Modules and Fields

Table of contents

Modules

Modules in Bigin let you categorize and keep track of various aspects of your business such as Contacts, Companies, and Pipelines. The data in these modules is stored as records and the information in each record is stored in fields.
The following modules are available in Bigin:

- Contacts
- Companies
- Pipelines
- Products
- Activities
  - Task

- Events
- Call

Working with modules

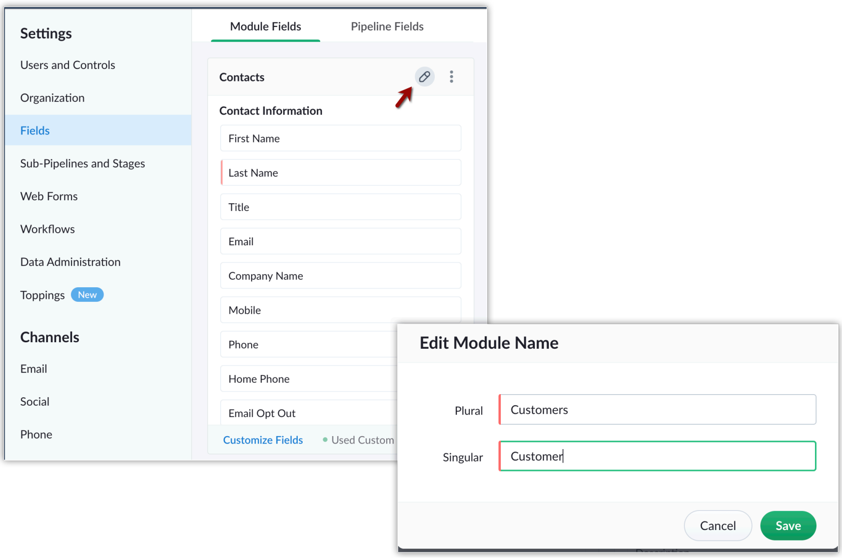
Rename modules

You can rename the modules. Let's say you refer to Contacts as Customers in your org. You can rename the Contacts module to "Customers".

> ⓘ Pipelines module cannot be renamed

To rename a module

1. Log in to Bigin with administrator privileges.
2. Go to **Settings** and then **Fields**.
3. Click the **edit** icon next to the **desired** module.
4. Enter the plural and singular forms of the module name.



5. Click **Save**.

Fields

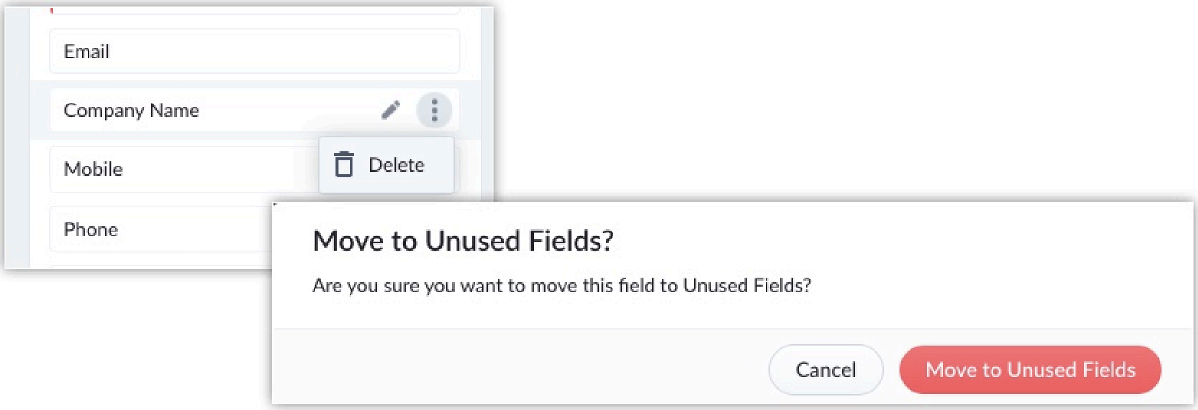
Fields hold information about a record. There are two types of fields in Bigin: default fields and custom Fields.

