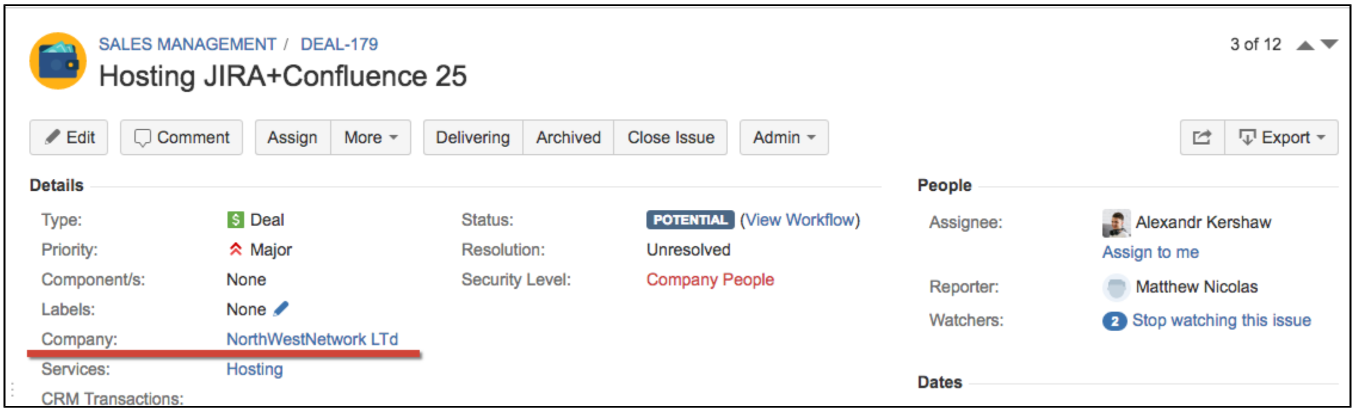
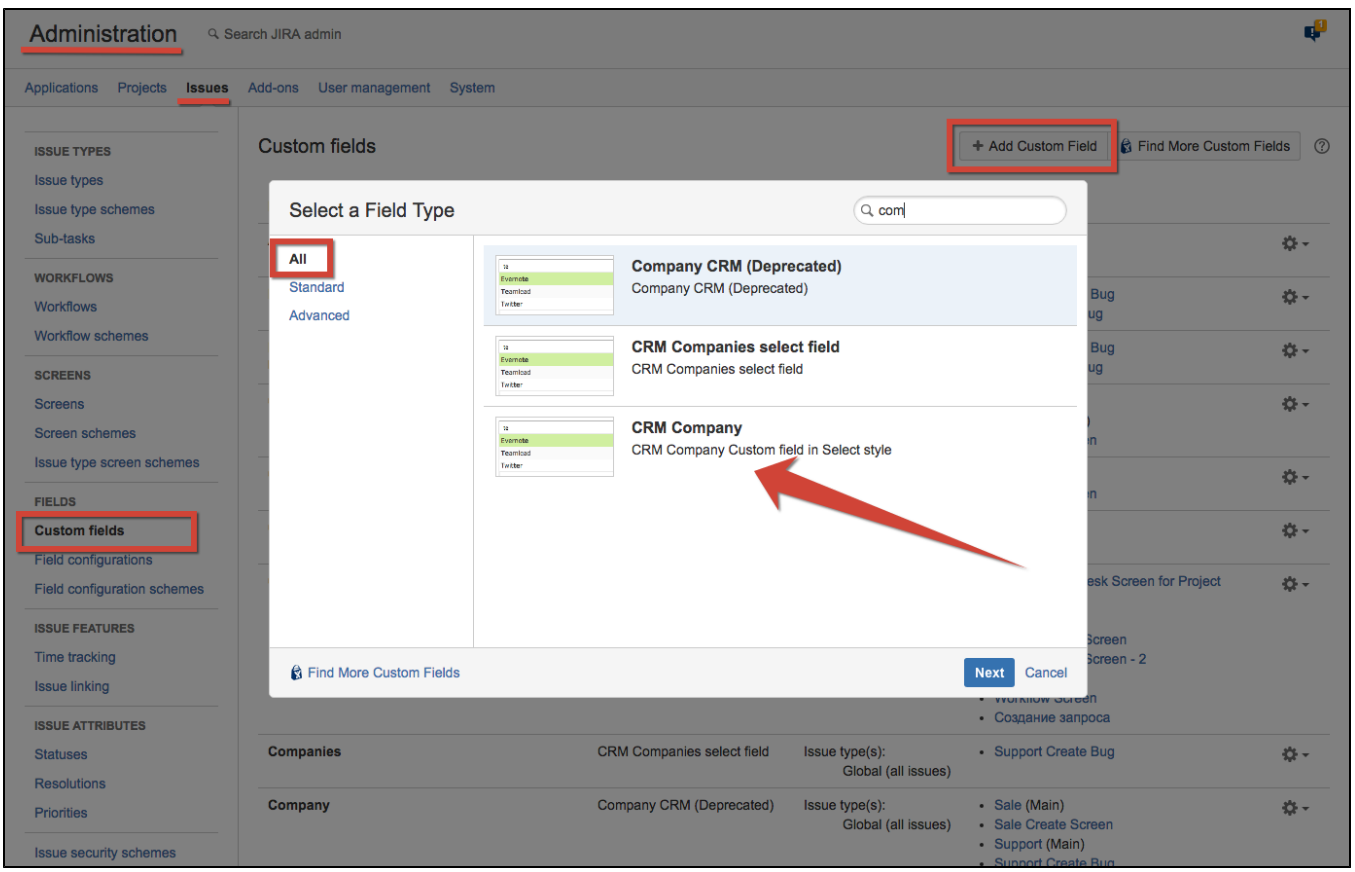
Custom field - CRM Company

