

Description

Provides the ability to create Predefined Filter on selected link.

Installation

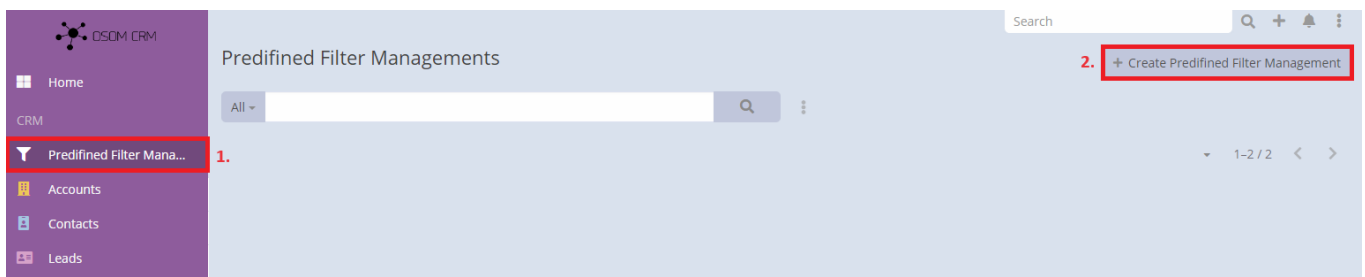
In order to install EspoCRM extension:

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/>

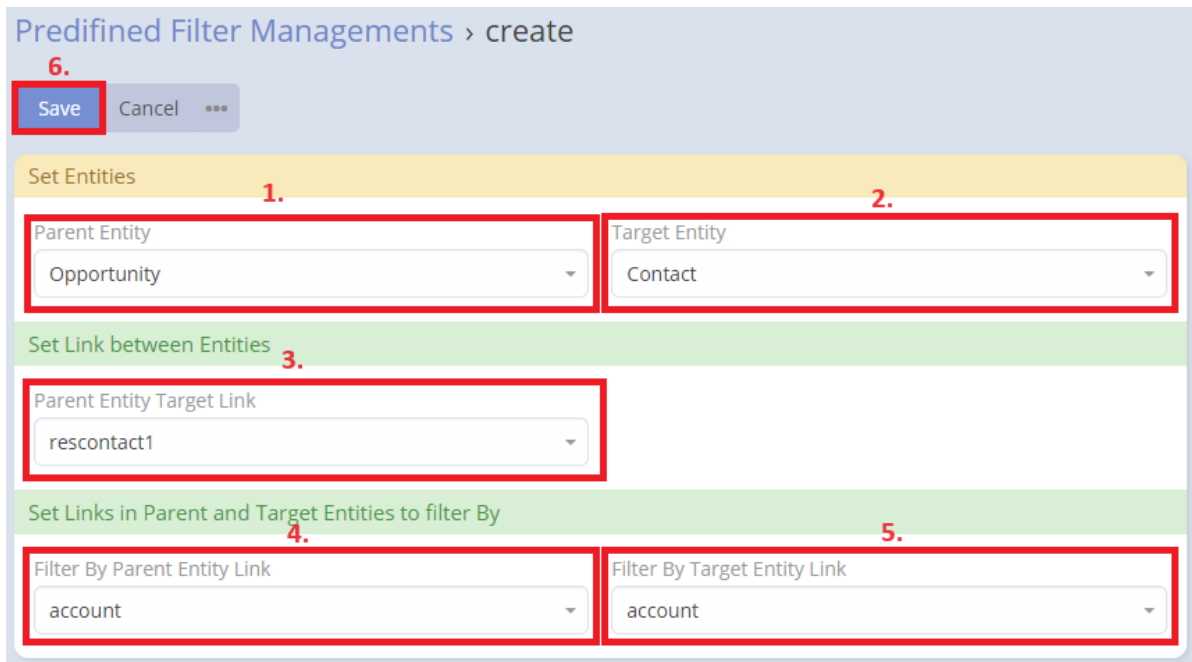
Creating a predefined filter

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



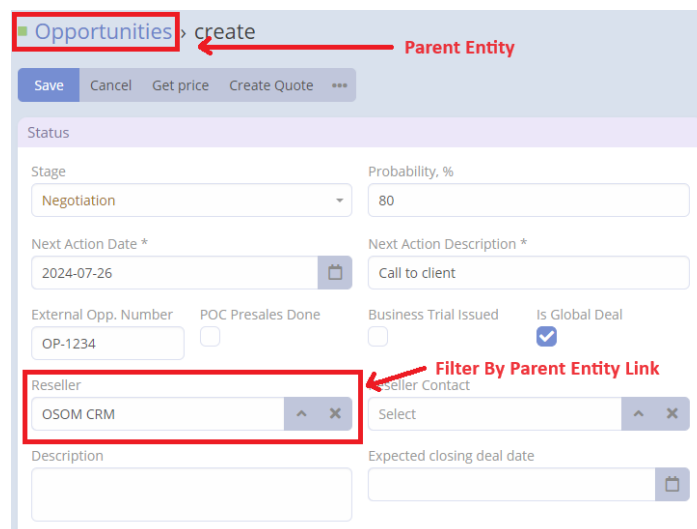
- 1) Select the entity where you want to apply a filter (**Parent Entity**).
- 2) Select the entity that the filter will be applied to (**Target Entity**).
- 3) Select the link in the *Parent Entity* on which the filter will be applied (**Parent Entity Target Link**).
- 4) Select the link in the *Parent Entity* that will determine how the *Target Entity* is filtered (**Filter By Parent Entity Link**).
- 5) Select the link in the *Target Entity* that will be used when selecting the *Parent Entity Target Link* (**Filter By Target Entity Link**).
- 6) Save the record.

NOTE: Parent Entity Target Link must be a link between Parent Entity and Target Entity. Filter By Parent Entity Link and Filter By Target Entity Link must be the link to the same entity – in this example to the Account.

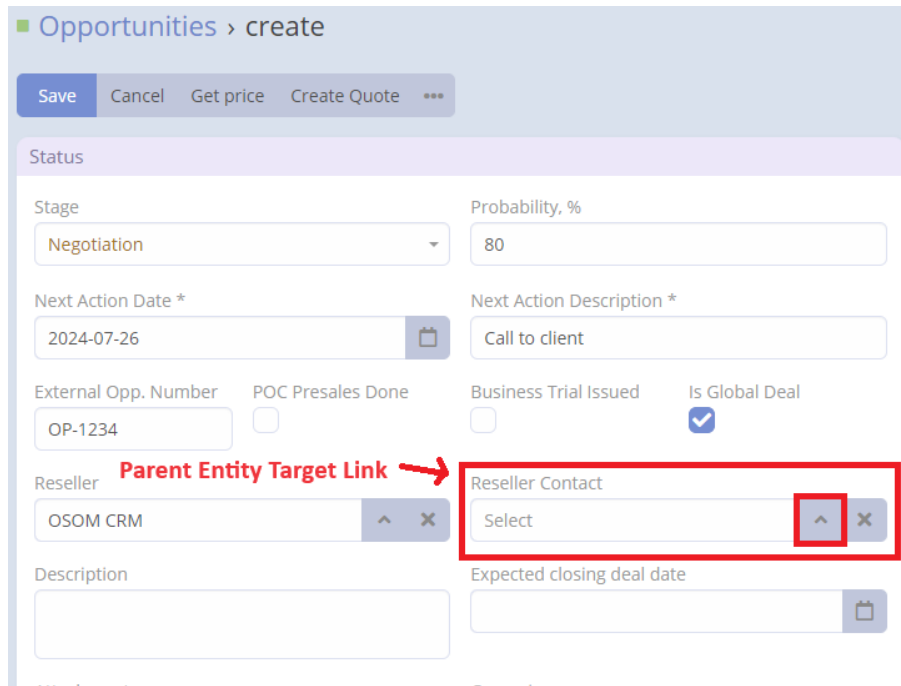


Created predefined filter

1. Go to Opportunity entity (Parent Entity) and select an account (in this example, label – Reseller) (Filter By Parent Entity Link).



