



Zoho Corporation

Manage List View

List view allows you to group records present in your Bigin account based on a specific criteria. Viewing all the records without any order will be hard for you to pull the required record immediately. For example, you may want to view the contacts that were added last week, to carry-out activities or create campaigns for them. It's not possible to manually check if the record was added that week and create an activity. That's where list view helps in pulling those records that you need. You can send bulk email, add/remove tags, update field, change owner, Delete or export the records from list view. You can also mark a list view as favourite by simply clicking the star next to the view.



💡 Navigate between records from list view with **Quick Preview**. You can update fields, add notes, tags, view related records and even send emails from the Quick Preview panel itself.

Deal Name	Amount	Stage	Closing Date	Customer Name	Company
Hatchback x Ted	\$10,000.00	Price Quote	Jan 30, 2023	Ted Watson	ABC Corp
SUV x Ted	\$80,000.00	Deal Won	Jan 31, 2023	Ted Watson	ABC Corp
SUV x Truhlar	\$30,000.00	Price Quote	Jan 31, 2023	Leota Dilliard	Truhlar And Tr
SUV x Leota	\$4,500.00	Deal Lost	Feb 01, 2023	Leota Dilliard	Commercial P
Sedan x Morlong	\$30,000.00	Deal Won	Feb 02, 2023	Mitsue Tollner	Morlong Assoc
Chapman	\$70,000.00	Negotiation	Jan 31, 2023	Simon Morasca	Chapman
Crossover x Chanay	\$20,000.00	Test Ride	Feb 01, 2023	Josephine Darakijy	
Sedan x Benton	\$30,000.00	Deal Won	Jan 31, 2023	John Butt	
MPV x Kris	\$40,000.00	Test Ride	Feb 03, 2023	Kris Marrier	
SUV x Leota	\$30,000.00	Test Ride	Mar 19, 2023	Leota Dilliard	
Hatchback x Simon	\$25,000.00	Vehicle Chosen	Feb 10, 2023	Simon Morasca	
SUV x John	\$80,000.00	Deal Won	Mar 09, 2023	John Butt	Benton
Crossover x Capla	\$20,000.00	Price Quote	Jan 28, 2023	Capla Paprocki	
Mathew	\$30,000.00	Negotiation	Mar 24, 2023	Kris Marrier	Feltz Printing S

The list views are of two types:

Standard list views and Custom list views.

- **Standard List Views:** Bigin offers certain pre-defined views based on the modules. You cannot edit the standard list views available.
- **Custom List Views:** You can create a list view of your choice in your Bigin account. These views can be edited or deleted if needed.

Categories in list view

The views in your Bigin account can be categorized into three:

- **Favourites** - The list views that you have marked as favourites will be displayed here.
- **Created by me** - The list views that you have created will be displayed.
- **Shared with me** - The list views that are shared with you by your fellow users will be displayed here.

The footer section displays the following:

- Total Contacts in the module
- Contacts with open pipelines
- Contacts without open pipelines
- Untouched contacts

The **records** drop-down list allows you to select the maximum number of records to be displayed in the page. Click the > button to move to the next page.

Create Custom Views

At times, the standard views offered, may not suite your requirement. in that case, you can create a custom view based on your needs. You can share the views that you have created.

To create custom views

1. Go to the module of your choice.
2. Click the view drop-down and select + **Create View**.
3. In the create window, do the following:
 - o Specify a **Name** for the view
 - o Specify the **criteria** based on which records should be displayed.
 - o Under **Choose Columns** multi-select drop-down list, select the columns that you want to be displayed in this view. You can re-arrange the columns once the view is created.
4. Specify who can access the view you have created.

You can choose from:

- o **Only Me** - Only you will be able to use the list view created
- o **All Users** - All users in your Bigin account can use the list view
- o **Selected Users** - Only the users selected can access the view that you have created.

<input type="checkbox"/>	Contact Name	Email	Mobile	Tag	Contact Owner
<input type="checkbox"/>	Ted Watson	support@bigin.com	609-884-0686	Premium customer	Aayisha
<input type="checkbox"/>	Ken Morrison	ken.morrison@sample.com	555555555	Premium customer Walk-in	Aayisha
<input type="checkbox"/>	Kris Marrier	krismarrier@gmail.com	555-555-5555	Walk-in	Aayisha
<input type="checkbox"/>	Sage Wieser	sage-wieser@truhlar.uk	555-555-5555	Walk-in	Aayisha
<input type="checkbox"/>	Leota Dilliard	leota-dilliard@hotmail.com	555-555-5555	Web lead	Aayisha
<input type="checkbox"/>	Mitsue Tollner	tollner-morlong@gmail.com	555-555-5555	Walk-in	Aayisha
<input type="checkbox"/>	Simon Morasca	simonm@chapman.com	555-555-5555	Premium customer	Aayisha
<input type="checkbox"/>	Donette Foller	foller-donette@in.com	555-555-5555	Web lead	Aayisha
<input type="checkbox"/>	Capla Paprocki	capla-paprocki@yahoo.com	555-555-5555	Web lead	Aayisha
<input type="checkbox"/>	James Venere	ljames-venere@chemel.org	555-555-5555	Web lead	Aayisha
<input type="checkbox"/>	Josephine Darakjy	joesphine-darakjy@chanay.com	555-555-5555	Premium customer Expo	Aayisha
<input type="checkbox"/>	John Butt	john-buttbenton@gmail.com	555-555-5555	Premium customer Expo	Aayisha

