



PrimeAgent Zapier Integration



Getting Started

The PrimeAgent Zapier integration allows you to automatically import leads from your favorite sources such as Facebook, Realtor.com, and Zillow, into your PrimeAgent CRM. Lets get started!

Contact Manager

Find a Contact

Zapier Information

Search result for:

ID	First Name	Last Name	Mobile Phone	Email	Status	Group	Contact Initial Source	Created On	Subscribed Campaigns	Latest Note	Next Reminder	Actions
<input type="checkbox"/>	Test		8002523366	test@test.com	New Lead	Web Leads	Lead - Agent Website	09/23/2019		09/23/2019 test test Please include any comments or additional information in this area		Select Action
<input type="checkbox"/>	Test123						Manually Added	11/21/2018				Select Action
<input type="checkbox"/>	REI	3		test@test.com	Hot	Web Leads	Lead - Agent Website	03/12/2019				Select Action

The first step is to create your Zapier account and connect the account to your PrimeAgent CRM. To do this, you will log in to your PrimeAgent account and go to CRM>>Contact Manager. In the upper left hand corner, click on the “Zapier Information” button. This will open a pop-up window with the Zapier Invite link and the API key. Copy the API key, then click on the Zapier link to be re-directed to Zapier.

Zapier Information

Zapier Link <https://zapier.com/developer/public-invite/15932/latest/>

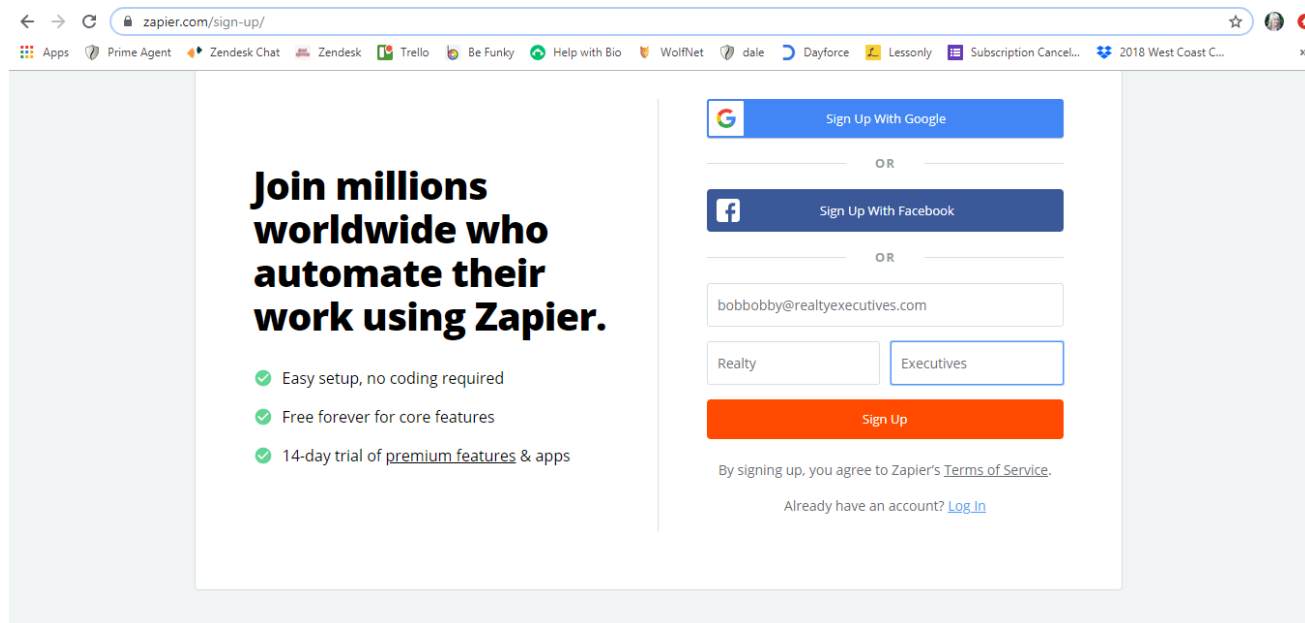
API Key c2c64b95-6778-4fdd-a37d-1ea491ca0ee3