- Create CRM Company field
- CRM Company (Deprecated)
- Copy Company Name to Text Field
- Hide field if it has no value
- Autocomplete of Company Custom Field

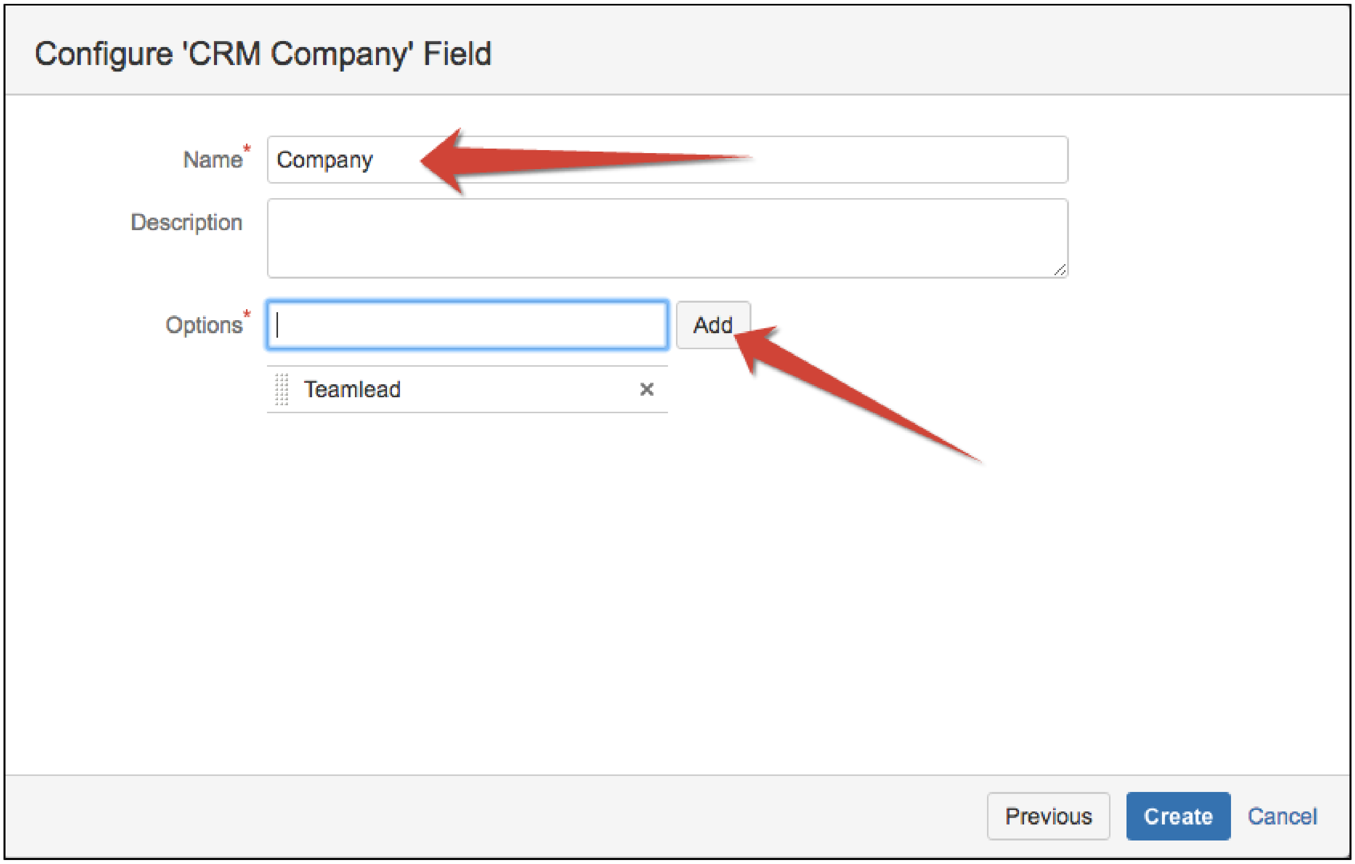


Create CRM Company field

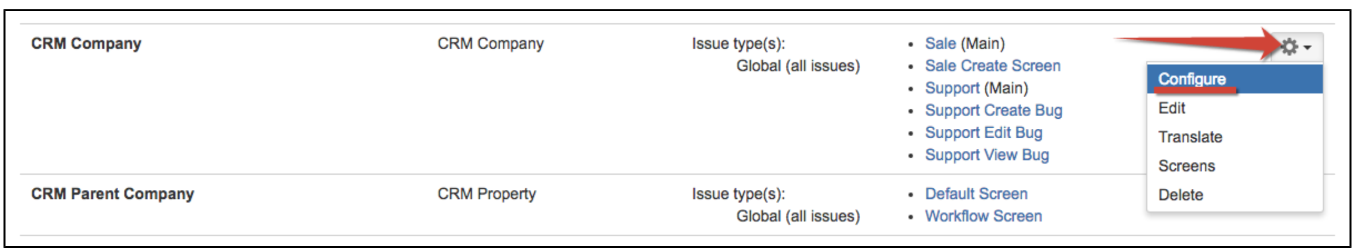
You can display CRM Company selected from dropdown list in the issue in the custom field type "CRM Company" field.



