

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.

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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:
 - Specify a Name for the view
 - Specify the **criteria** based on which records should be displayed.
 - 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:

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

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Ç.		Leota Dilliard	leota-dilliard@hotmail.com	555-555-5555	Web lead	Aayisha
Products		Mitsue Tollner	tollner-morlong@gmail.com	555-555-5555	Walk-in	Aayisha
Activities		Simon Morasca	simonm@chapman.com	555-555-5555	Premium customer	Aayisha
		Donette Foller	foller-donette@in.com	555-555-5555	Web lead	Aayisha
Dashboards		Capla Paprocki	capla-paprocki@yahoo.com	555-555-5555	Web lead	Aayisha
		James Venere	ljames-venere@chemel.org	555-555-5555	Web lead	Aayisha
		Josephine Darakjy	joesphine-darakjy@chanay.com	555-555-5555	Premium customer Expo	Aayisha
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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.

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Description	
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Save Cancel	

Additional capabilities of the list view

These opitions gives 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.

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Contacts		Portia Stimmel	908-722-7128	Bridgewater	portia.stimmel@a	1 08807				
-		An Fritz	609-228-5265	Atlantic City	an_fritz@hotmail	08401				
لمل Companies		Daron Dinos	847-233-3075	Highland Park	daron_dinos@cox	60035				
Ä		Marvel Raymo	979-718-8968	College Station	mraymo@yahoo.c	77840				
Products		Peggie Sturiale	619-608-1763	El Cajon	peggie@cox.net	92020				
Í		Lorrine Worlds	813-769-2939	Tampa	lorrine.worlds@w	33614				
Activities		My Rantanen	215-491-5633	Richboro	my@hotmail.com	18954				
Dashboards		Ceola Setter	207-627-7565	Warren	ceola.setter@sett	04864				
		Lauran Burnard	307-342-7795	Riverton	lburnard@burnard	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	43613				
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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.

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Pipelines		Contact Name	Email 🕂	Mailing City	Phone	Mailing Zip	₽
Contacts		Portia Stimmel	portia.stimmel@aol.com	Bridgewater	908-722-7128	08807	SS
-FB		An Fritz	an_fritz@hotmail.com	Atlantic City	609-228-5265	08401	SS
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Ë		Marvel Raymo	mraymo@yahoo.com	College Station	979-718-8968	77840	55
Products		Peggie Sturiale	peggie@cox.net	El Cajon	619-608-1763	92020	SS
Ö		Lorrine Worlds	lorrine.worlds@worlds.com	Tampa	813-769-2939	33614	SS
Activities		My Rantanen	my@hotmail.com	Richboro	215-491-5633	18954	55
Dashboards		Ceola Setter	ceola.setter@setter.org	Warren	207-627-7565	04864	SS
		Lauran Burnard	lburnard@burnard.com	Riverton	307-342-7795	82501	55
		Lashon Vizarro	lashon@aol.com	Roseville	916-741-7884	95661	55
		Alex Loader	alex@loader.com	Tacoma	253-660-7821	98409	55
		Rickie Plumer	rickie.plumer@aol.com	Toledo	419-693-1334	43613	55
			katina nalidari@aal.com		070 /0/ 0070	04007	4

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.

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		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	
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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.

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

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Products		Adell Lipkin	973-654-1561	Whippany	adell.lipkin@lipkin.com	07981
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Activities		Ahmed Angalich	717-528-8996	Harrisburg	ahmed.angalich@angalich.com	17110
Dashboards		Ahmed Angalich	717-528-8996	Harrisburg	ahmed.angalich@angalich.com	17110
		Aja Gehrett	973-544-2677	Nutley	aja_gehrett@hotmail.com	07110
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• **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.

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ē			Yvonne Tjepkema	3-714-1721	New York	yvonne.tjepkema@hotmail.com	Yvonne	5,687,496
Products			Yuki Whobrey	3-288-7937	New York	yuki_whobrey@aol.com	Yuki	5,687,496
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• **Bulk Update:** Updating values in bulk just got easier. You now have the Bulk Update option right inside the Actions menu for each column.

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Pipelines		Contact Name	Email	First Name	Phone	Mailing City ↓
Contacts		Alaine Bergesen	alaine_bergesen@cox.net	Alaine	914-300-9193	New York
-D	□ ↔	Stephaine Vi 🕥	stephaine@cox.net	Stephaine	415-767-6596	New York Hello 🔗 🔋
Companies		Lai Gato	lai.gato@gato.org	Lai	847-728-7286	New York
ä		Stephaine Barfield	stephaine@barfield.com	Stephaine	310-774-7643	New York
Products		Blair Malet	bmalet@yahoo.com	Blair	215-907-9111	New York
Í		Lai Harabedian	lai@gmail.com	Lai	415-423-3294	New York
Activities		Gail Similton	gail_similton@similton.com	Gail	760-616-5388	New York
Dashboards		Gail Kitty	gail@kitty.com	Gail	907-435-9166	New York
		Maile Linahan	mlinahan@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
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• Add Column: You can include new columns into the List View easily.

