Pipeline Views

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Introduction

Pipeline views allow organizations and individual users to set up saved views in the contact list to to emphasize potentially high-value opportunities and reduce the time required to locate and contact the right people.

Tabs are used on the contact list page to store predefined views that users can quickly switch to. Administrators can create and publish organization tabs to all users in their organization or to selected teams. Non-administrators can create custom tabs that are specific to their account.

Saved lists are stored in each tab to create related refined views. A saved list uses sorting, filtering, and column selections to display a grouping of contacts and their pertinent information. Administrators create 1 or more lists for each organization tab; these organization lists are available to anyone with access to the tab. Non-administrators can create and save custom lists in each organization or custom tab. Organization and custom lists are tied to the tab where they were created; they are not visible in other tabs. Custom tabs are only visible to the user who created them.

Administrator Actions

The instructions in this section show how administrators can create and manage tabs and lists that they can share with their full organization or selected user teams.

Creating a New Organization Tab

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Add and manage custom tabs** button (pencil icon) on the tab row.

3. In the Add and Manage Custom Tabs box:
    a. Click the **+Tab** button.
    b. Enter a name in the **Tab Label** field that appears. The name is limited to 20 characters.
    c. For the Include All Users toggle switch:
        i.   If you want to share the tab with everyone in your organization, switch the toggle to **Yes**. This is the default.
        ii. If you want to limit the tab to only certain teams, switch the toggle to **No**. Then click the **Select Team(s)** field that appears, and select the desired teams from the drop-down list. You can type in the field to filter the list.
    d. Click the **Save Tabs** button.
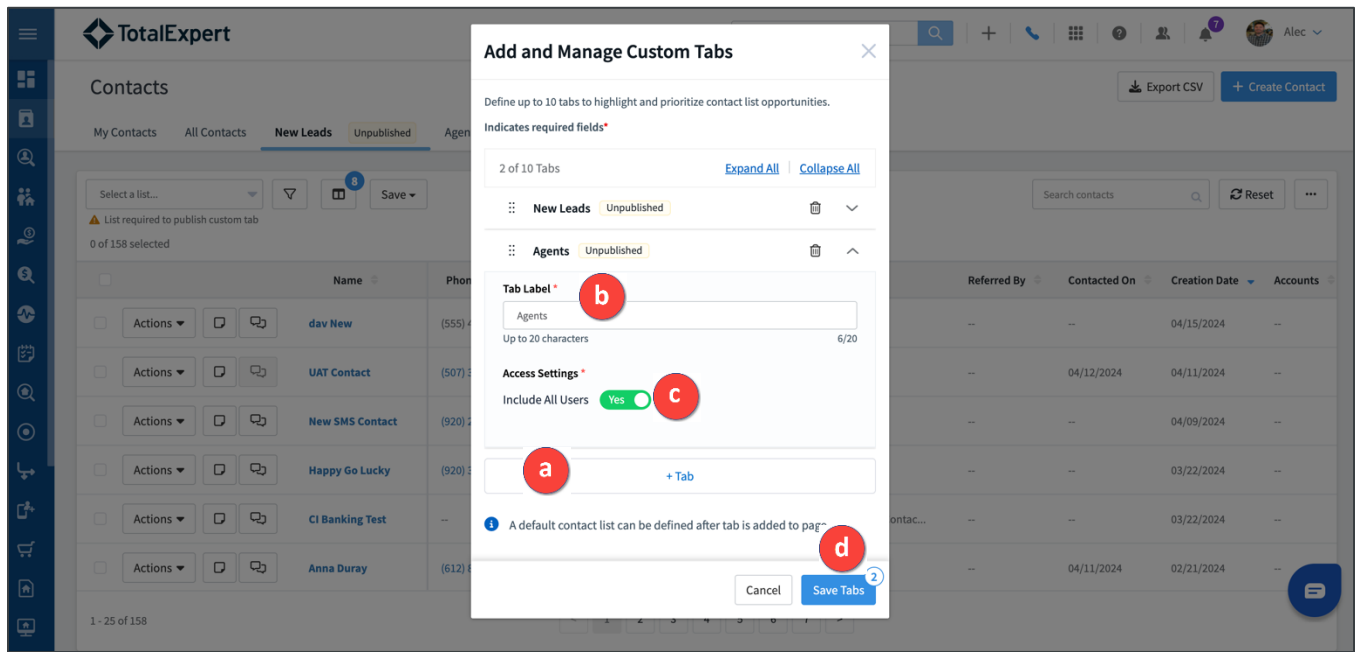
The new tab is added to the tab row. A new tab has the Unpublished label and no saved lists. A tab with the Unpublished label is not yet available to non-administrator users.

