Transaction C."

The 3 sample transactions will be the last 3 transactions that moved to the Status set for your Trigger. For example, if you chose "Pending," the pulled samples will be transactions recently moved to your *Pending Status*.

Choose a sample transaction. To choose a different sample transaction, click "Transaction C" and select another transaction, "Transaction B" or "Transaction A."

When you're building your Zap, it's important to work with a sample transaction that is similar to a real-life transaction you may expect to trigger the Zap.

If you prefer, you can set up a test transaction in Paperless Pipeline for building your Zap. As long as you delete it before your next bill, it won't count against your monthly quota.

Click [Continue].

Test trigger ✓

✓ **We found a transaction!**
This transaction was found in your Paperless Pipeline account. Learn more about test data.

> 🐴 Transaction B ⇕
>
> 🔍 Search
>
> **accepted_on:**
> **commission_amount:** 6420.00
> **location:** — Testing
> **selling_agent_count:** 2
> **seller:**
> **more_info:** Earnest Money Amount:
> **inspection_due_date:** null
> **loan_approval_due_date:** null
> **listed_on:**
> **is_selling:** true
> **buyer:** Buyer Test TWO
> **inspection_date:** null
> **name:** 421 Grove Test
> **loan_approval_date:** null
> **imported_at:**
> **mls:**

Continue

Close

Set Up a Filter Step (Optional)

Filters are optional. A filter step should be added at some point after your Paperless Pipeline Trigger but before the Actions where you're wanting to happen.

To add a filter step:

Click the [+] between your desired steps.

Select [Filter] from Zapier's Built-in tool options.

Filter setup & testing

Set your desired rules for the Filter.

Click [Continue].

Set Up an Action for Another App

To set up an action for another app:

Click the [+] between your desired steps.

Choose app & event

Search for and **select your desired app.**

Click "Choose an event," and **select your desired action.**

Click [Continue].

Choose account

Connect to and **choose your account for the application**.

Click [Continue.]

Set up action

Set up your desired information.

From Name

Pipeline Notification

Reply To

Enter text or insert data...

Specify a single reply address other than your own.

Subject (required)

1. Transaction Name: 421 Grove Test Closed!

Body Type

plain

If using the HTML option, you must add any and all formatting (paragraphs, lists, etc) directly using HTML. Learn more.

Body (required)

View 1. Transaction Name: 421 Grove Test here: https://app.paperlesspipeline.com/tx/view/
1. Transaction ID: 5027901 /

Signature

Choose value...

Include a default signature with the email? Will be placed at end of the message after a line break and another "--" lin...   more

Label/Mailbox

Choose value...

Attachments

Enter text or insert data...
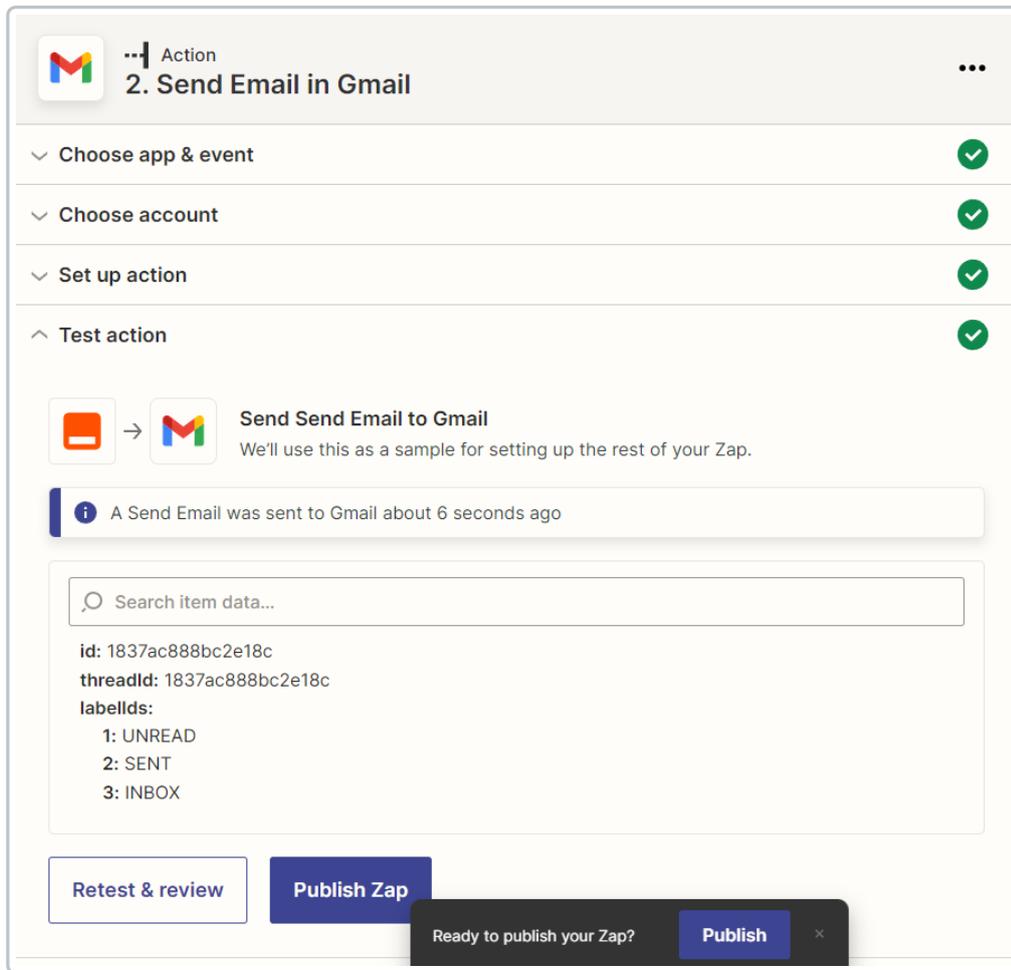
A file to be attached. Can be an actual file or a public URL which will be downloaded and attached.

