

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](https://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.

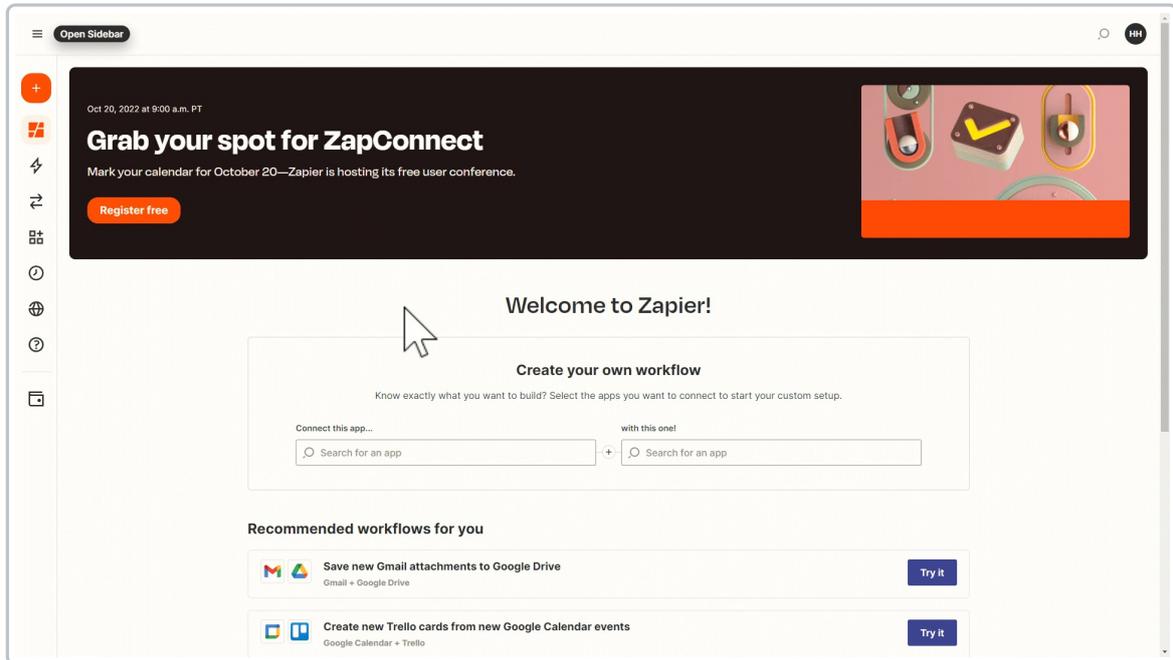
To connect to Paperless Pipeline on Zapier:

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.