A tab must have at least 1 saved list before it can be published (see below).
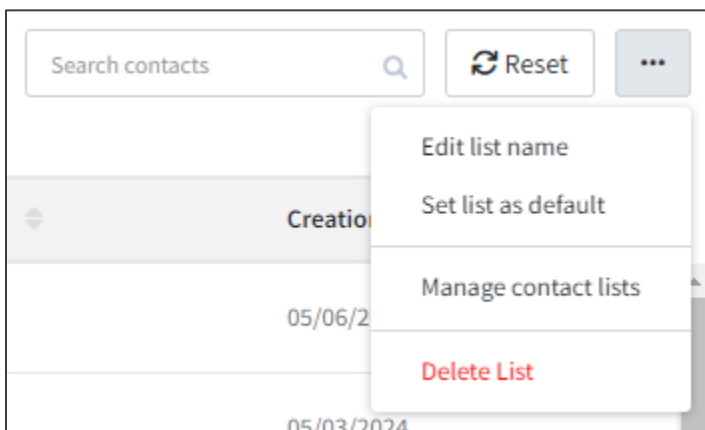
Note
Administrators can only create organization-level tabs (not tabs specific to their account). There is a limit of 10 total organization tabs, regardless of which administrator(s) created them.

Adding and Managing Lists on Organization Tabs

1. Navigate to **Leads & Contacts → Contacts**.
2. Click on any existing tab.
3. Use the filter tool, sorting, and column selector to customize the view as desired.
4. Select **Save → Save as new list**.
5. In the Create new contact list for [tab name] tab box:
    a. Enter a name for your configured list in the **Contact List Name** field.
    b. If you want this list to be the default view that users see when they select the current tab, select the **Make this the default list** checkbox. (If a default list was already designated, this changes the default to the new list.)
   c. Click the **Create List** button.
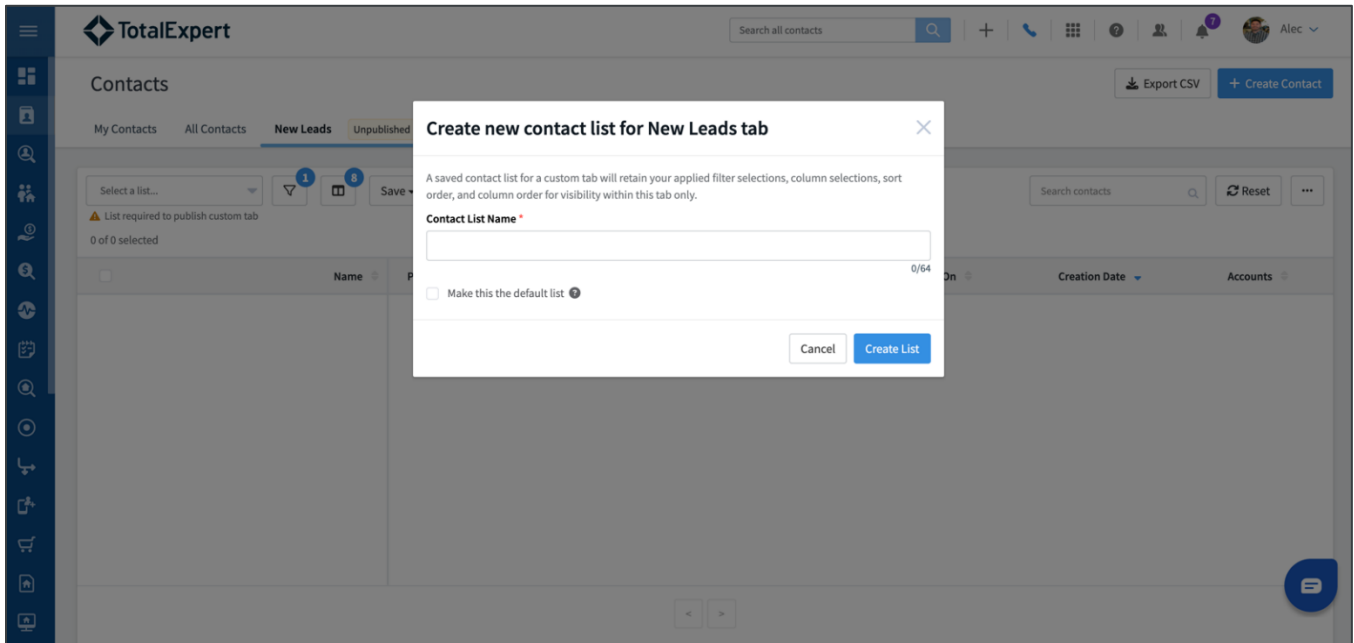
You can use the standard tools for editing, rearranging, changing default, and deleting lists in the ellipsis **[...]** menu on the right side of the page.