Guide [Download Zapier guide](#)

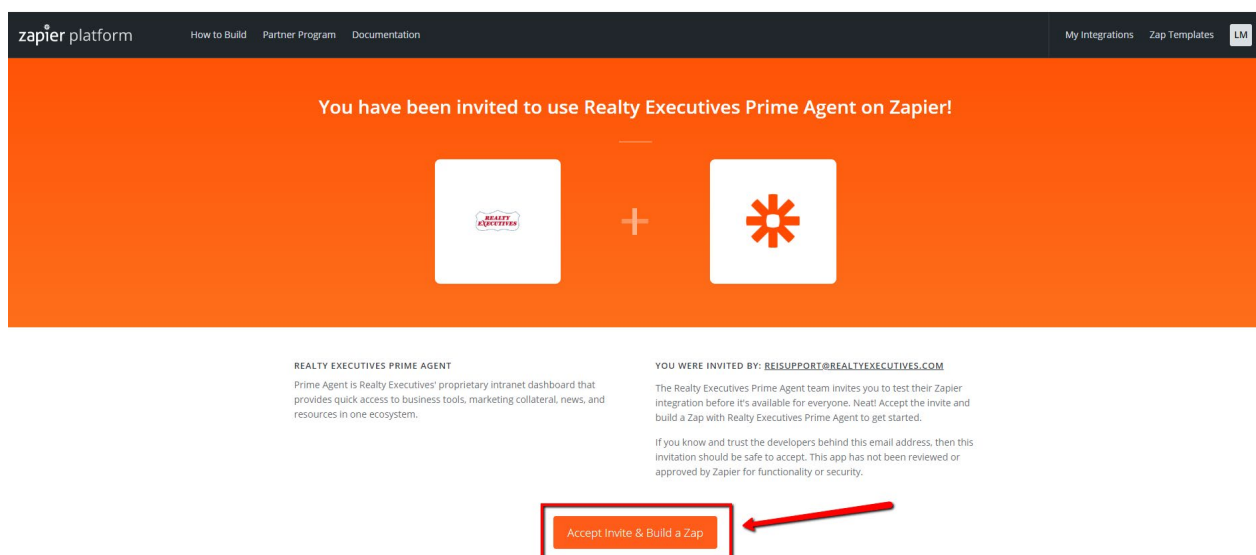
Close

Getting Started

If you do not have a Zapier account yet, click on “Don’t have a Zapier account yet? Sign Up.” Enter in your Realty Executives email, First Name, and Last name in the required fields. Then click the orange Sign Up button.



Once your account is created, you will be redirected to the Realty Executives Prime Agent on Zapier invite page. Click the Accept Invite & Build a Zap button on the bottom of the page.



Getting Started

Once you have accepted the invite, click on the My Apps tab towards the top of the page. Click on the “Connect a new account” under the Connected Accounts section and type in “Realty Executives Prime Agent.” Click on the “Realty Executives Prime Agent” app and enter in the API key when the pop-up appears on the screen. Finally, click “Yes, Continue.” Congrats! You have successfully linked your Zapier account to your PrimeAgent Contact Manager! You are now ready to start making Zaps.

The screenshot shows the Zapier 'My Apps' page. At the top, there is a navigation bar with 'Home', 'Apps', 'Explore', 'Tips & Advice', 'Upgrade Now', and 'Make a Zap!'. Below this is a secondary navigation bar with 'Dashboard', 'My Zaps', 'Task History', and 'My Apps'. A red box labeled '1.) Click My Apps' points to the 'My Apps' tab. Under the 'Connected Accounts' section, there is a search bar containing 'Realty Executives Prime Agent'. A red box labeled '2.) Type in "Realty Executives Prime Agent"' points to this search bar. Below the search bar, the 'Realty Executives Prime Agent' app is listed. A red box labeled '3.) Click on App' points to this app. Below the 'Connected Accounts' section is the 'Shared Connections' section, which includes a 'Start Your 1-4-day Trial' button. At the bottom of the page, there is a footer with 'zapier makes you happier :)', navigation links for 'Plans', 'Help', 'Developer Platform', 'Press', 'Jobs', and 'Zapier for Companies', social media icons, and a 'Get Help' button.



