

Formatting Toolbar

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

Introduction

A one-line message doesn't need anything. A message carrying three deadlines, a list of what's still missing, and a link to the portal does, because an unbroken wall of text gets skimmed and half-read.

The toolbar above the message box covers the formatting that makes a long message readable: structure, emphasis, links, and lists. It behaves the way a word processor does, so there's nothing to learn and nothing to preview. It's the same toolbar everywhere Pipeline gives you a full message box, which means a template you format once reads the same way when you send from it. What it deliberately isn't is a design tool.

A client or a title company mostly needs a message they can act on, and that's what the toolbar is for. The set of options is small on purpose and it hasn't grown much, so if you're hunting for something that isn't on the toolbar, it probably isn't hiding somewhere else. Pasting in text from a formatted document is the one thing worth a second look before you send, since styling that came from somewhere else doesn't always arrive the way you'd expect.

How It Works

The toolbar sits at the top of the message window, and it works the same way everywhere Pipeline gives you a full message box.

What's on the Toolbar

- **Heading** — turn a line into a section header.
- **Bold and Italic** — emphasis on a word or a phrase.
- **Horizontal line** — a divider between sections.
- **Link** — make selected text clickable.
- **Bullet list** and **Number list** — break a run of items apart.
- **Emoji** — pick one from the picker.

How You Apply It

Select the text first, then click the option. For the horizontal line and the emoji picker there's nothing to select — put your cursor where you want it and click.

What Isn't There

Text color, highlighting, underline, indenting, and inserted images aren't part of the editor. Customers have asked for all of them and the Development Team has the requests, but none of it is available today.

Headings and Minimal Formatting

If your company sends messages with minimal formatting turned on, headings arrive as regular bold text instead of headings. Everything else comes through as written. Minimal formatting is a company-wide setting a master admin controls.

Format Text in a Message

Apply a heading, bold, italic, a divider, or a list to what you're writing.

Who Can Do This: Anyone.

To format text in a message:

1. Start composing a note or an email.
2. Select the text you want to format, or place your cursor where the formatting should start.
3. Click the option you want in the toolbar at the top of the message window.
4. Keep composing your message.

The formatting shows in the editor exactly as it will arrive.

Add a Link to a Message

Turn a word or a phrase into a clickable link.

Who Can Do This: Anyone.

To add a link to a message:

1. Select the text you want to link.
2. Click [Link] in the toolbar.
3. Enter the URL.
4. Click [OK].

The selected text becomes a clickable link in the message you send.

Formatting Toolbar FAQ

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.

See [Formatting Toolbar FAQ](#)

Formatting Toolbar Troubleshooting

Message came out looking wrong? Start here.

- [Stray Symbols or Missing Formatting in a Message](#)
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