Follow Up Boss Embedded App

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

Introduction

An agent chasing a deal is in Follow Up Boss. The same deal, with its dates and its paperwork, is in Pipeline. Anyone who needs both ends up with two tabs open and a habit of checking one against the other.

The embedded app closes that distance from the Follow Up Boss side. It's a panel inside a lead's profile there, showing the Pipeline transaction that lead is linked to, with a way straight into the full record when the panel isn't enough. It reads Pipeline rather than merging with it, so information travels one direction only and a status change on a transaction doesn't move a deal stage in Follow Up Boss. Offices ask about that regularly, and it's worth knowing what the app is and isn't before you build a process on top of it.

Two tabs become one, and "where is this deal" gets answered without leaving the conversation you're already in. Connecting your profile changes nothing about what you're allowed to see, so the panel shows the transactions your Pipeline role already reaches and nothing beyond them. If a lead shows no transaction at all, nobody has linked it to one yet.

How It Works

The app runs inside Follow Up Boss, not inside Pipeline. Everything below happens in a Follow Up Boss Lead Profile.

Where It Lives

In the right sidebar of a Follow Up Boss Lead Profile. It sits alongside the other sidebar panels, and you can drag it higher if you'd rather have it near the top.

Who Turns It On

A Follow Up Boss Account Owner or Admin enables the app once, from Follow Up Boss's own admin settings. After that, everyone on the team connects their own Paperless Pipeline profile from any Lead Profile — one connection each, the same way for every role.

What You See on a Linked Lead

Once a lead is linked to a transaction, the app shows you:

- **Transaction Name**: click it to open the full transaction in Pipeline in a new window.
- **Status, Side, and Completion Percentage**: where the deal stands at a glance.
- **The transaction's maildrop address**: click the envelope icon to email documents straight in.
- **Key dates**: Listed On, Accepted, and Closes On.
- **Commission details**: List Price, Sale Price, Total Commission, and the Commission Summary.

- **Recent docs**: the ten most recently added, edited, commented on, or reviewed documents. Click a name to open it in a new window.

It Reads, It Doesn't Sync

The integration runs one way — Pipeline information appears in Follow Up Boss, and nothing travels back. Transaction statuses don't move contacts through Follow Up Boss Deal stages, Pipeline tasks don't become Follow Up Boss tasks, you can't start a Pipeline transaction from Follow Up Boss, and Follow Up Boss contact details don't flow into Pipeline. Those are the most-requested additions, and we've logged them for a later phase.

Your Permissions Don't Change

Connecting your Pipeline profile inside Follow Up Boss grants you nothing extra. You see exactly the transactions and details your Pipeline role already lets you see, and you see only the links you made yourself — not the ones your teammates made.

Enable the Embedded App

> Switch the Paperless Pipeline app on for your Follow Up Boss account so your team can start connecting.

> **Who Can Do This**: Follow Up Boss Account Owners and Admins. This is a Follow Up Boss permission, not a Pipeline one.

To enable the Paperless Pipeline embedded app in Follow Up Boss:

1. Log in to Follow Up Boss and click [Admin] from the top menu.

2. Scroll to the *Integrations* section and click [All Integrations].

3. Scroll to the *Embedded Apps* section and open the Paperless Pipeline integration.

4. Click [Enable].

The app now appears in the right sidebar of every Lead Profile, ready for each person to connect.

Connect to Your Paperless Pipeline Profile

> Link your own Pipeline profile to the embedded app so it can show you your transactions.

Who Can Do This: Anyone, once a Follow Up Boss Account Owner or Admin has enabled the app.

To connect your Paperless Pipeline profile in the embedded app:

1. Log in to Follow Up Boss and open any Lead Profile.
2. Find the Paperless Pipeline embedded app in the right sidebar. Drag it higher in the sidebar if you'd like it nearer the top.
3. Click [Connect to Paperless Pipeline].
4. Log in to Paperless Pipeline if you aren't already signed in, then click [Close Window] to return to Follow Up Boss.

Your profile is connected. You can now link leads to the transactions you have access to in Pipeline.

Link a Lead to a Transaction

Attach a Follow Up Boss lead to one or more Pipeline transactions so their details show on the lead's profile.

Who Can Do This: Anyone who has connected their Paperless Pipeline profile to the embedded app.

To link a lead to a transaction:

1. Log in to Follow Up Boss and open the profile of the lead you want to link.
2. Click [Link to a transaction] from the Paperless Pipeline embedded app.
3. Start typing the **Transaction Name** or property address to search for the transaction.
4. Check the box next to the transaction. If the lead is part of more than one deal, search for and select the others too.
5. Click [Link Transaction(s)] to confirm.

The lead's profile now shows that transaction's details every time you open it.

View a Lead's Linked Transactions

> Read a deal's status, dates, commission figures, and recent docs from inside Follow Up Boss.

> **Who Can Do This**: Anyone who has connected their profile — for the transactions they linked themselves and already have access to in Pipeline.

To view the transactions linked to a lead:

1. Log in to Follow Up Boss and open the profile of the person whose transactions you want to see.
2. Read the transaction details in the Paperless Pipeline embedded app in the right sidebar.
3. Click the **Transaction Name** to open the full transaction in Paperless Pipeline in a new window.

You'll see the status, side, and completion percentage, the key dates, the commission figures, and the ten most recent documents on that transaction.

Email a Transaction's Maildrop Address From the App

> Send documents into a linked transaction without leaving the lead's Follow Up Boss profile.

> **Who Can Do This**: Anyone who has connected their profile, on a lead with a linked transaction.

To email a transaction's maildrop address from the embedded app:

1. Log in to Follow Up Boss and open the lead's profile.
2. Click the envelope icon in the Paperless Pipeline embedded app. A new message opens in your default email app with the transaction's maildrop address already filled in.
3. Alternatively, right-click the envelope icon, select [Copy email address], and paste it into the recipient field of your own email.

Anything you send arrives on that transaction the same way it would if you emailed the maildrop address directly.

Follow Up Boss Embedded App FAQ

The 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. See Follow Up Boss Embedded App FAQ.