

Search

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Quick Search CRM Records

To find some records in dictionary you should start typing desired contact or company name in the search field. You can search by multiple attributes simultaneously.

For some fields it's possible to choose AND or OR logic for search. Click the field, check options and choose logic.

Quick search

Quick search

Company Name

Industry : All

Type : All

Site

Phone

Contact

Type

Lead

Client

Concurrent

Partner

Empty

☐	Company Name	Industry	Type	Site	Phone	Contact	
☐	BTS	Finance			+6 785 44320998	Enni Aalto	
☐	BrokerService	Finance			+2 305 86 356435	Mark Clatch	
☐	CasinoLite	Gaming			+1 345 46459839	Angela Likovich	
☐	ComplexIT	Software Development			+7(495)5468034	Andrey Alekseev	
☐	Developlead	Software Development			+7 812 4346 56567	Timofey Avdeev	
☐	Dixon	Retail			+7 342 5678 9944	Elisaveta Nicolaeva	
☐	MedPatent Insurance	Health	Client	www.medpatins.ru	+7 499 7896 5433	Alexey Danilov	
☐	Meridian LLC	Entertainment	Client	www.meridianent.org	+5 087 7635837	Abdulali	
☐	My Region LLC	Media	Lead	www.myregion.ee	+5 98 77435	Ande Sarnet	
☐	NSBank	Finance	Lead	www.ncbank.com	+4 675 879009	Robert Kenth	
☐	Netdesk LLC	Software Development	Lead	www.netdesk.ru	+7 921 7685438	John Werck	
☐	NorthWestNetwork LTd	Software Development	Client	www.nwnetwork.com	+3(435)22000254	Kit Nilson	
☐	Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	
☐	OptTorg	Retail	Client	www.opttorg.ru	+7 812 756 3435	Inna Shlikova	
☐	Oraclenz	Retail	Client	www.oraclenz.com	+1-45-777623443	Kat Clow	
☐	ProjectLab	Engineering	Lead	www.prolab.com	+5 986 3435 657	Michael Leitch	
☐	RosSanzdrav	Government	Lead	www.rs.ru	+ 7 499 678 944 55	Nina Kotina	
☐	SoftPix Development	Software Development	Partner	www.softpix.com	+6 8345 4539985	Yan Posheit	

Save Filter in Companies Directory

You can save frequently used filters in CRM Companies Directory.

For example you've filtered records in the grid by one or more field:

Search criteria: **op** (highlighted), Industry: All, **Lead, Client...** (highlighted), Site, Phone, Contact.

	Company Name	Industry	Type	Site	Phone	Contact	
☐	Developlead	Software Development	Client	www.devlead.ru	+7 812 4346 56567		
☐	Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	
☐	OptTorg	Retail	Client	www.opttorg.ru	+7 812 756 3435	Inna Shlikova	

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To save this search click on 'Add Filter' (star) in the sidebar menu:

Filter dialog box:

Filter name: **Client 'op'**

Buttons: Save, Close

Saved filter will appear in the grid's upper part:

Filter: **Client 'op' x** (highlighted with red arrow)

	Company Name	Industry	Type	Site	Phone	Contact	
☐	BTS	Finance	Lead	www.bts.fi	+6 785 44320998	Enni Aalto	
☐	BrokerService	Finance	Client	www.bsfinance.com	+2 305 86 356435	Mark Clatch	
☐	CasinoLite	Gaming	Client	www.casinolite.net	+1 345 46459839		
☐	ComplexIT	Software Development	Client	www.complexit.ru	+7(495)5468034	Andrey Alekseev	
☐	Developlead	Software Development	Client	www.devlead.ru	+7 812 4346 56567		

The screenshot above shows you the filter disabled when all Companies are displayed. To see the search results enable the saved filter by clicking on it:

Client 'op' x						
☐ op	Industry : All	Lead, Client	Site	Phone	Contact	
☐ Developlead	Software Development	Client	www.devlead.ru	+7 812 4346 56567		⚙
☐ Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	⚙
☐ OptTorg	Retail	Client	www.opttorg.ru	+7 812 756 3435	Inna Shlikova	⚙
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The saved filter is available to it's creator only.

