Follow Up Boss Embedded App FAQ

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The embedded app brings Pipeline transaction details into Follow Up Boss, and only in that direction. Answers to the common questions about what syncs, who enables it, and what each person can see.

Does the integration sync data between Pipeline and Follow Up Boss?

No — it runs one way, and it's view-only. Pipeline transaction details appear inside Follow Up Boss; nothing travels back into Pipeline.

Who has to turn the app on?

A Follow Up Boss Account Owner or Admin. It's enabled from Follow Up Boss's own admin settings, so it's a Follow Up Boss permission rather than a Pipeline one. Once it's on, everyone connects their own Pipeline profile.

Do I need a Follow Up Boss account to use it?

Yes. The app is embedded in Follow Up Boss and appears in the right sidebar of a Lead Profile — there's nothing to see without a Follow Up Boss account.

Can I create a Pipeline transaction from inside Follow Up Boss?

No. The app only brings existing transaction details into Follow Up Boss. Start the transaction in Pipeline, then link the lead to it.

Will a Pipeline status change move the contact through my Follow Up Boss Deal stages?

No. Pipeline statuses and labels don't sync to Follow Up Boss Deals, so Deals still get updated by hand. This is the most-requested addition and it's logged for a later phase of the integration.

Do Pipeline tasks show up in Follow Up Boss?

Not yet. Displaying tasks — and checking them off from Follow Up Boss — isn't built. Both were requested after the launch webinar and passed to the development team.

Does the app pull Follow Up Boss contact details into Pipeline?

No. Contact information, emails, and texts stay in Follow Up Boss. The integration doesn't write anything into Pipeline, so it isn't a way to log Follow Up Boss communications for compliance.

Does connecting give me access to transactions I couldn't see before?

No. Your permissions in the two systems stay independent. You see exactly the transactions and details your Pipeline role already allows, and connecting grants nothing extra.

Can I see transactions my teammates linked to their leads?

No. You only see the transactions you linked yourself. Links other people make from their own profiles aren't visible to you.

Does the app replace Pipeline's checklists and task due dates?

No. It surfaces transaction details, not checklist logic. Follow Up Boss action plans don't calculate due dates the way Pipeline checklists do, so the compliance work stays in Pipeline.

How many documents does the app show?

The ten most recent. That's anything added, edited, commented on, or reviewed. Click a doc's name to open it in a new window, or open the full transaction for everything else.

Learn More

See a lead's Pipeline transaction status, dates, commission details, and recent docs right inside their Follow Up Boss profile.

See Follow Up Boss Embedded App

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.