

# Administrator's Guide

## Installation

## Licensing

## Setting Up Features

- Initial Settings
- Defining a CRM User
- Setting up Access to Objects
- Configure CRM Directories
  - Setting Up Custom Directories (Dictionaries)
  - Setting Up Dictionary "Products & Services"
  - Set up Companies Directory
  - Set up Contacts Directory
  - Dictionary Attribute Types and Properties
- Setting Up Issue Custom Fields
  - Custom field - CRM Company
  - Custom field - CRM Contact
  - Custom field - CRM Property
  - Custom field - Contacts CRM
  - Custom field - CRM Products & Services
  - Custom field - CRM Custom Directory
  - Custom field - CRM Select Custom Field
  - Custom Field - Issue Picker
  - Custom field - CRM Transactions
  - Custom Field - CRM Companies Select
  - Company/Contact issue fields format
  - Custom Field - CRM Products Select / CRM Single Product Select
- CRM's Post-Functions
  - CRM Copy Transactions and Products Custom Fields Values to Issue
  - Setting Up a Post-Function Cloning Issue
  - Setting Up CRM Copy Contacts to Users Postfunction
- Adding CRM Custom Fields to Email Template
- Set Companies Hierarchy
- Auto-adding Companies and Contacts from CRM to Service Desk Projects
- Table Lists
- Setting Up Budgets

## Transactions

- Transactions Attributes
- Transactions Statuses
- Transactions Notifications
- Transactions Total Issue Fields

## Backing Up CRM's Data

## Importing/Exporting Data

## Reset all settings to default

## Audit Log

## Board's Integration

## CRM Security Levels

## Direct Mail

- Subscription Macro for Confluence

Link CRM Custom Fields to Jira Custom Fields