More actions in List View

You can carry out certain actions from the list view of a module. These actions include:

- **Send Email** - Opens the email composer where you can compose your email and send it to the respective contact.
- **Call** - Call the respective contact.
- **Create Task** - Allows you to add a task to the chosen contact
- **Log a call** - Allows you to log call information with the contact.
- **Delete** - Deletes a contact

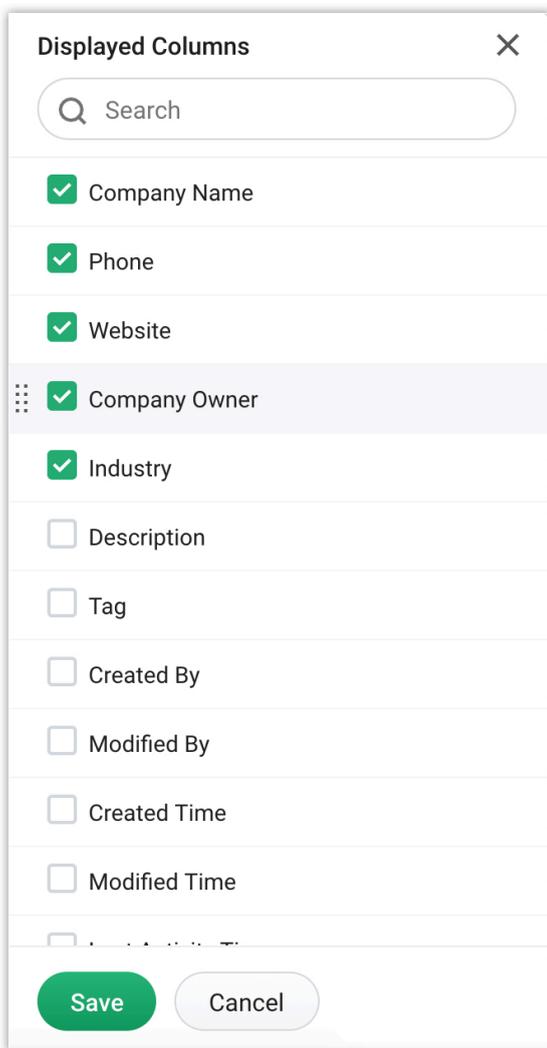
- **Export the view** - Allows you to export all the records present in the chosen view.
- **Manage Tags** - You can add tags to the module. A maximum of 20 tags can be added.

Add Columns in list view

In the list view, you can add the columns that you would like to view based on your requirement.

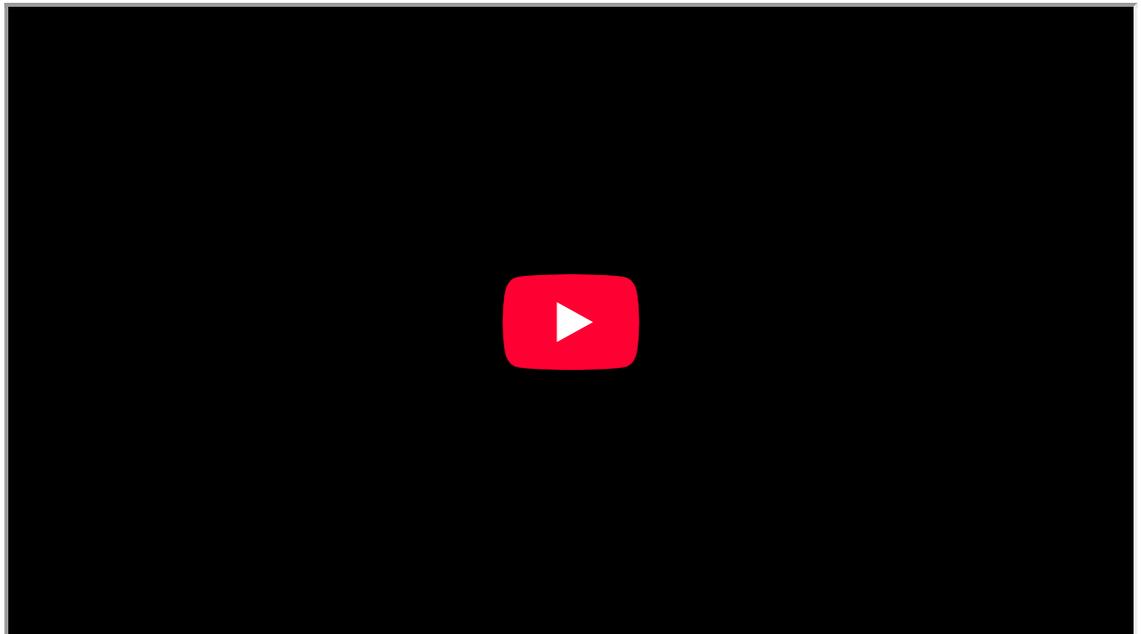
To add columns to your view

1. Click the **+** **Add Column** button.
A list of available columns will be displayed.
2. Select the columns you would like to view.
3. Re-order the columns by simply dragging the column to the required position.
4. Click **Save**.



Additional capabilities of the list view

These options give you more flexibility in personalizing how you view data inside Bigin. It introduces a more refined and interactive interface, optimizing the user experience for efficient data handling and exploration.



