



Directory Attribute Types and Properties

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To start working with company or contact card you need to create attributes for these objects in CRM settings. Attribute properties and its types are listed below.

Attribute Types


Type of an attribute is one of the attribute properties. The set of other attribute properties depends on the attribute type.

Attribute Type	Description
String (255 chars)	For simple string type attributes such as "Phone", "E-mail", etc
E-mail	Type to store E-mail of a company
Website	Type to store Website address of a company
date	Datepicker with calendar for date type attributes such as "Contact birthdate".
number	Integer number. For example, "Number of users".
checkbox	Single checkbox (yes/no). For example "Is platinum partner: Yes"
list of values	Used for selecting one value from cascading list. For example, "Company type" or "Branch". Possible values should be set in attribute property "Field values". For example: "1:Client;2:Rival;3:Partner;4:Agency"
Position	Values from Position dictionary. If there is no positions you can enter new value and save contact - new position will be added in the dictionary.
Contacts	List of contacts related to the company. Select fields to show in Company card. You can add/edit/remove contacts here.
Contact	This field is used for selecting main contact/contacts of the company. It is used for displaying main contact in the company dictionary or for searching company by contact. There can be several fields of Contact type in Company card with different contacts selected.
Company	This field is used for selecting company in contact card. Contact can be related to only one company at the moment. You can enter new value here - in that case a new company will be created in the company directory.
JQL	<p>This table-field displays JIRA issues by JQL-filter with necessary attributes. The value must be specified as JQL-filter in attribute property "JQL condition"</p> <p> If you want to display JIRA issue where current company or contact is specified - you need to provide the following values in the filter:</p> <ul style="list-style-type: none">• for company field type CRM Company: 'Company' = CURRENT_NAME• for company field type CRM Company (Deprecated): 'Company' ~ CURRENT• for contact: 'reporter' = CURRENT• for other type field, for example, Database Information: 'name field' = CURRENT_NAME <p>Example of JQL condition: "project = SALE AND issuetype = SALE AND 'Company' = CURRENT_NAME"</p> <p> If you want to display JIRA issue where company is not specified - you need to provide the following values in the filter:</p> <ul style="list-style-type: none">• for company field type CRM Company: Company IS EMPTY or Company = "Not defined"• for company field type CRM Company (Deprecated): Company ~ "Not defined"

Parent company	<p>This field is used for selecting parent company in company card. Parent company can have many child companies but only one parent can be set for company. Parent-child relations may be used for set issue security, see more</p> <p>CRM Security Levels</p>
Child companies	<p>This field is used for selecting child companies in company card. You can enter new value here - in that case a new company will be created in the company directory.</p>
Directory	<p>Field to store some value from specified CRM custom directory (only one value). It's possible to add new values to the directories through the fields of this type. The directory should be specified in the attribute property "Directory".</p>
Directory Attribute	<p>Field to store some attribute from custom directory that is set for "Directory" (see above) attribute.</p> <p>For example: Product has an attribute "Currency" of Directory type which is linked to custom directory "Currencies". "Currencies" directory has an attribute "Dollar exchange rate". Use Directory Attribute type if you want to add "Dollar exchange rate" to Product when you select currency in "Currency" attribute.</p>
Multi Directory Values	<p>Field to store several values from specified CRM custom dictionary. The dictionary should be specified in the attribute property "Dictionary".</p>
Table list	<p>Places a table into Company / Contact card from Table Lists sub-menu.</p>
Related Projects	<p>You could link some companies and contacts with any JIRA project. See more: Related Projects</p>
JIRA user	<p>Type to store one or more JIRA users, for example account manager of a company. It's possible to give additional CRM permissions for JIRA users, stored in fields of this type. See more there: Setting up Access to Objects</p>
JIRA group	<p>Type to store one or more JIRA groups. It's possible to give additional CRM permissions for JIRA users, stored in fields of this type. See more there: Setting up Access to Objects</p>
Transactions	<p>List of transactions related to the company. You can select fields to show in Company card and in Issue transaction view.</p>
Counter	<p>Field to set the order number to Company records. There is no possibility to assign number manually, it is made automatically. For every new record Counter field type adds 1 to previous created even if it was deleted.</p>
Textarea	<p>For multiple string type attributes. Maximum length is 400 symbols (including space and enter).</p>
Status date	<p>Field to store date of Transaction's status changing.</p>
Creator	<p>Field to store record creator name (fills in automatically, not editable).</p>
Creation date	<p>Field to store record creation date (fills in automatically, not editable).</p>
Updater	<p>Field to store record updater name (fills in and updates automatically).</p>
Updated date	<p>Field to store record update date (fills in and updates automatically).</p>
E-mail is valid	<p>Checkbox to show if contact's e-mail passed through validation during Direct Mail process.</p>
No subscribe me	<p>Checkbox to show if contact had unsubscribed from Direct Mail.</p>
Epic	<p>Field to store Epic name in Transactions if transaction is in issue which is part of an Epic.</p>


