Zapier Integration FAQ

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The Zapier integration sends transaction data out of Pipeline when a transaction changes status, and a master admin owns the setup. Answers to the common questions about what it connects to, what it sends, what it costs, and what it can't do.

Who can connect Paperless Pipeline to Zapier?

Master admins only. Every transaction detail, agent, contact, and commission figure travels through the connection, so there's no reduced-permission version of it — and agents can't connect their own profiles.

Can Zapier create or update anything in Paperless Pipeline?

No — the integration runs one way, out of Pipeline. Pipeline is a trigger app in Zapier, not an action app, so Zapier can't create a transaction, add a user, or edit anything inside Pipeline.

What starts a Paperless Pipeline Zap?

One trigger: **Transaction Status Changed**. You choose a status when you build the Zap, and it runs each time a transaction moves into that status.

Does the Zapier integration cost anything?

Nothing from us. Zapier charges by plan, and multi-step Zaps — filters, code steps, several actions — generally need a paid one. See zapier.com/pricing.

Does Pipeline integrate with QuickBooks?

Not directly, but you can connect the two through Zapier. QuickBooks Online is the supported path — a common setup drafts a bill or invoice when a transaction moves to a closed status.

Does Pipeline integrate with my CRM or transaction platform?

Not natively. Pipeline's built-in integrations are DocuSign and Dropbox Sign. Everything else connects through Zapier, if that app is available there. Tell us which one you're trying to reach and we'll help you work out whether Zapier can bridge it.

Are Custom Fields included in the Zapier data?

Yes. They come through as named fields, matching the names you gave them in Pipeline.

Does Zapier send my documents?

No. The trigger carries transaction data only — no attached PDFs, and no DocuSign contract data.

Can each agent connect their own Zapier account?

No. The connection is made once by a master admin and works at the account level, not per agent.

Will you set up my Zaps for me?

No, and we don't sell a setup service. We'll help with anything on the Pipeline side — which field holds what, why the trigger fired when it did. For hands-on build help, Zapier keeps an Expert Directory.

How do I turn off or delete a Zap?

In your Zapier account, not in Pipeline. Zaps are created, paused, and deleted in Zapier, and we can't change them on your behalf.

Does Paperless Pipeline have an open API?

Not today. The two integration options are SSO and Zapier. Broader API options are something the development team is looking at — and if a real API would change how you run your business, email help@paperlesspipeline.com and tell us. It's the kind of feedback that shapes what gets built.

Learn More

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

See Zapier Integration

Still Have Questions?

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