Getting Started With CRM

After the installation of the addon, you can configure values for Companys' and Contacts' directory in order to collect essential information for further actions. You can store information in a variety of fields types in order to make it more consistent.

Issues could be linked with companies automatically or manually, depends on your settings.

Field type	Description
String	The field to store a single-line text
Number	The field to store numbers
Link	The field to store link
Data	The field to store data information
Check-box	
E-mail	The field to store e-mail
CRM Company	Links contact to the company in contact's card. One contact could be linked only to one company.
CRM Contacts	Shows all contacts that are linked to the company in the

Good to know

- Release Notes
- Reporter's Company
- Roadmap

Directory	An advanced field type for your Company and Contacts cards. **1. List.** Allows adding a listing field **2. Table List.** Allows adding a table to Company/Contact card to gather information ⚠️ You need to configure values before adding them. If you add a directory, a new tab for it would be created automatically. If necessary you can define any available tab for it.

Configuration

Companies

By default would be available structure with pre-configured fields: Name (is title), web-site, description, contacts, address. You can rename them and create new ones in order to make your information more consistent. You can split information by different Tabs (it is impossible to rename them).

⚠️ One of the Attributes has to be **"Is title"** with field type string, in the default configuration that is "Name" field ⚠️ It would be shown as a Company name in "Company" custom field and in an issue

Contacts

By default would be available structure with pre-configured fields: Name (is title), related company, Jira User, email, phone. You can rename them and create new ones in order to make your information more consistent. You can split information by different Tabs (it is impossible to rename them).

After configuring you can sync up to 1000 Jira users with CRM contacts' directory or link each new item with Jira user manually.

⚠️ One of the Attributes has to be **"Is title"** with field type string, in the default configuration that is "Name" field ⚠️ It would be shown as a Contact name in "CRM Contacts" tab.