Making a Zap: Zillow

Now that your PrimeAgent and Zapier accounts are linked, we can begin making Zaps to import your external leads into your PrimeAgent Contact Manager. We'll first start with Zillow.

To begin, click on the "Make a Zap!" button in the upper right hand corner of Zapier. Under the "1. When this happens..." Section, search for Zillow Tech Connect" in the search bar. Click on the app. Next, a "Choose Trigger Event" field will appear and it will auto-populate with "New Contact." Leave the "New Contact" trigger, and click continue.

Welcome to the new editor - [see what's new.](#)

< ✨ / Name your zap

When this happens ...

1. New Contact in Zillow Tech Connect

Choose App & Event

Choose App (required)

Zillow Tech Connect

Choose Trigger Event (required)

New Contact

CONTINUE

+

2. Do this ...

+

Share Feedback

Making a Zap: Zillow

Next, you will set up your Webhook. To do this, you will log into your Zillow Agent Hub and click on your profile picture in the upper right hand corner>>Settings>>Connect My CRM. Then, click “Add Subscription” and select Zapier from the Partners drop down menu. Enter in your Zapier email address, then save.

The screenshot shows the Zillow Premier Agent interface. The top navigation bar includes 'Zillow PREMIER AGENT', 'Inbox', 'Tasks', 'Contacts', 'Advertising', 'Reporting', and 'Listings'. On the right, there is a 'Help' dropdown and a user profile icon. The main content area is titled 'Settings' and has a sidebar with categories: GENERAL (Account, Integrations, Link dotloop, Subscriptions, Connect my CRM), INBOX (Notifications, Message Templates, Lead Form, Lead Source, Message), and TEAM (Management). The 'Connect my CRM' section is highlighted, showing a description of the TechConnect program and a 'Please Note' about new contacts. Below this is an 'Add Subscription' button and a table with columns for 'Subscriber Identifier' and 'Status'. A table entry shows 'bobbobby@realtyexecutives.com' with an 'Active' status and a 'Delete' button. A red box highlights the 'Add Subscription' button with the instruction '4.) Click Add Subscription'. Another red box highlights the 'Connect my CRM' link in the sidebar with the instruction '3.) Click Connect my CRM'. A third red box highlights the user profile icon with the instruction '1.) Click Profile picture'. A fourth red box highlights the 'Settings' option in the dropdown menu with the instruction '2.) Click Settings'. Arrows point from these boxes to their respective elements.

This screenshot shows the 'Add Subscription' dialog box. The left sidebar has 'Choose a Partner' selected. The main area is titled 'Choose a Partner' and features a dropdown menu with 'Zapier' selected. Below the dropdown is a list of other partners: ShoutBoss, Sierra Interactive, Slacker, Spears Realty Group, Speed To Contact / Ricochet, SugarCRM, TeamLeads, Tom Ferry, TORCHx, Total Brokerage, Total Expert CRM, TRIBUS, Union Street Media, Wise Agent, WLN, Xcelerate CRM, Zapier (highlighted), Zapier (Follow Up Boss), Zoho (via Zapier), and Zurple. A 'Next' button is located at the bottom right of the dialog.

This screenshot shows the 'Add a Subscriber Identifier' dialog box. The left sidebar has 'Add a Subscriber Identifier' selected. The main area is titled 'Add a Subscriber Identifier' and contains 'Instructions' for connecting to Zapier. Below the instructions is a 'Zapier Login Email Address' field with 'bobbobby@realtyexecutives.com' entered. At the bottom right, there are 'Back' and 'Save' buttons.