Note
Saved lists are only visible in the tab where they were created.

Publishing Tabs

1. Navigate to **Leads & Contacts → Contacts**.
2. Click on a tab with the Unpublished label.
3. If the tab does not have at least 1 saved list, create a list and save it.
4. Click the **Publish Tab** button.
5. In the slide-out panel, you can manage the lists saved for that tab. When you are ready to publish, select the **Confirm changes** checkbox.
6. Click **Publish Tab** button.
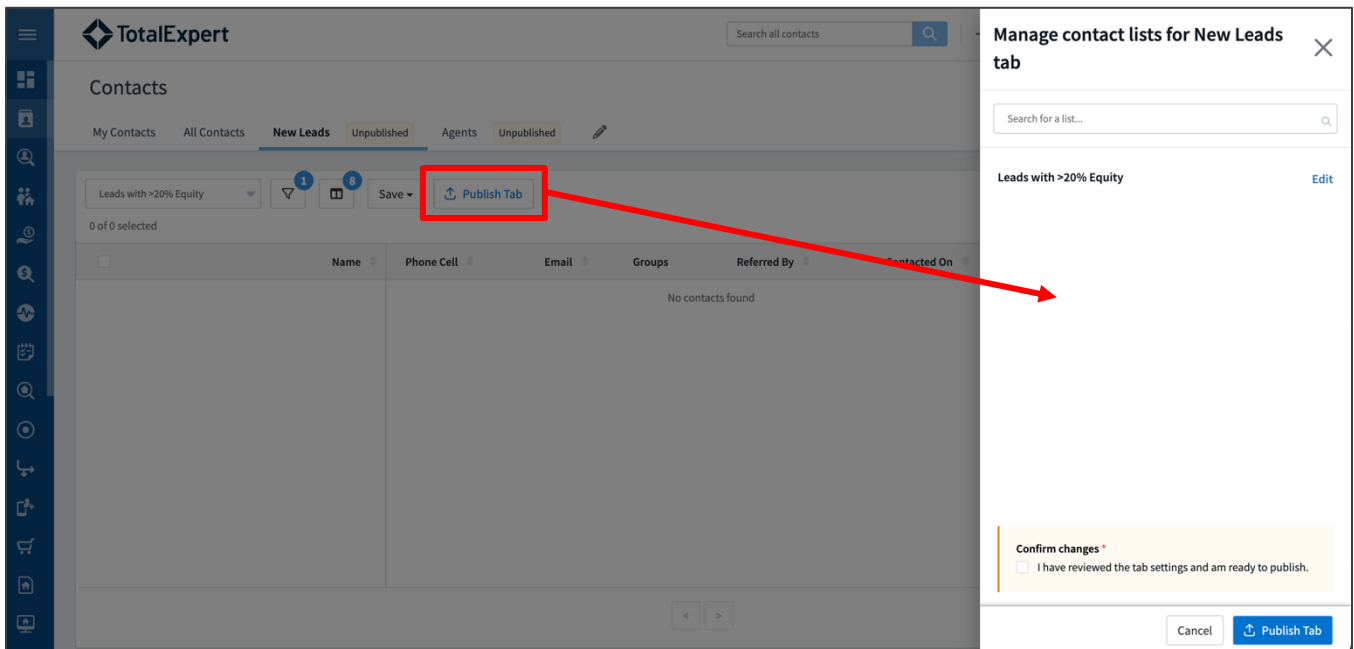
The tab's label changes to Active, and it is now available to non-administrator users.
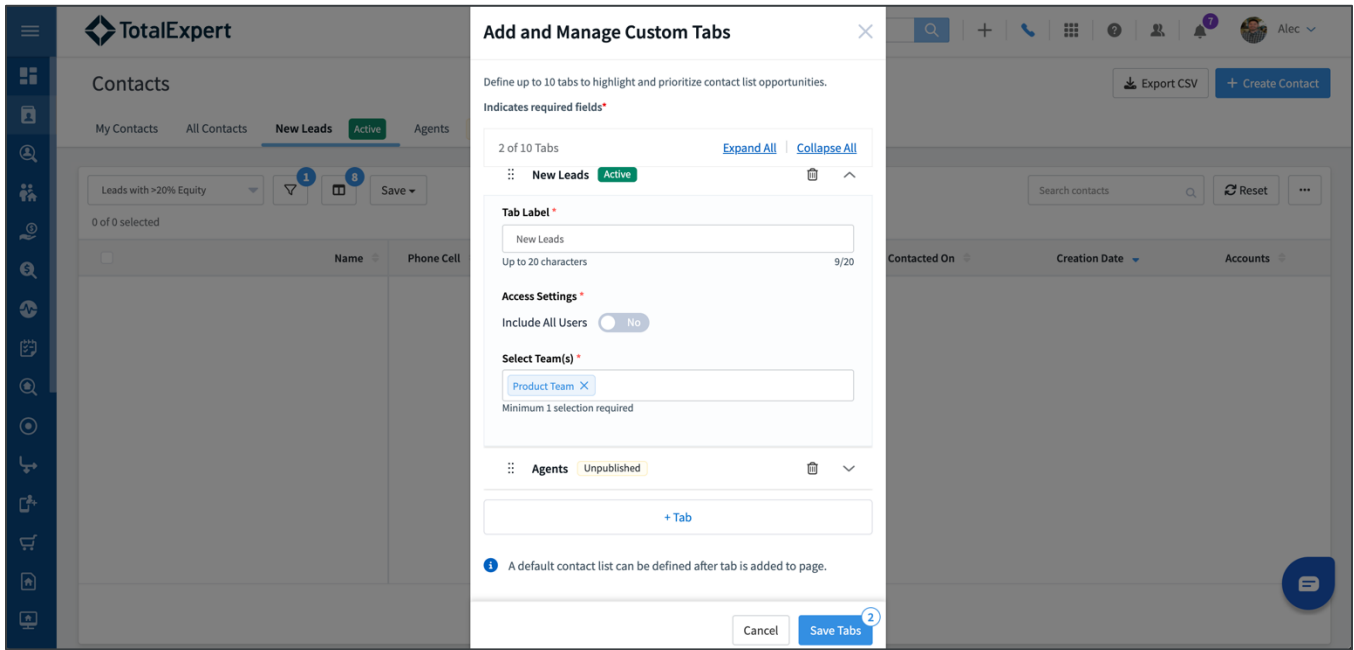
> **Note**
>
> A tab must have at least 1 saved list before it can be published to the organization or selected teams.
>
> Tabs are labelled either Active or Unpublished in the administrator view.

