Push Closed-Deal Clients Into Your CRM

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

When a deal closes, the buyer and the seller should land in your CRM, your review platform, or your mailing list without anyone retyping them. Zapier does the carrying. The work is on either end of it.

Introduction

A transaction moving into your closed status is the moment everything downstream wants to know about — the review request, the mailing-list add, the CRM record, the moving-services handoff. Pipeline hands Zapier that transaction's whole payload when the status changes, and the people on the deal come along with it.

What surprises most offices is where the work actually is. It isn't the connection, and it isn't the trigger. Both take a few minutes. It's that a Zap can only send people Pipeline already knows about, and that Pipeline hands over the transaction's whole Contacts list as a single value rather than as separate people. So the build has two real halves: getting the buyer and seller onto the transaction properly, and teaching Zapier to take them one at a time.

When to Use This

- You want every closed-deal client to get a review or testimonial request without an admin sending it.
- You want buyers and sellers added to your CRM or your email marketing list the day the deal closes.
- Your Zap runs, but every email address arrives crammed into one field, or everyone lands on one row.
- Assistants and file managers are getting the client survey, or sending it.
- The seller gets the survey every time and the buyer never does.

Why This Takes More Than One Mapping Step

The instinct is to map Pipeline's Contacts field into your CRM's email field and call the Zap done. It looks right in the mapping screen and it fails the moment a deal has two clients — because Contacts is a line-item value carrying every person on the transaction at once, not a single contact. Mapped straight across, your CRM gets one record with three names in it, or a spreadsheet row with four addresses in one cell.

The fix isn't a different field. It's a loop: you tell Zapier to walk the contact list, keep only the roles you're sending to, and run the action once per person. That's one extra step in the Zap and it's the difference between a working automation and a nightly cleanup job.

1. Put the Buyer and Seller on the Transaction as Contacts

This is the step that decides whether anything happens at all. A Zap can only send the people the transaction carries — if only the seller is listed, only your listing-side Zap ever fires, and the buyer's survey never goes out. Make it part of how the file gets built, not something you check at closing.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

> Email address is what the downstream app needs, and it's the field most often left blank on a contact that was added in a hurry. A contact with no email is invisible to the Zap.

2. Give Every Contact the Role Your Zap Will Filter On

The role is what your Filter step compares against, so it has to be the same word every time. Pipeline remembers the roles your office types, which is exactly what you want here — the first person who types "Buyer" sets the value everyone else picks from the suggestion list.

A Contact Role says what someone does on the transaction — buyer, lender, escrow officer, attorney. Type a new one once and Pipeline offers it back to you the next time.

See Contact Roles

> Your Filter step matches the role text exactly. If half your office types "Buyer" and the other half types "Buyer 1", half your closings will quietly skip the Zap — and nothing anywhere reports it as an error.

3. Connect Pipeline to Zapier and Trigger on Your Closed Status

Pipeline offers Zapier one trigger, Transaction Status Changed, and you pick the status it watches. Point it at the status your office actually closes on, and the connection has to be made by a master admin.

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

See Zapier Integration

4. Split the Contacts List Into One Send Per Person

Here's the step the whole article exists for. Pipeline delivers Contacts as a line-item value, so before your CRM step runs you have to break that list apart and run the action once for each person you want to reach.

Add a **Looping by Zapier** step that walks the contact line items, then a **Filter by Zapier** step inside the loop that continues only when the Contact Role is one you're sending to. Your action step then runs once per surviving contact, with that one person's name and email mapped into it.

To route buyers and sellers to different destinations, a lot of offices run two Zaps — or one Zap with paths — off the same status change: one that keeps Seller contacts on listing-side transactions, one that keeps Buyer contacts on buying-side ones.

> Two Zapier utilities save most of the remaining fiddling. **Formatter by Zapier** splits a contact's full name into First Name and Last Name, since Pipeline stores names whole. And if your destination is Google

Sheets, its **Create Spreadsheet Row(s)** action understands line items on its own — each contact lands on its own row without a loop.

5. Filter Out the People Who Shouldn't Get It

Pipeline sends every agent on the transaction, assistants included — that's deliberate, so your Zap has the full picture. It also means a survey built naively goes out on behalf of the file manager as often as the agent. Add a **Code by Zapier** step that picks the first Listing or Selling Agent who isn't an Assistant, and map that person into the sender field.

The same idea handles the transactions that shouldn't trigger anything. If you run leases or property management through Pipeline, tag those with their own transaction label and add a Filter step that stops the Zap when the label is present — tenants don't need a home-purchase review request.

Tag a user as an assistant on a transaction — they help with the file without taking sales credit or commission.

See Agent Assistants

> There's no per-contact opt-out switch in Pipeline. When one client shouldn't be contacted, offices mark the contact record in a field they aren't otherwise using — an asterisk in the name, a note in the Fax field — and add a Filter step that checks for it. It's a workaround, so write down which field you chose.

6. Test It on a Real Closed Deal Before You Trust It

When you test the trigger, Zapier pulls three transactions that recently moved into your chosen status, which gives you real contact data to map against instead of a placeholder. Map from a deal that looks like the ones you actually run — two clients, an assistant on the file, a role typed the way your office types it.

After it's live, Zap History is where you find out what really happened. Runs that stopped or errored name the step that failed, and filtered runs are normal — they mean your conditions weren't met that time, not that something broke.

> If you build against a test transaction you created for the purpose, delete it before your next bill so it doesn't count toward your monthly transaction quota.