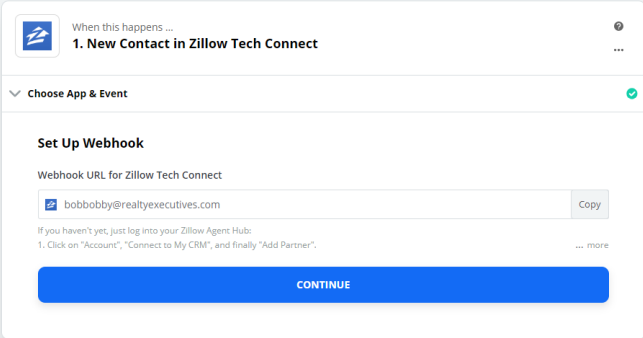


Making a Zap: Zillow

Now, back in Zapier, you can add your Zillow Tech Connect webhook. This will be the email address you use to log into your Zillow Agent Hub. Click continue, then Test and continue. This will move you to Step 2 “Do this...”

Welcome to the new editor - [see what's new](#).

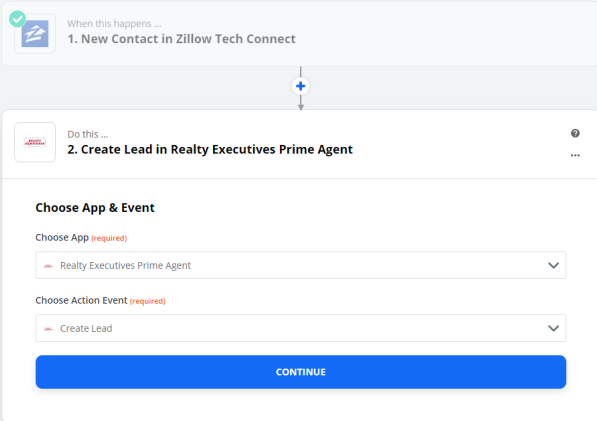
name your zap



The screenshot shows the Zapier interface for Step 1. The trigger is "1. New Contact in Zillow Tech Connect". Under "Choose App & Event", the "Set Up Webhook" section is active. It displays the "Webhook URL for Zillow Tech Connect" as "bobbobby@realtymaxim.com" with a "Copy" button. Below the URL, there is a "CONTINUE" button. A "Share Feedback" link is at the bottom.

In Step 2: Do this... search for the Realty Executives Prime Agent app and click the app once it appears. Under Choose Action Event, “Create a Lead” should populate. Do not change this. Click continue.

Name your zap



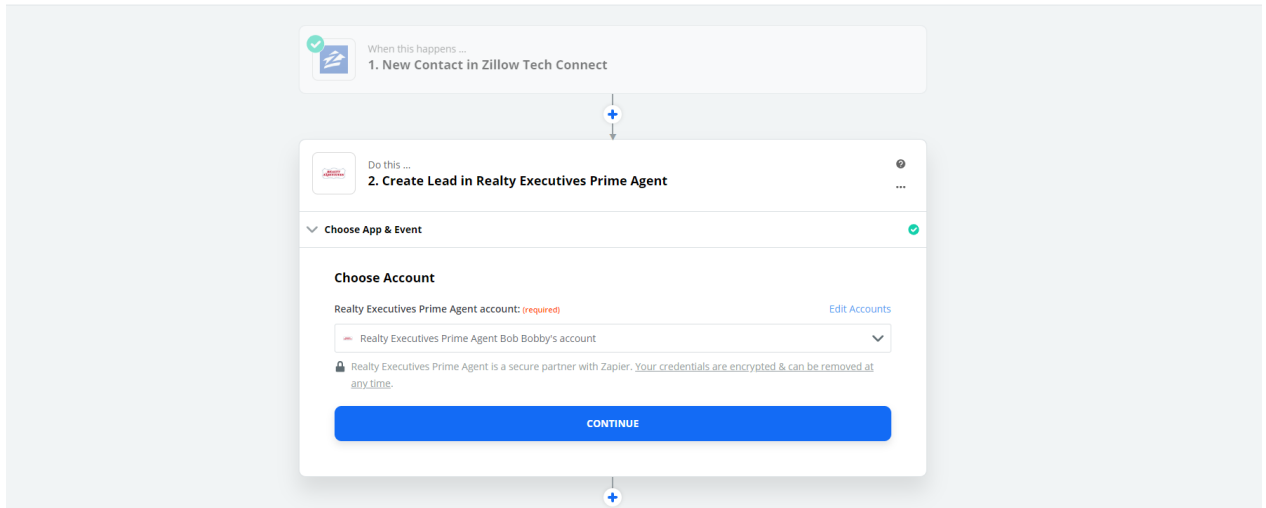
The screenshot shows the Zapier interface for Step 2. The trigger is "1. New Contact in Zillow Tech Connect". The action is "2. Create Lead in Realty Executives Prime Agent". Under "Choose App & Event", the "Choose App (required)" dropdown is set to "Realty Executives Prime Agent" and the "Choose Action Event (required)" dropdown is set to "Create Lead". A "CONTINUE" button is at the bottom. A "Share Feedback" link is at the bottom.




