

Paperless Pipeline API Through Zapier

SUMMARY

Learn about Paperless Pipeline's API through Zapier.

Introduction

You can connect Paperless Pipeline to your Zapier account to automate sending information from Paperless Pipeline to other applications. Once your Pipeline account is connected to Zapier, you can create workflows that copy transaction data from Pipeline into other applications you use such as: alerting you about important transactions via email, adding contacts to your contact management system, maintaining a custom report in your spreadsheet program, and many other time-saving tasks.

What is Zapier?

Zapier is a web application that provides a friendly interface for automating repetitive tasks between different web applications you use.

What is a Zap?

Your repetitive tasks are carried out by Zaps, which are automated workflows you can build to set the rules your automation should follow. A Zap is made up of steps that act like building blocks for your workflow, and all Zaps contain at least two steps:

- *A Trigger step* - When something should happen...
- *An Action step* - What to do when the trigger happens...

What is a Trigger?

A Trigger is the first step of your Zap, and the event that starts a Zap. Zapier will constantly watch for the trigger event to occur. When the Trigger occurs, Zapier will complete any Actions you set to happen after the Trigger.

What is an Action?

An Action is the event set to perform when your Zap's trigger event occurs. Zapier will perform any Actions you set to occur after the Trigger.

How do Paperless Pipeline & Zapier work together?

Paperless Pipeline offers a Trigger in Zapier: *Transaction Status Changed*. The Trigger occurs when a *Transaction Status* changes to your desired *Status*. When you create a Zap, the Trigger will always be the first step of your Zap, or the event that starts your Zap. A Paperless Pipeline Zap will contain at least two steps:

- *The Paperless Pipeline Trigger* - When a transaction status is changed in Paperless Pipeline..
- *The Action* - Perform your desired action in another app.

What are some examples of Zaps using Paperless Pipeline & Zapier?

Here are a few examples of Zaps you may use as a starting point to create your Zaps:



Connecting Pipeline to Zapier is free once you sign up for a paid Zapier subscription.
[Review Zapier plans and pricing →](#)

Who Can Do This?

Master admins with a Zapier account can connect to Zapier and create Paperless Pipeline Zaps.

How To

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:

- 1 Go to [Zapier.com](#).
- 2 Click [Sign up] to start a free trial.



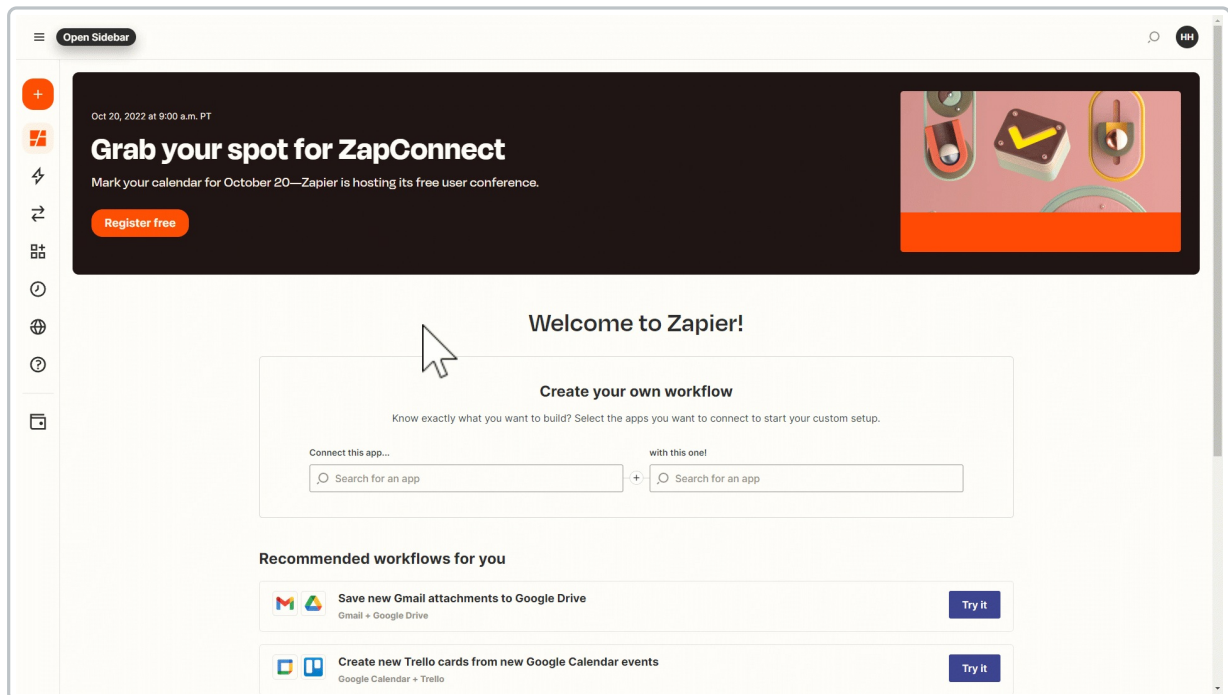
[Learn more from Zapier about getting started with your free Zapier trial →](#)

