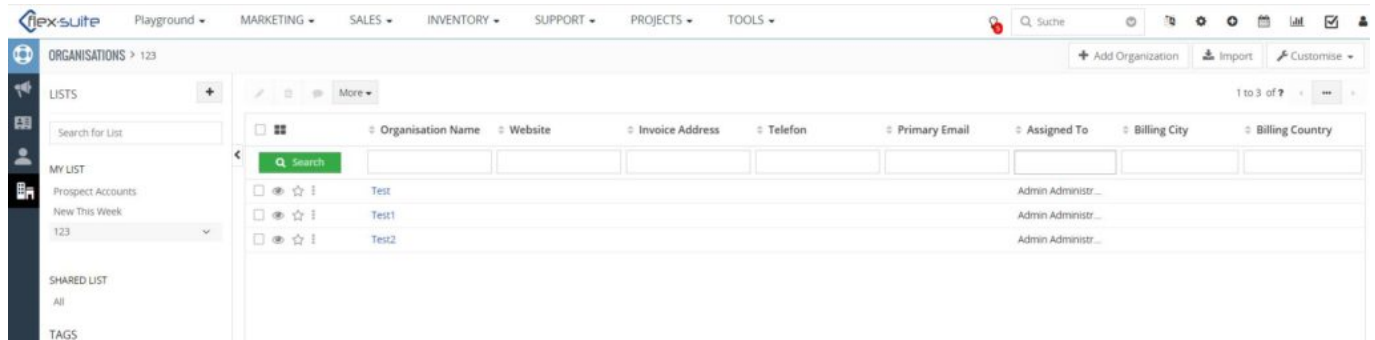




## Flexx.Suite

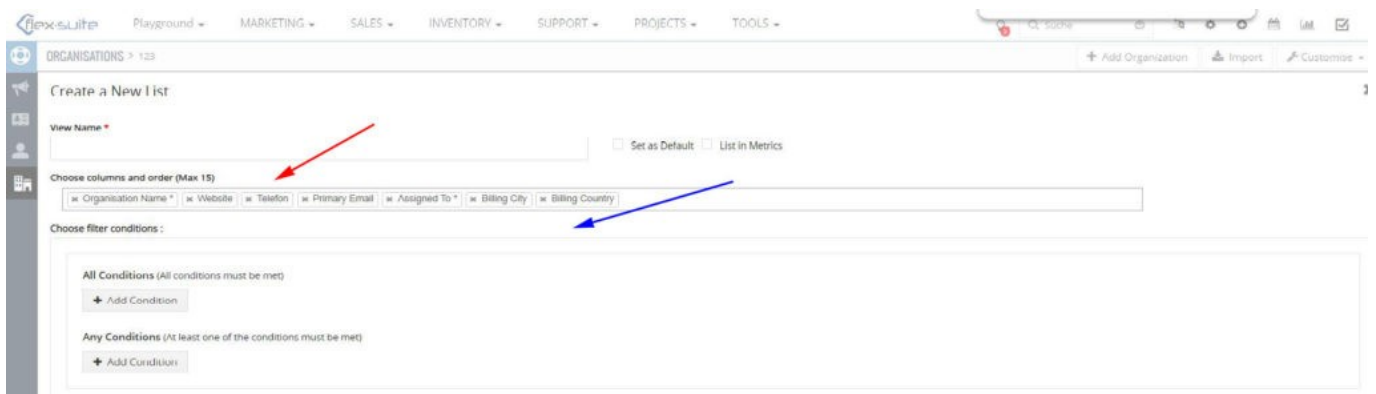
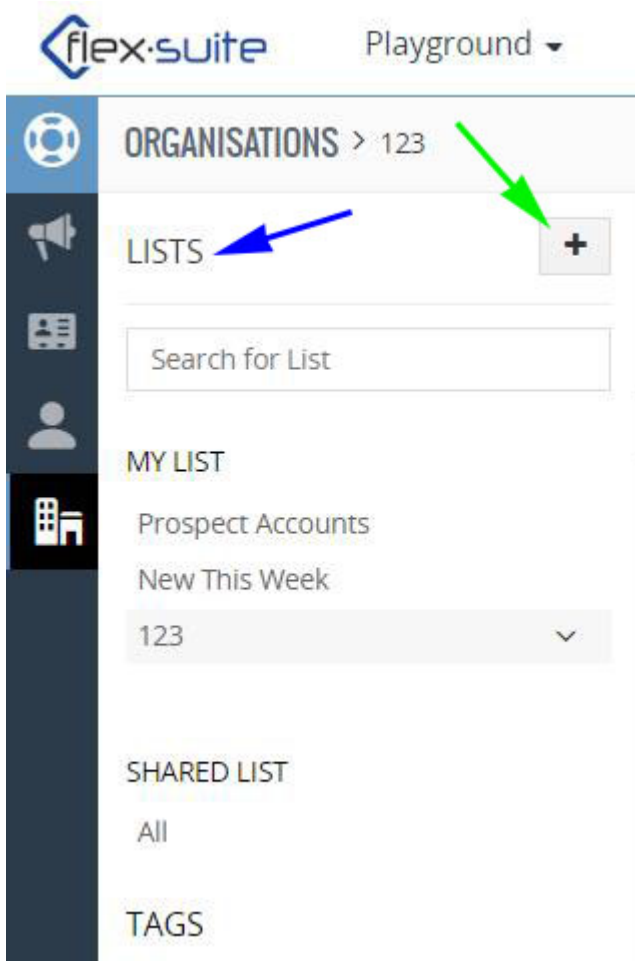
### 15.List management in CRM

All modules have a list view



On the left side you can access the list menu where you can configure your list view.

Here you can duplicate the existing lists or create your own by clicking the “Plus” button (→ green arrow) opposite the LISTS menu item (→ blue arrow).



In the opened menu you can enter the list name. (→ red arrow)

Now add the columns that are important for you (→ blue arrow)

The screenshot shows the 'Create a New List' configuration page. At the top, there are navigation tabs for 'MARKETING', 'UMSATZ', 'INVENTORY', 'SUPPORT', 'PROJEKTE', 'HR', and 'WERKZEUGE'. The main content area is titled 'Create a New List' and includes a 'View Name' field, a 'Set as Default' checkbox, and a 'List in Metrics' checkbox. Below this is a 'Choose columns and order (Max 15)' section with a dropdown menu showing 'Vendor Name', 'Primary Email', 'Primary Phone', 'Website', and 'Category'. The 'Choose filter conditions' section has two options: 'All Conditions (all conditions must be met)' and 'Any Conditions (at least one of the conditions must be met)'. A red arrow points to the 'Select Field' dropdown in the 'All Conditions' section. At the bottom, there is a 'Share the list' checkbox, a 'View Default Sort' section, and an 'Advanced Search' section. A green arrow points to the 'Save' button at the bottom right.

You can also create the list you created by conditions. Select the appropriate area according to your needs:

All conditions (All conditions must be met)

Any conditions (At least one of the conditions must be fulfilled).

Confirm your entries with the "Save" button (→ green arrow)

