

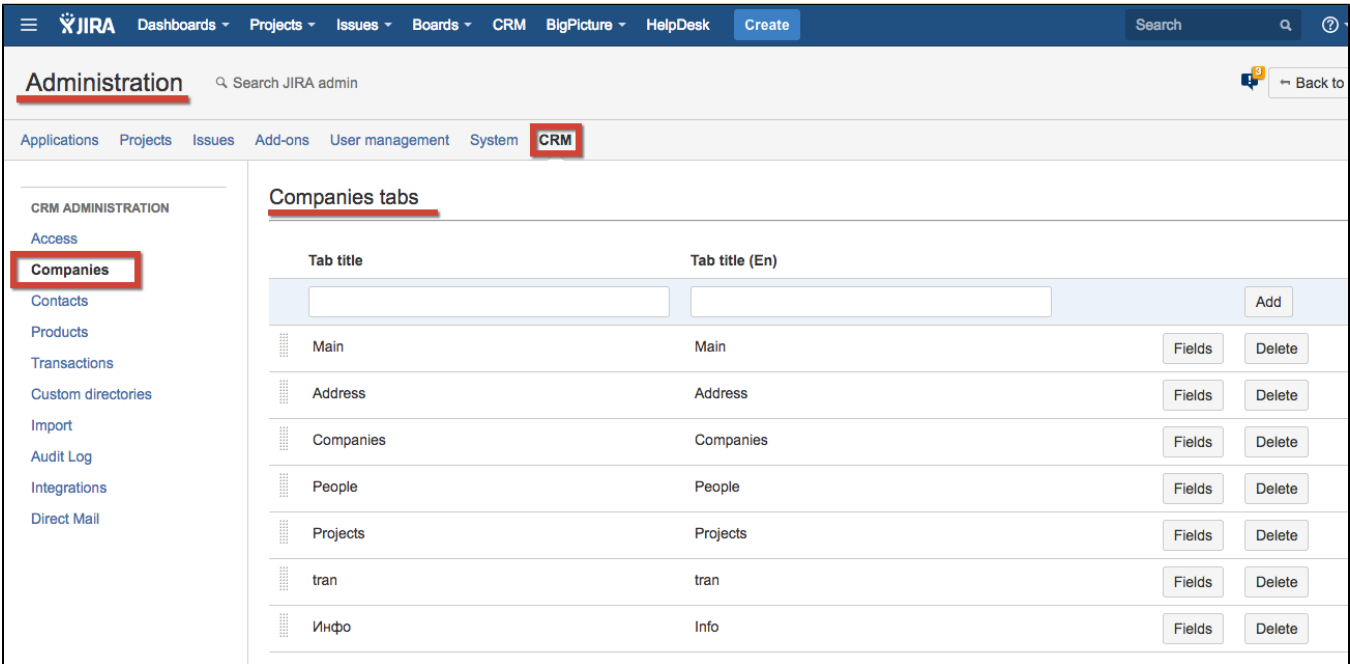
Set up Companies Directory

Companies in CRM have a set of attributes of different types. Use the following information to set up your Companies attributes, attributes' properties and to place attributes to different tabs of Company card. These settings can only be modified by JIRA administrators.

- [Set up Company Card Tabs](#)
- [Set up Company Attributes](#)
- [Set up Company Card Size](#)
- [Security Level](#)
- [Show only companies](#)

