

Pipeline List View

This article applies to:

[Pro](#)

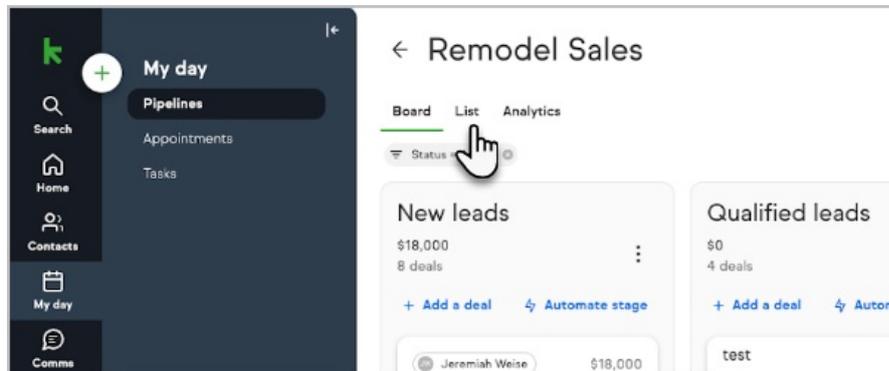
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Pipeline List View allows users to quickly view a large number of deals and efficiently make changes to them.

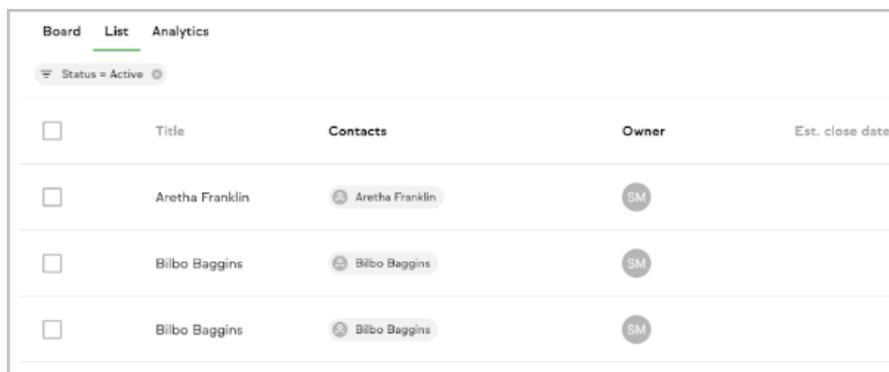
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Getting started - Accessing List view

1. Navigate to a pipeline, and then click **List** from the tabs at the top of the Pipeline view



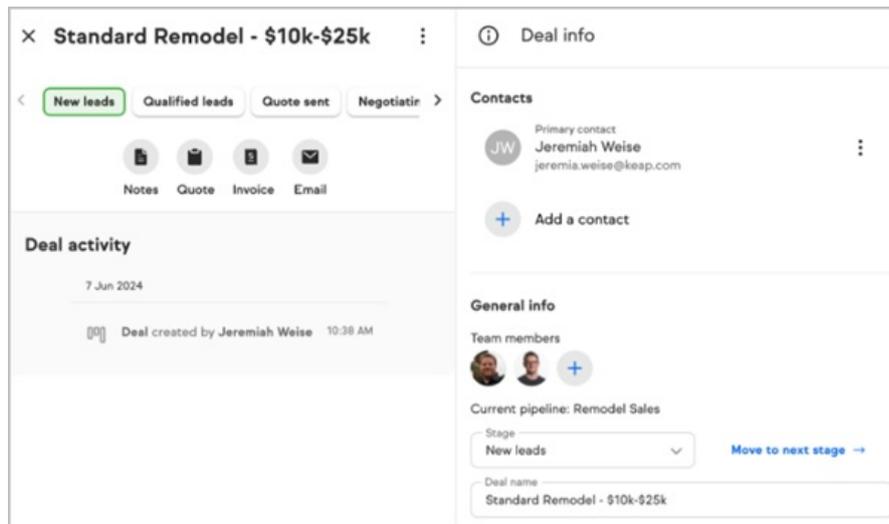
2. Once there, you can quickly view deals in a list view, or take various actions.