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		Kaitlyn Ogg	Kaitlyn	410-665-4903	New Jersey	
		Helaine Halter	Helaine	201-832-4168	New Jersey	
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• **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.

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			Maile Linahan	Maile		336-670-2640	Linahan	New Jersey
			Kaitlyn Ogg	Kaitlyn		410-665-4903	Ogg	New Jersey
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• Move Right/Left: You can shift columns left or right for precise organization within the List View.

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Dashboards			Gail Kitty	Gail		907-435-9166	Kitty	New Jersey
			Maile Linahan	Maile		336-670-2640	Linahan	New Jersey
			Kaitlyn Ogg	Kaitlyn		410-665-4903	Ogg	New Jersey
			Helaine Halter	Helaine		201-832-4168	Halter	New Jersey
			Caitlin Julia	Caitlin		401-948-4982	Julia	New Jersey
			Raina Brachle	Raina		406-318-1515	Brachle	New Jersev
Chats	Total C	ontacts	20 Contacts With Open Pipel Contacts Here is your Smar	i • 0 Without Pipelines t Chat (Ctrl+Space)	• 26 Un	touched • 0		Records per page 100 • 1 to 26

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

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Pipelines		Contact Name	Last Name	First Name	Phone	Mailing City + 日
Contacts		Alaine Bergesen	Bergesen	Alaine	914-300-9193	New Jersey
di l		Stephaine Vinning	Vinning	Stephaine	415-767-6596	New Jersey
لمل Companies		Lai Gato	Gato	Lai	847-728-7286	New Jersey
Ĕ		Stephaine Barfield	Barfield	Stephaine	310-774-7643	New Jersey
Products		Blair Malet	Malet	Blair	215-907-9111	New Jersey
$\overline{\bigcirc}$		Lai Harabedian	Harabedian	Lai	415-423-3294	New Jersey
Activities		Gail Similton	n Similton	Gail	760-616-5388	New Jersey
لَّتُنَ Dashboards		Gail Kitty	Kitty	Gail	907-435-9166	New Jersey
		Maile Linahan	Linahan	Maile	336-670-2640	New Jersey
		Kaitlyn Ogg	Ogg	Kaitlyn	410-665-4903	New Jersey
		Helaine Halter	Halter	Helaine	201-832-4168	New Jersey
		Caitlin Julia	Julia	Caitlin	401-948-4982	New Jersey
		Raina Brachle	Brachle	Raina	406-318-1515	New Jersev
	Total Conta	acts • 26 Contacts With Open Pi	peli • 0 Without Pipelines	• 26 Untouched • 0	Records per pa	age 100 • < 1 to 26 >
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• **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.

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		÷	Stephaine Vir	ning 💿		Vinning	Stephaine	415-767-6596	New Jersey	Hello	0:
ليتا Companies			Lai Gato			Gato	Lai	847-728-7286	New Jersey		
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Products			Blair Malet		1	Malet	Blair	215-907-9111	New Jersey		
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Activities			Gail Similton		on.com	Similton	Gail	760-616-5388	New Jersey		
Dashboards			Gail Kitty			Kitty	Gail	907-435-9166	New Jersey		
			Maile Linahar	ı	om	Linahan	Maile	336-670-2640	New Jersey		
			Kaitlyn Ogg		:om	Ogg	Kaitlyn	410-665-4903	New Jersey		
			Helaine Halte	r	1	Halter	Helaine	201-832-4168	New Jersey		
			Caitlin Julia		g	Julia	Caitlin	401-948-4982	New Jersey		
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• **Delete Field:** Using this option, you can delete a field from the module and move it to the Unused Fields section.

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Pipelines			Contact Name 🦊		Mailing Zip	First Name	Home Number ↓
Contacts		(+)	Zona Colla 💿	@hotmail.com	06854	Zona	5,687,496 Hello 🖉 🗄
æ			Zona Colla	@hotmail.com	06854	Zona	5,687,496
لمل Companies			Yvonne Tjepkema	ne.tjepkema@hotmail.com	07004	Yvonne	5,687,496
Ä			Yvonne Tjepkema	ne.tjepkema@hotmail.com	07004	Yvonne	5,687,496
Products			Yuki Whobrey	whobrey@aol.com	48180	Yuki	5,687,496
Ø			Yuki Whobrey	whobrey@aol.com	48180	Yuki	5,687,496
Activities			Youlanda Schemmer	nda@aol.com	97754	Youlanda	5,687,496
لک) Dashboards			Youlanda Schemmer	nda@aol.com	97754	Youlanda	5,687,496
			Yolando Luczki	do@cox.net	13214	Yolando	5,687,496
			Yolando Luczki	do@cox.net	13214	Yolando	5,687,496
			Yoko Fishburne	@fishburne.com	06511	Yoko	5,687,496
			Yoko Fishburne	@fishburne.com	06511	Yoko	5,687,496
			Xuan Rochin	@gmail.com	94403	Xuan	5.687.496
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Chats			Here is	your Smart Chat (Ctrl+Space)		ć	Chat with us 🕐 Need Help? 🗐 Q