Default fields

The system-defined fields that are present in every module are called default fields. These fields cannot be renamed or deleted. However, you can move some of these fields to the Unused Fields section of the module if you don't need them.

To move the default fields to the unused section

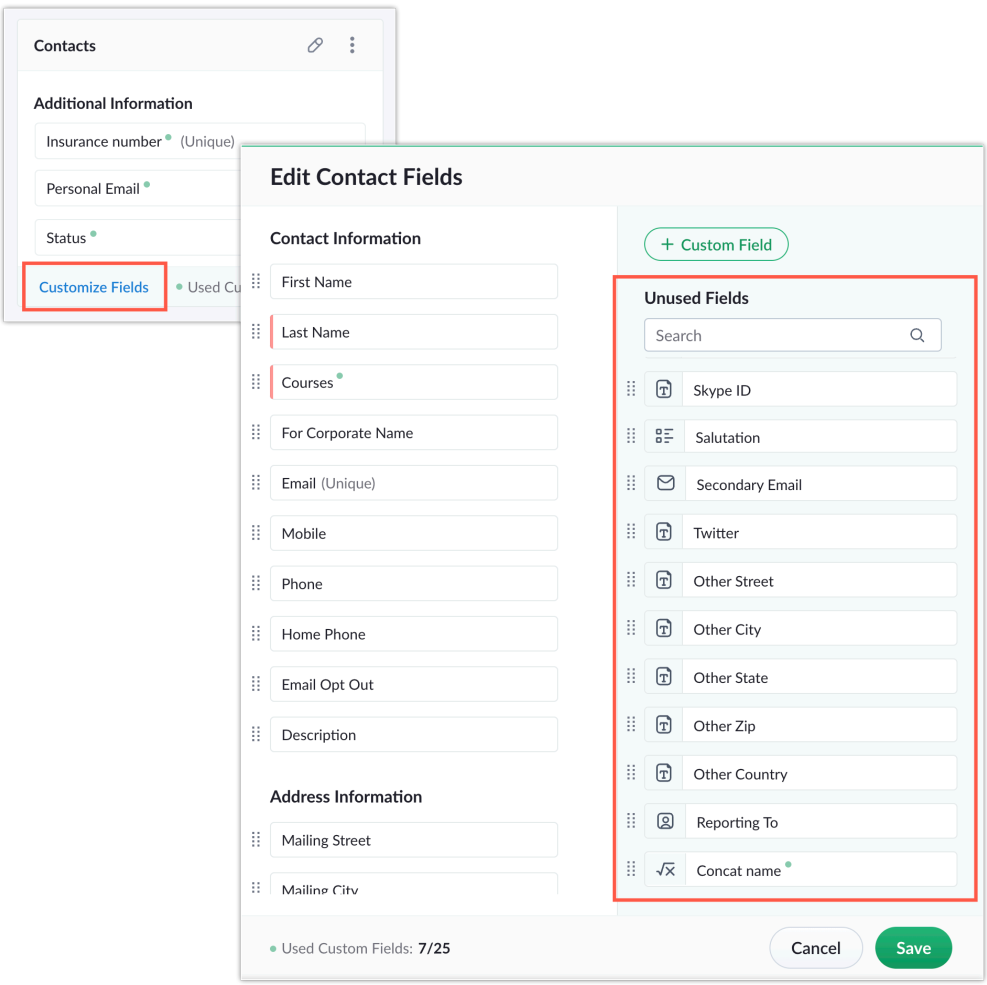
1. Go to **Settings** and then **Fields** and select the required module.
2. Click the **more** icon and then **Delete**.
3. Click **Move to Unused fields** in the pop-up.



You can access these fields by going to the Unused Fields section of the module.

To use the fields in the unused section

1. Go to **Settings** and then **Fields**.
2. Click on **Customize Fields** and you will find all the **Unused Fields.**
3. Click and drag on the fields to add them.



You can find the list of supported fields in the each module along with their description here.

Custom fields

If you require more fields, you can create custom fields for each module.
Note:

- Custom fields are supported in Contacts, Accounts, Pipelines, Events and Tasks modules.
- You can rename the custom fields but you cannot change Field Type (eg. Text, Integer, Date, etc.) of the custom fields.
  For instance, if you create a Text field, you cannot change the same to Integer field.