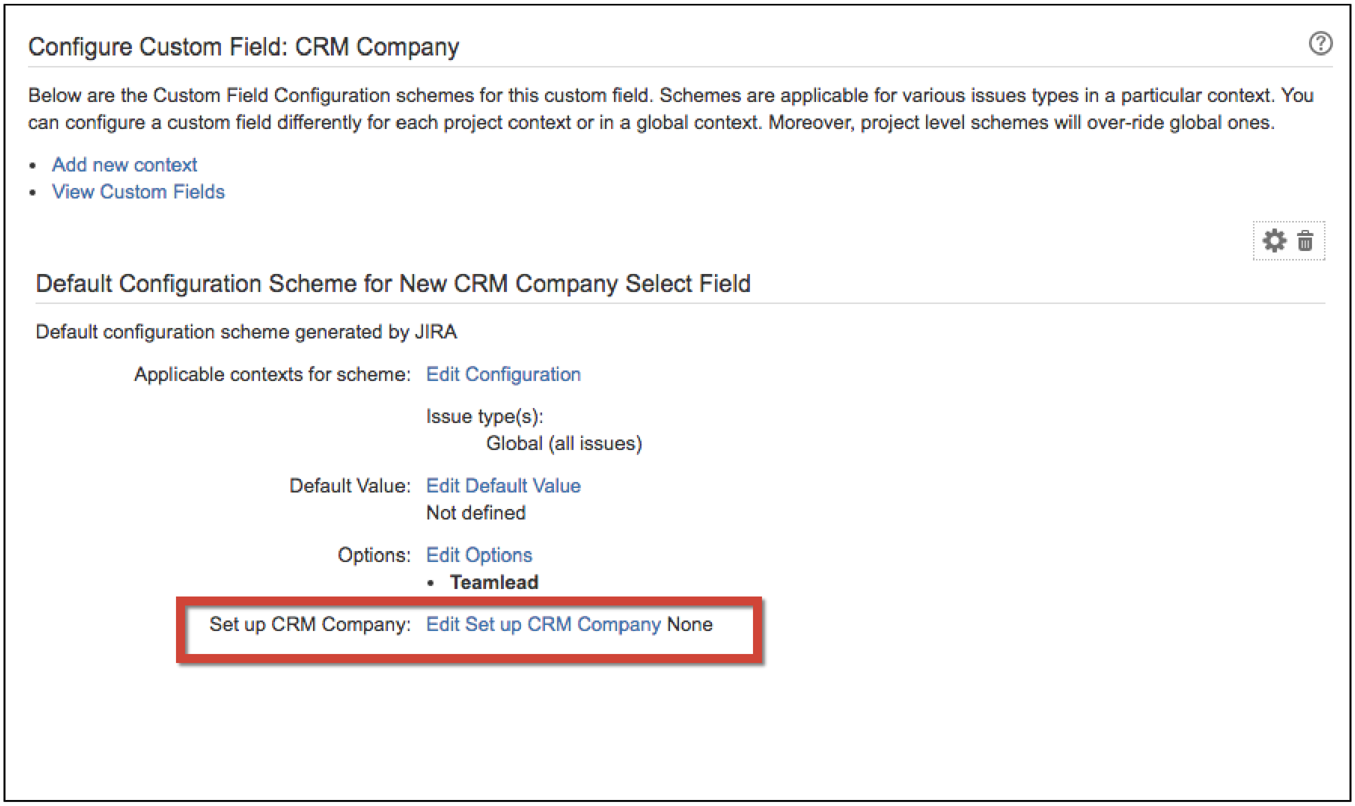
Enter name of field and add at least 1 company name in Options if this field is present and is required:

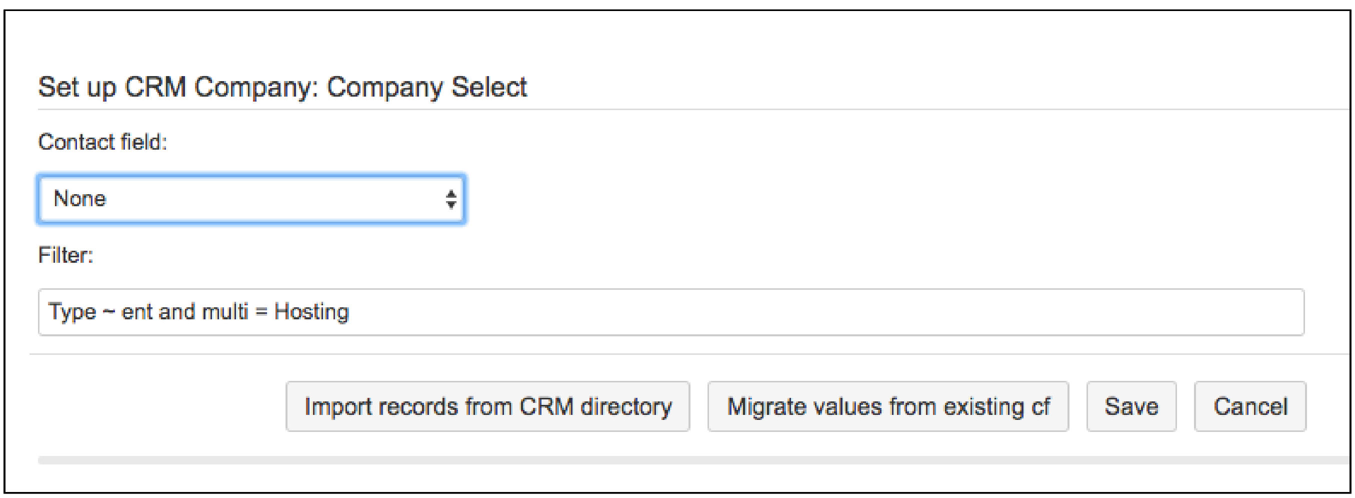


Select the screens you need the field to be displayed then press Configure:



And click on Edit Set up CRM company select field and press on Import records from CRM directory:





On this stage you can adjust filter for companies search in custom field. For example on screenshot 'Type ~ ent and multi = Hosting' means that users can select only companies that include 'ent' in type attribute (client, concurent) and multi attribute (it is name of attribute of Multiple Directories type) equals Hosting.

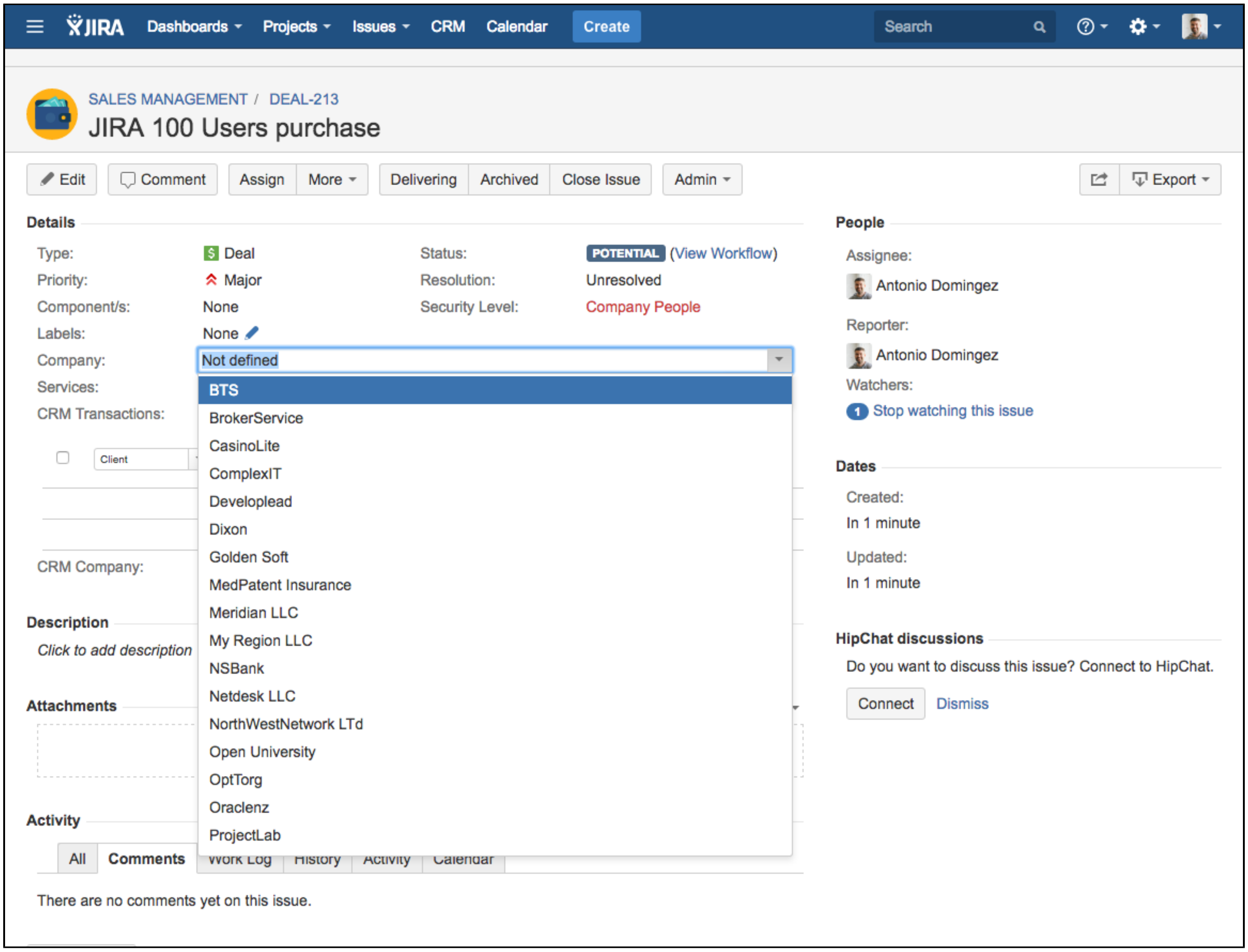
For this filter you can use operators:

(=) - equals
(~) - includes

Attribute Types:

- string
- list of value
- directory
- e-mail
- website

Now you can choose a company from dropdown list in Company field:



CRM Company (Deprecated)

In earlier versions of CRM for Jira you use field type **CRM Company (Deprecated)** to place company to your issue. This field type has several significant limitations.

- This field type can't be used for JIRA gadgets and reports for grouping;
- This field type can't be shown on JIRA Service Desk customer portal;
- While exporting issues to XML or some external add-ons reports you got companies numbers instead of names, like (23) for example;
- There wasn't autosubstitution for fields of this type in advanced issue search.

That's why we developed a new custom field type **CRM Company**. This type was released in CRM 1.3.4.2.

Now you can use field **Company** in reports and gadgets, with XML and SD portal.

We recommend always use the new field type - CRM Company. Nevertheless you may continue to use old field type CRM Company (Deprecated) if listed above limitations are not important for you.

What if you already use CRM Company (Deprecated) and want to shift to CRM Company?

We tried to make switching to CRM Company fields as easy as possible for users and admins of CRM.

Below are the steps to switch to the new field type.

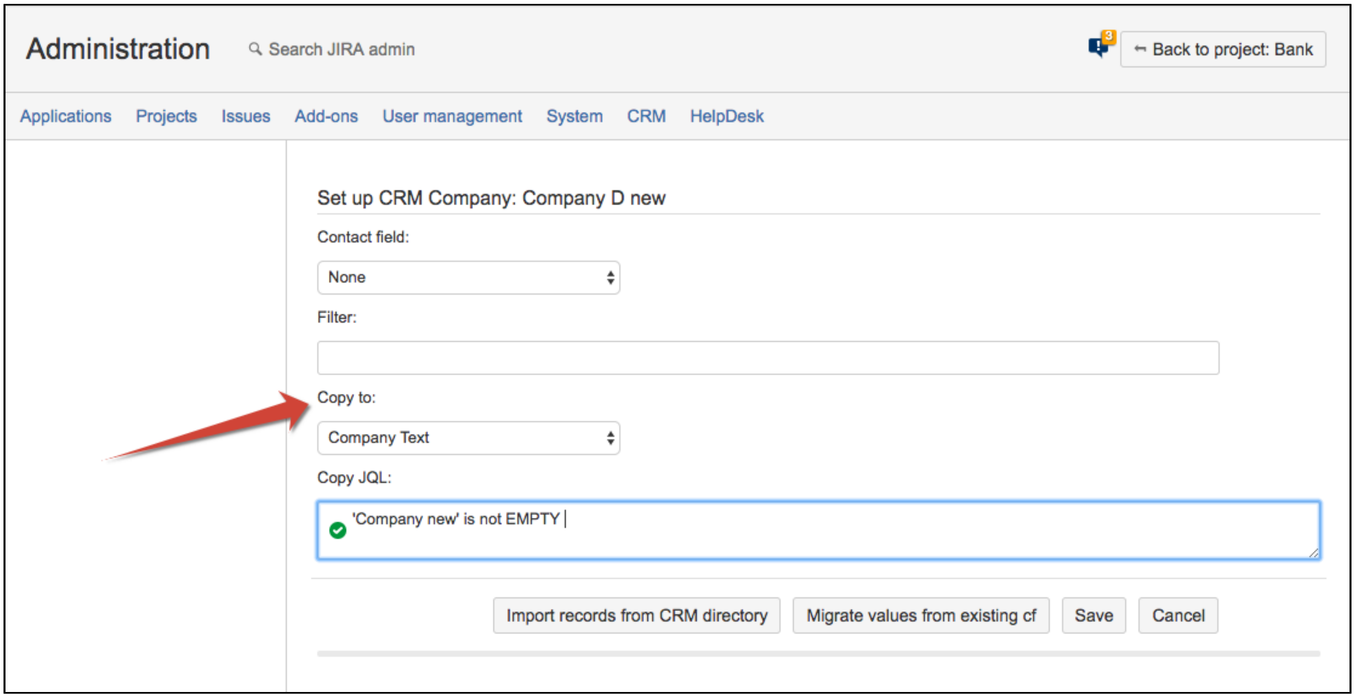
1. Create a new custom field Company new with **CRM Company** type
2. Please add this new field to all screens where there is the old Company field.
3. Go to the new field Settings
4. Press «Import records from CRM directory»
5. Then press «Migrate values from existing cf»
6. Choose old field of CRM Company (Deprecated) to import from
7. Check one-two issues that the new Company field value is the same as the old Company field value
8. In case you have autocomplete set for field Company, set it also for the new field
9. Rename the old field to **Company (Old)**
10. Rename the **new field** to the name that previously had the old field
11. Now you may delete the old field from screens. We recommend to not delete it from custom fields or from field configuration to prevent possible errors.
12. As the new field has the old name it’s not necessary to change any saved filters, but still you may need to reset some gadgets and reports and agile boards.