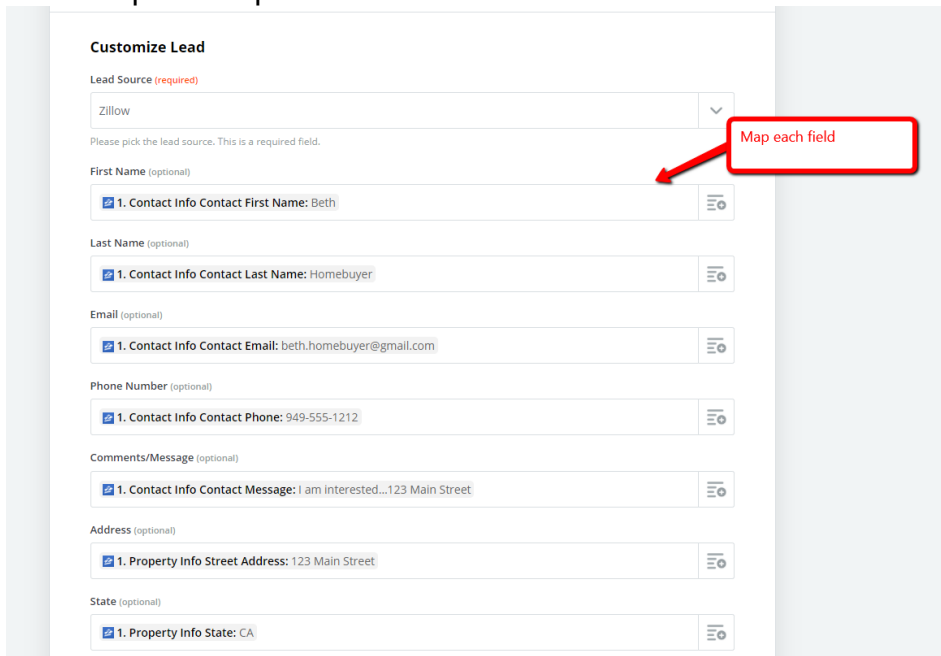
Making a Zap: Zillow

Under the Choose Account dropdown, select your Realty Executives account, then continue