Managing Existing Organization Tabs

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Add and manage custom tabs** button (pencil icon) on the tab row.
3. In the Add and Manage Custom Tabs box:
   a. Click the name of a tab or the drop-down arrow to expand its entry in the list. In the expanded entry:
      i. Edit the tab's name.
      ii. Update the tab's Access Settings.
   b. Click and hold the dots icon on the left side for a tab, then drag and drop the tabs into a different order.
   c. Click the **delete** button (trash can icon) for a tab to remove it. Click the **Confirm Delete** button to complete this action. Any lists saved in the tab are also deleted.

> **Note**
>
> Any administrator can view, edit, and delete organization-wide tabs.
>
> If an administrator deletes a tab, all of the organization lists saved in that tab are also deleted. Users no longer have access to the tab or lists.
>
> Changes to active tabs are effective for all users with access once the tab is saved. The administrator does not need to republish changes.

End User Actions

The instructions in this section show non-administrators how they can use tabs and lists that have been shared with them and how to create and manage their own custom tabs and lists.

Using Organization Tabs

1. Navigate to **Leads & Contacts → Contacts**.
2. Click on an organization tab.
3. (optional) Select a list from the **Select a list…** drop-down list to serve as a foundation for your custom list.

4. Use the filter tool, sorting, and column selector to customize the view as desired.
5. Select **Save → Save as new list**.

The custom list is now saved in the organization tab under MY LISTS. Other users with access to the tab do not see your custom lists.

> **Note**
>
> Non-administrator users cannot edit or delete organization tabs. They also cannot modify the organization's lists within a tab. They can add their own lists to an organization tab.

If an administrator deletes an organization tab, the user-specific lists in that tab are moved to the user's My Contacts tab.

Tabs newly published by an administrator have a New label. After 1 week, this label disappears.

Managing User-Specific Custom Tabs and Lists

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the **Add and manage custom tabs** button (pencil icon) on the tab row.
3. In the Add and Manage Custom Tabs box:
   a. Click the **+Tab** button.
   b. Enter a name in the **Tab Label** field that appears. The name is limited to 20 characters.
   c. Click the **Save Tabs** button.

4. Click on the new tab.
5. Use the filter tool, sorting, and column selector to customize the view as desired.
6. Select **Save → Save as new list**.

Note

All saved list functionality (renaming, deleting, and making changes to a saved list) works the same way as it would in non-pipeline views. Lists are contained within a specific tab, however.

Non-administrator users can create up to 10 of their own custom tabs and as many lists as they want in a tab.