Connect Pipeline to Zapier and Decide Who Owns It

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Connecting Pipeline to Zapier takes a few minutes. Deciding who holds that connection is the part worth slowing down for, because it reaches every transaction on your account.

Introduction

Most offices arrive at this question sideways. A vendor (a review platform, a CRM, a marketing service) offers to set the integration up for you, and the first thing they ask for is a master admin login. It's a reasonable-sounding request and it's the wrong answer, for a reason that has nothing to do with trusting the vendor.

Pipeline's Zapier connection is account-level. There's no reduced-permission version of it and no way to scope it to one agent, one location, or one kind of deal. Whoever holds the connection can build a Zap that reaches every transaction you have, along with its agents, contacts, and commission figures. So the decision in front of you isn't *should we use Zapier* — it's *whose account owns the connection, and what do we restrict on the far side of it*

When to Use This

- A vendor has asked for master admin access to build your integration, and you're not sure whether that's normal.
- You're about to connect Pipeline to Zapier and want to know who on your team should do it.
- An agent wants their own transactions synced to their own CRM and is asking for access.
- You need to limit what data actually leaves your account once the connection exists.
- You're the vendor, and your mutual client is asking you to start the request with us.

Why This Isn't Just Handing Over a Login

A master admin login isn't a key to the integration. It's a key to the account — every location, every transaction, every setting, and the ability to add and remove people. Handing that to an outside company to save yourself an afternoon trades a permanent risk for a temporary convenience, and there's no way to take back just the part they needed.

The alternative costs almost nothing. You open your own Zapier account, you make the connection with your own master admin login, and the vendor helps from their side of the Zap — where their expertise actually lives. They configure their app's action steps; you own the connection to yours. If they need to see what's happening, a screen share does it without a credential ever changing hands.

1. Know What the Connection Reaches

Before you pick a person, be clear about what you're handing them. Everything on a transaction travels through the Zapier connection — transaction details, the agents on it, the contacts, the fees, the CDA figures, your custom fields under the names you gave them. Documents are the one exception: no PDFs go across.

That breadth is why the connection is master-admin-only. It isn't a permission we could hand out more narrowly if we wanted to; there's no partial version of the payload.

2. Pick the Master Admin Who Will Own It

The connection lives in a Zapier account and authorizes against a Pipeline master admin login, so choose someone who'll still be there in a year — the broker, the office manager, whoever owns your other operational accounts. If a Zap breaks, this is the person who has to fix it.

The master admin sits at the top of your account — full access to every location, every transaction, and the settings no one else can touch.

See Master Admin

> If the person you have in mind isn't a master admin yet, an existing master admin can promote them from Manage Users — open their profile, then User Permissions, then Make master admin under Account-wide Permissions. Nobody can promote themselves.

3. Keep the Vendor on Their Own Side of It

Tell the vendor you'll be connecting Pipeline yourself and ask them to help with their app's half of the Zap. That's the arrangement we recommend to every office that asks, and it's the one that works — the vendor knows their action steps far better than you do, and none of that knowledge requires access to your account.

If a vendor writes to us directly asking to set up an integration on your behalf, we'll ask them to have you make the request. Not to be difficult — we have no way to know that you asked for it unless you tell us.

> We advise against granting a third party master admin access, and we'll say so if you ask. If you decide to anyway, treat it like any other credential you can't take back cleanly, and put a date on your calendar to remove it.

4. Make the Connection

With the owner settled, the connection itself is a short job in Zapier — add Paperless Pipeline as an app and authorize it with the master admin login. There's no API key and no URL to paste; if you're asked for either, you've landed in Zapier's Webhooks app instead of ours.

Connect Pipeline to QuickBooks, your CRM, or a spreadsheet, and let a transaction changing status kick off whatever comes next.

See Zapier Integration

5. Restrict What Leaves, on the Zapier Side

Pipeline sends the full payload every time the trigger fires. Everything you don't want going out gets stopped in

Zapier rather than in Pipeline, and there are two levers.

The first is **field mapping**: a Zap only sends the fields you actually map into the action step, so a Zap that maps a name and an email sends a name and an email, whatever else arrived. The second is the **Filter by Zapier** step, which decides whether the Zap continues at all — filter on a transaction label to exclude property-management deals, or on the agent so a Zap runs only for one person's transactions.

> Be honest with yourself about what a Filter is. It shapes what a particular Zap does; it doesn't shrink what the connection can reach. Anyone who can edit that Zapier account can edit the filter.

6. Give Your Agents an Answer

Agents ask for this regularly, usually wanting their own deals in their own CRM, and the answer is the same for all of them: they can't connect their own profiles, and there's no version of the connection scoped to one agent's transactions. That isn't an oversight — it's the same account-level design that makes the connection master-admin-only in the first place.

What you can do is build it for them. A Zap on your connection, with a Filter step that continues only when that agent is on the transaction, sends their deals where they want them without anyone else's data moving. You own the Zap; they get the outcome.