Types of custom fields

The custom fields are classified based on the type of data they hold. Certain field types are classified further into sub types. The following table displays all the fields and their corresponding sub types if any.

Field Type	Sub type
Text	Single line #
	Multi line
Numerical	Number #
	Long Number #
	Decimal
	Percent
	Auto number
Currency	-
Date	Date picker
	Date and time
Email #	-
Phone #	-
URL #	-
Picklist	Single select
	Multi select

represents fields that can be marked unique.

Text
This field allows users to enter a text such as Name, Company, website, etc. They are categorized into two:

Single Line

It is a small box which allows you to enter single line of text. The text can be 255 Characters long. (Including blank space, symbols, etc.)

Multi Line

It is a large box which allows you to enter multiple lines of text. Pressing **Enter/Return** button on your keyboard takes the cursor to the next line for you to enter your text. It can be used for entering description, comments, etc.

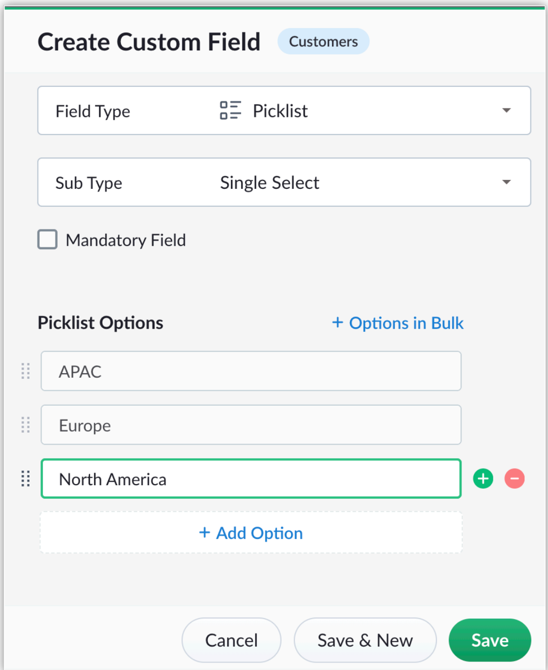
Picklist

Custom picklist field allows users to select a value from the list you define. There are two types of picklist fields:

- **Single Select** - Only one value can be chosen from the picklist.
  Let's say you run an insurance company and James (your contact) wants to avail an Auto Insurance. You go to his record and select Auto Insurance from the insurance type picklist field, which displays a list of other type of insurance you offer.
- **Multi Select** - Multiple values can be chosen from the picklist.
  Let's say you own an electronic store and offer accessories as well. Your contact Abigail wants to purchase a Laptop and accessories such as Headphones, Speakers, Webcam. You go to her record and select ABC Laptop in the Product field and select the above Accessories from the multi-select picklist.

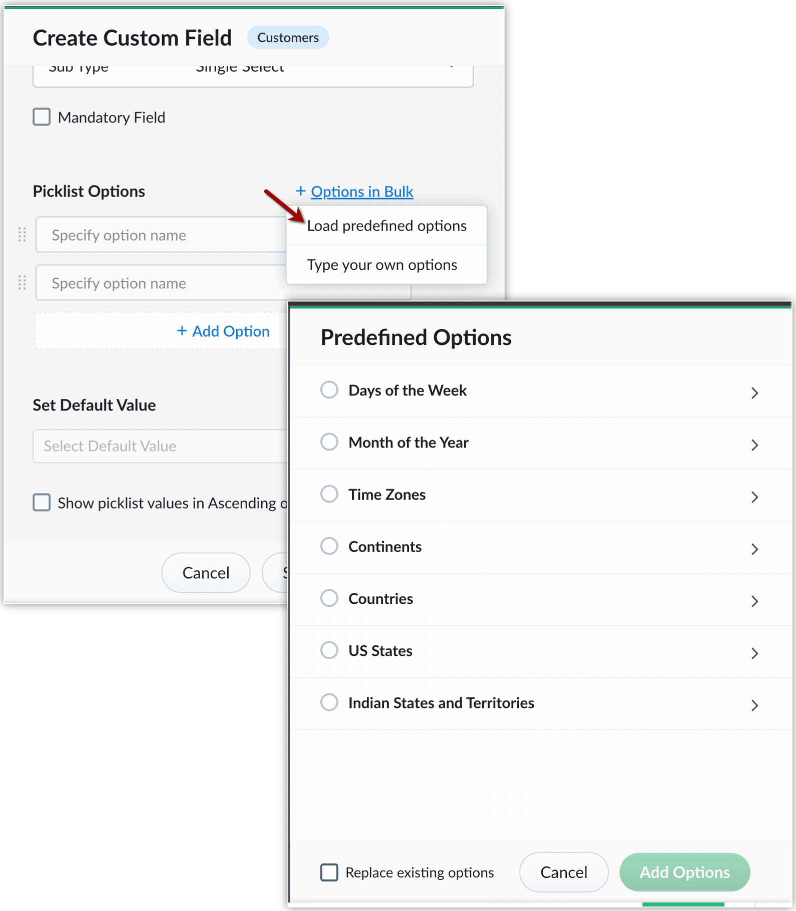
You can add picklist values using the follow methods:

1. Add your own picklist values one by one.

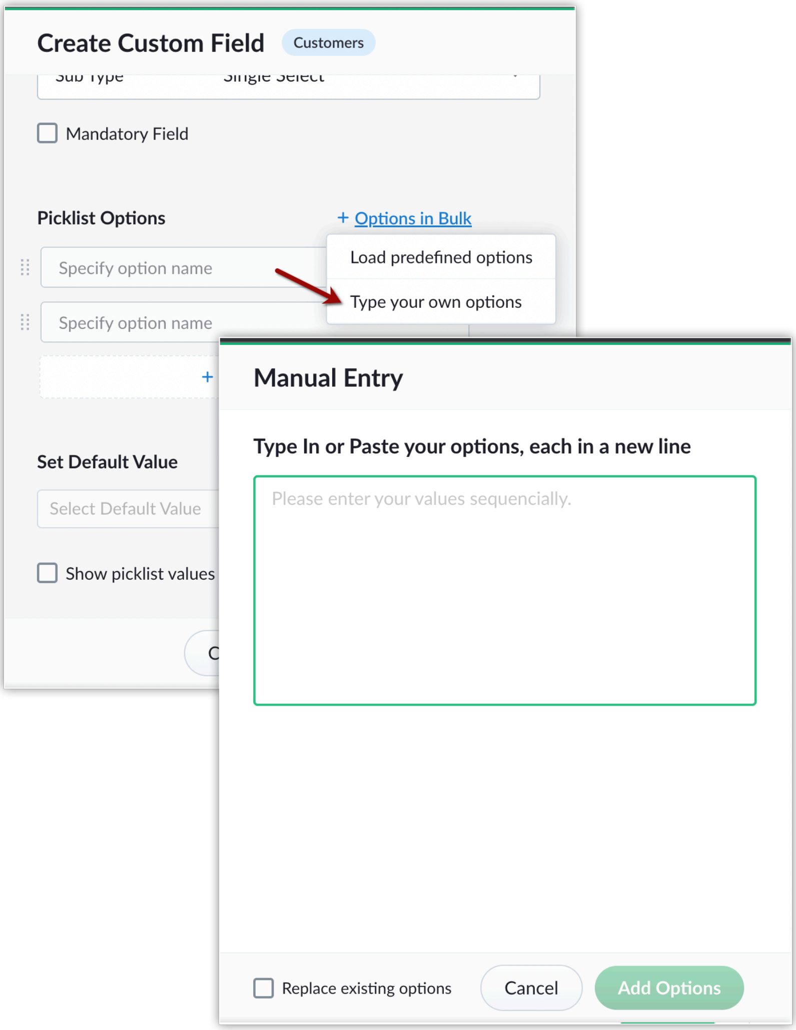


2. Add you own picklist values in bulk by clicking on the **Options in Bulk** button.

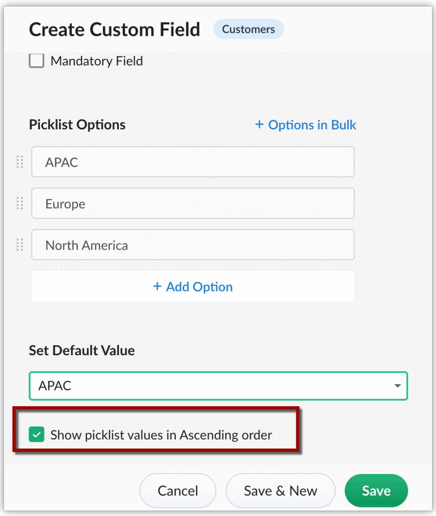
a. Load pre-defined options like days of the week, time zones, countries etc.,



b. Type your own options

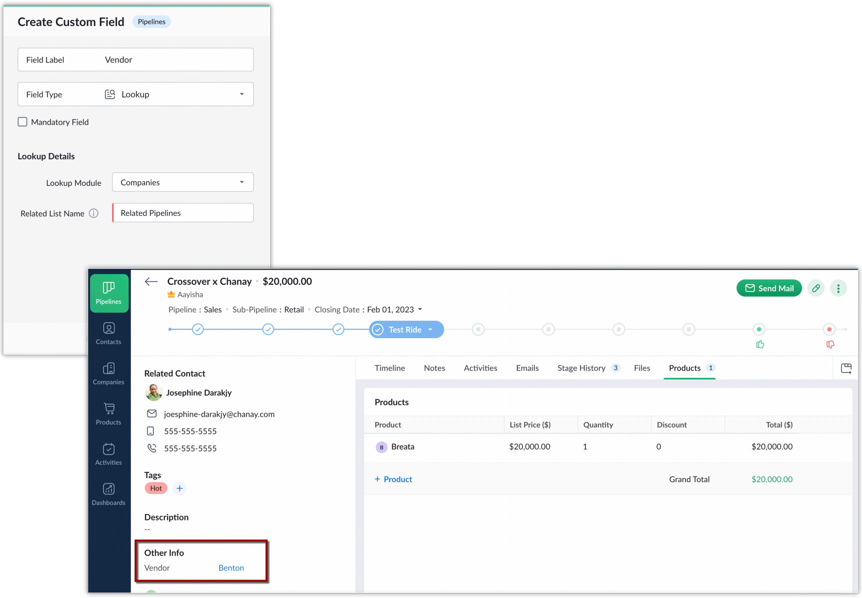


Furthermore, you can sort the picklist options to appear in ascending order by selecting the **Show picklist values in Ascending order** checkbox.