1. Resize Column:

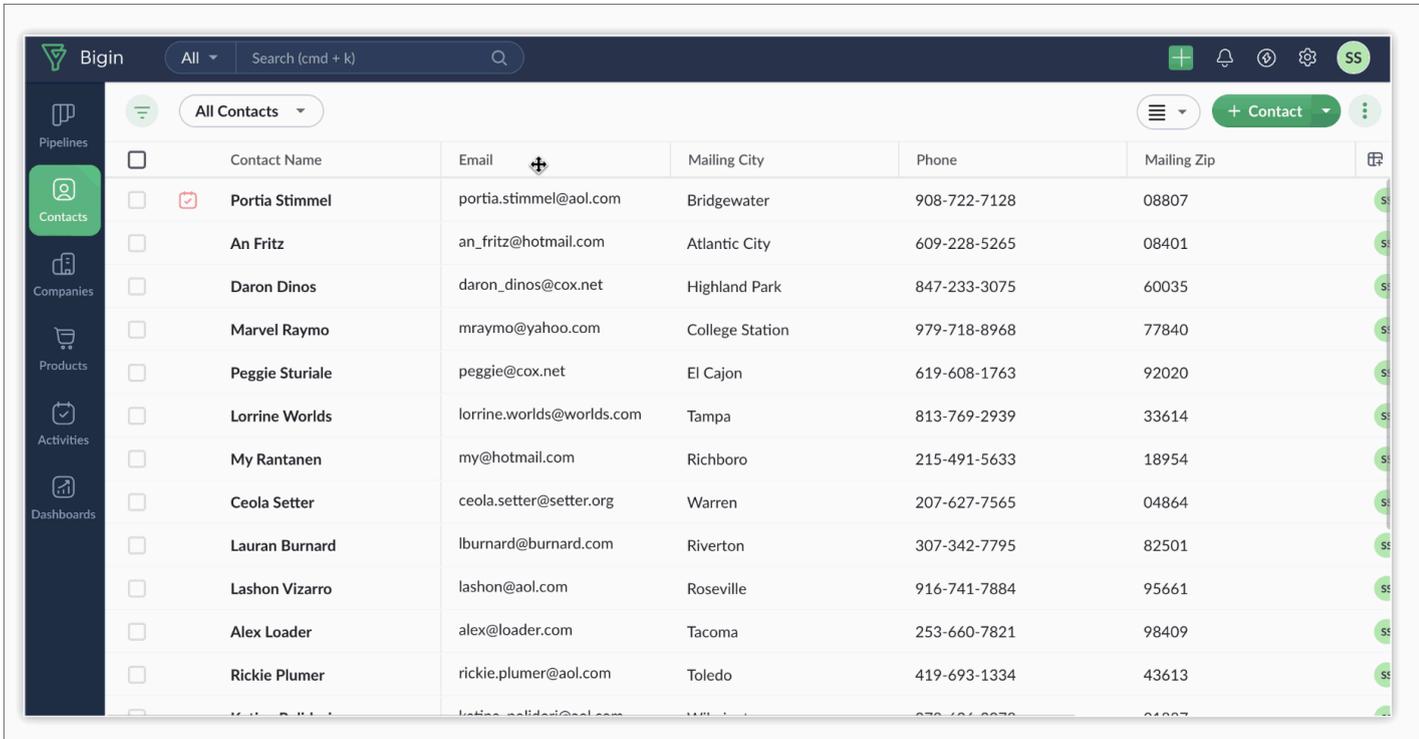
You can modify the width of columns for a more tailored and concise display of information. This allows you to prioritize specific data based on individual preferences and data priorities.

	Contact Name	Phone	Mailing City	Email	Mailing Zip
<input type="checkbox"/>	Portia Stimmel	908-722-7128	Bridgewater	portia.stimmel@a...	08807
<input type="checkbox"/>	An Fritz	609-228-5265	Atlantic City	an_fritz@hotmail...	08401
<input type="checkbox"/>	Daron Dinos	847-233-3075	Highland Park	daron_dinos@cox...	60035
<input type="checkbox"/>	Marvel Raymo	979-718-8968	College Station	rraymo@yahoo.c...	77840
<input type="checkbox"/>	Peggie Sturiale	619-608-1763	El Cajon	peggie@cox.net	92020
<input type="checkbox"/>	Lorraine Worlds	813-769-2939	Tampa	lorrine.worlds@w...	33614
<input type="checkbox"/>	My Rantanen	215-491-5633	Richboro	my@hotmail.com	18954
<input type="checkbox"/>	Ceola Setter	207-627-7565	Warren	ceola.setter@sett...	04864
<input type="checkbox"/>	Lauran Burnard	307-342-7795	Riverton	lburnard@burnard...	82501
<input type="checkbox"/>	Lashon Vizarro	916-741-7884	Roseville	lashon@aol.com	95661
<input type="checkbox"/>	Alex Loader	253-660-7821	Tacoma	alex@loader.com	98409
<input type="checkbox"/>	Rickie Plumer	419-693-1334	Toledo	rickie.plumer@aol...	43613

