Description

Provides the ability to create Predefined Filter on selected link.
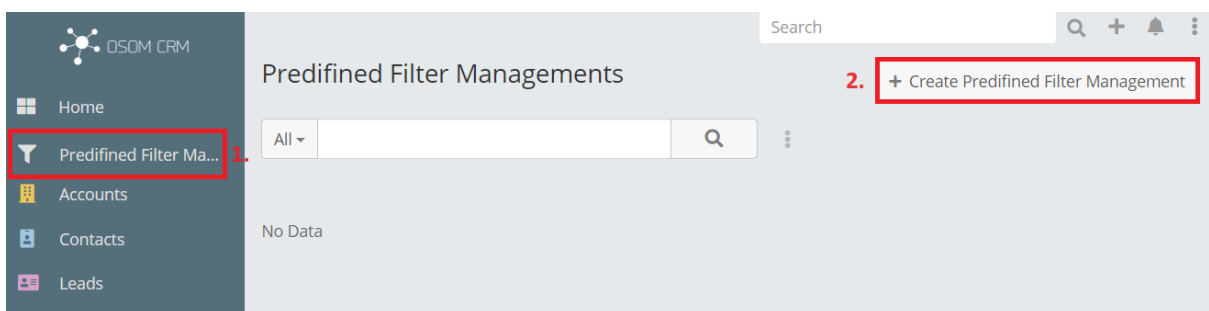
Installation

In order to install EspoCRM extension:

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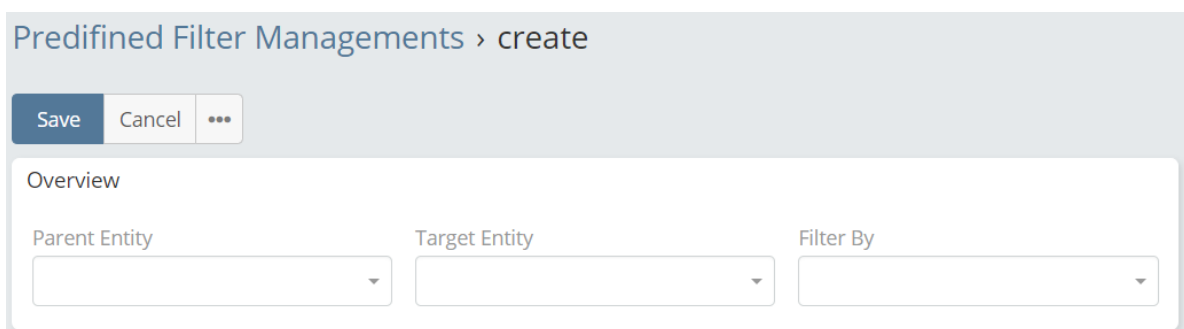4. Click Install button.

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.

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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.

Created predefined filter

1. Go to Consent entity and select a Lead.

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2. Click on Contact selection.

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