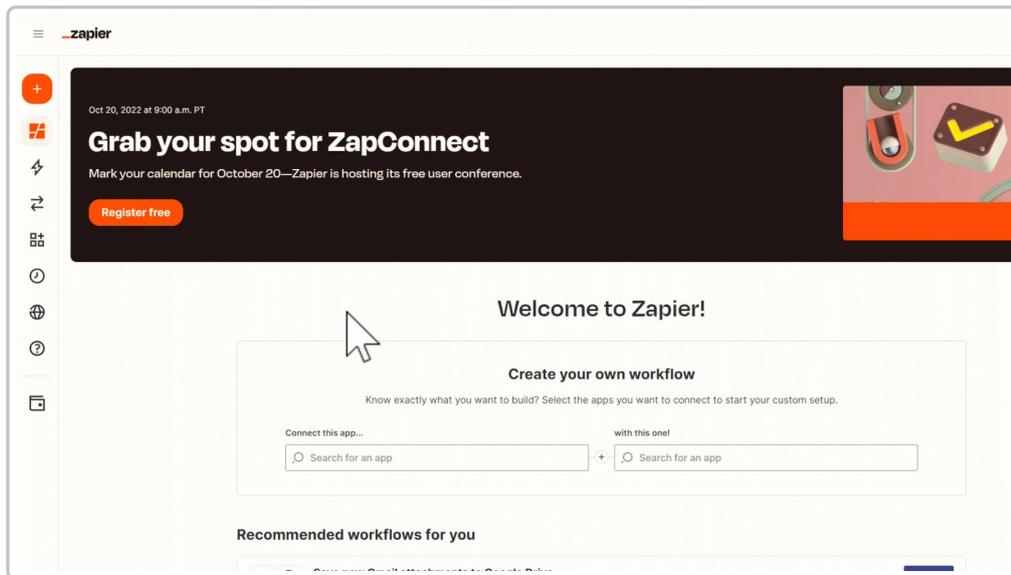


Create a Paperless Pipeline Zap

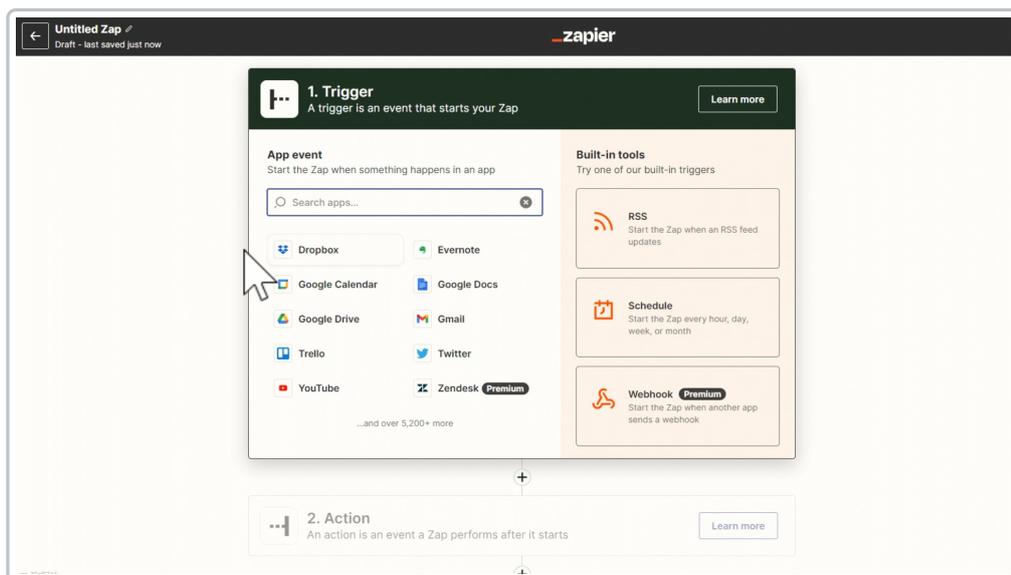
Create a Paperless Pipeline Zap.

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."

1. Trigger

A trigger is an event that starts your Zap

[Learn more](#)

App event

Start the Zap when something happens in an app

Paperless Pipeline

Built-in tools

Try one of our built-in triggers

RSS
Start the Zap when an RSS feed updates

Schedule
Start the Zap every hour, day, week, or month

Webhook Premium
Start the Zap when another app sends a webhook

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

Trigger

1. Paperless Pipeline

Choose app & event

Paperless Pipeline [Change](#)

Event (required)

Transaction Status Changed [Instant](#)
Triggers when a transaction's status is changed.

Click [Continue].

Trigger
1. Transaction Status Changed in Paperless Pipeline

Choose app & event ✓

Paperless Pipeline Change

Event (required)
Transaction Status Changed

This is what starts the Zap.

Continue

Choose account !

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.

Trigger
1. Transaction Status Changed in Paperless Pipeline

Choose app & event ✓

Choose account !

Paperless Pipeline account: (required)
Choose an account...

Choose...

Search

Paperless Pipeline Paperless Real Estate (used in 1 Zap) Personal

+ Connect a new account

Click [Continue].

