Using CRM's Fields within Issues

- Manual Input of Company
- Auto-determining Company by Issue Reporter
- Editing Company Details within Issue

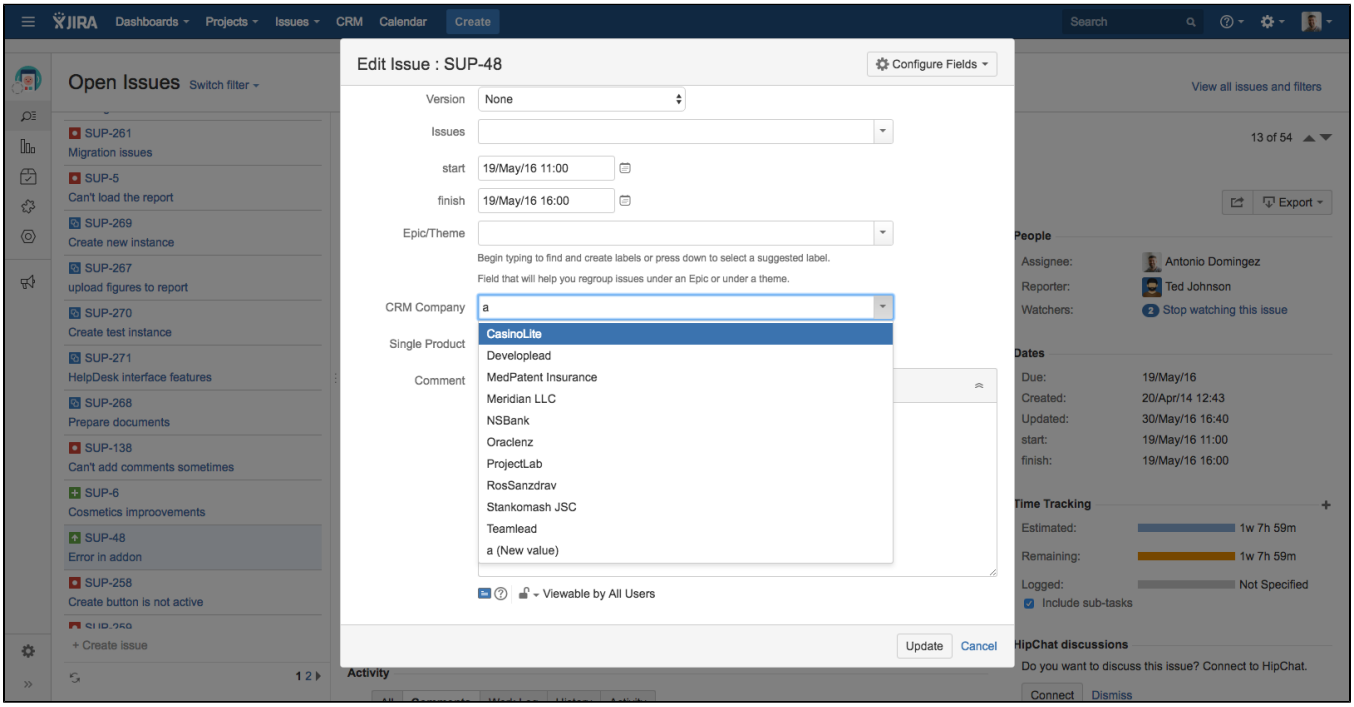
There are two ways of working with Company field in JIRA issues:

- Manual input of company by user;
- Auto determinig of company by issue reporter.