2. Drag-and-Drop:

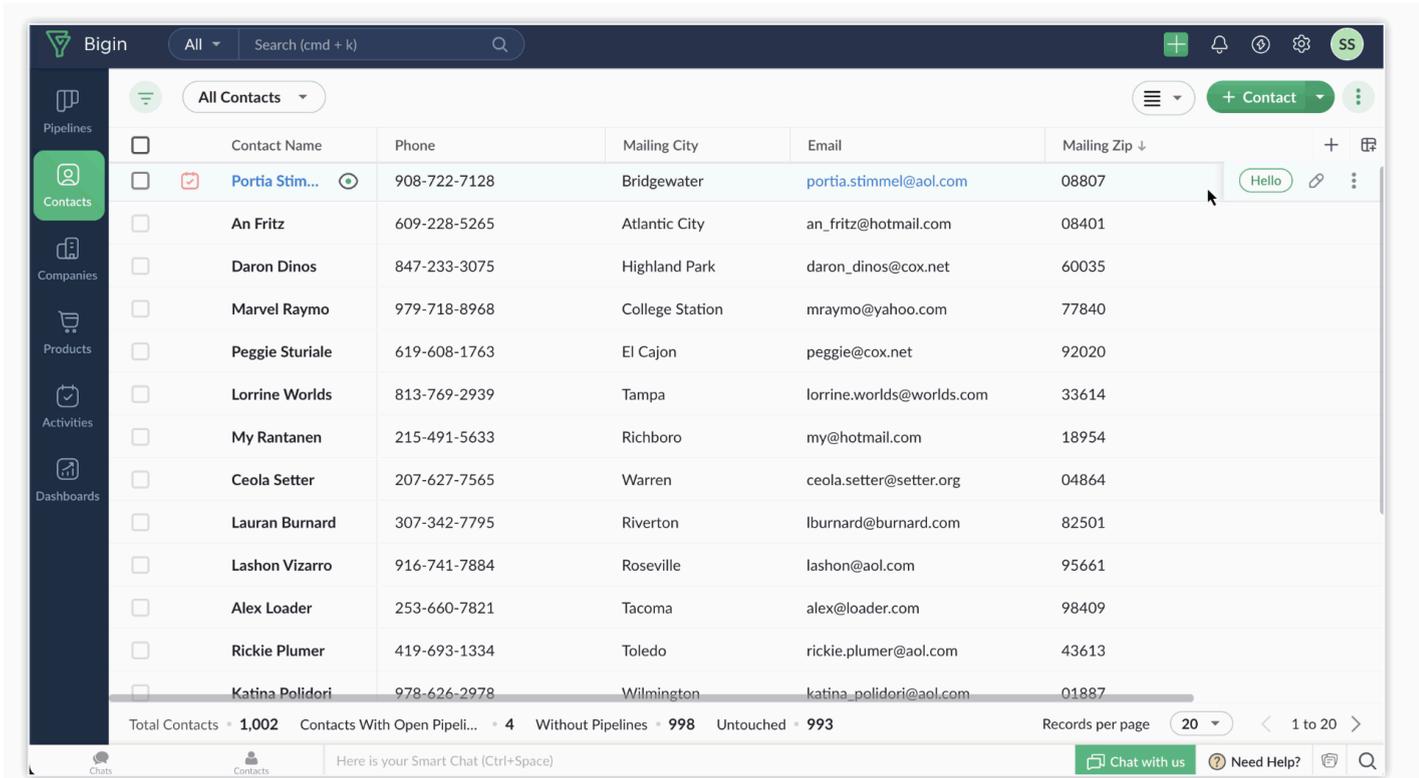
You can now rearrange columns through an intuitive drag-and-drop interface. This facilitates a personalized

data arrangement to suit your preferences and workflow requirements.



3. Create Fields from the List View:

Now you can create fields right from the List View by clicking on the + icon at the top-right corner of the header.



4. Action Menu for each column:

With this update, we are introducing an action menu for each column to perform quick actions specific to the data in the column. A list of options is available under this menu, such as:

- **Sort:** You can arrange data in ascending or descending order based on selected column values.

Contact Name	Phone	Mailing City	Email	Mailing Zip
Portia Stimmel	908-722-7128	Bridgewater	portia.stimmel@aol.com	08807
An Fritz	609-228-5265	Atlantic City	an_fritz@hotmail.com	08401
Daron Dinos	847-233-3075	Highland Park	daron_dinos@cox.net	60035
Marvel Raymo	979-718-8968	College Station	mraymo@yahoo.com	77840
Peggie Sturiale	619-608-1763	El Cajon	peggie@cox.net	92020
Lorraine Worlds	813-769-2939	Tampa	lorraine.worlds@worlds.com	33614
My Rantanen	215-491-5633	Richboro	my@hotmail.com	18954
Ceola Setter	207-627-7565	Warren	ceola.setter@setter.org	04864
Lauran Burnard	307-342-7795	Riverton	lburnard@burnard.com	82501
Lashon Vizarro	916-741-7884	Roseville	lashon@aol.com	95661
Alex Loader	253-660-7821	Tacoma	alex@loader.com	98409
Rickie Plumer	419-693-1334	Toledo	rickie.plumer@aol.com	43613
Katina Polidori	978-626-2978	Wilmington	katina_polidori@aol.com	01887

- **Filter:** You can apply filters to quickly narrow down data based on specific criteria.