The screenshot shows the CRM interface for the 'Remodel Sales' pipeline in List view. The 'List' tab is selected, and the interface displays a table of deals.

	Title	Contacts	Owner	Est. close date
<input type="checkbox"/>	Aretha Franklin			
<input type="checkbox"/>	Bilbo Baggins			
<input type="checkbox"/>	Bilbo Baggins			

3. To view a deal, just click on it like you would from the Board view, and your deal will be pulled up



Sorting columns & filtering results

1. **Sorting columns** - Deals can be sorted by most columns.
2. To sort deals in List view based on a column, simply click the column you want to sort by. A single click will sort the values ascending, and a second click sorts descending. Note: the following columns can currently be sorted:

1. **Title**
2. **Estimated close date**
3. **Status**
4. **Stage**
5. **Deal value**

Status	Stage	Deal value ↓
Active	New leads	\$18,000
Active	New leads	\$15,000
Active	New leads	\$3,400

3. Filtering works the same as Board view - by default, Deals will be filtered based on a status of 'Active', but this can be adjusted. The following filters are available:

1. **Status**
2. **Owner**
3. **Date created / date closed**
4. **Contact**
5. **Deal name**

Filter deals
Clear filters

Deal status
Remove

Includes any ▼

Active ✕

▼

Add a filter
▼

Performing bulk actions

you can take certain actions on multiple deals at once.

1. To get started, click the leftmost checkbox next to one or more deals you wish to modify. Alternatively, you can click the top checkbox in the checkbox column to select all deals in the list.