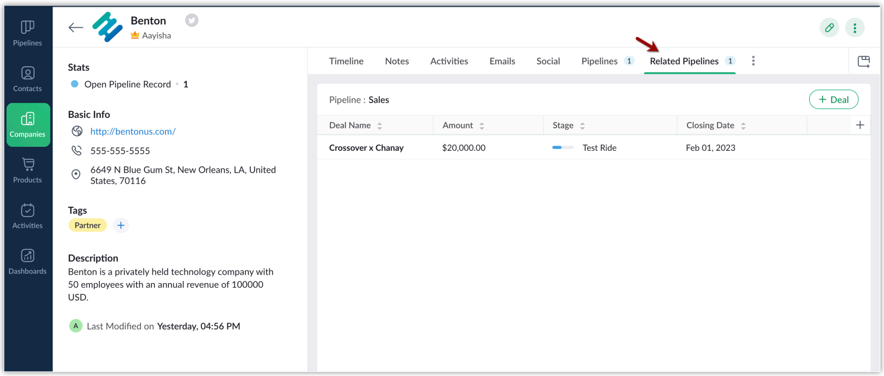


Lookup

Lookup field helps link two records from different modules. Let us assume you want to associate your vendor company and the customer's company to a pipeline record (deal). Here, you can create a custom look up field to associate the Companies module with the Pipelines module.



The related list section will appear in the details page of each Company record. It will show the list of pipeline records linked through this lookup field with each company.

