Zapier Integration

Last Modified on 09/04/2026 11:10 am EDT

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

Introduction

Something happens on a deal and three other systems need to know about it. A bill has to be drafted, a spreadsheet updated, a contact moved along in the CRM. Doing that by hand is fine until the volume turns it into somebody's job.

Zapier is a third-party service that wires web apps together, and Paperless Pipeline plugs into it. Pipeline's part is deliberately narrow: it announces when a transaction moves into a status, and Zapier carries things from there. That makes it a one-way door. Data leaves Pipeline and nothing comes back in, so no automation you build can create a transaction, add a user, or change a field. The workflow itself lives in your Zapier account rather than in Pipeline, which means the build belongs to you, along with whatever Zapier charges for it.

Once a zap is built, the person who used to retype the deal into the next system stops doing it. Because Zapier sits outside Pipeline, the split is worth knowing: we know the Pipeline side cold, and the rest is Zapier's territory. If Pipeline shows as unavailable while you're adding a step that does something, nothing is broken and you haven't misconnected anything.

How It Works

Pipeline gives Zapier one thing to listen for, and Zapier carries the rest.

Zaps, Triggers, and Actions

The vocabulary here is Zapier's, not ours. A **Zap** is one automated workflow. Every Zap opens with a **trigger** — the event Zapier watches for — and finishes with one or more **actions**, the work it performs when that event happens. Paperless Pipeline supplies the trigger; the actions belong to whatever app you're sending data to.

One Trigger: Transaction Status Changed

Pipeline offers a single trigger, **Transaction Status Changed**. You pick a status when you build the Zap, and every time a transaction moves into that status, Pipeline hands Zapier that transaction's data.

Data Goes Out, Not In

Paperless Pipeline is a trigger app in Zapier, not an action app. If you search for it while building an action step, Zapier shows it as unavailable — that's expected, not a fault. Zapier can't create a transaction, add a user, or change anything inside Pipeline.

What Pipeline Sends

The trigger data describes the transaction in detail: transaction info, agents, contacts, agent fees, client fees, broker financials, CDA info, and referrals, among others. Custom Fields come through under the same names you gave them in Pipeline. Documents don't — no PDFs, and no DocuSign contract data. Email help@paperlesspipeline.com and we'll send you the spreadsheet listing every field the trigger passes.

What It Costs

Nothing from us. Zapier charges by plan, and multi-step Zaps — the ones with filters, code steps, or several actions — generally need a paid one. Pricing is at zapier.com/pricing.

Who Supports What

We support the Pipeline side: the connection, the trigger, and which field holds what. Zapier is self-serve and changes on its own schedule, so the build, the action steps, and ongoing upkeep are yours. We don't sell a setup service; if you'd rather hand the work off, Zapier keeps an Expert Directory of people who do it for a living.

Connect Pipeline to Zapier

> Add Paperless Pipeline to your Zapier account and authorize it with your master admin login.

> **Who Can Do This**: Master admins with a Zapier account.

To connect Pipeline to Zapier:

1. Sign in to Zapier, or sign up if you don't have an account yet.
2. Go to [My Apps].
3. Click [+ Add connection].
4. Search for and select "Paperless Pipeline."
5. In the pop-up window, log in to your master admin Pipeline account, then click [Authorize Zapier].

Zapier confirms the new connection. You won't be asked for an API key or a URL along the way — if you are, you've landed in Zapier's Webhooks app rather than the Paperless Pipeline one.

Set Up the Paperless Pipeline Trigger

> Point a new Zap at Pipeline and choose which transaction status starts it.

> **Who Can Do This**: Master admins with a Zapier account.

To set up the Paperless Pipeline trigger:

1. In Zapier, start a new Zap and give it a name that describes what it does.
2. For the trigger step, search for and select "Paperless Pipeline."
3. Choose the event **Transaction Status Changed**.
4. Choose your connected Paperless Pipeline account.
5. Select the transaction status that should start the Zap.
6. Test the trigger. Zapier pulls in three recent transactions that moved into that status, so you have real data to map.

From here you add your action step in the other app and publish. Build against a sample that looks like the transactions you actually expect — or set up a test transaction in Pipeline for the purpose, and delete it before your next bill so it doesn't count toward your monthly quota.

Turn a Zap On or Off

> Zaps run, pause, and get deleted inside Zapier — there's no switch for them in Pipeline.

> **Who Can Do This**: Anyone with access to the Zapier account that owns the Zap.

To turn a Zap on or off:

1. In Zapier, go to [Zaps].
2. Find the Zap you want to change.
3. Toggle its **Running** switch on or off.

The change takes effect right away. To retire a Zap for good, delete it from the same screen. We can't turn a Zap on or off on your behalf — the automation lives in your Zapier account, not in Pipeline.

Check Your Zap History

Zap History shows every run, its status, and the data that came through on it.

Who Can Do This: Anyone with access to the Zapier account that owns the Zap.

To check your Zap history:

1. In Zapier, go to [Zap History].
2. Click [Zap runs].
3. Open any run to see its status and the data Pipeline sent.

Stopped and errored runs name the step that failed, which is usually the fastest route to a missing field. Filtered runs are normal — they mean the Zap's conditions weren't met that time, not that something broke.

Decide Which Moments Are Worth Automating

The trigger is a status, so your status list is the whole vocabulary of what a Zap can react to. An office running three statuses has three moments to hang automation on; an office running ten has ten.

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

See Transaction Statuses

Zapier Integration FAQ

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.

See Zapier Integration FAQ

Zapier Integration Troubleshooting

Running into a problem? Start here.

- Why Isn't My Zapier Zap Working?