Make the Important Thing Stand Out

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Five ways to put emphasis where it belongs so the thing that needs action is the thing people see: a formatted message, a message that formats itself, a colored label on a document, a highlighted task, and one symbol in the right field.

Introduction

Most of what people miss in Pipeline was on the screen. The date was in the third paragraph of an email that read as one block. The document that needed a signature sat in a list of forty that all looked alike. The task with the deadline was the fourteenth line of a checklist. Nothing was hidden. Nothing stood out either.

Pipeline gives you a small set of tools for emphasis, and each one belongs to a place. Messages have a formatting toolbar, and some things you drag into a message arrive formatted on their own. Documents have labels, fourteen colors you name. Tasks have @mentions, which turn a line green for the person it belongs to. And any text field takes an emoji, which is one character that the eye lands on before it reads a word.

Used with restraint, they make the important thing visible at a glance. Used everywhere, they cancel each other out, so the rule under all five is the same: emphasise the few things that matter and leave the rest plain.

When to Use This

- Clients skim your longer emails and miss the date in the middle.
- Your broker only reviews contracts and has to hunt for them in the Unreviewed list.
- Documents that are missing a signature look exactly like the ones that are not.
- A long checklist buries the one task that is due this week.
- The yes-or-no answer in More Info takes a full read to find.

1. Format the Message So It Can Be Skimmed

A message carrying three deadlines and a list of what is missing needs structure. The toolbar above the message box gives you headings, bold, italic, a horizontal line, links, bulleted and numbered lists, and emoji. Select the text and click. Put each section under a heading, bold the date, and turn any series into a list, numbered when you will refer back to the items. Do it once in a message template and every message sent from it arrives the same way. If your company has minimal formatting turned on, headings arrive as bold text and everything else comes through as written.

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

2. Let What You Drag In Format Itself

Some emphasis costs nothing. Drag a contact into the message body and their details arrive laid out with the name in bold. Drag a task and it comes with its due date and status set off in italics. Drag a doc comment and the document name is bold, the timestamp and author italic. The full set of drag-and-drop moves is in Work Pipeline

Like a Power User.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

3. Put a Colored Label on the Documents That Need Something

Doc Labels are fourteen colors you name once for the whole account: Missing Signatures, Broker Review, Rejected Offer, a coordinator's initials. Hover over a document, click the [Label] icon, and pick one. The color shows beside the doc for everyone who can see it, on the transaction and in Unassigned, where you can label a whole batch at once. Click the label column on a transaction's doc list and the docs sort into their groups. On the Unreviewed page, filter by label and a broker who only reviews contracts sees only the documents marked for them, a view worth saving as a shortcut.

Color-coded tags you name once and apply to any doc, so your team can spot, sort, and filter documents at a glance.

See Doc Labels

A label organizes; it never changes who can open a document. That is what permission categories do. And a label no longer has to be applied by hand every time: a standardized document name can carry a label of its own, so every appraisal report arrives already tagged.

Build a shared list of your company's document names, and everyone on your team names the same form the same way — with your preferred label and permission category already attached.

See Standardized Document Names

4. Turn a Task Green for the Person It Belongs To

An @mention in a task name highlights that task in green for the person or role mentioned, on the transaction, on their Tasks page, and in their daily reminder email. Put it on the checklist template and it reaches every transaction. When the mention text makes a long checklist harder to read, you can hide it and keep the highlight, as Keep Your Account Clean and Easy to Read shows. How mentions combine with visibility to assign a task is in Show Each Person Only the Tasks That Are Theirs.

Type @ and a name to highlight a task for the person who owns it, right where they'll look.

See Task @Mentions

5. Put One Symbol Where the Eye Should Land

An emoji is text, so it goes anywhere text goes and searches like a word. A colored circle at the front of a transaction name marks whose file it is. A red flag at the front of one task anchors it in a long list. In More Info, a green circle after "buyer signed" and a red one after "seller signed" answers the question before anyone reads the sentence. Keep to a few plain symbols that each mean one thing, because the point is contrast, and a list full of symbols has none. The system for choosing them, and the mail caveat for emoji in transaction names, is in Build an Emoji System Your Whole Office Can Read.