

# Manage Contacts & Companies

- [What's the problem](#)
- [Existing Solutions](#)
- [How It Works](#)

## What's the problem

Many companies that use JIRA for internal and external business processes face problems with building Service Desk and CRM solutions. The problem is that JIRA has no Company dictionary so it is impossible to associate tickets or sales with customers. JIRA Users Dictionary has only **Full name** and **e-mail** fields and doesn't provide an opportunity to keep such information as **Position, Phone number or Company**.

## Existing Solutions

The above constraints force administrators to tune up integration with external databases. For example, you can use [nFeed](#) plugin. It allows you to add new field into JIRA issues and use it for selecting values from external DB using SQL-queries. The configuration of this plugin requires a knowledge of SQL. Customers already using popular CRM-systems can use connectors such as [Salesforce Plugin](#) but they will have to work in both systems. You can also use [Contact Manager](#) plugin for contact management, but it is very expensive in our opinion. Also there is a free solution - using special JIRA project and issue type **Contact** with unique attributes. But all these solutions either too expensive or not suitable for all situations.

We solved this problems by using [CRM for JIRA \(EN\)](#). It allows your JIRA administrator to create contact and company dictionaries with the necessary attributes. Plugin setup takes about an hour. After that we can use dictionary records, search them and create new records on-the-fly from JIRA issue.

## How It Works

Let's take a look at how we create new company in CRM. This can be done 3 ways:

- importing from external data (XML, CSV-files, external DB)
- creating company in the dictionary
- creating company in JIRA issue

To create new company in dictionary you can just click **Add** button in toolbar and fill in attributes:

The screenshot shows the JIRA CRM interface. On the left sidebar, the 'Add' button is highlighted with a red box. A red arrow points from this button to the 'Company Name' modal. The modal is a form with tabs for 'Main', 'Address', 'People', 'Deals', 'Products', 'Transactions', and 'Related Projects'. The 'Main' tab is active, showing fields for 'Company Name', 'Industry', and 'Type'. The 'Company Name' field has a dropdown menu with options: 'New Company', 'New Company (New value)', and 'Client'. The 'Industry' field is empty, and the 'Type' field has a dropdown menu with 'Client' selected. The background shows a list of companies with columns for Company Name, Industry, Type, Site, Phone, and Contact.

Notice that **Company name** field is intelligent. If you start typing new company's name - system will display existing records from the dictionary with similar names.

The screenshot shows the JIRA CRM interface. The 'Company Name' modal is open, showing a form with tabs for 'Main', 'Address', 'People', 'Deals', 'Products', 'Transactions', and 'Related Projects'. The 'Main' tab is active, showing fields for 'Company Name', 'Industry', and 'Type'. The 'Company Name' field has a dropdown menu with options: 'tel', 'CasinoLite', 'MedPatent Insurance', 'Teamlead', and 'te (New value)'. The 'Industry' field is empty, and the 'Type' field has a dropdown menu with 'Client' selected. The background shows a list of companies with columns for Company Name, Industry, Type, Site, Phone, and Contact.

JIRA Administrator can add a new attribute to the card or even the whole tab at any time.

## Company: Teamlead

Main People Sales Projects Software Address

Site

E-mail

Address

Phone

Print

Full page

Save

Close

You can also determine if the attribute is required.

## Contact: Oxana Alexeenko

Main

Related Projects

All Related Issues

Full Name

Oxana Alexeenko

Company

Teamlead

Position

Marketing Director

E-Mail



Birthday

16.09.1981

Phone

+7(812)309-29-57

JIRA login

oxana@teamlead.ru

Print

Full page

Save

Close

If you need attribute with long dictionary value (for example, branch or city) you can use attribute with **Custom Dictionary value** that displays values from custom dictionary. These dictionaries are also a part of CRM plugin. Please note, that you can add new values to the dictionaries from JIRA issue without going into dictionary.