Name your zap

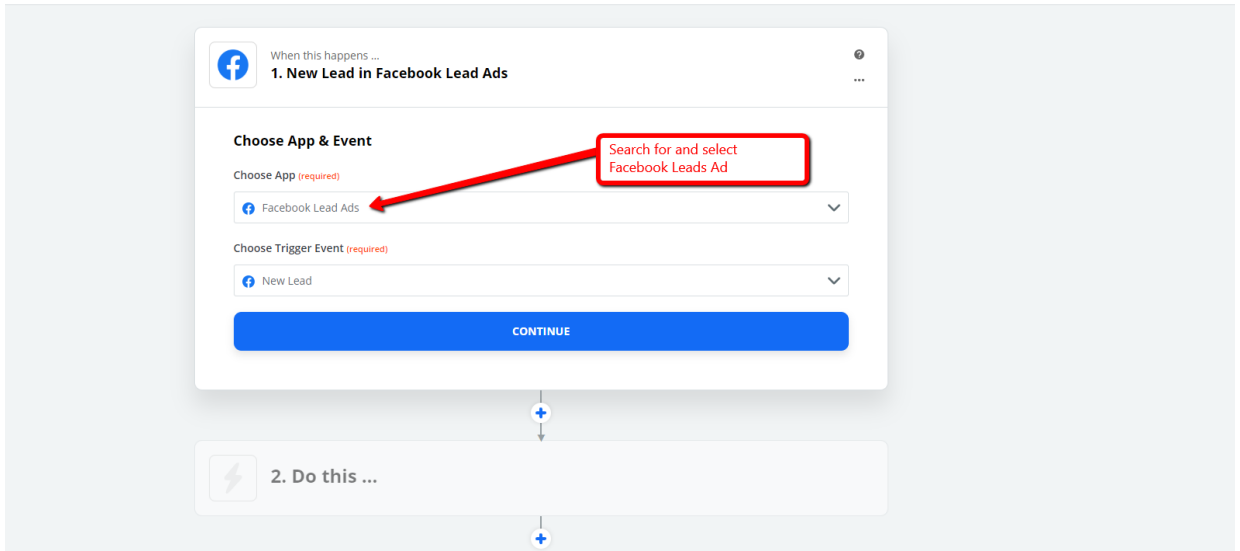


Under the Lead Source section, select Zillow. Then, in the fields below (First Name, Last Name, etc) click the  button and match up each field with the appropriate option. For example: under the First Name field, select Contact Info Contact First Name. Repeat this with all fields. Then, click Continue>>Test & Continue. Finally, click Turn on Zap to complete.



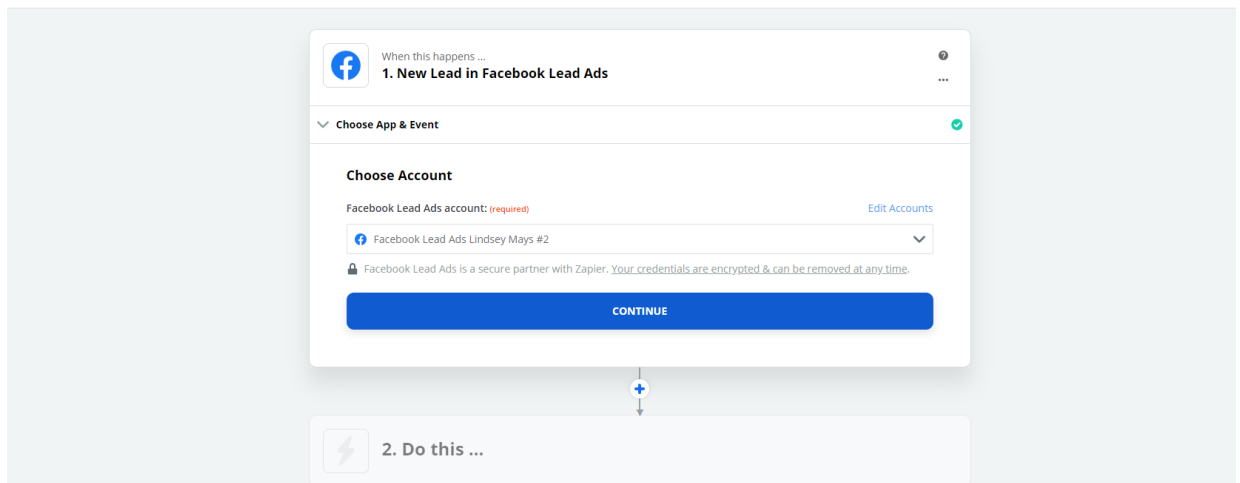
Make a Zap: Facebook Leads

First, click on the orange Make a Zap! button in the upper right hand corner of Zapier. Under the Choose App & Event section, select Facebook Leads Ad. In the Choose Trigger Event field, New Lead will auto-populate. Do not change this selection. Then, click “Continue.”



