Build an Emoji System Your Whole Office Can Read

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An emoji is a text character, so it works in any field in Pipeline and searches like a word. Used with a small, fixed vocabulary, it becomes a third layer of classification on transactions, a priority marker on tasks, and a label in More Info, all of it searchable and savable.

Introduction

Locations sort your transactions by office and labels sort them by property type. Statuses say where a deal is. Then there is everything else an office wants to see at a glance: which coordinator owns the file, which state it is in, whether the broker has reviewed it, which three tasks on a forty-line checklist matter most. Pipeline has no field for those, and it does not need one, because it has text fields everywhere and an emoji is text.

A colored circle at the front of a transaction name, a flag on a task, a numbered step in the Home page announcement. Each is one character, visible on every list, and searchable exactly like a word, which means every group you mark can be found, saved as a shortcut, and shared. The trick is discipline. A handful of symbols that each mean one thing, used the same way every time, is a system. Twenty symbols used freely is clutter.

You end up with an account your team can read without opening anything, and lists you can pull in one click for any group you have marked.

When to Use This

- Several transaction coordinators share one account and nobody can tell whose file is whose from the list.
- You need a marker for a transaction that no status or label covers, such as reviewed by the broker or under an internal audit.
- A checklist runs long and the three tasks that matter disappear into it.
- More Info holds the same yes-or-no answers on every deal and you want them readable at a glance.
- You want a set of transactions marked for yourself or a colleague without changing anything the office sees.

1. Write the Key Before You Type the First Emoji

Decide where emoji will be used and what each one means, then write it down: green circle is Frank's files, red flag is a high-priority task, checkbox at the end of a name is broker-reviewed. Use symbols everyone recognizes, keep the list short, and never let one symbol mean two things. Save the key as a PDF and post it in your Reference Library, so the meaning lives somewhere other than one person's head.

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See Reference Library & Forms

To type an emoji anywhere in Pipeline, right-click in the field and choose Emoji, or press the Windows key and the period on Windows, or Command, Control, and Space on a Mac.

2. Mark Transactions in the Name

The transaction name is the most visible text in Pipeline, so it is where a classification pays most. Put a classifying emoji at the front of the name, the coordinator's color or the state's symbol, and a progress or pin emoji at the end, such as a checkbox once the broker has reviewed the file. Edit the transaction, add the character, and save. When you sort the Transactions list by name, that front emoji is the first character it sorts on, so the files that share it sit together instead of falling in address order.

A transaction's name is how you'll recognize it at a glance — set it to match your office's convention.

See Transaction Names

One caveat matters more than it used to. The transaction name goes into the subject line of every email sent from the transaction, and Yahoo, AOL, and Gmail can reject a subject that carries an emoji. Start the subject with a pipe character, the | key above the backslash, to keep the name out of that message. If a name will carry an emoji for the life of the deal, expect to use the pipe on outside mail. Details are in An Email You Sent Didn't Arrive.

3. Find Every Marked Transaction and Save the List

Because the emoji is part of the name, Power Search finds it. Click into Power Search in the upper-left corner, choose the name field, paste or type the emoji, and search. Add a status filter in More Search Options, All Active for instance, to narrow it. Click [Add Shortcut] and Frank's files or the reviewed deals are one click from your Home page from then on. The page address of the search is shareable too: paste it to a colleague and they see the same list, limited to what they can access.

A search you run every morning doesn't need rebuilding every morning. Save it once and it's one click away in your left menu, for as long as you want it there.

See Custom Shortcuts

The same works on the Tasks page. Search the emoji there and you have every task on Frank's transactions, ready to save as its own shortcut.

4. Turn the Marker Into a Flag on the List

Pipeline cannot flag one transaction by itself, but it can flag every transaction that matches a search. Save your emoji search as a Transaction Flag, choose red, green, or blue, and a colored flag appears beside every matching row on your Transactions page from then on. The emoji is what makes the deal findable. The flag is what makes it visible without reading a single name.

Some transactions need watching. Save the search that finds them as a flag, and Pipeline marks every match on your Transactions page for you.

See Transaction Flags

5. Make the Important Tasks Stand Out

Tasks have no priority setting and no color, and they do not need one. Lead a task name with an emoji, a red flag for urgent or a camera for the photography steps, and it lines up down the left edge of the checklist where the eye scans. Do it on the checklist template so it reaches every transaction without anyone typing it again, and use it on the few tasks that should stand out rather than all of them. The Tasks page search finds the emoji, so every high-

priority task across the office is one search and one shortcut away.

Pipeline has no priority flag, no color picker, and no bold button. What it has is a name field on every task — and that turns out to be enough.

See Make a Long Checklist Readable

A checklist name takes an emoji too, which separates the compliance list from the marketing list on a transaction that carries both.

6. Use Emoji in More Info as Icons or as Options, Not Both

In More Info and Admin Info, an emoji can be an icon that draws the eye to a line, a lock before the lockbox code, a bank before the lender, or it can be an option, a green circle for yes and a red for no, a one or two or three for a service tier. Pick one approach and keep it, or the box becomes noise. Small circles, lines, and triangles also break a long block of text into sections when the field is doing more than one job.

Both fields are searchable from Power Search. Choose the info field or the admin-info field, type the emoji, and every transaction carrying that option comes back, ready to save as a shortcut. When an option is something you will also sort or report on, give it a custom list field instead, because a custom field comes out as its own column in a download and More Info stays free text.

County, financing type, offer of compensation, the reference number your accounting system uses — when the detail you need isn't a field yet, you can build one that behaves like Pipeline shipped it.

See Track a Detail Pipeline Has No Field For

7. Guide the Team From the Home Page

The company announcement at the top of every Home page takes emoji through its formatting options. Number the three steps you want every agent to follow, add the transaction, upload the docs, check off the tasks, and the workflow sits in front of them every time they sign in. Four lines is the limit, so the emoji does the work words would take.

Post a short message to the top of everyone's Home page to share news, a reminder, or a link with your whole team.

See Company Announcement