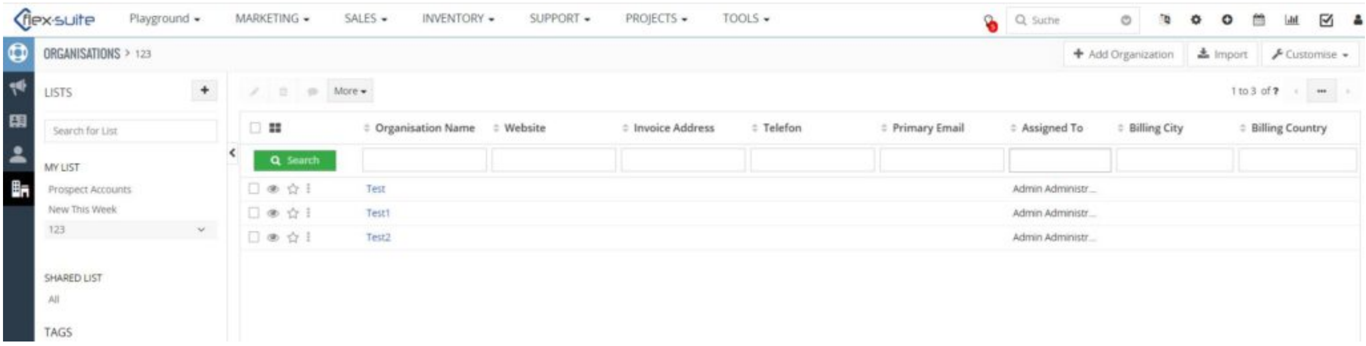
Flexx.Suite

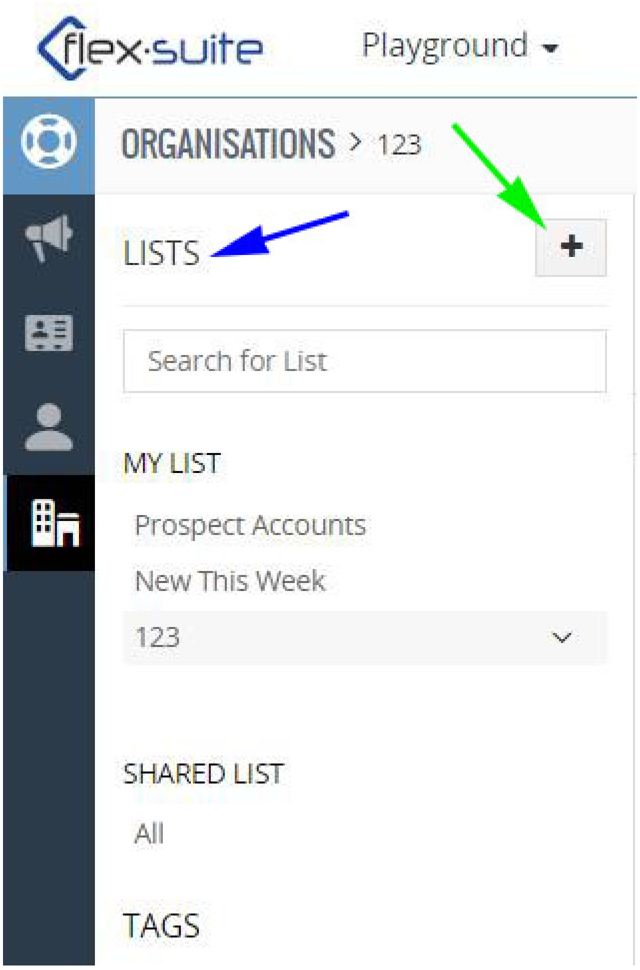
15.List management in CRM

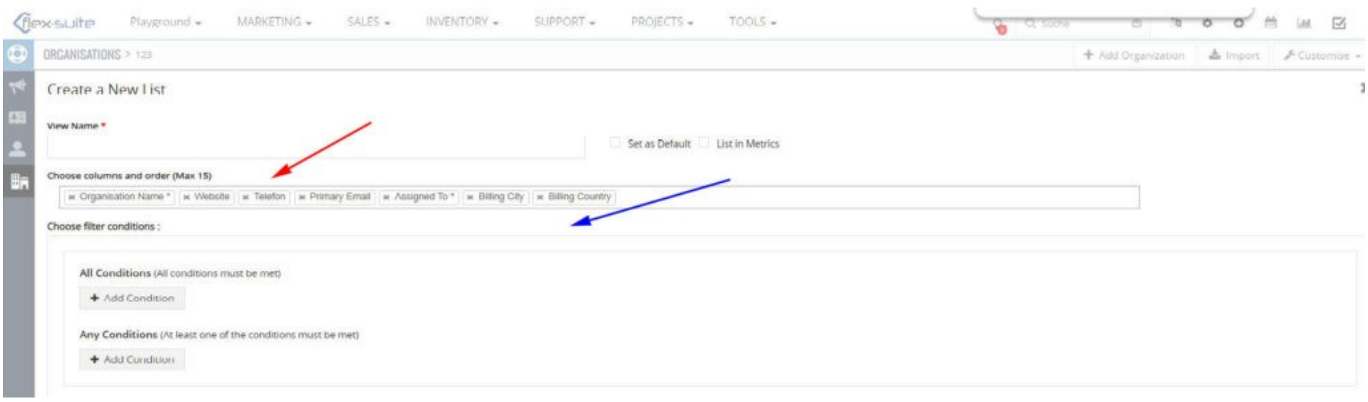
All modules have a list view



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

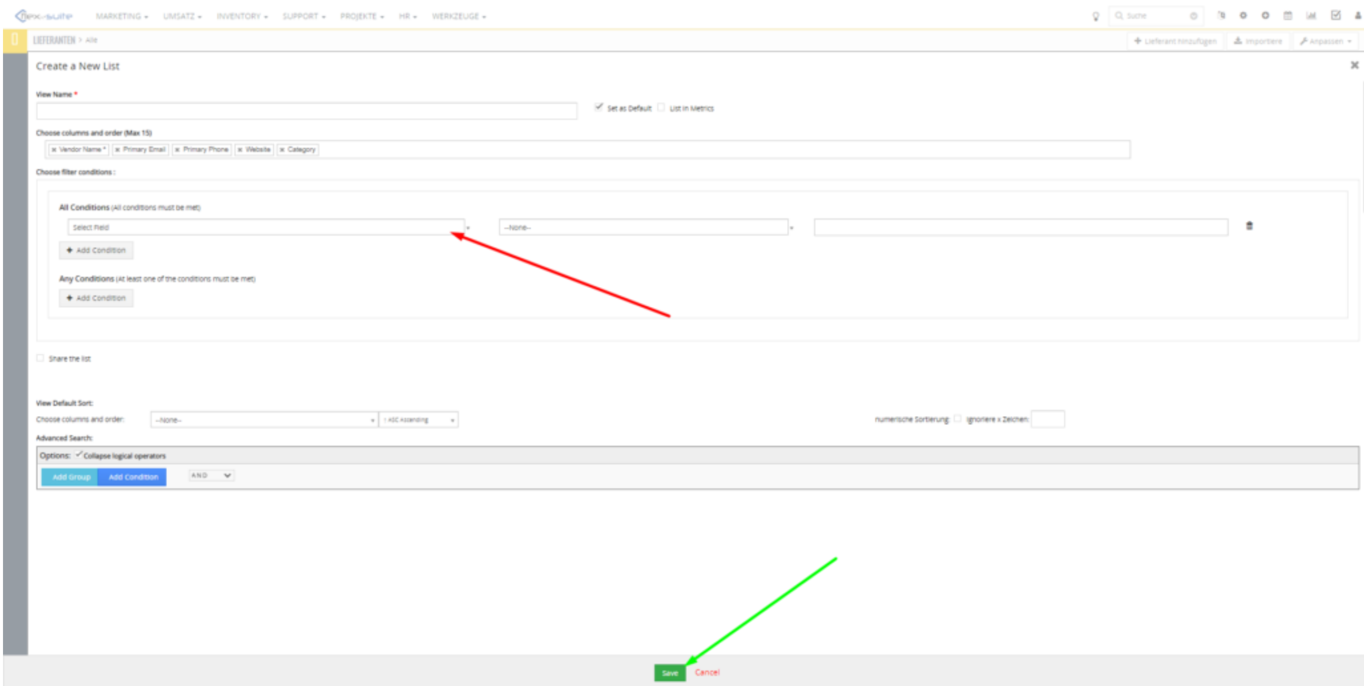
Here you can duplicate the existing lists or create your own by clicking the “Plus” button (→ green arrow) opposite the LISTS menu item (→ blue arrow).





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

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



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)