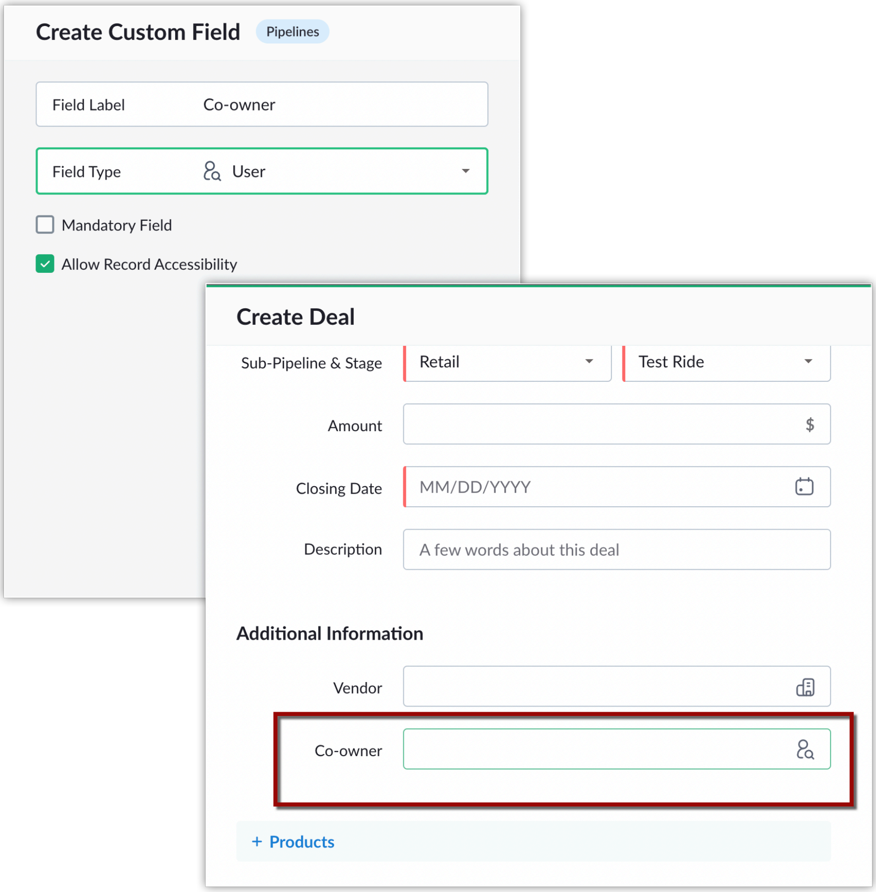


Lookup fields cannot be created for Tasks and Events.

User

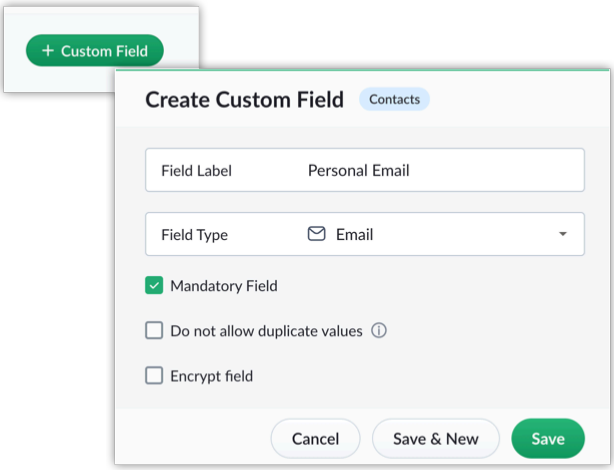
Available for paid and trial edition - Premier, Zoho One

User field helps provide multiple ownership to a record. For instance, some high value pipeline records involve collaboration with peers and during such instances multiple users would need access to update, modify, add or delete record details. So, this field will provide the users the same privileges as the record owner.



