

Formatting Toolbar FAQ

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

The message editor covers headings, bold, italic, links, lines, lists, and emoji. Answers to the common questions about what you can format, what you can't, and why a message sometimes arrives looking different.

What formatting can I use in a message?

Headings, bold, italic, a horizontal line, links, bulleted lists, numbered lists, and emoji. They're all in the toolbar above the message box, and what you see in the editor is what arrives.

Can I change text color or highlight text?

Not today. Color and highlighting aren't in the editor. It's a standing request with the Development Team, with no timeline.

Can I underline text?

No. Bold and italic are the two emphasis options. Underline has been requested and isn't available.

Can I add an image or a screenshot to a message?

No. The editor doesn't insert images, in messages or in message templates. To get a file to someone, attach it to the message from the transaction or from your Reference page instead.

Why did my heading arrive as plain bold text?

Your company has minimal formatting turned on. With that setting on, headings render as regular bold text. Everything else you formatted comes through normally.

Do I need to type any special characters to format text?

No. Pipeline's editor is visual — click the toolbar option and the formatting applies. Older Pipeline messages used markdown symbols, which is why some long-lived templates still have stray asterisks in them.

Why are there asterisks or pound signs in my sent message?

They're markdown characters that came in with pasted text. Open the message or template, delete the symbols, and re-apply the formatting with the toolbar.

Does formatting survive when I paste from Word or another program?

Sometimes, and not always cleanly. Pipeline doesn't strip or rewrite what you paste, so whatever the source

program carries over comes with it — including line breaks that collapse your paragraphs. Re-pasting often fixes it; otherwise tidy it up in the editor.

Learn More

Headings, bold, links, and lists live in a small toolbar above the message box, so a long message arrives easy to read.

See [Formatting Toolbar](#)

Still Have Questions?

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