

Custom field - CRM Transactions

You can output transactions on issue screen by using CRM Transactions Custom field:

JIRA

Dashboards

Projects

Issues

CRM

Create

Search

SALES MANAGEMENT / DEAL-188

Purchase of 2000 licenses Jira Software + Jira HelpDesk

Edit

Comment

Assign

More

Delivering

Archived

Close Issue

Admin

Export

Export

Details

Type: Deal

Priority: Major

Component/s: None

Labels: None

Company: OptTorg

Services: Licensing

Status: POTENTIAL

Resolution: Unresolved

People

Assignee: Anna Lokteva

Reporter: Inna Shlikova

Watchers: Stop watching this issue

Dates

Created: 12/Feb/16 14:30

Updated: 02/May/16 00:20

Time Tracking

Estimated: Not Specified

Remaining: 0m

Logged: 4h

HipChat discussions

Do you want to discuss this issue? Connect to HipChat.

Connect

Dismiss

CRM Transactions:

Client

Note

All

All

All

Date

Amount

All

All

Add

Total: 25,600.00

OptTorg

Invoice #244, 245

Client

Licensing

Income

29.03.16

24,000.00

VTB 24

PLAN

OptTorg

Invoice #244, 245

Client

Licensing

Income

23.03.16

1,600.00

VTB 24

PLAN

Total: 25,600.00

Description

Hi,

We need a contract and an invoice for the purchase of these products (+ your charter documents).

Attachments

Drop files to attach, or browse.

Activity

All

Comments

Watchers

History

Activity

To set this field go to Administration menu/ Issues/ Custom fields click "Add Custom Field" and select "CRM Transactions" field type:

Administration

ApplicationsProjectsIssuesAdd-onsUser managementSystem

ISSUE TYPES

Issue types

Issue type schemes

Sub-tasks

WORKFLOWS

Workflows

Workflow schemes

SCREENS

Screens

Screen schemes

Issue type screen schemes

FIELDS

Custom fields

Field configurations

Field configuration schemes

ISSUE FEATURES

Time tracking

Issue linking

ISSUE ATTRIBUTES

Statuses

Resolutions

Custom fields

+ Add Custom Field

Find More Custom Fields

Name	Type	Available Context(s)	Screens
Application	CRM Custom directory	Issue type(s): Global (all issues)	
Budget	Number Field	Issue type(s): Global (all issues)	Support Create Bug Support View Bug
Business Value Measurement of business value of a requirement.	Number Field	Issue type(s): 	Support Create Bug Support View Bug
CRM Company	CRM Property	Not configured for any context	Default Screen Sale (Workflow) Workflow Screen
CRM Parent Company	CRM Property	Issue type(s): Global (all issues)	Default Screen Workflow Screen
CRM Transactions	CRM Transactions	Issue type(s): Global (all issues)	Default Screen Sale (Main)
Checkboxes	Checkboxes	Issue type(s): Global (all issues)	JIRA Service Desk Screen for Project DESK Reopen Resolve Issue Screen Resolve Issue Screen - 2 To Customer Workflow Screen Создание запроса
Companies	CRM Companies select field	Issue type(s): Global (all issues)	Support Create Bug Support View Bug