Company Name: Dixon

Main

Address

People

Deals

Products

Transactions

Related Projects

Company Name

Dixon

Industry

Type

Retail

Automotive

Consulting

Consumer

Education

Engineering

Entertainment

Finance

Gaming

Government

Health

Media

Retail

Social Network

Software Development

Technology

Print

Full page

Remove

Save

Close

Also you can add a list of chosen company issues to separate tab, see more [8.4 How to display list of issues at Company/Contact card](#)

There are situations when it is necessary to create an organization directly from JIRA issue. CRM plugin automatically determines the company by issue reporter almost in all of our projects:

**JIRA** Dashboards Projects Issues CRM **Create** Search ? ? ? ?

**SALE / SALE-6**  
Development web-service for Apache

Edit Comment Assign More Start Progress Resolve Issue Close Issue Admin Export

**Details**

Type: Sale Status: **REOPENED** (View Workflow)  
 Priority: Major Resolution: Fixed  
 Component/s: None Security Level: Company People  
 Labels: None

Main Workflow Transactions  
 Company: Teamlead  
 Sale Type: Development  
 Contact: Anton Kolin  
 Reporter's Phone: +4-400-334-44-00  
 Reporter's Title: Sales Manager  
 Software: Apache  
 Company's SLA: SLA-3 Premium  
 Company phone: +7(812)309-29-57

**People**  
 Assignee: mark  
 Assign to me  
 Reporter: Anton Kolin  
 Watchers: 1 Stop watching this issue

**Dates**  
 Created: 16/Sep/13 23:38  
 Updated: Just now

**Time Tracking**  
 Estimated: Not Specified  
 Remaining: 0m  
 Logged: 5h

But you can enable manual filling in of companies - it will allow the users to select company from the directory with livesearch by name or any other attribute, for example: VATIN, phone number, website, etc.

**JIRA** Dashboards Projects Issues CRM Calendar **Create** Search ? ? ? ?

**Support / SUP-261**  
Migration issues

Edit Comment Assign More Delivering Archived Close Issue Admin Export

**Details**

Type: Bug Status: **POTENTIAL** (View Workflow)  
 Priority: Major Resolution: Unresolved  
 Affects Version/s: None Fix Version/s: None  
 Component/s: None  
 Labels: None  
 CRM Company: a

**Description**  
 Developlead  
 MedPatent Insurance

**Attachments**  
 Meridian LLC  
 NSBank  
 Oraclenz  
 ProjectLab  
 RosSanzdrav  
 Stankomash JSC  
 Teamlead  
 a (New value)

**Activity**  
 All Comments  
 There are no comments

**People**  
 Assignee: Antonio Domingez  
 Reporter: Antonio Domingez  
 Watchers: 1 Stop watching this issue

**Dates**  
 Due: 09/May/16  
 Created: 04/Mar/16 20:24  
 Updated: 23/Nov/16 15:46  
 start: 21/Nov/16 10:00  
 finish: 21/Nov/16 19:00

**Time Tracking**  
 Estimated: 1w 7h 59m  
 Remaining: 1w 7h 59m  
 Logged: Not Specified

**HipChat discussions**  
 Do you want to discuss this issue? Connect to HipChat.  
 Connect Dismiss

If CRM plugin cannot determine company automatically (reporter doesn't have specified company) the field will suggest to create new or select existing.

**JIRA** Dashboards ▾ Projects ▾ Issues ▾ CRM **Create** Search ? ⚙️ 👤 ▾

**SALE Manual / SALEM-23**

## Developing plugin for JIRA

Edit Comment Assign More ▾ Start Progress Resolve Issue Close Issue Admin ▾ Export ▾

### Details

Type: **Sale** Status: **OPEN**  
 Priority: **Major** Resolution: **Unresolved**  
 Labels: **None**

Main Workflow Transactions

Company: **New**  
 Contact: **New (New value)**  
 Reporter's Phone: **+4-400-334-44-00**  
 Reporter's Title: **Sales Manager**  
 Software: **Not defined**

### People

Assignee: **Anton Kolin**  
 Reporter: **Anton Kolin**  
 Watchers: **1 Stop watching this issue**

### Dates

Created: **04/Oct/14 20:24**  
 Updated: **03/Feb/15 16:17**

### HipChat discussions

Do you want to discuss this issue? Connect to HipChat.  
 Connect Dismiss

### Description

Click to add description

### Activity

All **Comments** Work Log History Activity

There are no comments yet on this issue.

Comment

Working with company table is simple - just type any part of the company name. It's possible to sort company list by any column.