Contact Name	Phone	Mailing City	Email	Mailing Zip
Abel Maclead	631-335-3414	Middle Island	amaclead@gmail.com	11953
Abel Maclead	631-335-3414	Middle Island	amaclead@gmail.com	11953
Adelina Nabours	216-230-4892	Cleveland	adelina_nabours@gmail.com	44103
Adelina Nabours	216-230-4892	Cleveland	adelina_nabours@gmail.com	44103
Adell Lipkin	973-654-1561	Whippany	adell.lipkin@lipkin.com	07981
Adell Lipkin	973-654-1561	Whippany	adell.lipkin@lipkin.com	07981
Ahmed Angalich	717-528-8996	Harrisburg	ahmed.angalich@angalich.com	17110
Ahmed Angalich	717-528-8996	Harrisburg	ahmed.angalich@angalich.com	17110
Aja Gehrett	973-544-2677	Nutley	aja_gehrett@hotmail.com	07110
Aja Gehrett	973-544-2677	Nutley	aja_gehrett@hotmail.com	07110
Alaine Bergesen	914-300-9193	Yonkers	alaine_bergesen@cox.net	10701
Alaine Bergesen	914-300-9193	Yonkers	alaine_bergesen@cox.net	10701
Albina Glick	732-924-7882	Dunellen	albina@elick.com	08812

- **Rename/Edit Field:** You can modify custom fields and rename them, and for the system-defined field, the properties can be changed. You cannot rename a system-defined field.

Bigin All Search (cmd + k)

All Contacts System defined field + Contact

Contact Name	Phone	Mailing City	Email	First Name	Home Number
Zona Colla	3-461-1949	New York	zona@hotmail.com	Zona	5,687,496
Zona Colla	3-461-1949	New York	zona@hotmail.com	Zona	Hello
Yvonne Tjepkema	3-714-1721	New York	yvonne.tjepkema@hotmail.com	Yvonne	5,687,496
Yvonne Tjepkema	3-714-1721	New York	yvonne.tjepkema@hotmail.com	Yvonne	5,687,496
Yuki Whobrey	3-288-7937	New York	yuki_whobrey@aol.com	Yuki	5,687,496
Yuki Whobrey	3-288-7937	New York	yuki_whobrey@aol.com	Yuki	5,687,496
Youlanda Schemmer	1-548-8197	New York	youlanda@aol.com	Youlanda	5,687,496
Youlanda Schemmer	1-548-8197	New York	youlanda@aol.com	Youlanda	5,687,496
Yolando Luczki	3-304-4759	New York	yolando@cox.net	Yolando	5,687,496
Yolando Luczki	3-304-4759	New York	yolando@cox.net	Yolando	5,687,496
Yoko Fishburne	3-506-4706	New York	yoko@fishburne.com	Yoko	5,687,496
Yoko Fishburne	3-506-4706	New York	yoko@fishburne.com	Yoko	5,687,496
Xuan Rochin	3-933-5072	New York	xuan@zmail.com	Xuan	5,687,496

Total Contacts 1,002 Contacts With Open Pipeli... 4 Without Pipelines 998 Untouched 0 Records per page 100 1 to 100

- **Bulk Update:** Updating values in bulk just got easier. You now have the Bulk Update option right inside the Actions menu for each column.

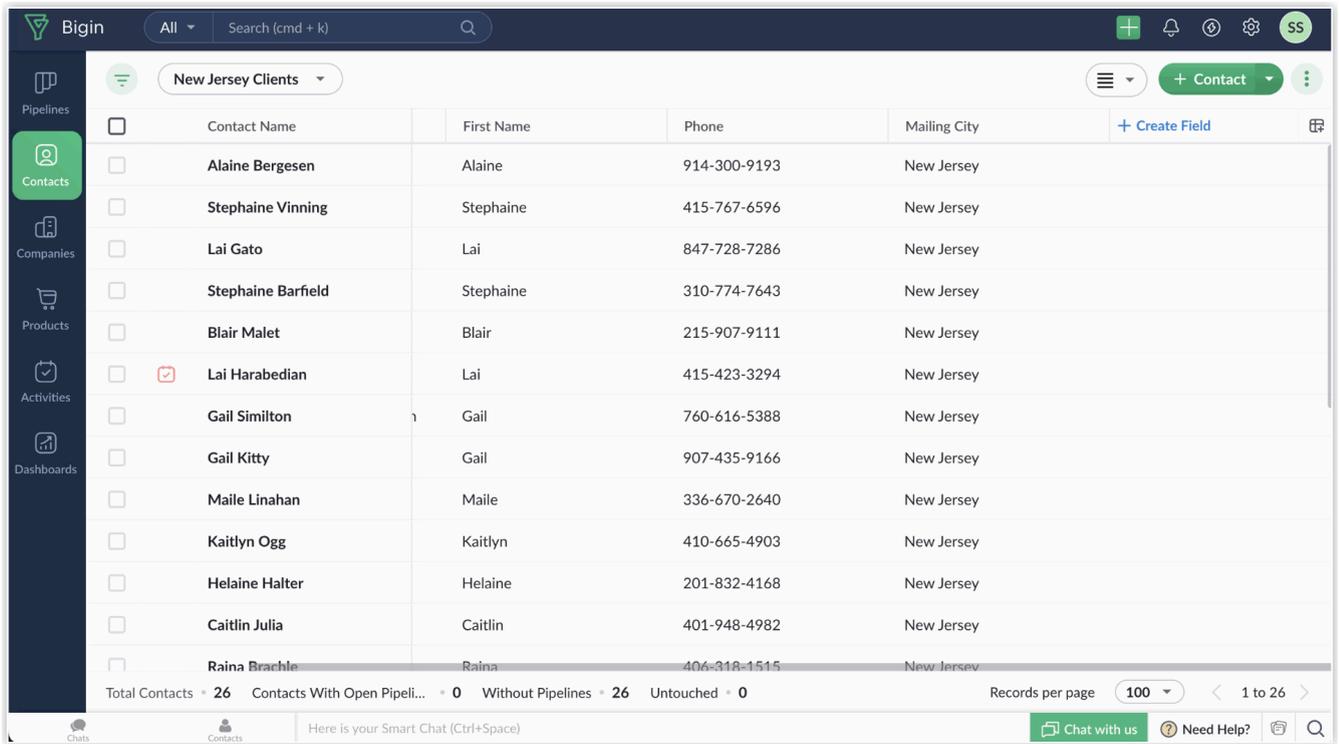
Bigin All Search (cmd + k)