Connect to Paperless Pipeline on Zapier

To connect to Paperless Pipeline on Zapier:

- 1 In [Zapier](#), go to [My Apps].
- 2 Click [+ Add connection].
- 3 Search for and select “Paperless Pipeline.”

- 4 From the pop-up window, log in to your master admin Pipeline account (if you aren't already), then click [Authorize Zapier].

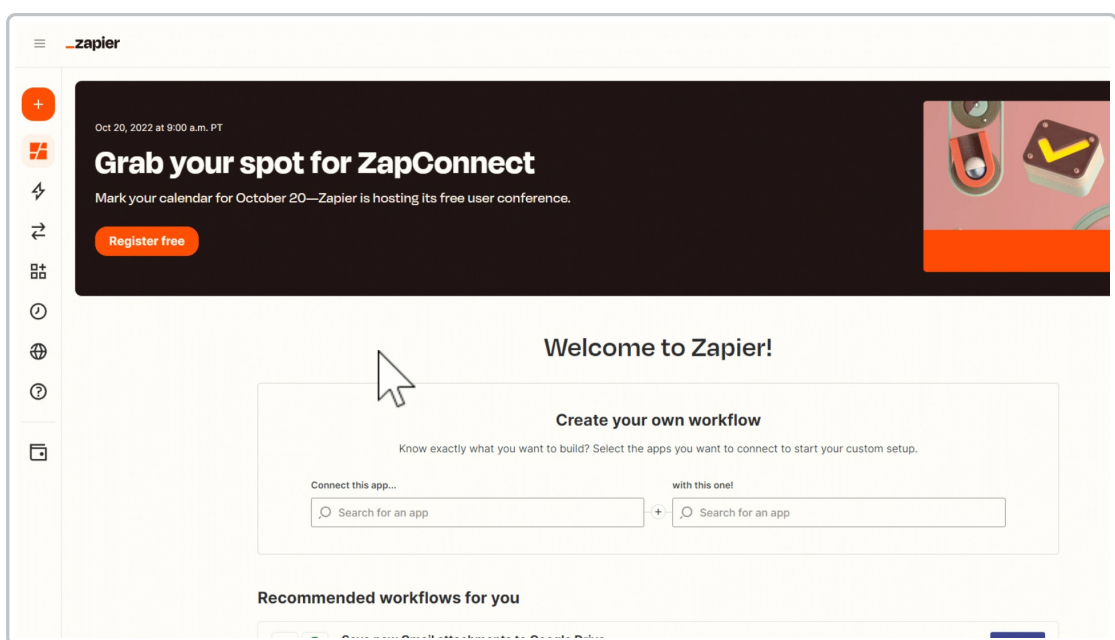


Zapier will confirm the new connection was added.