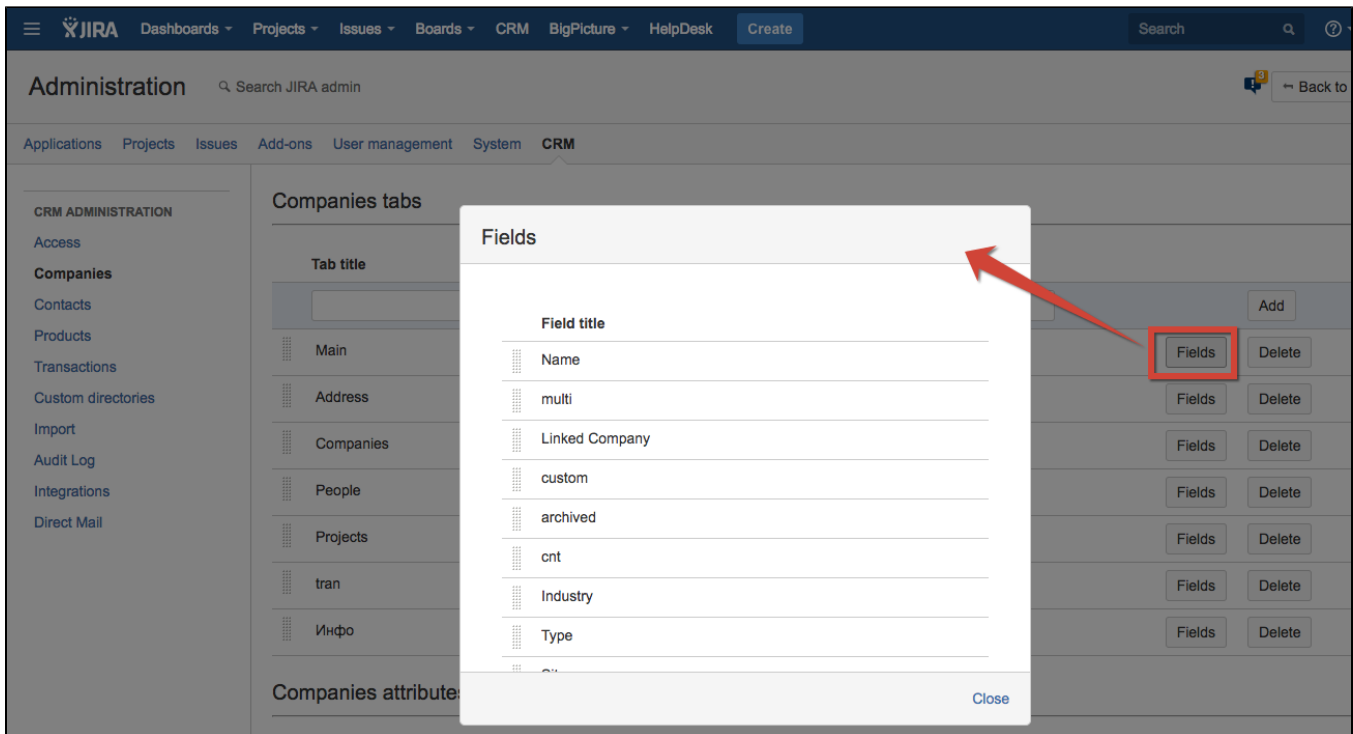
Set up Company Card Tabs

If you have many company attributes, it is a good idea to put them to different tabs. To organize company card tabs go to **"Administration\Add-ons\CRM\Companies"** menu, see below.



Tabs can be reordered by drag and drop.

Press "Fields" button to reorder fields from Company's attributes list (see below) in the Company card:



Set up Company Attributes

To set companies attributes go to **"Administration\Add-ons\CRM\Companies"** menu and scroll down to "Companies attributes" section.

The screenshot shows the 'Companies attributes' section. A table lists various attributes. Red annotations highlight specific actions: 'Add a new attribute' (pointing to the 'Add' button), 'Open attribute properties' (pointing to the 'Properties' button), 'Delete an attribute' (pointing to the 'Delete' button), 'Title attribute is highlighted' (pointing to the 'Company Name' row), and 'Reorder attributes by drag&drop' (pointing to the 'Type' row).

Field title	Field type	Tab	Is required	Show in grid		
	string (255 symbols)		<input type="checkbox"/>	<input type="checkbox"/>		Add
Web-site	string (255 symbols)	5	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
project	Related projects	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
SLA	Dictionary	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Company Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Industry	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Type	list (format)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Site	Website	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Office Address	string (255 symbols)	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Phone	string (255 symbols)	Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Contact	Main contact	People	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete

Attributes order in the list defines order of columns in CRM Companies Directory.

When you create a new attribute you should define its properties. The list of attributes properties depends on the attribute type.

Full description of attributes types and properties you can find there: [Dictionary Attribute Types and Properties](#)

Set up Company Card Size

As it is impossible to forecast the number of tabs and attributes of the card you can set the size of the company card in **"Administration\Add-ons\CRM\Companies"** menu. Scroll down to **Card Size**:

Card Size

Width :

Height:

Security Level

CRM can automatically fill a multiuser-picker customfield based on a Company Customfield in the issue. You can choose customfield for company people here:

Security level

Companies Users Field Type :

Show only companies

It is possible to show not all companies in CRM Companies Directory. For example you don't need to be shown archived companies. Type your request in:

Show only companies where:

Show only companies where: :

Use '=' or '!=' operators and only 'AND' operator if you need several conditions.

For example:

archived != true (It is more recommended to use 'true')

archived = true AND Type != Lead