

Description

Provides the ability to create Predefined Filter on selected link.

Installation

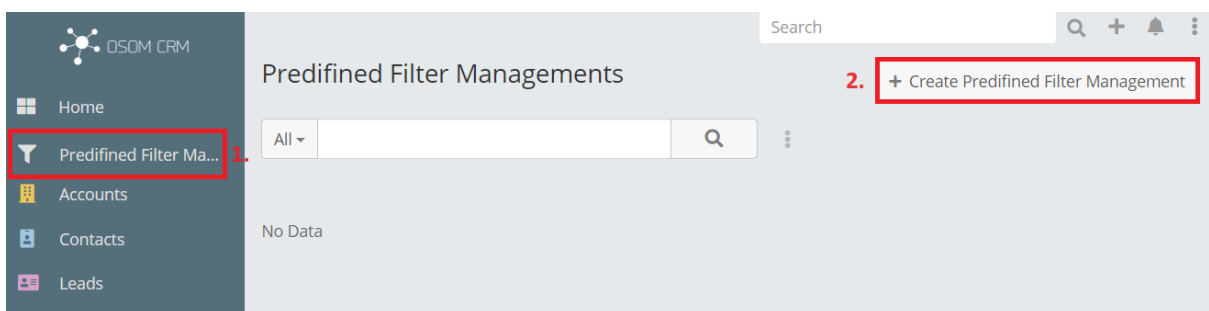
In order to install EspoCRM extension:

1. Login as an administrator.
2. Go to Administration > Extensions.
3. Upload your extension package (zip file).
4. Click Install button.

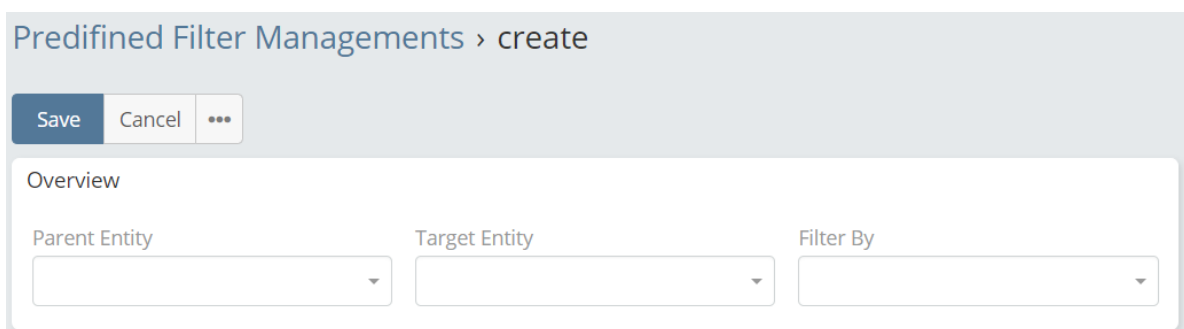
You can find more information here: <https://docs.espocrm.com/administration/extensions/>

Creating a predefined filter

1. Go to „Predefined Filter Management“ entity and click on „+ Create Predefined Filter Management“ button.



2. Fill out the form.



3. Select an entity where you want to have a filter (Parent Entity), select an entity for which the filter will be applied (Target Entity), select a link which the records will be filtered by (Filter By). Click Save. After save the filter will be created.

Predifined Filter Managements > create

4.

Save

Cancel



Overview

1.

2.

3.

Parent Entity

Consent

Target Entity

Contact

Filter By

lead

Created predefined filter

1. Go to Consent entity and select a Lead.

Consents > create

Save

Cancel



Overview

Name

Email



Action



First Name

Last Name

Contact

Select



Lead

My Lead



Unsubscribe Reason

Description

2. Click on Contact selection.

Consents > create

Save Cancel ...

Overview

Name Email Action

First Name Last Name

Contact

Lead

Unsubscribe Reason Description

3. When selecting a Contact, the filter will already be applied.

Consents > create

Save Cancel ...

Overview

Name Email

First Name Last Name

Contact

Lead

Unsubscribe Reason Description

Select: Contacts

Cancel

All

Lead

My Lead

Name	Account	Email
Contact 2	Account'as	

Create Contact