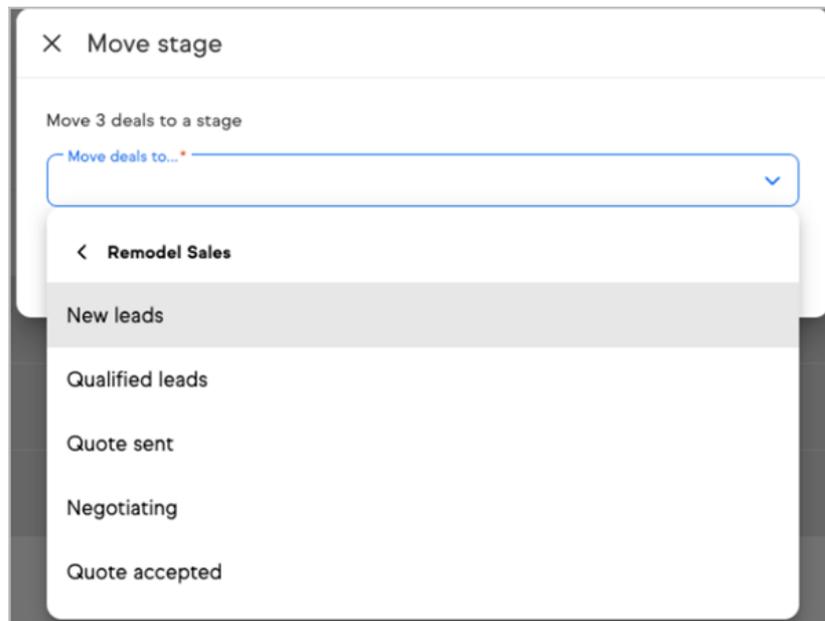
←
Remodel Sales

Board List Analytics

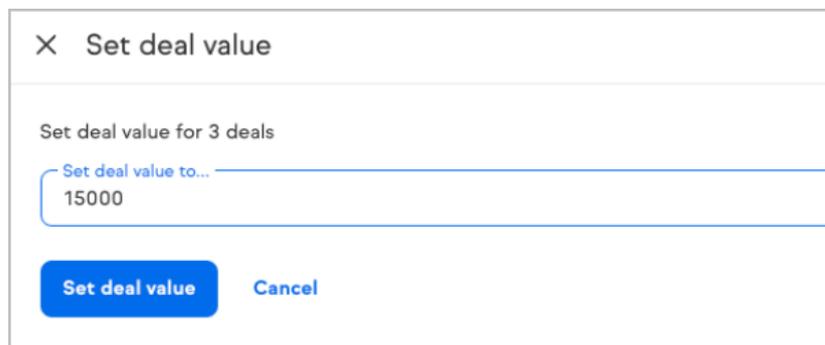
☰ Status = Active ✕

	Title	Contacts	Owner	Est.
<input checked="" type="checkbox"/>	Standard Remodel - \$10k-\$25k	✕ Jeremiah Weise		
<input checked="" type="checkbox"/>	Aretha Franklin	✕ Aretha Franklin	SM	
<input checked="" type="checkbox"/>	Bilbo Baggins	✕ Bilbo Baggins	SM	
<input type="checkbox"/>	Blanche Frost	✕ Blanche Frost	SM	
<input type="checkbox"/>	Bois	✕ Agent P	<div style="display: flex; gap: 5px; align-items: center;"> SM SA CH ME </div>	

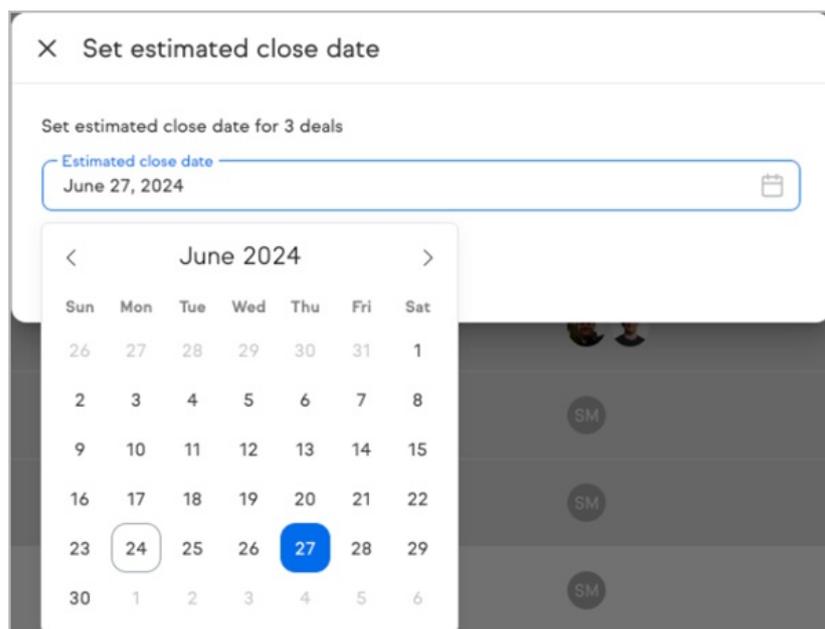
2. Once one or more deals are selected, you can make any of the following changes in bulk to the selected deal(s)
 1. **Move stage** - clicking **Move stage** will allow you to specify a different stage or even pipeline to move the deals to:



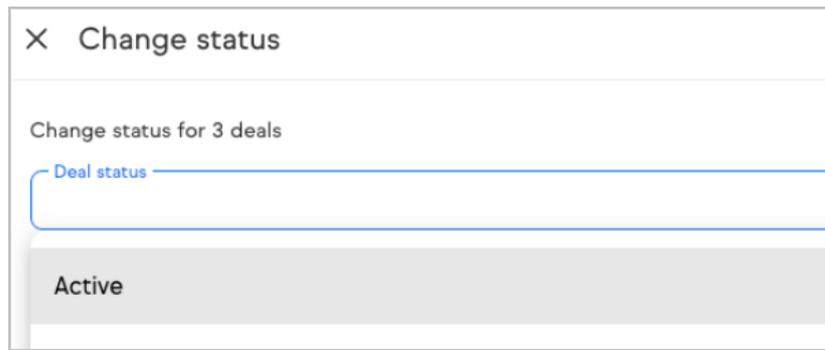
2. **Edit deal value** - clicking **Edit value** will allow you to change the deal value associated with multiple deals at once:



3. **Change estimated close date** - by clicking **Set estimated close date**, you can modify the Estimated close date for multiple deals:



4. **Change deal status** - enables you to update the deal status on multiple deals at once by clicking **Change status** from the bottom of the List view:

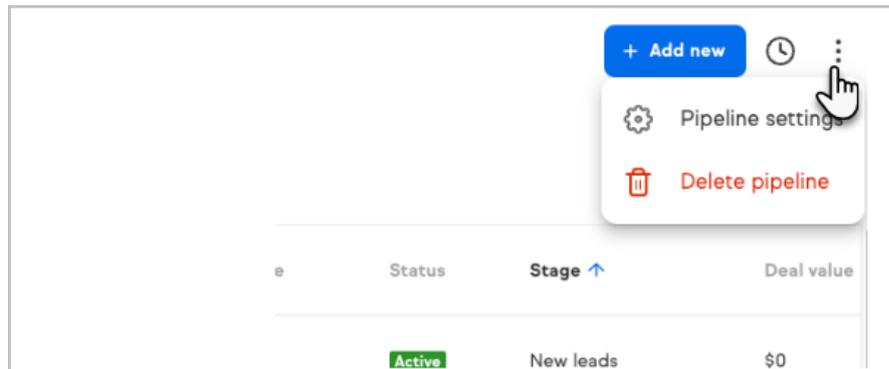


Hint: to adjust the status names for positive and negative deal status, see Pipeline settings below.

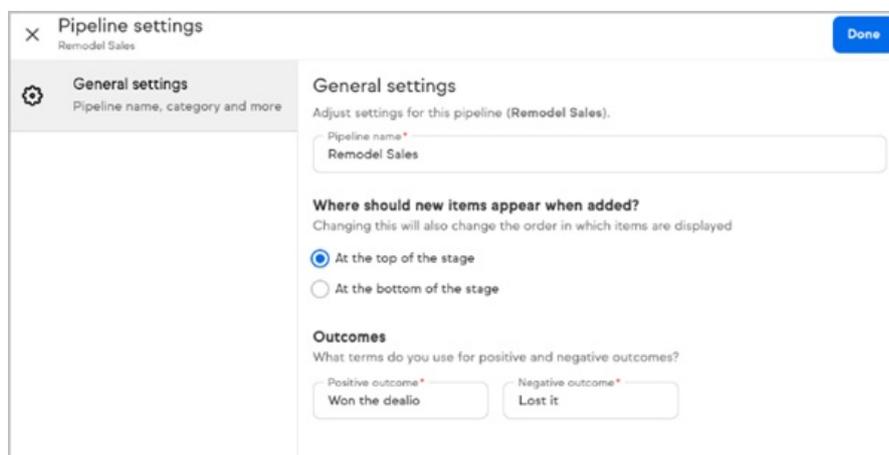
Pipeline settings

Pipeline settings have been streamlined and are available from either the Board or List view.

1. You can now access Pipeline settings directly from either the Board or List view by clicking the '...' more menu from the top right corner of the page.



2. Once opened, you can rename the Pipeline, determine whether new items should be added to the top or bottom of a stage, and specify what Positive and Negative outcomes are called.



3. Pressing **Done** will close Pipeline settings.

FAQs

I want to perform other bulk actions on deals, such as delete - can I?

Other actions are planned down the road, however we are excited to get this initial set of actions into the hands of users, and have plans for adding additional actions down the road.