All of the above is also all applicable for such field types as CRM Contact, CRM Custom Directory value.

Copy Company Name to Text Field

Some add-ons don't work with CRM Company type field. You can copy Company's name from CRM Company field to some text field or CRM Company (Deprecated) field.

Create a text field to store company's name, go to CRM Company field configuration and select recently created text field in "Copy to" field. You can filter records to be copied by using "Copy JQL".



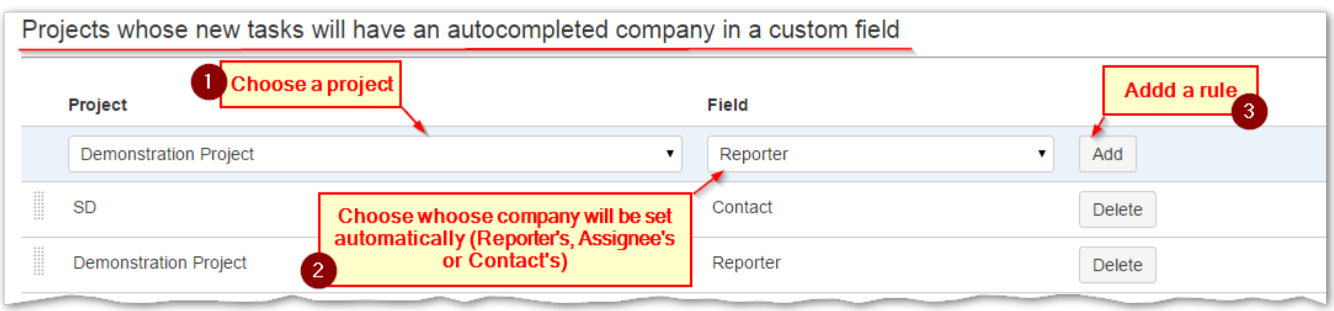
Hide field if it has no value

You can select if you want to show empty Company field or not with the setting **Hide field if it has no value.**

Autocomplete of Company Custom Field

With CRM plugin it's possible to complete Company field automatically depending on issue Reporter or Assignee or Contact (CRM custom field)

To set autocomplete go to **"Administration\Add-ons\CRM\Companies"** menu and scrool down to "Projects whoose new tasks will have an autocompleted company in a custom field"



The field can be filled manually and if it is empty , the system puts 'Not defined' in it so standard JIRA validator of required fields don't return error when no company is written in the required CRM Company field.

CRM Company autocomplete setting requires synchronization of CRM Contacts with Jira Users.