 Trigger

1. Transaction Status Changed in Paperless Pipeline

▼ Choose app & event ✓

^ Choose account ✓

Paperless Pipeline account: (required)

 Paperless Pipeline Paperless Real Estate

Paperless Pipeline is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#) You can [manage all of your connected accounts here.](#)

Continue

▼ Set up trigger ✓

▼ Test trigger !

Set up trigger

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

 Trigger

1. Transaction Status Changed in Paperless Pipeline

▼ Choose app & event ✓

▼ Choose account ✓

^ Set up trigger ✓

Status

Select a status

Status Custom

329649

Pending
324775

Closed
324395

Fell Through
324396

Terminated
332269

Click **[Continue]**.

 Trigger

1. Transaction Status Changed in Paperless Pipeline

⋮

- ✓ Choose app & event
- ✓ Choose account
- ^ Set up trigger

Status

Closed

This Zap will only be triggered by transactions whose status is changed to the exact status selected below.

[Refresh fields](#) [Continue](#)

- ✓ Test trigger

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*.

 Trigger

1. Transaction Status Changed in Paperless Pipeline

⋮

- ✓ Choose app & event
- ✓ Choose account
- ✓ Set up trigger
- ^ Test trigger

 → 

Test your trigger

We'll find a recent transaction in your  Paperless Real Estate account to confirm that the right account is connected and your trigger is set up correctly.

[Test trigger](#)

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

Set up trigger ✓

Test trigger ✓

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

Transaction C

Choose another ...

- Transaction C
Pulled in 24 seconds ago
- Transaction B
Pulled in 24 seconds ago
- Transaction A
Pulled in 24 seconds ago

Load more

selling_agent_count: 0
seller:
more_info:
inspection_due_date: null
loan_approval_due_date: null
listed_on:

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.

2. Action

An action is an event a Zap performs after it starts

[Learn more](#)

App event

Do something in an app

- Dropbox
- Evernote
- Google Calendar
- Google Docs
- Google Drive
- Gmail
- Trello
- Twitter
- YouTube
- Zendesk **Premium**

...and over 5,200+ more

Built-in tools

Try one of our built-in actions

- Delay**
Pause actions for a certain amount of time
- Filter**
Only proceed when a condition is met
- Format**
Change how incoming data is formatted

Filter setup & testing

Set your desired rules for the Filter.

2. Only continue if...

Choose app ✓

Filter setup & testing !

Only continue if...

1. Location (Text) Exactly matches Broadway Office ×

[+ And](#) [+ Or](#)

Nice work - now let's test it out!
We'll test these conditions against the example data we received.

[Continue](#)

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.

2. Action

An action is an event a Zap performs after it starts

[Learn more](#)

App event

Do something in an app

- Gmail
- CallTrackingMetrics
No action available.
- BigMarker Beta
- SegMetrics Beta
- Gmelius
- LeadSigma Beta

Built-in tools

Try one of our built-in actions

- Path**
Build different steps for different rules
- Delay**
Pause actions for a certain amount of time
- Filter**
Only proceed when a condition is met
- Format**
Change how incoming data is formatted

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

2. Gmail

Choose app & event

Gmail [Change](#)

Event (required)

- Create (but do not send) a new email message.
- Create Label**
Creates a new label.
- Send Email**
Create and send a new email message.
- Remove Label from Email**
Remove a label from an email message.
- Reply to Email**
Send a reply to an email message.

Click [Continue].

---| Action

2. Send Email in Gmail

⋮

^ Choose app & event ✓

Gmail

Change

Event (required)

Send Email

↕

This is performed when the Zap runs.

Continue

∨ Choose account !

Choose account

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

Click [Continue.]

Set up action

Set up your desired information.

---| Action

3. Send Email in Gmail

⋮

∨ Choose app & event ✓

∨ Choose account ✓

^ Set up action ✓

To

hollis@paperlesspipeline.com

×

Enter text or insert data...

