

Custom field - CRM Company

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SALES MANAGEMENT / DEAL-179
3 of 12

Hosting JIRA+Confluence 25

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Details

Type: Deal
Priority: Major
Component/s: None
Labels: None
Company: NorthWestNetwork LTd
Services: Hosting
CRM Transactions:

Status: POTENTIAL (View Workflow)
Resolution: Unresolved
Security Level: Company People

People

Assignee: Alexandr Kershaw
Assign to me
Reporter: Matthew Nicolas
Watchers: 2 Stop watching this issue

Dates

Create CRM Company field

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

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Custom fields

+ Add Custom Field Find More Custom Fields

Select a Field Type

All Standard Advanced

Company CRM (Deprecated)
Company CRM (Deprecated)

CRM Companies select field
CRM Companies select field

CRM Company
CRM Company Custom field in Select style

Find More Custom Fields Next Cancel

Companies CRM Companies select field Issue type(s): Global (all issues)

Company Company CRM (Deprecated) Issue type(s): Global (all issues)

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

Configure 'CRM Company' Field


Name*

Description

Options*

☐ Teamlead

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



CRM Company	CRM Company	Issue type(s): Global (all issues)	<ul style="list-style-type: none">• Sale (Main)• Sale Create Screen• Support (Main)• Support Create Bug• Support Edit Bug• Support View Bug	 Configure Edit Translate Screens Delete
CRM Parent Company	CRM Property	Issue type(s): Global (all issues)	<ul style="list-style-type: none">• Default Screen• Workflow Screen	

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

Configure Custom Field: CRM Company ?

Below are the Custom Field Configuration schemes for this custom field. Schemes are applicable for various issues types in a particular context. You can configure a custom field differently for each project context or in a global context. Moreover, project level schemes will over-ride global ones.

- [Add new context](#)
- [View Custom Fields](#)

Default Configuration Scheme for New CRM Company Select Field

Default configuration scheme generated by JIRA

Applicable contexts for scheme: [Edit Configuration](#)

Issue type(s):
Global (all issues)

Default Value: [Edit Default Value](#)
Not defined

Options: [Edit Options](#)

- Teamlead**

Set up CRM Company: [Edit Set up CRM Company None](#)

Set up CRM Company: Company Select

Contact field:

None

Filter:

Type ~ ent and multi = Hosting

Import records from CRM directory

Migrate values from existing cf

Save

Cancel

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, concurrent) 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:

The screenshot displays the JIRA CRM interface for an issue titled "JIRA 100 Users purchase". The top navigation bar includes links for Dashboards, Projects, Issues, CRM, and Calendar. The main header shows the issue type "SALES MANAGEMENT / DEAL-213". The "Details" section on the left lists various fields: Type (Deal), Priority (Major), Component/s (None), Labels (None), Company (Not defined), Services (BTS), and CRM Transactions (BrokerService, CasinoLite, ComplexIT, Developlead, Dixon, Golden Soft, MedPatent Insurance, Meridian LLC, My Region LLC, NSBank, Netdesk LLC, NorthWestNetwork LTD, Open University, OptTorg, Oraclenz, ProjectLab). The "Status" is "POTENTIAL" and "Resolution" is "Unresolved". The "People" section on the right shows the assignee as Antonio Domingez. The "Dates" section shows the issue was created and updated "In 1 minute". The "HipChat discussions" section prompts the user to connect to HipChat.

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".

Administration Back to project: Bank

Applications Projects Issues Add-ons User management System CRM HelpDesk

Set up CRM Company: Company D new

Contact field:

Filter:

Copy to:

Copy JQL:

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"

Projects whoose new tasks will have an autocompleted company in a custom field

Project	Field	
<input type="text" value="Demonstration Project"/>	<input type="text" value="Reporter"/>	<input type="button" value="Add"/>
<input type="text" value="SD"/>	<input type="text" value="Contact"/>	<input type="button" value="Delete"/>
<input type="text" value="Demonstration Project"/>	<input type="text" value="Reporter"/>	<input type="button" value="Delete"/>

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.