Show Transaction Status Inside Follow Up Boss

Last Modified on 09/04/2026 11:09 am EDT

Your agents already live in Follow Up Boss. Put the deal's status, dates, and commission figures on the lead's profile and they'll stop asking you for them.

Introduction

The lead your agent is working in Follow Up Boss and the transaction you're tracking in Pipeline are the same deal, and for most offices the only bridge between them is somebody asking somebody else. The embedded app removes that: open a lead, and the Pipeline half of the picture is right there in the sidebar — status, side, completion percentage, key dates, commission figures, and the ten most recent documents.

Rolling it out is a three-part job with a shape worth knowing in advance. One person enables the app for your Follow Up Boss account, then every individual connects their own Pipeline profile, then leads get linked to transactions one at a time. There's nothing to configure in Pipeline and nothing to schedule with us. But what the panel shows is read live from your transactions, so the value of the whole thing depends on your files being current.

When to Use This

- Your agents keep asking the office where a deal stands, and everything they want is already in Pipeline.
- You use Follow Up Boss for client relationships and Pipeline for the transaction, and people are living in two tabs.
- You've been told to set this up through Zapier and want to know whether that's right.
- An agent has connected the app but their lead's profile shows nothing.
- You're wondering whether Follow Up Boss action plans could replace your Pipeline checklists.

1. Make Sure the Transaction Says What Your Agents Need to Read

The panel is a window, not a copy — it reads the transaction live, so a status nobody has moved since the inspection is exactly what your agent sees in Follow Up Boss. Before you roll this out to a team, it's worth checking that your statuses actually track the stages agents ask about, because this integration turns every stale file into a visible one.

Statuses mark where each transaction stands in its lifecycle — so your team reads any file at a glance.

See Transaction Statuses

> The same goes for the dates and money on the panel. Listed On, Accepted, and Closes On come off the transaction's own fields, and the commission figures come from the Commission Summary — so whatever your admins keep filled in is what your agents get to see.

2. Turn the App On in Follow Up Boss

This is a Follow Up Boss job, not a Pipeline one. A Follow Up Boss Account Owner or Admin enables the Paperless Pipeline embedded app once from Follow Up Boss's own admin settings, and after that it appears in the sidebar of every Lead Profile for everyone on the team. There's no Zapier in this, no API key, and no setup call with us.

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

3. Have Each Person Connect Their Own Pipeline Profile

Enabling the app doesn't connect anyone. Each person connects once, from the panel on any Lead Profile, by signing in to Pipeline through it — the same way for every role, with no admin step in between.

What that connection does *not* do is worth saying out loud when you announce the rollout, because it's the first question you'll get. Connecting grants nobody any access they didn't already have. Each person sees exactly the transactions their Pipeline role allows, and only the links they made themselves — an agent doesn't inherit the office's view by connecting, and doesn't see the leads a teammate linked.

Access decides who can open a transaction and see what's inside it — and in Pipeline, that comes down to who's on the transaction and who can view everything in its location.

See Transaction Access

> That's also the answer when someone's panel looks empty. Either they haven't connected their profile, or they haven't linked that lead yet — those are two different steps, and both are theirs to do.

4. Link Each Lead to Its Transaction

The link is what turns a lead profile into a deal view, and it's made by hand, per lead, by the person who wants to see it. Open the lead, search by transaction name or property address, and select it. A client working more than one deal at once can be linked to all of them.

Build it into the moment the transaction gets created rather than treating it as a catch-up project — the agent who just wrote the contract is the person who knows which lead it belongs to.

> Once a lead is linked, the panel carries that transaction's maildrop address behind the envelope icon. It's the shortest path from a client's email in Follow Up Boss to a filed document in Pipeline: forward it straight to the deal without opening Pipeline at all.

5. Keep the Compliance Work in Pipeline

Say this clearly at rollout and you'll save yourself an argument later: the embedded app shows transaction details, and that's the whole of it. Nothing travels back — Pipeline statuses don't move contacts through Follow Up Boss Deal stages, Pipeline tasks don't become Follow Up Boss tasks, and you can't start a transaction from a lead.

The one that matters most is deadlines. Follow Up Boss action plans don't calculate due dates off a transaction's dates the way Pipeline checklists do, so the dated work stays where it can be dated. Follow Up Boss is where the relationship lives; Pipeline is where the deal has to hold up.

Mark a task as a key date and its deadline flows onto coversheets, calendars, and your emails.

See Key Dates