

Manage Contacts & Companies

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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.

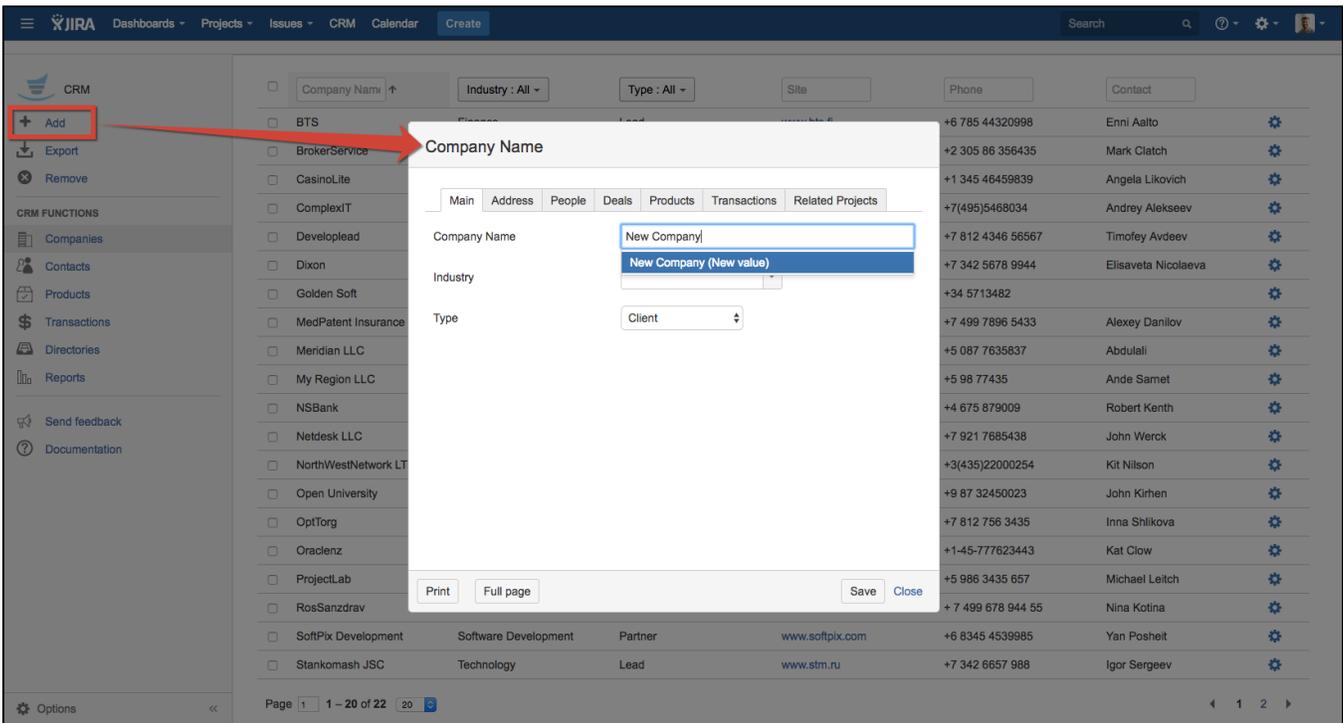
We solved this problems by using [CRM for JIRA \(EN\)](#). It allows your JIRA administrator to create contact and company dictionaries with the necessary attributes. Plugin setup takes about an hour. After that we can use dictionary records, search them and create new records on-the-fly from JIRA issue.

