Get Text Message Threads Into the Transaction Record

Last Modified on 09/04/2026 11:12 am EDT

Texts are part of the deal and they live on somebody's phone. Send the thread to the transaction's maildrop address and it lands on the file with everything else.

Introduction

The conversation that actually moved a deal is often a text. In some markets that's not a preference — the regulator expects all correspondence in the file, and an audit that pulls a dozen transactions will notice what's missing.

Pipeline doesn't capture texts automatically the way it captures email, so this is a habit rather than a setting. The good news is the receiving end is the same address you already use: a transaction's maildrop takes what a phone sends it. The choice is really about how you get a thread out of the phone, and the three routes trade effort against how clean the result is.

When to Use This

- Your state or your broker requires text correspondence in the transaction file.
- An audit is coming and the texts about a deal are still on an agent's phone.
- Something was agreed by text and the file should show when and by whom.
- You've been screenshotting threads and ending up with dozens of loose images you can't merge.
- An agent is leaving and their client conversations need to come off their phone.

Why This Is a Forward and Not a Capture

People reasonably expect texts to work the way email does — give Pipeline a number, let it listen. It isn't a feature we're withholding; it's a limit of how texting works. Business messaging services can't sit inside a group thread the way an email address sits on a CC line, so a listening number would only ever see one side of the conversation. Half a thread in the file is worse than none, because it looks complete.

So the honest answer is that a person sends the thread in, and the practical goal is to make that as close to one action as possible. Do it while the deal is live rather than reconstructing it during an audit, and the whole thing stays small.

1. Send the Thread Straight From the Phone

The fastest route uses nothing but the messaging app that's already open. Forward the messages to the transaction's maildrop address instead of to a phone number — most phones let you select several at once — and they arrive in that transaction's *Received Emails* like any other message.

You can also just text the maildrop address directly from the phone, which is handy for a quick note in the moment rather than a thread after the fact.

Forward an email into a transaction and it stays there — the subject, the message, and a record of what came attached.

See Received Emails

2. Keep the Address in the Phone's Contacts

This is what makes the habit stick. Save the transaction's maildrop address as a contact on the phone, named after the property, and forwarding becomes a two-tap action instead of a trip back to a laptop to look up an address.

Agents who do this send texts in as they happen. Agents who don't send them in six months later, badly, when someone asks.

Email your documents to a maildrop address and Pipeline pulls the attachments in — no logging in, no uploading.

See Maildrop

3. Export a Long Thread as a PDF

For a conversation that ran for months, forwarding message by message isn't realistic. Phone apps exist that export a whole thread to a single PDF — SMS Export to PDF on iPhone, SMS Backup & Restore on Android are the two customers have had success with — and one clean PDF emailed to the maildrop is far better than two hundred fragments.

These aren't ours and we haven't tested them, so treat them as a starting point rather than a recommendation, and check the output before you rely on it.

> Name the PDF for what it is — the property and the other party — before you send it. A file called "sms_export_2026.pdf" on a transaction tells nobody anything two years from now.

4. Screenshot Only as a Last Resort

Screenshots work and they're what most people reach for first, but know the cost before you commit to it. A long thread becomes dozens of images, and images can't be merged into one document the way PDFs can — so you get a wall of files on the transaction rather than one readable record.

If your account only accepts PDFs, screenshots won't even upload until a master admin changes that setting. Which is a reason to reach for the PDF export in the first place: it clears the setting problem and the tidiness problem at once.

Restrict uploads to PDFs and you can preview, rotate, merge, and break apart everything that lands in your account without leaving Pipeline.

See PDF-Only Restriction