

# Getting Started With CRM

After the installation of the addon, you can configure values for Companies' 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 

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## 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

Company Edition Form

Main Contact info People

Name

Teamlead

Number of people

15

Industry

Software

- Automotive
- Architectural Services
- Banking
- Bars & Restaurants
- Construction
- Health Care
- Real Estate
- Retail
- Software

**2. Table List.** Allows adding a table to Company/Contact card to gather information

Company Edition Form

Main Contact info People

Name

Teamlead

Number of people

15

Industry

Software

Software list

Search...

Add record

Application	Version	Server name
Jira	8.15	jira-1-nw
Confluence	7.0	confluence-nw

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Remove Save Close

⚠ 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).

Jira Software Your work Projects - Filters - Dashboards - People Apps - Create

Search

Company edition table

Tab title

Title

Tab title

Tab title

Related Contacts

Address information

Fields configuration

Field title	Add type	Tab	is title
Title	Directory	Select tab	is title
First Name	String	First Name	is Title
Name	Header	Main	
Website	URL	Main	
Description	Text	Main	
Contacts	Checkbox	Related Contacts	
Address	Directory	Address information	

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Remove Save Close

⚠️ 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

### CRM For JIRA

## 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.

Field Name	Field Type	Is Title	Is Tab
Name	String	Yes	Yes
Related Company	CRM Company	Yes	Yes
Jira User	JIRA User	Yes	Yes
Email	E-mail	Yes	Yes
Phone	Number	Yes	Yes

⚠️ 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.