Manual Input of Company

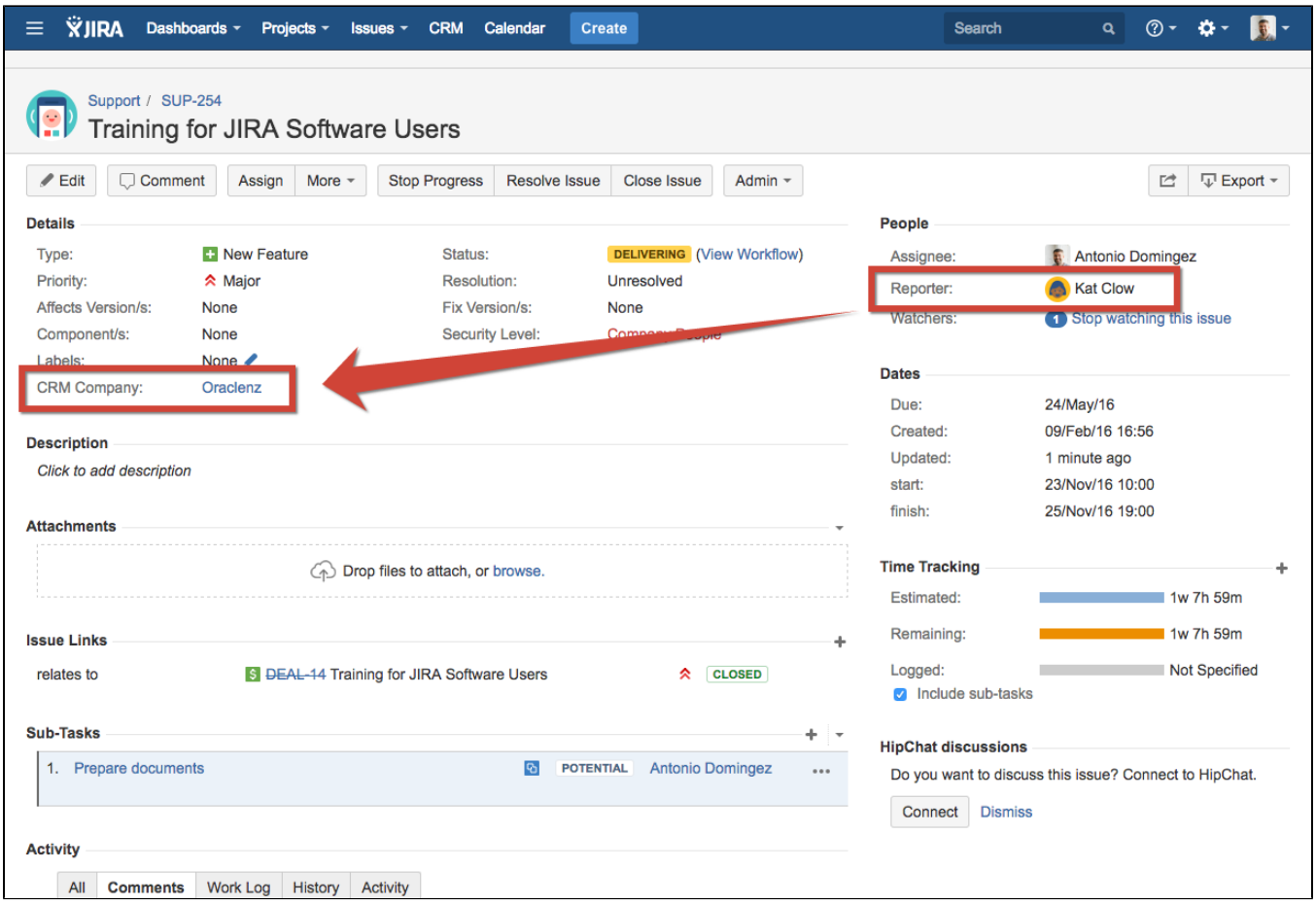
While creating new Company or editing existing one a user can fill in **Company type** field with **Company Dictionary** value. To do this he must start typing company name from any part of its name. The system will offer matching results that a user can specify.

If system do not offer any matching results a user can create new company with entered name. To do this he must click button on the right from Company field.



Auto-determining Company by Issue Reporter

To turn on auto determining of company by issue reporter you need to enable this feature at **"CRM\Company"** menu for desired project. See Autocomplete setting in Custom field - CRM Company

