

Screenshot Tour

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- CRM's CustomFields In The Issue View Screen
- Searching Issue By Company Name
- Money Management
- Worklog Report

Companies Dictionary

	Company Name	Industry : All	Type : All	Site	Phone	Contact	
☐	BTS	Finance	Lead	www.bts.fi	+6 785 44320998	Enni Aalto	
☐	BrokerService	Finance	Client	www.bsfinance.com	+2 305 86 356435	Mark Clatch	
☐	CasinoLite	Gaming	Client	www.casinolite.net	+1 345 46459839	Angela Likovich	
☐	ComplexIT	Software Development	Client	www.complexit.ru	+7(495)5468034	Andrey Alekseev	
☐	Developlead	Software Development	Client	www.develead.ru	+7 812 4346 56567	Timofey Avdeev	
☐	Dixon	Retail	Client	www.dixon.ru	+7 342 5678 9944	Elisaveta Nicolaeva	
☐	MedPatent Insurance	Health	Client	www.medpatins.ru	+7 499 7896 5433	Alexey Danilov	
☐	Meridian LLC	Entertainment	Client	www.meridianent.org	+5 087 7635837	Abdulali	
☐	My Region LLC	Media	Lead	www.myregion.ee	+5 98 77435	Ande Sarnet	
☐	NSBank	Finance	Lead	www.ncbank.com	+4 675 879009	Robert Kenth	
☐	Netdesk LLC	Software Development	Lead	www.netdesk.ru	+7 921 7685438	John Werck	
☐	NorthWestNetwork LTD	Software Development	Client	www.nwnetwork.com	+3(435)22000254	Kit Nilson	
☐	Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	
☐	OptTorg	Retail	Client	www.opttorg.ru	+7 812 756 3435	Inna Shlikova	
☐	Oraclenz	Retail	Client	www.oraclenz.com	+1-45-777623443	Kat Clow	
☐	ProjectLab	Engineering	Lead	www.prolab.com	+5 986 3435 657	Michael Leitch	
☐	RosSanzdrav	Government	Lead	www.rszy.ru	+ 7 499 678 944 55	Nina Kotina	
☐	SoftPix Development	Software Development	Partner	www.softpix.com	+6 8345 4539985	Yan Posheit	
☐	Stankomash JSC	Technology	Lead	www.stm.ru	+7 342 6657 988	Igor Sergeev	
☐	StroyPlus LLC	Engineering	Client	www.sp.ru	+7 8654 786 65 54	Nicolay Gvozdev	

CRM CustomFields

Create Issue

⚙️ Configure Fields ▾

Project *

💰 SALE ▾

Issue Type *

💰 Sale ▾ ?

Summary *

Support JIRA - Walmart - 2years

Sale Type

Support ▾

Contacts

h ▾

Helen Sanderson

John Drebih

Robin Sherwood

Ted Johnson

h (New value)

Description

☐ Create another

Create

Cancel

Company Card

JIRA Dashboards Projects Issues CRM Create Search

Company Name Industry: All Type: All Site Phone Contact

Company: Dixon

Main Address People Deals Products Transactions

Company Name Dixon

Industry Retail

Type Client

Print Full page Remove Save Close

Company Name	Industry	Type	Site	Phone	Contact
BTS	Finance	Lead		+6 785 443 0008	Enni Aalto
BrokerService	Finance				Mark Clatch
CasinoLite	Gaming				Angela Likovich
ComplexIT	Software				Andrey Alekseev
Developlead	Software				Timofey Avdeev
Dixon	Retail	Client			Elisaveta Nicolaeva
MedPatent Insurance	Health				Alexey Danilov
Meridian LLC	Enterprise				Abdulali
My Region LLC	Medical				Ande Sarnet
NSBank	Finance				Robert Kenth
Netdesk LLC	Software				John Werck
NorthWestNetwork LTd	Software				Kit Nilson
Open University	Education				John Kirhen
OptTorg	Retail				Inna Shlikova
Oraclenz	Retail				Kat Clow
ProjectLab	Engineering				Michael Leitch
RosSanzdrav	Government				Nina Kotina
SoftPix Development	Software				Yan Posheit
Stankomash JSC	Technology	Lead	www.stm.ru	+7 342 6657 988	Igor Sergeev
StroyPlus LLC	Engineering	Client	www.sp.ru	+7 8654 786 65 54	Nicolay Gvozdev