How It Works

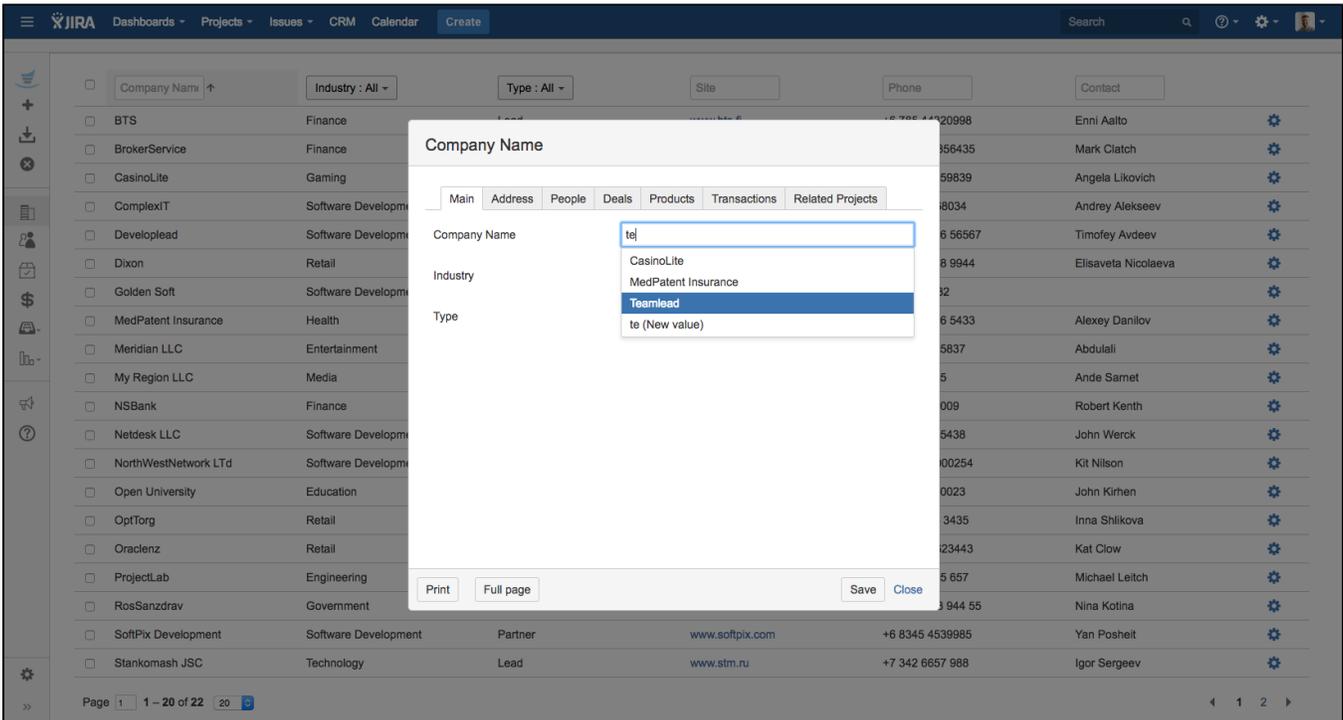
Let's take a look at how we create new company in CRM. This can be done 3 ways:

- 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:



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.



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	<input type="text" value="www.teamlead.ru"/>
E-mail	<input type="text" value="info@teamlead.ru"/>
Address	<input type="text" value="Saint-Petersburg, Bolshoy Sampsonievsky pr,"/>
Phone	<input type="text" value="+7(812)309-29-57"/>

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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

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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: Retail

Type: Retail

- Automotive
- Consulting
- Consumer
- Education
- Engineering
- Entertainment
- Finance
- Gaming
- Government
- Health
- Media
- Retail**
- Social Network
- Software Development
- Technology

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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:

SALE / SALE-6
Development web-service for Apache

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
 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.

Support / SUP-261
Migration issues

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

Attachments

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.

The screenshot shows a JIRA issue page for 'Developing plugin for JIRA'. The header includes navigation menus for Dashboards, Projects, Issues, CRM, and a 'Create' button. The issue details are as follows:

- Type: Sale
- Priority: Major
- Status: OPEN
- Resolution: Unresolved
- Labels: None
- Assignee: Anton Kolin
- Reporter: Anton Kolin
- Created: 04/Oct/14 20:24
- Updated: 03/Feb/15 16:17

The 'Company' field is currently set to 'New', and a dropdown menu is open showing 'New (New value)'. The 'Description' field is empty with a 'Click to add description' prompt. The 'Activity' section shows 'All', 'Comments', 'Work Log', 'History', and 'Activity' tabs, with a message stating 'There are no comments yet on this issue.' and a 'Comment' button.

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

The screenshot shows a JIRA CRM 'Contacts Dictionary' view. The table contains the following data:

Name	Industry	Type	Site	Phone	Contact
Teamlead	Software Development	Client	http://www.teamlead.ru	+7 812 3092957	Antonio Domingez

The interface includes search filters for 'team', 'Industry: All', and 'Type: All'. The page shows 'Page 1 1 - 1 of 1 20' and navigation arrows.

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

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

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Antonio Domingez
Nicolay Gvozdev
Igor Sergeev
Yan Posheit
Nina Kotina
Michael Leitch
Kat Clow
Inna Shlikova
John Kirhen
Kit Nilson
John Werck
Robert Kenth
Ande Sarnet
Abdulali
Alexey Danilov
Elisaveta Nicolaeva
Timofey Avdeev
Andrey Alekseev
Angela Likovich

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

The screenshot shows the JIRA search interface. The search criteria are: Support, Type: All, Status: All, Assignee: All, and a search box containing 'Contains text'. The search results are displayed in a table with columns: Due, Status, Reporter, Assignee, CRM Company, and Remove. Two issues are shown:

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

The 'Company' column is highlighted in red. A dropdown menu for 'Company' is also highlighted in red, showing 'Teamlead' as the selected option.

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

The screenshot shows the JIRA issue navigator with the filter 'Support In Progress'. The table displays the following data:

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

The 'Reaction Time' and 'Company' columns are highlighted in green. The page shows 11-13 of 13 results.