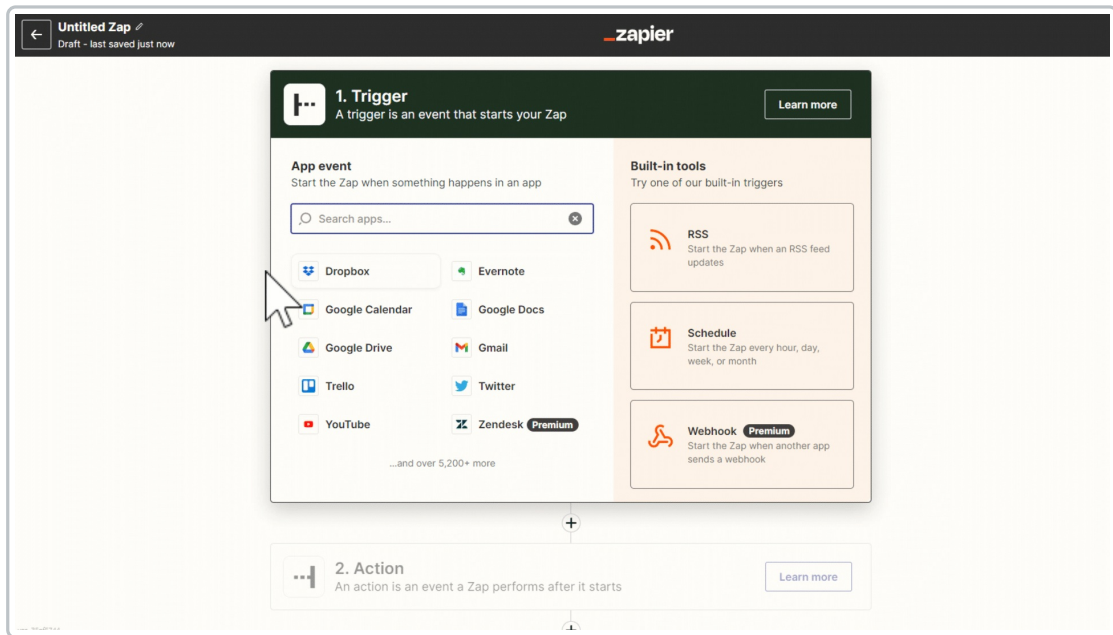
Create a Paperless Pipeline Zap

To create a Paperless Pipeline Zap:

- 1 In Zapier, click [+ Create Zap].



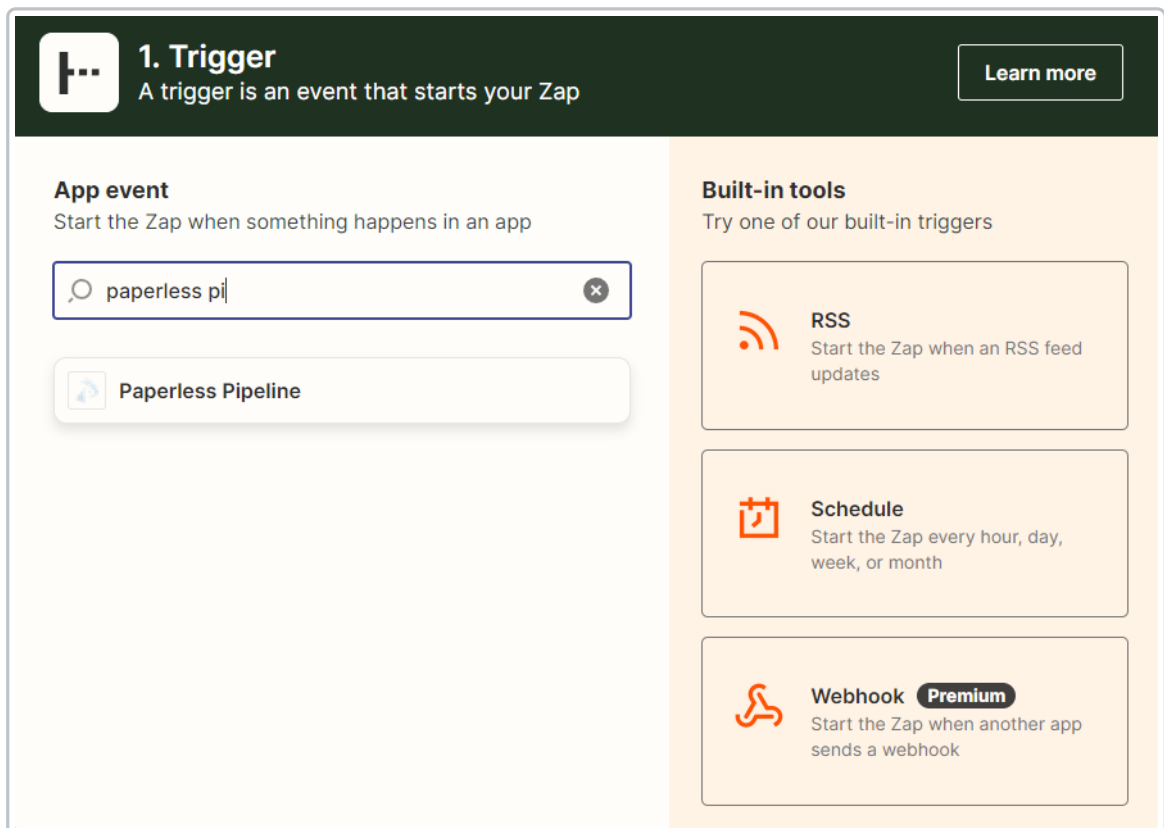
- 2 **Name your Zap.** From the upper-left corner, click the pencil icon and enter a name that describes your Zap.



