Basic Terminology

Before you start exploring the product, it will be helpful to familiarize yourself with the following terminology to get you up to speed.

Modules

All the data in your Bigin account is categorized into groups such as Pipelines, Contacts, Companies, Products, Activities and Dashboards which are collectively known as Modules. For example, the Contacts module contains the data about all your customers, Activities module has all the events, tasks, and calls you had or have scheduled with them.

Records

The entries in any module are known as records. For example, each contact in the Contacts module is a record.

Fields

A single piece of information in a record is referred to as a field.
For example, Name, Company, Email, and Website are fields in a contact record.

Contacts

Contacts are the people your organization does business with. They in turn represent their companies as a point of contact.

Companies

The organizations your contacts belong to are called companies.

Team Pipelines

Team Pipelines are multi-dimensional pipelines that unify your customer-centric operations. With Team Pipelines. you can have dedicated pipelines for different business processes and customize them with pipeline-specific fields, record types, stages, and profile permissions.

Sub-Pipelines

Sub-pipelines are traditional pipelines that contains a series of stages. You can have multiple sub-pipelines inside a Team Pipeline.

Activities

Any action that you perform in your business is an activity. All the tasks, events, and calls with your customers are grouped as activities.

Dashboards

Dashboards give you a visual overview of all the key stats that you need to analyze your team's performance. Bigin also lets you create your own dashboards. You can put together Key Performance Indicators (KPIs) and Charts and create a new dashboard.

Users

Employees in your organization who are given access to your Bigin account are called users.

Roles

The organizational hierarchy followed in your organization can be replicated in Roles. It lets you control data visibility across your team's hierarchy. Users in lower levels of the hierarchy cannot access data which belongs to users in the higher levels of the hierarchy.

Profiles

Profiles define the access permissions for the data in your Bigin account. You can create new profiles based on the needs of your organization and associate users to the appropriate profiles.