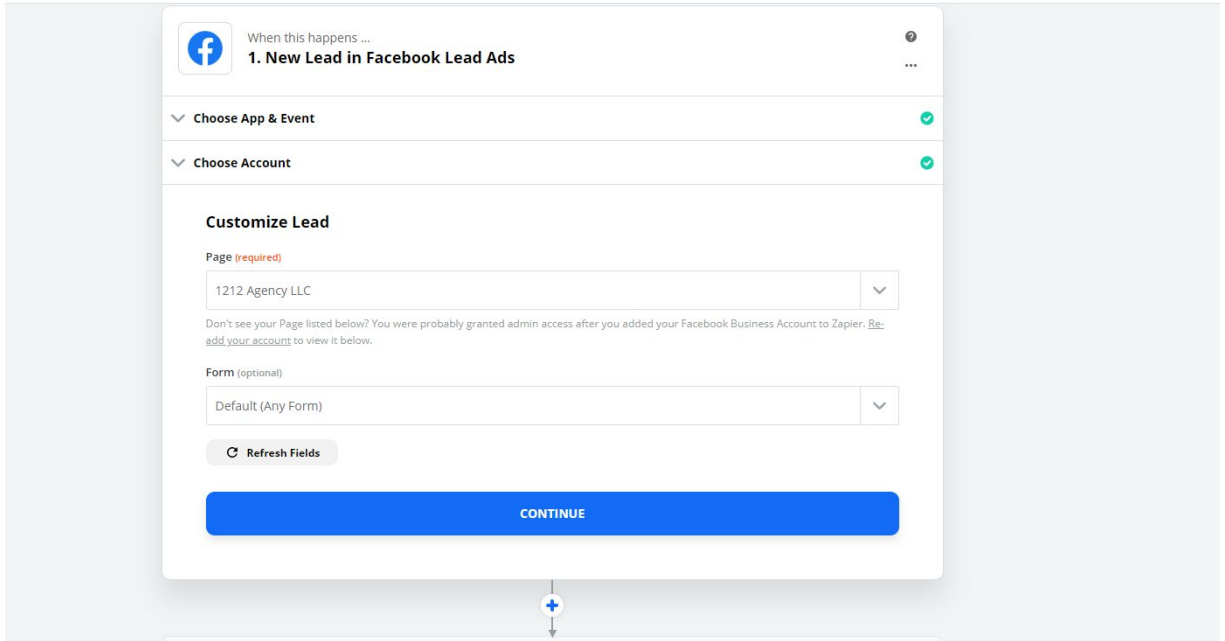
Under the Choose Account section, click “Add New Account.” In the Pop-up window, log into your Facebook account. In the next window, you will see a message saying “Zapier would like to manage your business.” Click the blue OK button in the bottom right. The pop-up window will then close, and you will be able to select your Ad Leads account. Click continue.