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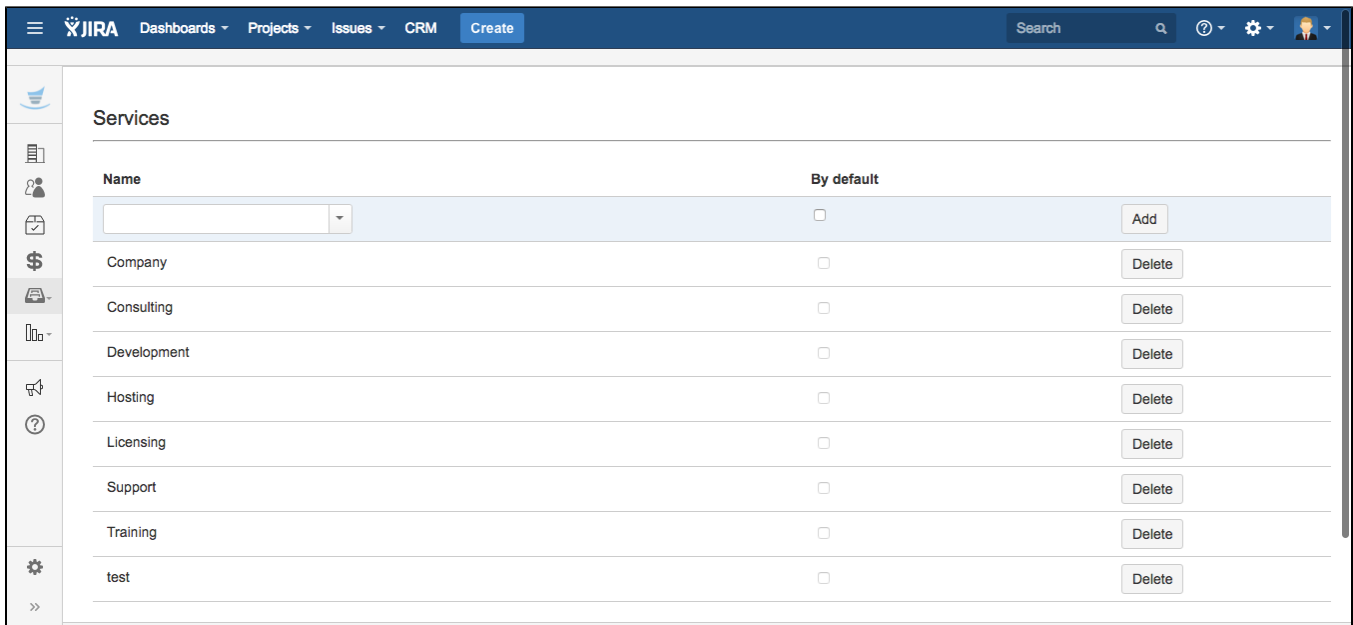
Custom Dictionaries

JIRA Dashboards Projects Issues CRM Create Search

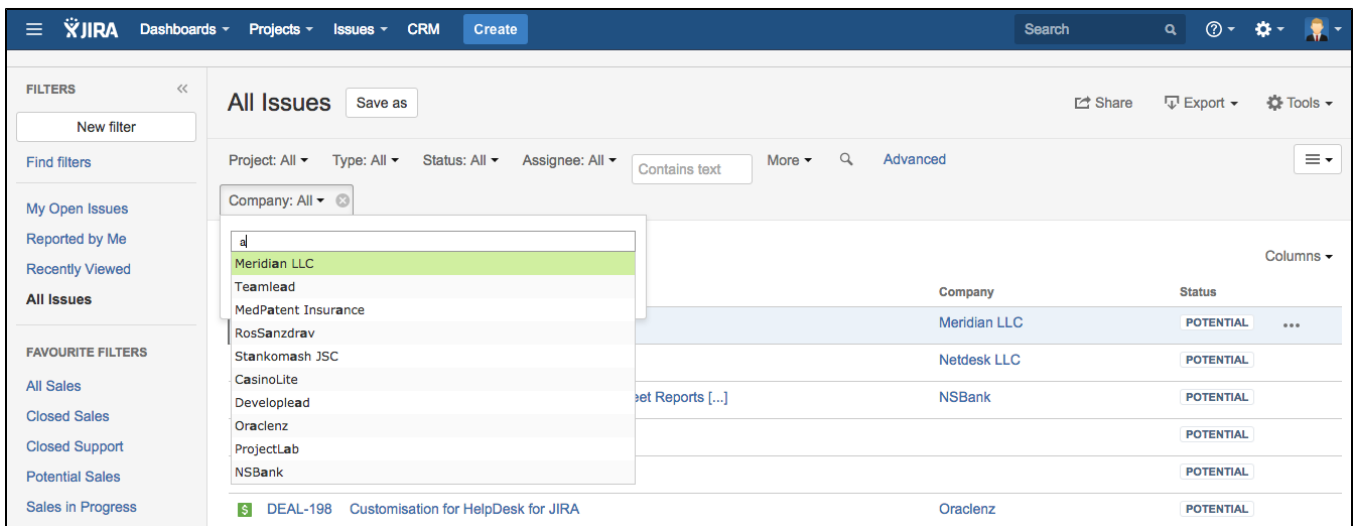
Services

Name	By default	
	☐	Add
Company	☐	Delete
Consulting	☐	Delete
Development	☐	Delete
Hosting	☐	Delete
Licensing	☐	Delete
Support	☐	Delete
Training	☐	Delete
test	☐	Delete

CRM's CustomFields In The Issue View Screen



Searching Issue By Company Name



Money Management

Support

Sales

Support

+ Add Gadget

Edit Layout

Tools

Pie Chart: CRM Transactions chart

Context: Direction

Total amount: 10,050

Income	46,500 - 56%
Expense	36,450 - 43%

Pie Chart: CRM Transactions chart

Context: Department

Total amount: 82,950

Company	29,100 - 35%
Hosting	20,100 - 24%
Licensing	15,350 - 18%
Consulting	15,200 - 18%
Support	2,000 - 2%
Development	1,200 - 1%