2. Click on Contact (Target Entity) link selection (in this example, label – Reseller Contact) (Parent Entity Target Link).



Opportunities > create

Save Cancel Get price Create Quote ...

Status

Stage: Negotiation Probability, %: 80

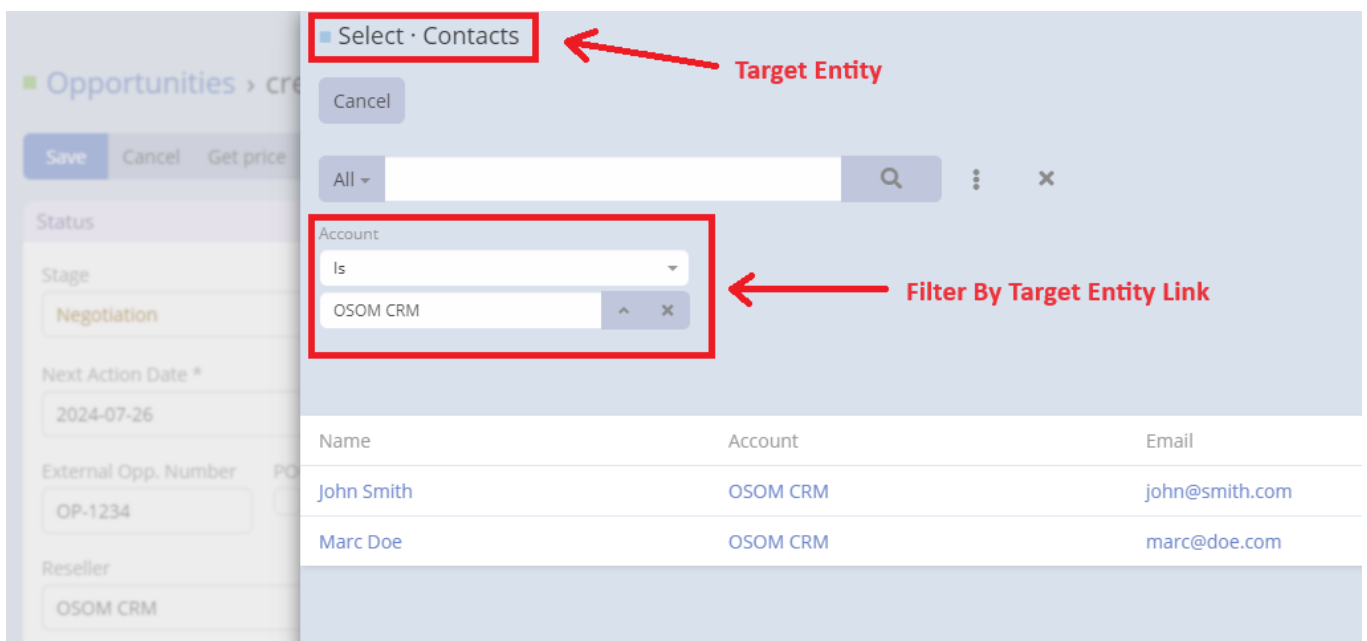
Next Action Date *: 2024-07-26 Next Action Description *: Call to client

External Opp. Number: OP-1234 POC Presales Done: Business Trial Issued: Is Global Deal:

Reseller: OSOM CRM **Parent Entity Target Link** → Reseller Contact (Select) ^ x

Description: Expected closing deal date:

3. When selecting a Contact (Target Entity), the filter will already be applied (Filter By Target Entity Link).



Opportunities > create

Save Cancel Get price

Status

Stage: Negotiation

Next Action Date *: 2024-07-26

External Opp. Number: OP-1234

Reseller: OSOM CRM

Select · Contacts ← Target Entity

Cancel

All Q

Account: Is OSOM CRM **Filter By Target Entity Link**

Name	Account	Email
John Smith	OSOM CRM	john@smith.com
Marc Doe	OSOM CRM	marc@doe.com