Who will this email be sent to? Multiple email addresses can be entered either individually, or as a comma separated... [more](#)

Cc

Enter text or insert data...

Who should be cc'd on this email? Multiple email addresses can be entered either individually, or as a comma separat... [more](#)

Bcc

Enter text or insert data...

Who should be bcc'd on this email? Multiple email addresses can be entered either individually, or as a comma... [more](#)

From

hollis@paperlesspipeline.com

↕

Select an email address or alias from your Gmail Account. Defaults to the primary email address.

From Name

Reply To

Specify a single reply address other than your own.

Subject (required)

Body Type

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

Body (required)

Signature

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

Attachments 📎

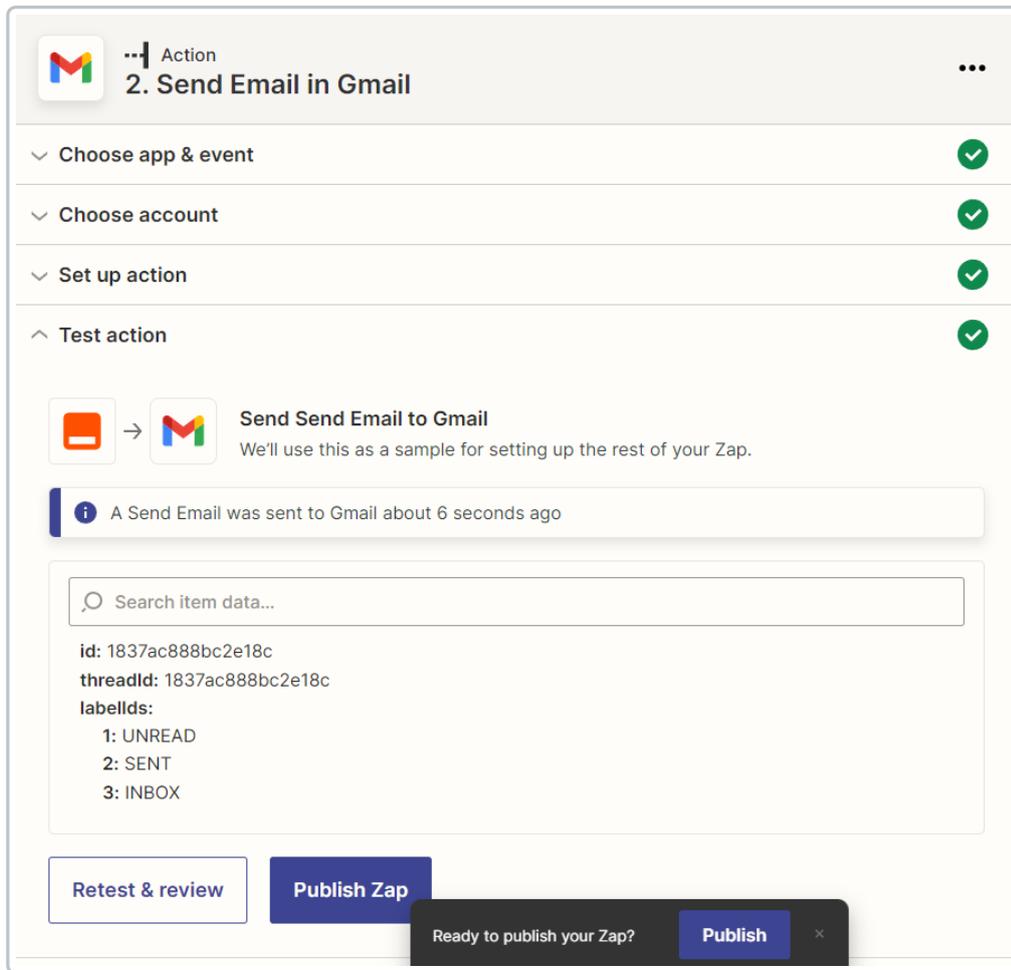
A file to be attached. Can be an actual file or a public URL which will be downloaded and attached.