New Jersey Clients + Contact

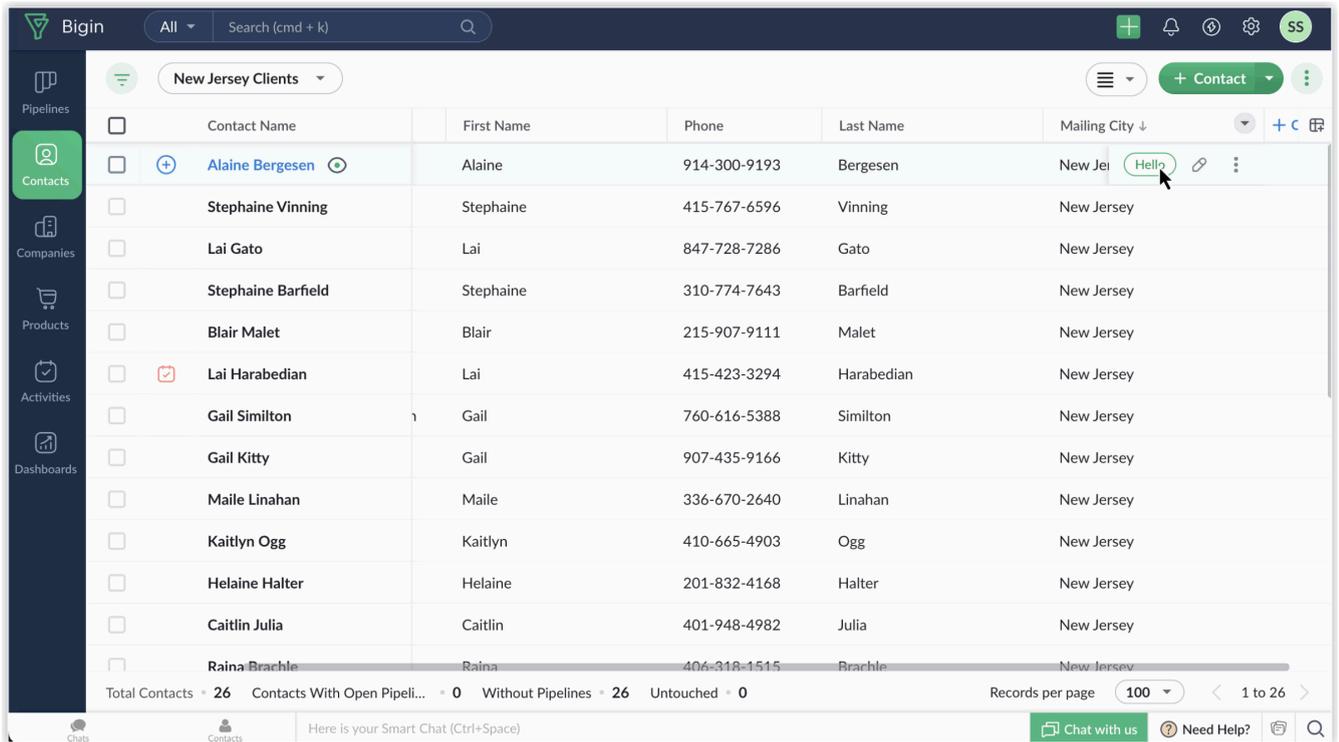
Contact Name	Email	First Name	Phone	Mailing City
Alaine Bergesen	alaine_bergesen@cox.net	Alaine	914-300-9193	New York
Stephaine Vi...	stephaine@cox.net	Stephaine	415-767-6596	New York
Lai Gato	lai.gato@gato.org	Lai	847-728-7286	New York
Stephaine Barfield	stephaine@barfield.com	Stephaine	310-774-7643	New York
Blair Malet	bmalet@yahoo.com	Blair	215-907-9111	New York
Lai Harabedian	lai@gmail.com	Lai	415-423-3294	New York
Gail Similton	gail_similton@similton.com	Gail	760-616-5388	New York
Gail Kitty	gail@kitty.com	Gail	907-435-9166	New York
Maile Linahan	mlihan@yahoo.com	Maile	336-670-2640	New York
Kaitlyn Ogg	kaitlyn.ogg@gmail.com	Kaitlyn	410-665-4903	New York
Helaine Halter	hhalter@yahoo.com	Helaine	201-832-4168	New York
Caitlin Julia	caitlin.julia@julia.org	Caitlin	401-948-4982	New York
Raina Brachle	raina.brachle@brachle.org	Raina	406-318-1515	New York