Name your zap



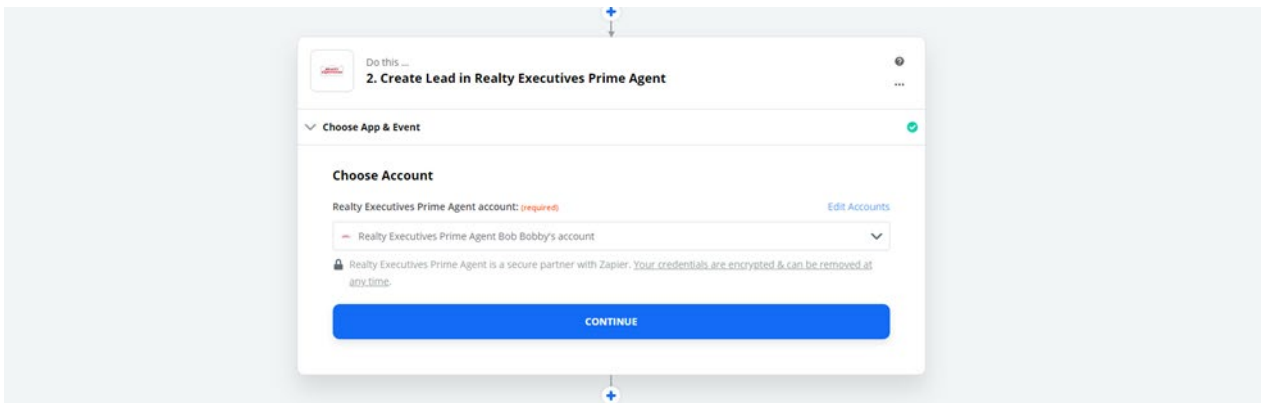
Make a Zap: Facebook Leads

Next, under the Page field, you will select your Facebook Business Page you would like to pull your leads from. Under the Forms section, click Default (Any Form). Then, click continue>>Test & Continue



The screenshot shows the Zapier configuration interface for a Zap titled "1. New Lead in Facebook Lead Ads". The "When this happens ..." section is set to "New Lead in Facebook Lead Ads". Below this, the "Choose App & Event" and "Choose Account" sections are both marked with a green checkmark, indicating they are successfully configured. The "Customize Lead" section contains two dropdown menus: "Page (required)" is set to "1212 Agency LLC" and "Form (optional)" is set to "Default (Any Form)". A "Refresh Fields" button is located below the dropdowns. At the bottom of the configuration panel is a large blue "CONTINUE" button.

In Step 2: Do this... search for the Realty Executives Prime Agent app and click the app once it appears. Under Choose Action Event, "Create a Lead" should populate. Do not change this. Click continue. Under the Choose Account dropdown, select your Realty Executives account, then continue



The screenshot shows the Zapier configuration interface for a Zap titled "2. Create Lead in Realty Executives Prime Agent". The "Do this ..." section is set to "Create Lead in Realty Executives Prime Agent". Below this, the "Choose App & Event" section is marked with a green checkmark. The "Choose Account" section shows a dropdown menu for "Realty Executives Prime Agent account: (required)" with "Realty Executives Prime Agent Bob Bobby's account" selected. A blue "Edit Accounts" link is visible to the right of the dropdown. Below the dropdown is a security notice: "Realty Executives Prime Agent is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time." At the bottom of the configuration panel is a large blue "CONTINUE" button.

Make a Zap: Facebook Leads

Under the Lead Source section, select Facebook. Then, in the fields below (First Name, Last Name, etc) click the button and match up each field with the appropriate option. For example: under the First Name field, select Contact Info Contact First Name. Repeat this with all fields. Then, click Continue>>Test & Continue. Finally, click Turn on Zap to complete.

The screenshot displays the 'Customize Lead' configuration page in Zapier. At the top, the 'Lead Source' is set to 'Zillow'. Below this, several optional fields are listed, each with a dropdown menu for mapping to a specific contact field. A red arrow points to the 'First Name' field's dropdown, which is highlighted with a red box containing the text 'Map each field'.

Field	Selected Option
Lead Source (required)	Zillow
First Name (optional)	1. Contact Info Contact First Name: Beth
Last Name (optional)	1. Contact Info Contact Last Name: Homebuyer
Email (optional)	1. Contact Info Contact Email: beth.homebuyer@gmail.com
Phone Number (optional)	1. Contact Info Contact Phone: 949-555-1212
Comments/Message (optional)	1. Contact Info Contact Message: I am interested...123 Main Street
Address (optional)	1. Property Info Street Address: 123 Main Street
State (optional)	1. Property Info State: CA

Make a Zap: Email Parser

Have leads coming into your inbox from sources other than Zillow or Facebook? No problem! You can utilize the Email Parser by Zapier to pull in lead information directly from your email.

If you visit <https://parser.zapier.com/>, take a look at the video at the bottom of the page. It will provide a detailed walkthrough on how to set up the email parser to pull your leads into the PrimeAgent CRM

Questions? Please feel free to reach out to the concierge team at customerservice@realtyexecutives.com for help!