Set Up a Paperless Pipeline Trigger

Choose app & event

- 1 Search for and select “Paperless Pipeline.”



- 2 Click “Choose an event,” and select “Transaction Status Changed.”

The screenshot shows the Zapier Trigger configuration interface. At the top, it says "Trigger" and "1. Paperless Pipeline". Below this is a section titled "Choose app & event" with a yellow warning icon. Under "Choose app & event", there is a box for "Paperless Pipeline" with a "Change" button. Below that is a section for "Event (required)" with a search bar containing "Choose an event". A dropdown menu is open, showing "Transaction Status Changed" with the description "Triggers when a transaction's status is changed." and an "Instant" frequency selector.

- 3 Click [Continue].

The screenshot shows the Zapier Trigger configuration interface after selecting the event. The title is now "1. Transaction Status Changed in Paperless Pipeline". The "Choose app & event" section now has a green checkmark icon. The "Event (required)" dropdown now shows "Transaction Status Changed". Below this, it says "This is what starts the Zap." and there is a large blue "Continue" button. At the bottom, there is a section titled "Choose account" with a yellow warning icon.

Choose account

- 1 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

2 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

1 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

StatusCustom

Search...

329649

Pending

324775

Closed

324395

Fell Through

324396

Terminated

332269

2 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

- 1 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

- 2 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.

3 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:

- 1 Click the [+] between your desired steps.
- 2 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

- 1 Set your desired rules for the Filter.



Action

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

- 2 Click [Continue].

