

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.

	osom crm			Search		Q	+	.	
	•	Predifined Filter Managements			2.	+ Create Predifined	Filter N	Manag	ement
	Home								
T	Predifined Filter Ma 1	All -	Q	000					
	Accounts								
٥	Contacts	No Data							
23	Leads								

2. Fill out the form.

Predifined Filter Managements > create						
Save Cancel •••						
Overview						
Parent Entity	Target Entity	Filter By	•			



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.						
Overview 1. 2. 3.						
Parent Entity Consent	Target Entity Contact	Filter By				

Created predefined filter

1. Go to Consent entity and select a Lead.

Consents > create		
Overview		
Name Em	il Action	•
First Name	Last Name	
Contact	Lead	
Select	∧ × My Lead	~ ×
Unsubscribe Reason	Description	<i>i</i> ,



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2. Click on Contact selection.

Consents > create				
Save Cancel •••				
Overview				
Name	Email		Action	
		\odot \bullet		•
	+			
First Name		Last Name		
Contact		Lead		
Select	^ X	My Lead		~ ×
Unsubscribe Reason		Description		
				10

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

	Select: Contacts		×
Consents > create	Cancel		
Save Cancel •••	All -	Q : ×	
Overview	Lead		
	ls 🔹		
	My Lead		
	Name	Account	Email
	Contact 2	Account'as	
	Create Contact		
Select			