



Search and sort records

Search records

A typical day in the life of a sales rep involves checking and replying to emails, making calls, following up with leads, and helping customers find what they want. They must also keep a record of all relevant information about each customer and the sales they make. It could be tedious and time consuming for sales reps to look for each record in their Bigin account to update these details right away. And they may miss some details if they leave the updates to make later.

With Bigin's powerful search feature, sales reps can preview records instantly, update fields and even send emails right from the search bar!

The search function pulls the required record in seconds and the reps can make changes instantly, avoiding the extra work of going to the relevant module and looking for the record among hundreds of other records.

Simply search for a record with the record name or any other detail. The search bar lets you perform the following actions from the search results.

Update field

1. Click the required record in the search results.
2. Go to the *Information* tab and click the field you want to update.
3. Enter the value and click **Save**.

The screenshot shows the Zoho CRM interface for a contact named Josephine Darakjy. The left sidebar contains sections for Contacts, Deals, and Companies. The main area displays the contact's profile with tabs for Information and Notes. Under the Information tab, there is a 'Basic Info' section with fields for email, phone, and address. A red box highlights a text input field where the phone number '555-555-555' is being entered, with a green checkmark and a close button to its right.

Add tags

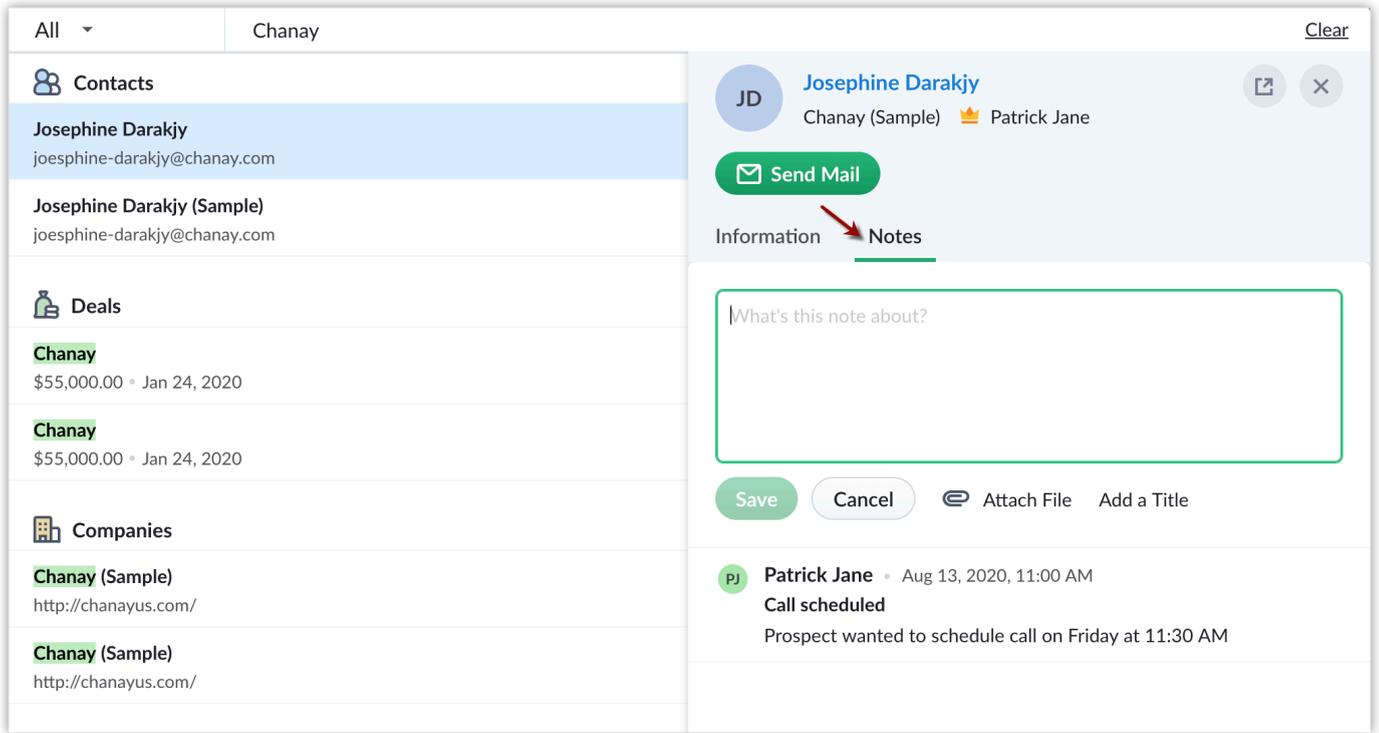
1. Click the required record in the search results.
2. Go to the *Information* tab and click the **add tag** icon.
3. Enter the tags and click **Save**.

This screenshot shows the same contact profile as the previous image, but with the 'Tags' section highlighted by a red box. The 'Tags' section contains a text input field with two tags: 'USA' and 'Premium Contact'. Each tag has a small 'x' icon next to it. To the right of the input field are a green checkmark and a close button. Below the tags section, the 'Description' and 'Other Info' sections are visible.