⌵ **Test action** 

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

Test action

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

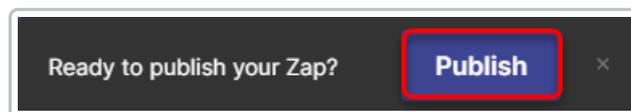


Publish Your Zap

Publish Your Zap Now

To publish your Zap now:

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

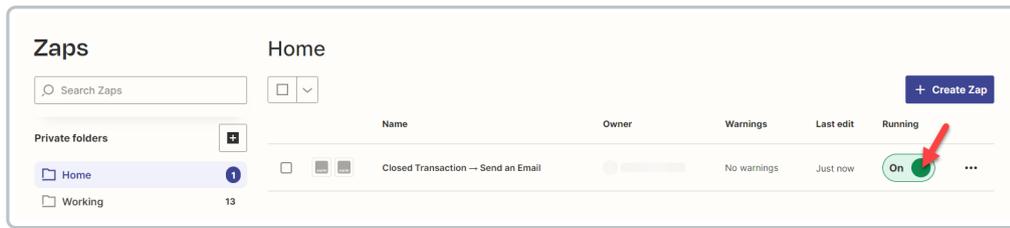


Publish Your Zap Later

To publish your Zap later:

In [Zapier](#), **go to [Zaps]**.

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



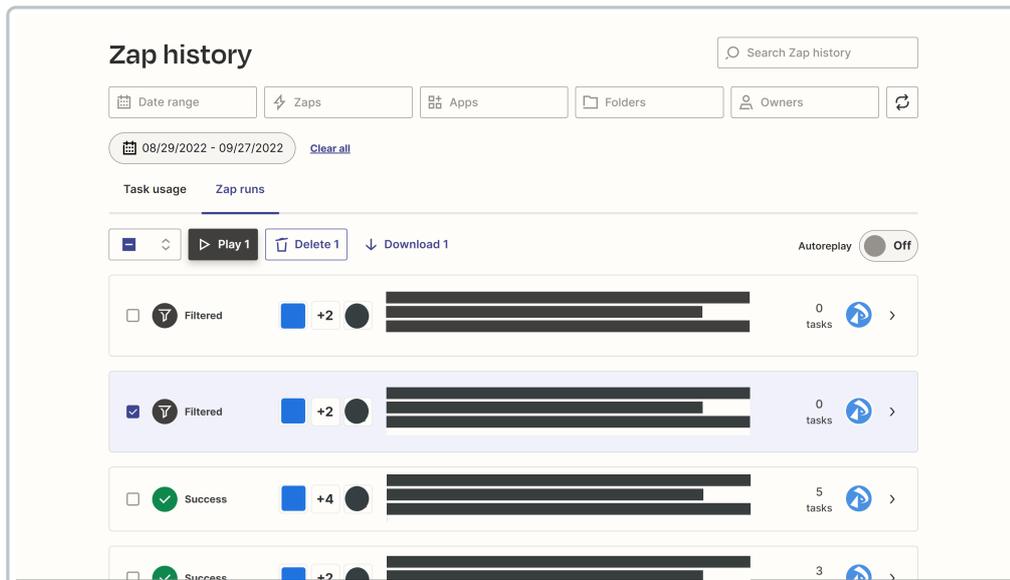
View Your Zap History

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

Search 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 Autoplay Off

<input type="checkbox"/>	Filtered	+2	████████████████████ ████████████████████	0 tasks	▶
<input checked="" type="checkbox"/>	Filtered	+2	████████████████████ ████████████████████	0 tasks	▶
<input type="checkbox"/>	Success	+4	████████████████████ ████████████████████	5 tasks	▶
<input type="checkbox"/>	Success	+2	████████████████████ ████████████████████	3 tasks	▶

FAQ

Ways to Use