

# Setting Up Custom Company Directories

Custom company directories settings allow administrators create separate companies directories with their own permissions.

Go to CRM administrator menu / Custom company directories and create new directories:

Administration

Search JIRA admin

Back to previous page

ApplicationsProjectsIssuesAdd-onsUser managementLatest upgrade reportSystemCRMHelpDesk

CRM ADMINISTRATION

Access

Companies

Contacts

Products

Transactions

Custom directories

Audit Log

Integrations

Direct Mail

Table lists

Budget

Custom fields links

Contact Synchronization

Custom company directories

Custom company directories

Directory name (System locale)Directory name (EN)

Add

Clients

Clients

Fields

Permissions

Delete

Competitors

Competitors

Fields

Permissions

Delete

To add new fields to directories click on "Fields" button:

Fields

Tab title

Tab title (En)

Add

Основное

Main

Fields

Delete

Field title

Field title (En)

Field type

Tab

Is required

Show in grid

string (255 sy

☐

☐

Add

Competitors

Competitors

string (255 symbols)

Main

☒

☒

Properties

Delete

Phone

Phone

number

Main

☐

☒

Properties

Delete

Address

Address

string (255 symbols)

Main

☐

☒

Properties

Delete

Website

Website

Website

Main

☐

☒

Properties

Delete

Close

The process is the same as for creation of new [Custom Directories](#). First create Tabs in the table above then create new fields of needed types. Don't forget to add the fields to the tabs. To set the order of the fields in the tabs in the table above select the tab and click on "Fields" button and drag'n'drop the fields in the order you want.

When new fields and tabs are created you can set the permissions to the custom company directory. To do that click on "Permissions" button:

| Permissions      |                                                                                                                                                                                                       |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Permission       | Groups                                                                                                                                                                                                |
| Remove           |  jira-administrators                                                                                                 |
| View             |  jira-administrators<br> jira-users |
| Edit             |  jira-administrators                                                                                                 |
| Add record       |  jira-administrators<br> jira-users |
| <div>Close</div> |                                                                                                                                                                                                       |

Add Jira-groups for the permissions:

| Permission | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Remove     | Permission to remove records from directory                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| View       | Permission to view the directory page. <div>  Notice that if the user is not the member of any of listed groups, this user will see standard Company directory (if has access to that). If the user has permission to view at least one Custom company directory then the standard Company directory will be hidden and the user will see only Custom company directory that he/sha has access to.         </div> |
| Edit       | Permission to edit records in the directory                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Add record | Permission to add new records                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

To use these directories inside Jira issue you have to [create custom field](#).