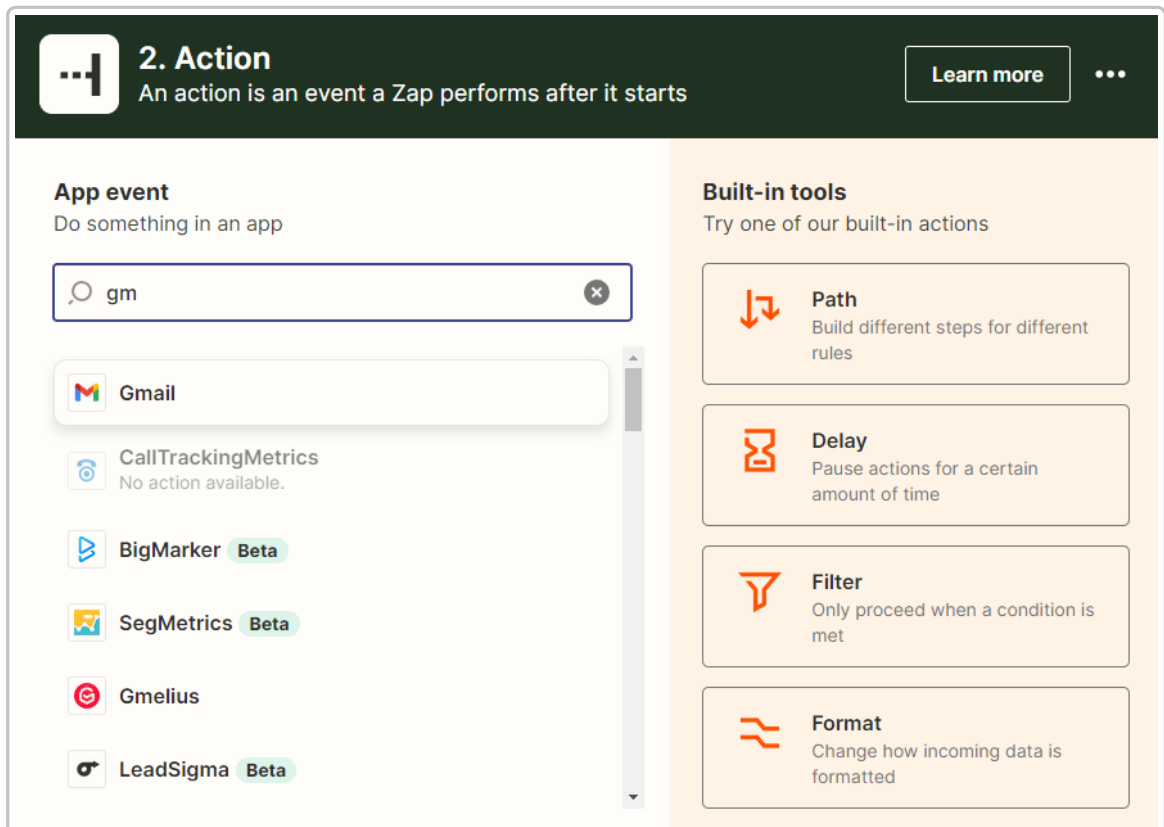
Set Up an Action for Another App

To set up an action for another app:

- 1 Click the [+] between your desired steps.

Choose app & event

- 1 Search for and select your desired app.



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

 **Action**
2. Gmail

Choose app & event

 **Gmail**

Change

Event (required)

Choose an event

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.

3 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

- 1 Connect to and choose your account for the application.
- 2 Click [Continue.]

Set up action

1 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

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



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

Test action

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

 **Action**
2. Send Email in Gmail ...

✓ Choose app & event

✓ Choose account

✓ Set up action

^ Test action ✓

 → 

Send Send Email to Gmail
We'll use this as a sample for setting up the rest of your Zap.

 A Send Email was sent to Gmail about 6 seconds ago

id: 1837ac888bc2e18c
threadId: 1837ac888bc2e18c
labelIds:
1: UNREAD
2: SENT
3: INBOX

Retest & review

Publish Zap

Ready to publish your Zap?

Publish

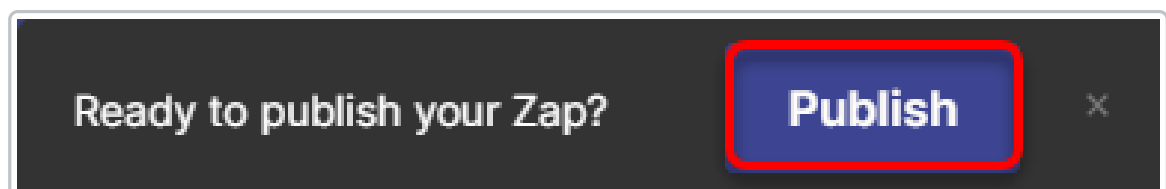
×

Publish Your Zap

Publish Your Zap Now

To publish your Zap now:

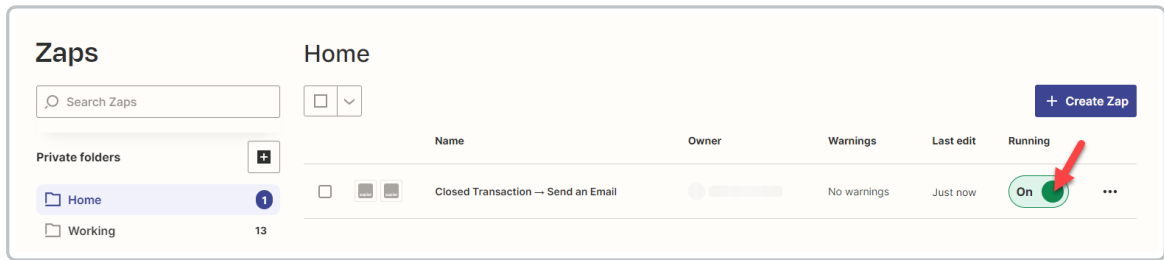
- 1 In the Zap editor, click **[Publish]**.



Publish Your Zap Later

To publish your Zap later:

- 1 In [Zapier](#), go to [Zaps].
- 2 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:

- 1 In [Zapier](#), go to [Zap History].
- 2 Click [Zap runs] to view a list of Zaps that have ran and their status.