Total Contacts 26 Contacts With Open Pipeli... 0 Without Pipelines 26 Untouched 0 Records per page 100 1 to 26

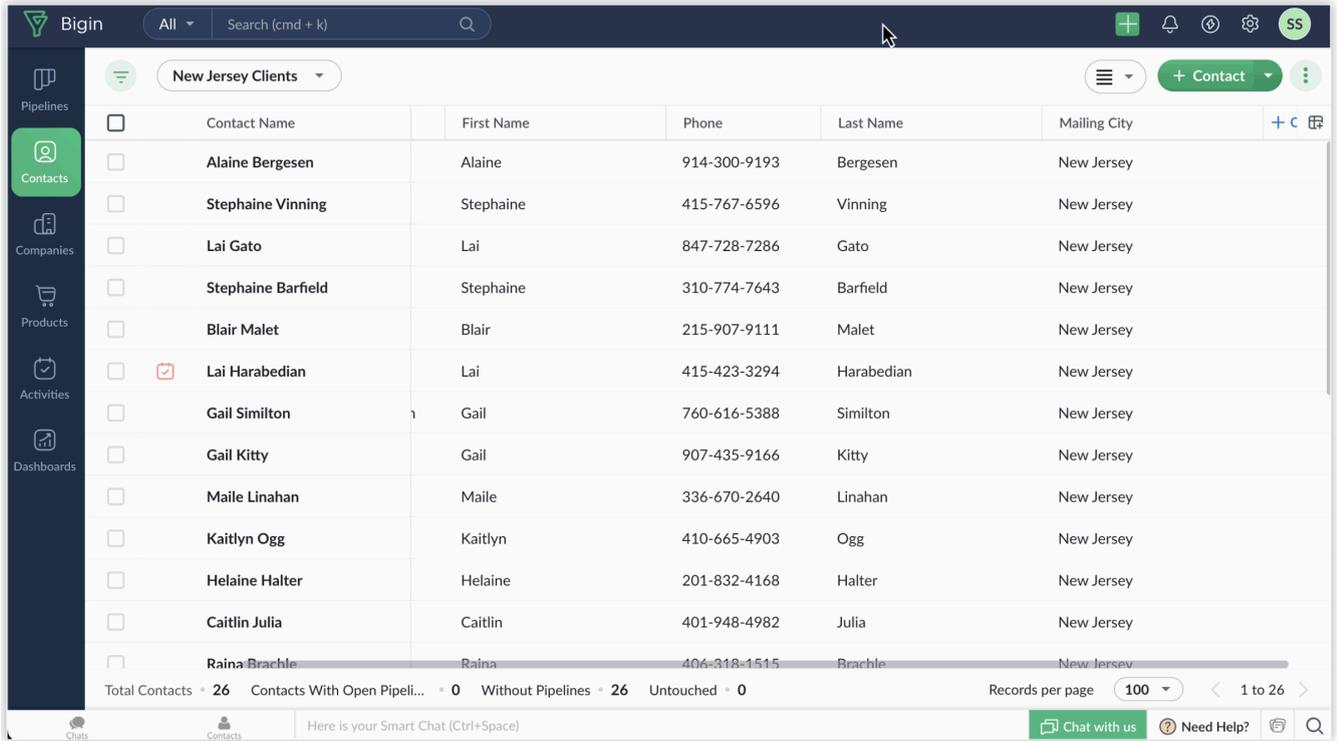
- **Add Column:** You can include new columns into the List View easily.



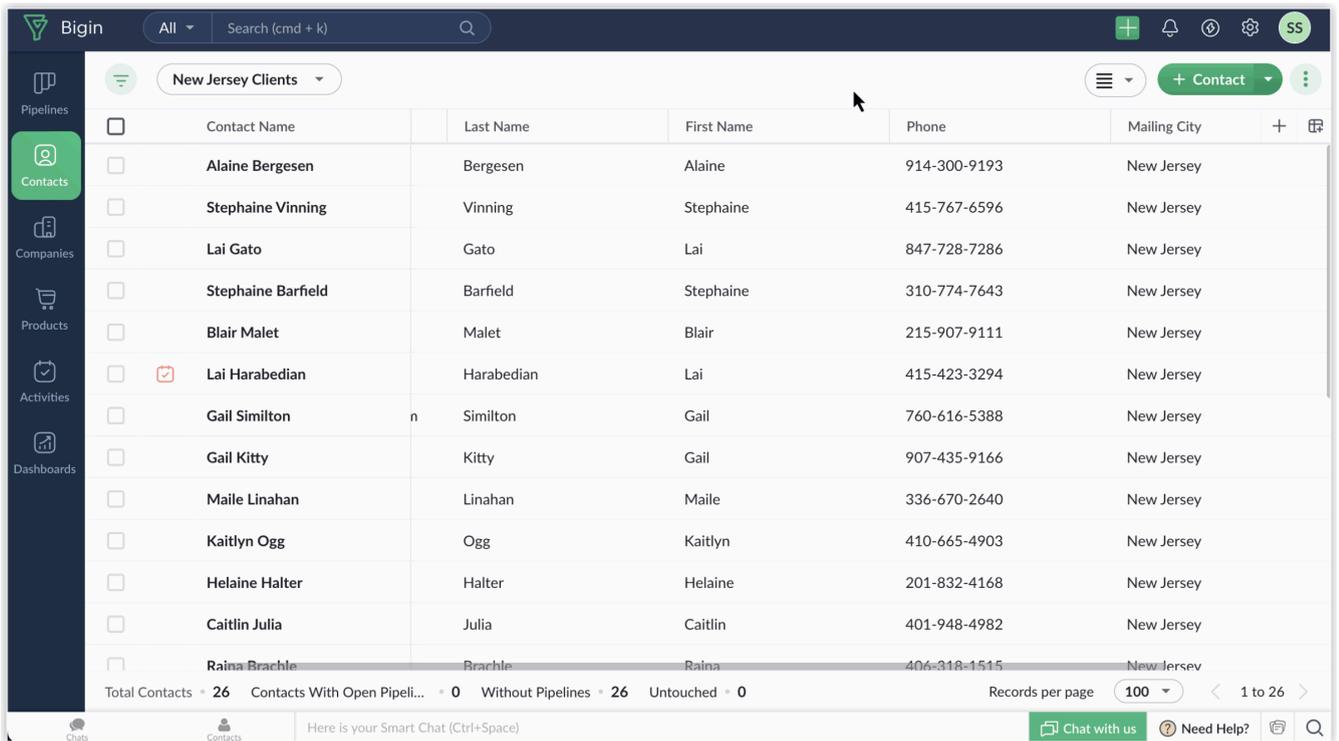
- **Collapse:** You can streamline the display by collapsing specific columns, which optimizes the screen focus. You can expand it again by simply clicking on the collapsed column.