You can delete your filter by clicking on 'x'.

Search Issues by CRM Fields

To find issues with certain Company/Contact fields values go to JIRA issue search (Issues->Search for issues)

You need to add Company/Contact fields to your search criteria and select desired value by typing its name.

JIRA
Dashboards
Projects
Issues
CRM
Create Issue
Quick Search

Search
Save as
Share
Export
Tools

SALE
Sale
Status: All
Assignee: All
Contains text
More
Advanced

Company: All

micro
Microsoft
Update
Close

				Status	Due
SALE-12	Microsoft	Stash 500 Enterprise		Potential	
SALE-11	Microsoft	Stash 100 Users		In Progress	
SALE-10	Microsoft	Testing Evironment		Potential	
SALE-9	Microsoft	Maintenance Consulting (Atlassian JIRA)		In Progress	
SALE-8	Facebook	Development Plugin for JIRA (Timesheet Report)		In Progress	
SALE-7	Oracle	Trainings - JIRA, Agile, Confluence		In Progress	
SALE-6	Microsoft	Development web-service for Apache		In Progress	
SALE-5	Oracle	Supporting Atlassian JIRA (2 years)		Potential	
SALE-4	IBM	Infrastructure Consulting (Virtual Servers)		Potential	

💡 To find issues with empty company you need to use JQL-filter: (Company = "Not Defined")

The screenshot shows the JIRA CRM interface. At the top, there's a navigation bar with 'JIRA', 'Dashboards', 'Projects', 'Issues', 'CRM', and a 'Create' button. Below this is a search bar with 'Search' and 'Save as' buttons. On the left, there's a 'FILTERS' sidebar with options like 'New filter', 'Find filters', 'My Open Issues', 'Reported by Me', 'Recently Viewed', 'All Issues', and 'FAVORITE FILTERS'. The main area shows a search result for 'Company ~ "Not Defined"'. A table of issues is displayed with columns: Reaction Time, T, Key, Summary, Status, Company, and Assignee. The 'Company' column is highlighted with a red box, and a red arrow points from the filter 'Company ~ "Not Defined"' to this column. The table contains three rows of issues, all with 'Not defined' in the Company column and 'Ben Storm' as the Assignee.

Reaction Time	T	Key	Summary	Status	Company	Assignee
30/09/2014 00:09 2h / Overdue	🔴	SUP-66	I have an idea for HelpDesk plugin	IN PROGRESS	Not defined	Ben Storm
30/09/2014 23:46 2h / Overdue	🔵	SUP-50	We need a search issues in HelpDesk	RESOLVED	Not defined	Ben Storm
30/09/2014 12:00 2h / Overdue	🟢	SALE-7	Trainings - JIRA, Agile, Confluence	IN PROGRESS	Not defined	Ben Storm

CRM JQL Operators for Advanced Search

The following operators can be used in Advanced Search of issues.

JQL Operator	Description
Reporter in CurrentUserCompany()	To find all issues reported by colleagues of current user (a user who is performing JQL search). The search is made by the Reporter field.
id in CurrentUserCompanyField("Company") where "Company" is the name of custom field CRM Company type	Returns a list of issues, where Company in field "Company" is the same as CurrentUser Company
id in MentionedIn("Deals", "project = CRM")	To find the issues that are selected in a field "Deals" (IssuePicker field) of issues of project "CRM"
id in issueHasProduct("Confluence")	To find issues where product "Confluence" is selected at CRM Products&Services field
id in issuesByField(Company field, "JQL") example: Project - Support AND id in issuesByField (Company, "Project=Sale")	To find those issues at Support Project, where Company has other issues at Sale Project
Reporter in CurrentUserHolding ()	To find all issues reported by Holding employees where current user (a user who is performing JQL search) is working
id in CurrentUserHoldingIssues("Company") where "Company" is the name of custom field CRM Company type	To find all issues where "Company" field is part of a Holding where current user (a user who is performing JQL search) is working
id in ReporterFrom("Company") where "Company" is the name of custom field CRM Company type	To find all issues where reporter's company is the same as the company mentioned in field "Company"