Attribute Properties

Properties common to all types

Property	Type of property value	Description
Field title	String	This value will be displayed in a card or dictionary.
Field type	Cascading Select list of types	There are fixed set of attribute types with unique features. See full list and description in the table above.
Show in grid	Checkbox	If checked this property will be shown in the directory as a column.
Is title	Checkbox	 This is the most important property. It must be checked only in one attribute - usually company or contact name. It shows that this is a key attribute and is used in dictionaries for searching company/contacts. If this property is checked in another attribute it will be unchecked in current attribute.
Is required	Checkbox	If checked the system will require users to fill in the attribute before saving contact/company.
Show in a CRM name field	Checkbox	If checked the attribute will be shown in brackets in the field marked as "is title" in CRM directories.
Show in CRM custom fields	Checkbox	Company/Contact issue fields format . If checked the attribute will be shown in brackets with contact (company) name in issue's CRM custom field.
Is read only	Checkbox	If checked this attribute will not be available for editing.
From creation	Checkbox	This property is pared to "read only". If checked the attribute will be not editable from the moment of it's creation. Unchecked allows to fill in the attribute while creating new record in CRM directory.
Restrict duplicates	Checkbox	If checked the system will examine if the same value for this attribute already exists in CRM directory and decline creation (import) of duplicate.
To search by	Checkbox	If checked the system will use this attribute for searching in addition to company name. It is useful if you have two fields for name in English and in Russian. If you check this property in "Russian name" attribute you can search company by either Russian or English name.
Fields	String	See full list and description in the table below.
Tab	Cascading Select list of tabs	The tab on which to put the attribute. If the tab list is empty - just create tabs in tab table.
Width	Integer	The width of the attribute in pixels. Important for fields like "address", "full name", etc.
By default	Checkbox	Is used for Checkbox attribute type. If unchecked, new records will be created with unchecked checkbox attribute. If checked - checkbox attribute will be checked by default for new records. Notice that for existing records checkbox attribute is created unchecked.
Set from company	checkbox	Is used in Transactions

Special properties for some attributes types

Property	Type of attribute	Type of property value	Description
Directory	Directory Multi Directory Values	Cascading Select list of custom directories	Specify a custom directory in this field, to choose values from.

JQL condition	JQL	JQL-filter	<p>The value must be specified as JQL-filter in attribute property "JQL condition"</p> <p> If you want to display JIRA issue where current company or contact is specified - you need to provide the following values in the filter:</p> <ul style="list-style-type: none"> • for company: 'Company' ~ CURRENT • for contact: 'reporter' = CURRENT • for other type field, for example, Database Information: 'name field' = CURRENT_NAME <p>Example of JQL condition: "project = SALE AND issuetype = SALE AND 'Company' ~ CURRENT".</p> <p>Notice that JQL can be not larger than 250 symbols.</p>
Fields	JQL	String	<p>This property allows to set columns which would be shown in Company table attributes like issues (JQL), transactions, contacts.</p> <p>1) For JQL attribute type</p> <p>If not set in the "JQL" field there will be only 3 standard columns (issuekey, summary and status). If you need additional issue fields displayed in the "JQL" field you must enter JIRA customfields ID's (without spaces).</p> <p>Example: "issuekey,customfield_14440,summary,customfield_10163,status".</p> <p>All available fields:</p> <ul style="list-style-type: none"> • customfield_ID • issuekey • summary • created • updated • securityLevelId • dueDate • environment • description • issueType • resolution • resolutiondate • affectedVersions • fixVersions • components • project • status • priority • assignee • reporter • labels • subtasks • timeoriginalestimate • timeestimate • timespent <p>2) For Contacts attribute type. You may set contacts attributes names (without spaces between field names and commas).</p> <p>3) For Transactions attribute type. You may set transactions attributes names (without spaces between field names and commas).</p>
Field values	list of values	String	<p>Possible values of a list should be set in this property "Field values".</p>
Set from company	Directory	Checkbox	<p>Is used in Transactions Directory attribute. When checked directory value is taken automatically from the same "Directory" attribute of Company.</p>