Refresh fields   Continue

∨ Test action   !

Once your desired information is entered, **click [Continue.]**

Test action

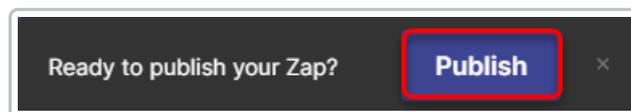**Click [Test & Review]** to test your zap and view the results.

Publish Your Zap

Publish Your Zap Now

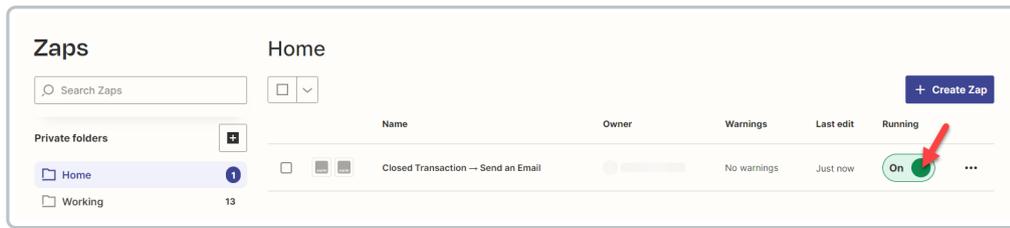To publish your Zap now:

In the Zap editor, **click [Publish].**

Publish Your Zap Later

To publish your Zap later:

In Zapier, **go to [Zaps].**

Toggle the Zap's Running button from "Off" to "On."

View Your Zap History

If a Zap fails to run, you'll receive a notification via email (as long as you keep that notification turned on in your Zapier settings). You can also view a full Zap history from within Zapier to check the status of any individual Zap.

To view your Zap History:

In Zapier, **go to [Zap History].**

Click [Zap runs] to view a list of Zaps that have ran and their status.
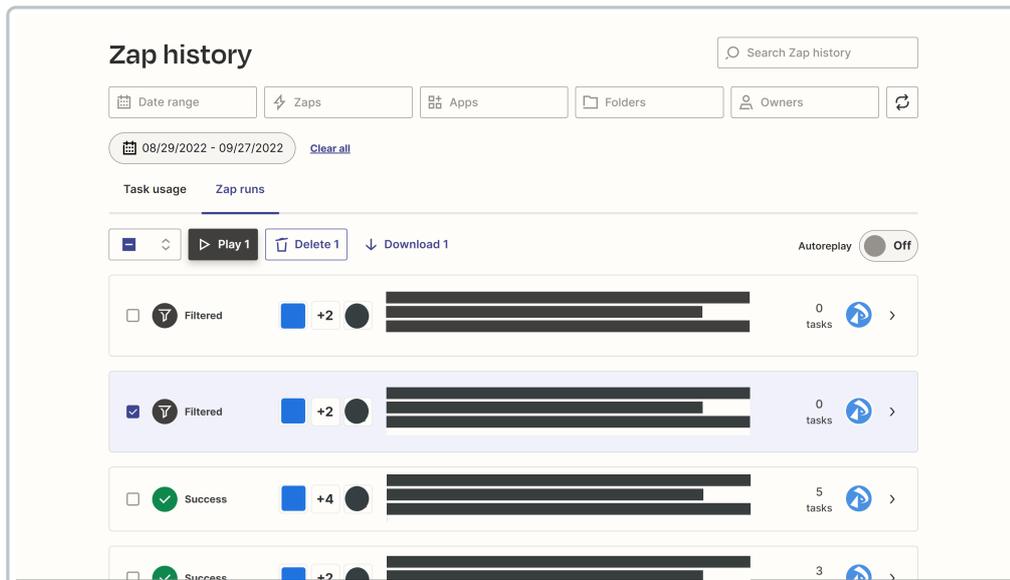

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Zap history

Date range | Zaps | Apps | Folders | Owners

08/29/2022 - 09/27/2022   Clear all

Task usage   Zap runs

Play 1   Delete 1   Download 1   Autoreplay   Off

☐ Filtered	+2	▬▬▬▬▬▬▬▬▬	0 tasks	>
☑ Filtered	+2	▬▬▬▬▬▬▬▬▬	0 tasks	>
☐ Success	+4	▬▬▬▬▬▬▬	5 tasks	>
☐ Success	+2	▬▬▬▬▬▬▬	3	>

FAQ

Ways to Use