Add notes

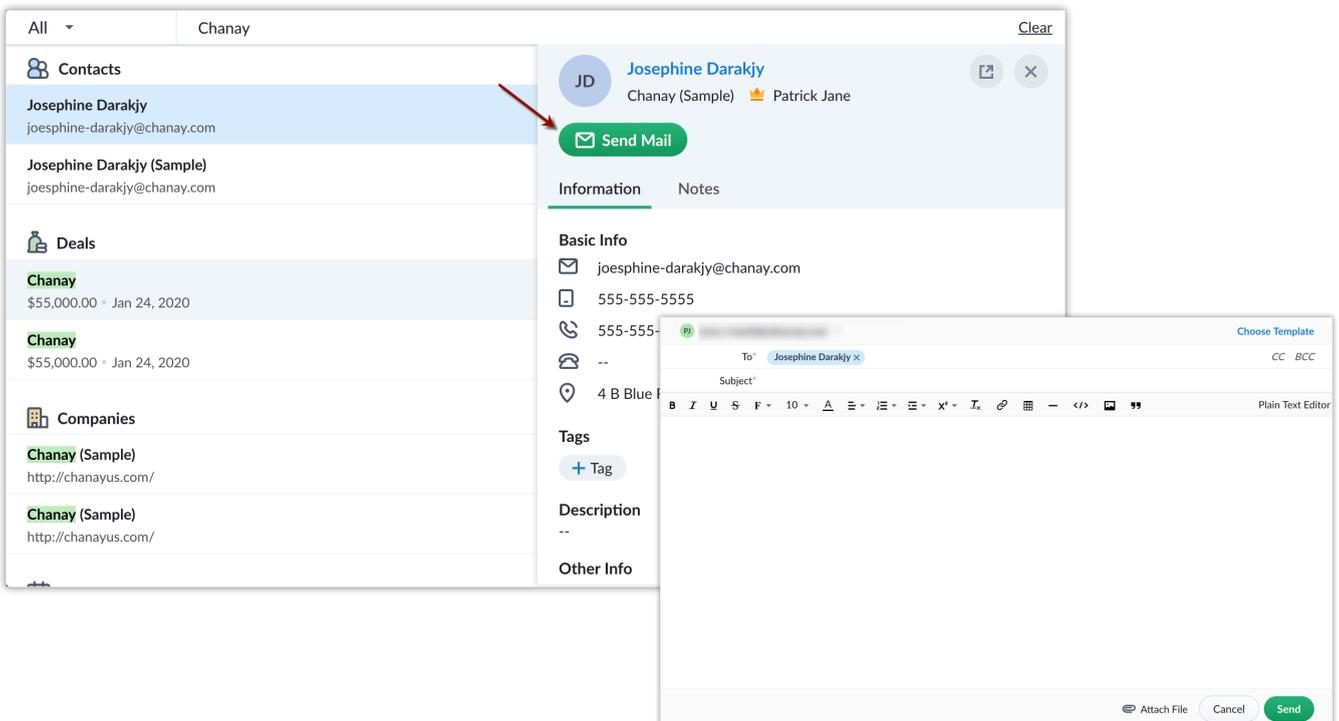
1. Click the required record in the search results.
2. Go to the **Notes** tab, enter the description, and attach files (if required)

3. Click **Save**.



Send email

1. Click the required record in the search results.
2. Click **Send Email**, compose your email content, and hit **Send**.



View recent search history

Access records right away from the search history. Click the search bar to find a list of your recently searched records.

All ▾ | Search (cmd + k)

Recent Search • Clear

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Josephine Darakjy
 joesphine-darakjy@chanay.com

Sort records in List View

Records in a module can be sorted in Ascending or Descending order so that it is easier to find the information we are looking for. Text columns and numeric columns can be sorted.

My Contacts ▾

<input type="checkbox"/> Contact Name ↕	Email ↕	Phone ↕
<input type="checkbox"/> Abagael McKay	amckay67@ask.com	807-555-2887
<input type="checkbox"/> Abagael McKay	amckay67@ask.com	807-555-2887
<input type="checkbox"/> Abra Beament	abeament5h@cloudflare.com	807-574-4825
<input type="checkbox"/> Abra Beament	abeament5h@cloudflare.com	807-574-4825
<input type="checkbox"/> Addie Espinho	aespinho7q@imageshack.us	575-855-7596
<input type="checkbox"/> Addie Espinho	aespinho7q@imageshack.us	575-855-7596
<input type="checkbox"/> Addison Lazell	alazell@rakuten.co.jp	405-555-4985
<input type="checkbox"/> Addison Lazell	alazell@rakuten.co.jp	405-555-4985
<input type="checkbox"/> Adelaida Limon	alimon15@trellian.com	575-494-2922
<input type="checkbox"/> Adelaida Limon	alimon15@trellian.com	575-494-2922
<input type="checkbox"/> Adelina Manthorpe	amanthorpei8@blog.com	781-525-2784

My Contacts ▾

<input type="checkbox"/> Contact Name ↕	Email ↕	Phone ↕
<input type="checkbox"/> Zainath Rabina	zainath.rabina@zylker.com	505-555-5555
<input type="checkbox"/> Yvette Pinn	yvettep@zoho.com	505-555-5555
<input type="checkbox"/> Simon Morin	simonm@chapman.com	505-555-5555
<input type="checkbox"/> Simon Morasca	simonm@chapman.com	505-555-5555
<input type="checkbox"/> Sage Wieser	sage-wieser@truhlar.uk	505-555-5555
<input type="checkbox"/> Sage Wieser	sage-wieser@truhlar.uk	505-555-5555
<input type="checkbox"/> Mitsue Tollner	tollner-morlong@gmail.com	505-555-5555
<input checked="" type="checkbox"/> Mitsue Tollner	tollner-morlong@gmail.com	505-555-5555
<input type="checkbox"/> Leota Dilliard	leota-dilliard@hotmail.com	505-555-5555

To sort the records in a view

1. Go to the required module and open a list view.
2. Go to the column you want to sort and click the **up arrow** to sort in ascending order or the **down arrow** to sort in descending order.

The records in the module are sorted automatically based on the column values.