- **Move Right/Left:** You can shift columns left or right for precise organization within the List View.

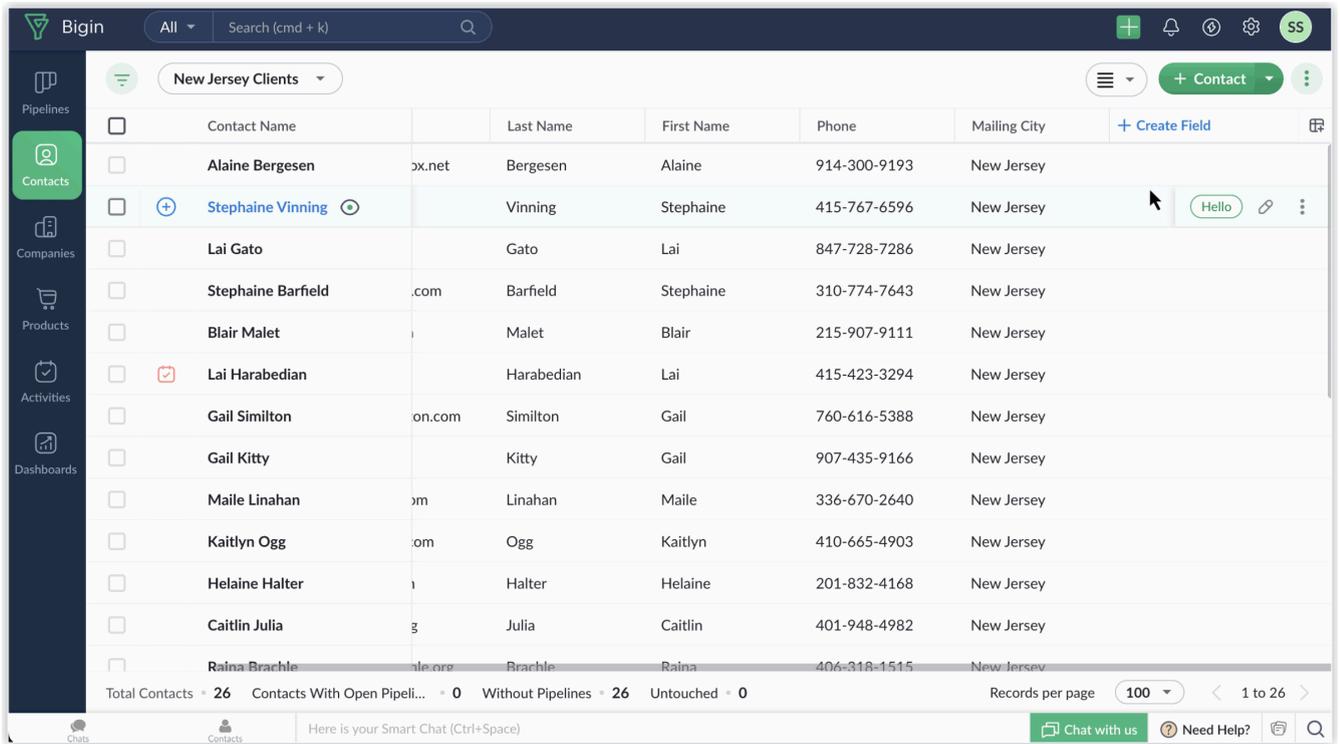


- **Auto Fit Column:** You can automatically adjust column width to fit the content.



- **Remove Column:** You can remove unnecessary columns to declutter the view and spotlight essential information. Please note that this just removes the column from the List View and does not delete the

underlying field from the module.



- **Delete Field:** Using this option, you can delete a field from the module and move it to the Unused Fields section.