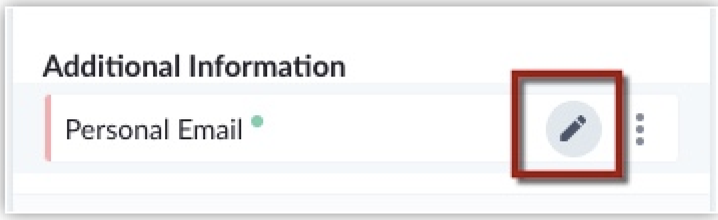
Create custom fields

1. Log in to Bigin with admin privileges.
2. Go to **Settings** and then **Fields** and select the required module.
3. Click **Customize Fields** and click **+Custom field** button.
4. Enter the field label and choose the appropriate field type.
   You can also mark a field as **mandatory, encrypt a field, or mark a field as unique.** Enter the **Related List Name** for Lookup field.
5. Click **Save**.



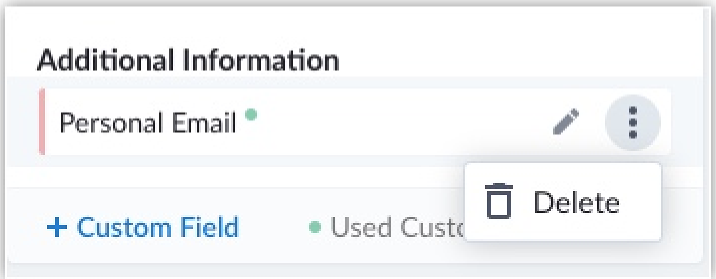
Edit custom fields

1. Log in to Bigin with admin privileges.
2. Go to **Settings** and then **Fields** and select the required module and then the required field.
3. Click the **edit** icon.
   Make the required changes.
4. Click **Save**.



Delete custom field

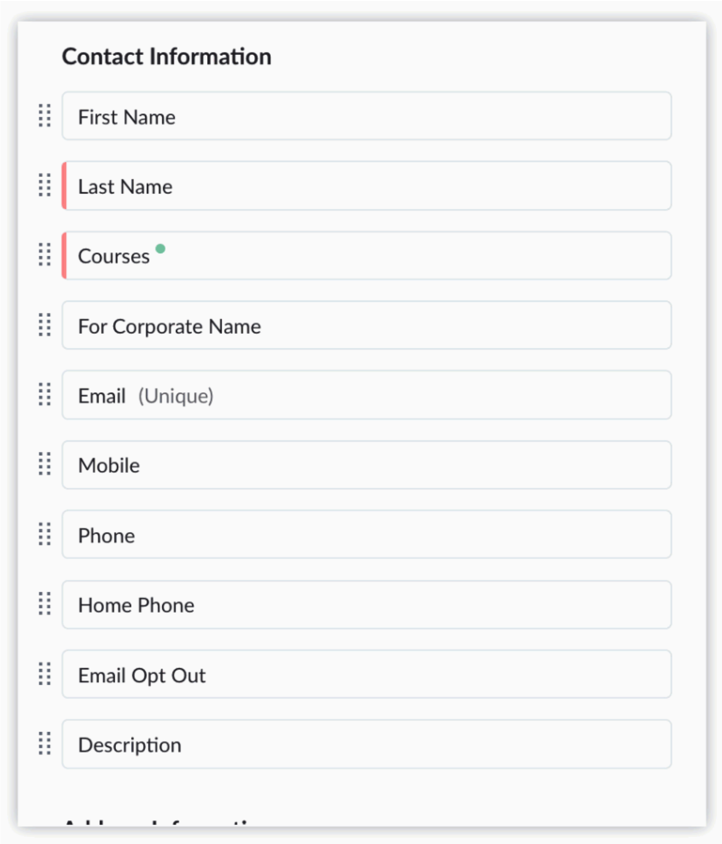
1. Log in to Bigin with admin privileges.
2. Go to **Settings** and then **Fields** and select the required module and then the required field.
3. Click the **more** icon and click **Delete**.



Rearrange fields in a module

You can sort the order of the fields as per your preference. To rearrange the fields in a module:

1. Log in to Bigin with admin privileges.
2. Go to **Settings** and then **Fields** and click **Customize Fields**.
3. Click and drag on the field to rearrange.
4. Click **Save**.



Notes:

- Field type and sub type cannot be modified once a custom field has been created.
- **Availability :**
  - Express - 10/Module
  - Premier - 25/Module