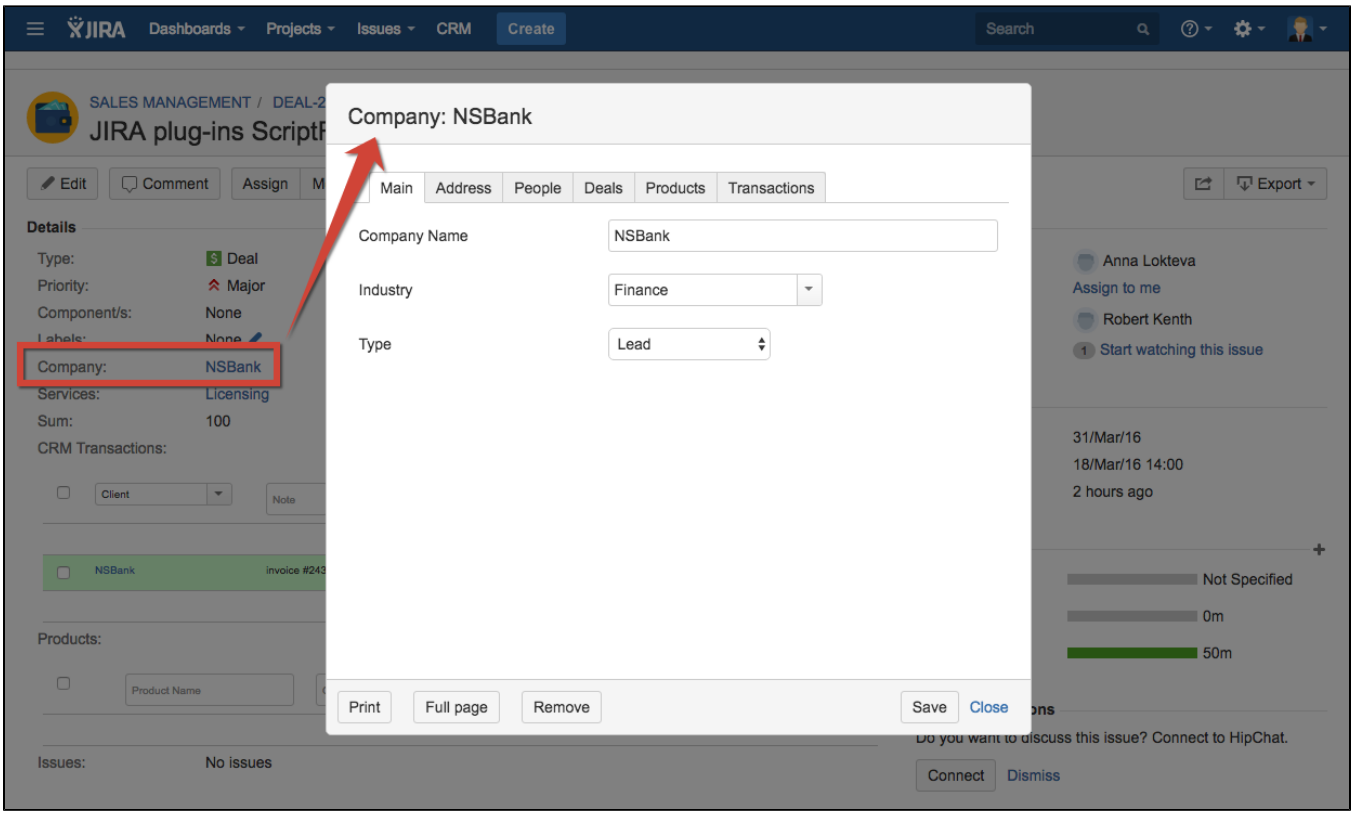


If issue reporter is changed - then the company will be automatically changed too.

If issue reporter is not associated with any company - system will prompt to create new company or to select an existing.

Editing Company Details within Issue

On the view issue screen a user can click on the company name to edit its attributes. To open **Company Card** a user must have appropriate access that is set in **"CRM\Access"** menu.


JIRA
Dashboards
Projects
Issues
CRM
Create
Search
SALES MANAGEMENT / DEAL-2
JIRA plug-ins Script
Edit
Comment
Assign
Export
Details
Type:
Deal
Priority:
Major
Component/s:
None
Company:
NSBank
Services:
Licensing
Sum:
100
CRM Transactions:
Client
Note
NSBank
Products:
Product Name
Issues:
No issues
Anna Lokteva
Assign to me
Robert Kenth
Start watching this issue
31/Mar/16
18/Mar/16 14:00
2 hours ago
Not Specified
0m
50m
Do you want to discuss this issue? Connect to HipChat.
Connect
Dismiss
Company: NSBank
Main
Address
People
Deals
Products
Transactions
Company Name
NSBank
Industry
Finance
Type
Lead
Print
Full page
Remove
Save
Close