

Set up Companies Directory

Companies in CRM have a set of attributes of different types. Use the following information to set up your Companies attributes, attributes' properties and to place attributes to different tabs of Company card. These settings can only be modified by JIRA administrators.

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Set up Company Card Tabs

If you have many company attributes, it is a good idea to put them to different tabs. To organize company card tabs go to **"Administration\Add-ons\CRM\Companies"** menu, see below.

JIRA

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Administration

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CRM ADMINISTRATION

Access

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Integrations

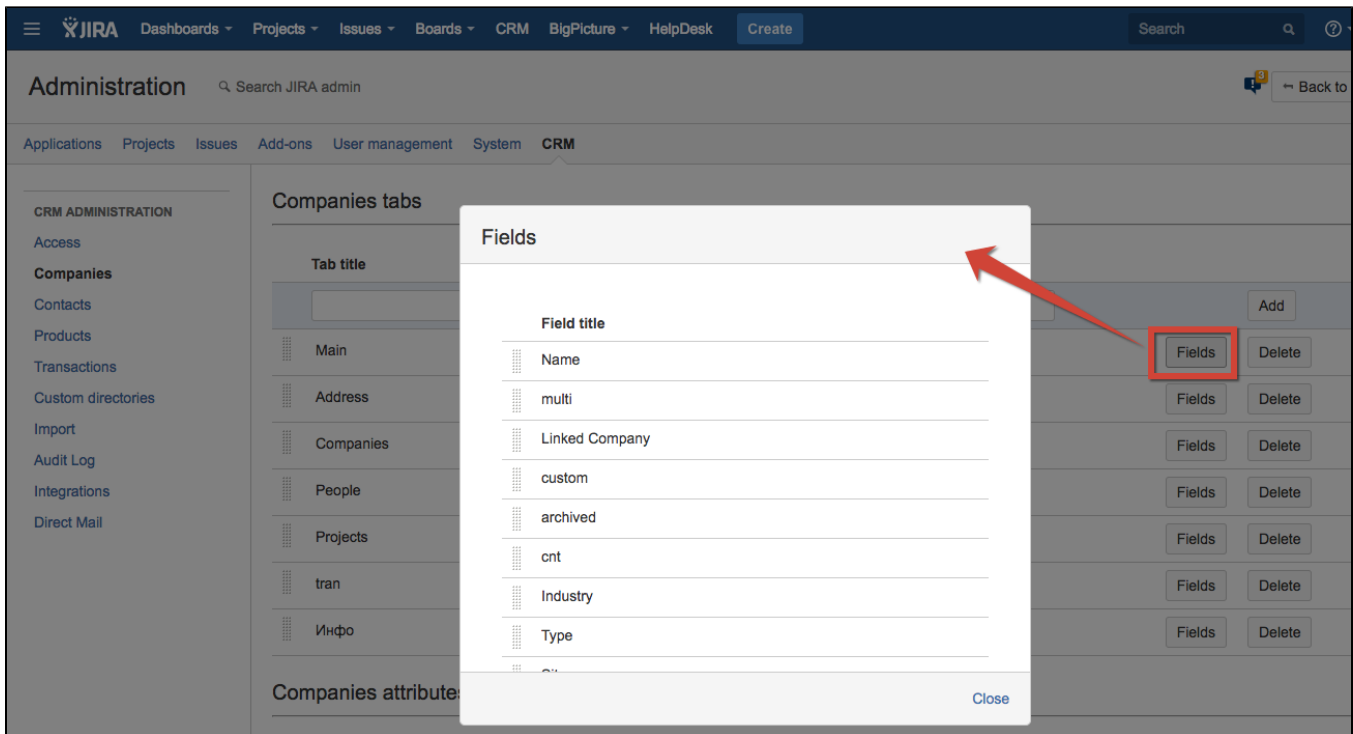
Direct Mail

Companies tabs

Tab title	Tab title (En)		
			Add
Main	Main	Fields	Delete
Address	Address	Fields	Delete
Companies	Companies	Fields	Delete
People	People	Fields	Delete
Projects	Projects	Fields	Delete
tran	tran	Fields	Delete
Инфо	Info	Fields	Delete

Tabs can be reordered by drag and drop.

Press "Fields" button to reorder fields from Company's attributes list (see below) in the Company card:



Set up Company Attributes

To set companies attributes go to **"Administration\Add-ons\CRM\Companies"** menu and scroll down to "Companies attributes" section.

The screenshot shows the 'Companies attributes' section in the JIRA Administration interface. A table lists various attributes with their field titles, types, tabs, and whether they are required or shown in the grid. Annotations highlight specific actions: 'Add a new attribute' points to the 'Add' button; 'Open attribute properties' points to the 'Properties' button; 'Delete an attribute' points to the 'Delete' button; 'Title attribute is highlighted' points to the 'Company Name' row; and 'Reorder attributes by drag&drop' points to the drag handle icon.