**JIRA** Dashboards ▾ Projects ▾ Issues ▾ CRM Calendar **Create** Search ? ⚙️ 👤 ▾

	team	Industry : All ▾	Type : All ▾	Site	Phone	Contact
<input type="checkbox"/>	Teamlead	Software Development	Client	<a href="http://www.teamlead.ru">http://www.teamlead.ru</a>	+7 812 3092957	Antonio Domingez

Page 1 1 - 1 of 1 20

Other things to say about working with contacts. CRM plugin also provides **Contacts Dictionary**. It is very similar **Company Dictionary** according to the features. There are two important things to focus on:

- Contacts can be synchronized with JIRA users system dictionary. This allows CRM users to create JIRA users without having JIRA Administrators permission.
- To work with contacts from company card you need to add attribute with **Contacts type**. It will allow you to associate contacts with company.

User can quickly find, create or edit contacts from company card:

JIRA Dashboards Projects Issues CRM Calendar Create Search

Company Name Industry: All Type: All Site Phone Contact

Teamlead Software Development Client [http://www.teamlead.ru](#) +7 810 3000057 Antonio Domingez

StroyPlus LLC Nicolay Gvozdev

Stankomash JSC Igor Sergeev

SoftPix Development Yan Posheit

RosSanzdrav Nina Kotina

ProjectLab Michael Leitch

Oraclenz Kat Clow

OptTorg Inna Shlikova

Open University John Kirhen

NorthWestNetwork LTD Kit Nilson

Netdesk LLC John Werck

NSBank Robert Kenth

My Region LLC Ande Sarnet

Meridian LLC Abdulali

MedPatent Insurance Alexey Danilov

Golden Soft Elisaveta Nicolaeva

Dixon Timofey Avdeev

Developlead Andrey Alekseev

ComplexIT Software Development Client [www.complexit.ru](#) +7(495)5468034 Angela Likovich

CasinoLite Gaming Client [www.casinolite.net](#) +1 345 46459839

Page 1 1 - 20 of 22 20

Company: Teamlead

Main Address People Deals Products Transactions Related Projects

Contact Antonio Domingez

+ Add contact

	Full Name	Position	E-Mail
<input type="checkbox"/>	Alexandr Kersha...	Designer	antonov@teamlea...
<input type="checkbox"/>	Anna Backer	PR specialist	annalok@teamlea...
<input type="checkbox"/>	Antonio Dominge...	Marketing manag...	anton@teamlead....
<input type="checkbox"/>	Helen Lambert	Market Analyst	cindy@teamlead....
<input type="checkbox"/>	Mark Berger	Developer	mark@facebook.c...
<input type="checkbox"/>	Nicolas Harris	Advertising spe...	tom@teamlead.co...
<input type="checkbox"/>	Nicolas Harris	Support enginee...	nic@teamlead.ru

Print Full page Remove Save Close

Managing companies and contacts will allow you to search issues and make reports by them:



JIRA Dashboards Projects Issues CRM Calendar Create Search ? Settings User

**FILTERS** << New filter

Find filters

My Open Issues  
Reported by Me  
Recently Viewed  
All Issues

**FAVOURITE FILTERS**

All Sales  
Closed Sales  
Closed Support  
My issues  
My Marketing tasks  
Potential Sales  
Sales in Progress  
SLA Violations  
SUP-19878  
Support  
Support In Progress  
Support New Issues

**Search** Save as Share Export Tools

Support Type: All Status: All Assignee: All Contains text More Advanced

Company: Teamlead

Teamlead

Update Close

Due	Status	Reporter	Assignee	CRM Company	Remove
30/May/16	REOPENED	Antonio Domingez	Antonio Domingez	Teamlead	...
31/May/16	REOPENED	Dmitri Abroso	Antonio Domingez	Teamlead	...

1-2 of 2

You can also display contacts and companies in the columns of your JIRA issue navigator:

Filter Results: Support In Progress				
Reaction Time ↑	T	Key	Summary	Company
04/10/2014 20:28 2h / Overdue	+	SUP-8	CRM Billing report	Meridian LLC
05/10/2014 14:00 4h / 4h	•	SUP-66	I have an idea for HelpDesk plugin	Developlead
06/10/2014 12:00 2h / 2h	•	SUP-48	Error in addon	My Region LLC
11-13 of 13				