Field title	Field type	Tab	Is required	Show in grid		
	string (255 symbols)		<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Web-site	string (255 symbols)	5	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
project	Related projects	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
SLA	Dictionary	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Company Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Industry	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Type	list (format	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Site	Website	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Office Address	string (255 symbols)	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Phone	string (255 symbols)	Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Contact	Main contact	People	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete

Attributes order in the list defines order of columns in CRM Companies Directory.

When you create a new attribute you should define its properties. The list of attributes properties depends on the attribute type.

Full description of attributes types and properties you can find there: [Directory Attribute Types and Properties](#)

Set up Company Card Size

As it is impossible to forecast the number of tabs and attributes of the card you can set the size of the company card in **"Administration\Add-ons\CRM\Companies"** menu. Scroll down to **Card Size**:

Card Size

Width :

Height:

Save

Security Level

CRM can automatically fill a multiuser-picker customfield based on a Company Customfield in the issue. You can choose customfield for company people here:

Security level

Companies Users Field Type :

Save

Show only companies

It is possible to show not all companies in CRM Companies Directory. For example you don't need to be shown archived companies. Type your request in:

Show only companies where:

Show only companies where: :

Save

Use '=' or '!=' operators and only 'AND' operator if you need several conditions.

For example:

archived != true (It is more recommended to use 'true')

archived = true AND Type != Lead

Synchronization from the Service Desk to CRM

To synchronize SD companies you need to create JIRA Service with class

```
ru.teamlead.jira.plugins.listener.crm.CRMSDIntegration
```

Go to **"Administration\System\Services"** and click **Add service** menu, see below.

Administration

Search JIRA admin

Back to project: Pilot

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General configuration
Find more admin tools

SYSTEM SUPPORT
System info
Instrumentation
JMX Monitoring
Database monitoring
Integrity checker
Logging and profiling
Scheduler details
Troubleshooting and support tools
Audit Log

SECURITY
Project roles
Global permissions
Password Policy
User sessions
Remember my login
Whitelist

Issue collectors

AUTOMATION FOR JIRA
Automation rules

USER INTERFACE
Default user preferences

Services

Name / Class	Properties	Schedule	
Mail Queue Service com.atlassian.jira.service.services.mail.MailQueueService		0 **** ?	Edit
Backup Service com.atlassian.jira.service.services.export.ExportService		0 0 3/12 ** ?	Edit Delete
Audit log cleaning service com.atlassian.jira.service.services.auditing.AuditLogCleaningService		Daily at 3:00 am	Edit Delete
Служба Резервного Копирования com.atlassian.jira.service.services.export.ExportService	• USE_DEFAULT_DIRECTORY: true	0 0 3/12 ** ?	Edit Delete

Add Service

Add a new service by entering a name and class below. You can then edit it to set properties. Mail handlers should be added or edited via our new [Incoming Mail](#) section.

NameSynch SD to CRM

Classru.teamlead.jira.plugins.listener.crm.CRMSDIntegration

Built-in Services

Schedule

Daily

Days per Week

Days per Month

Advanced

Interval0 0/5 *** ?

Cron Expression

Add Service

Here is result of creation your Service in picture below.

Administration

Search JIRA admin

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General configuration
Find more admin tools

SYSTEM SUPPORT
System info
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Database monitoring
Integrity checker
Logging and profiling
Scheduler details
Troubleshooting and support tools
Audit Log

SECURITY
Project roles

Services

Name / Class	Properties	Schedule	
Mail Queue Service com.atlassian.jira.service.services.mail.MailQueueService		0 **** ?	Edit
Backup Service com.atlassian.jira.service.services.export.ExportService		0 0 3/12 ** ?	Edit Delete
Audit log cleaning service com.atlassian.jira.service.services.auditing.AuditLogCleaningService		Daily at 3:00 am	Edit Delete
Служба Резервного Копирования com.atlassian.jira.service.services.export.ExportService	• USE_DEFAULT_DIRECTORY: true	0 0 3/12 ** ?	Edit Delete
Synch SD to CRM ru.teamlead.jira.plugins.listener.crm.CRMSDIntegration		0 0/5 *** ?	Edit Delete

Then all your companies from Service Desk Projects...

Queues

Customers

Reports

Raise a request

Knowledge base

Customer channels

Invite team

Welcome guide

PROJECT SHORTCUTS

Add a link to useful information for your whole team to see.

+ Add link

Customers

Add organizations

Add customers

This service desk is open to customers who are added to the project. [Change permissions.](#)

Search customers and organizations

Name	Open requests	Closed requests
Winterfall	0 open	0
Helen Lambert (cindy@teamlead.com)	0 open	0
Mark Berger (mark@facebook.com)	0 open	0
Nicolas Harris (tom@teamlead.com)	0 open	0
Юзер Юзерович (user@teamlead.ru)	0 open	0

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... will synchronize to CRM Company directory.

+ Add record

Export

Import

Clear search criterias

Find Duplicates

★ Add filter

Companies

Contacts

Products

Transactions

Budget

Directories

Reports

Documentation

Type : All

Winterfall

Industry : All

Main Contact

Web-site

Клиент

Winterfall

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▶