

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.

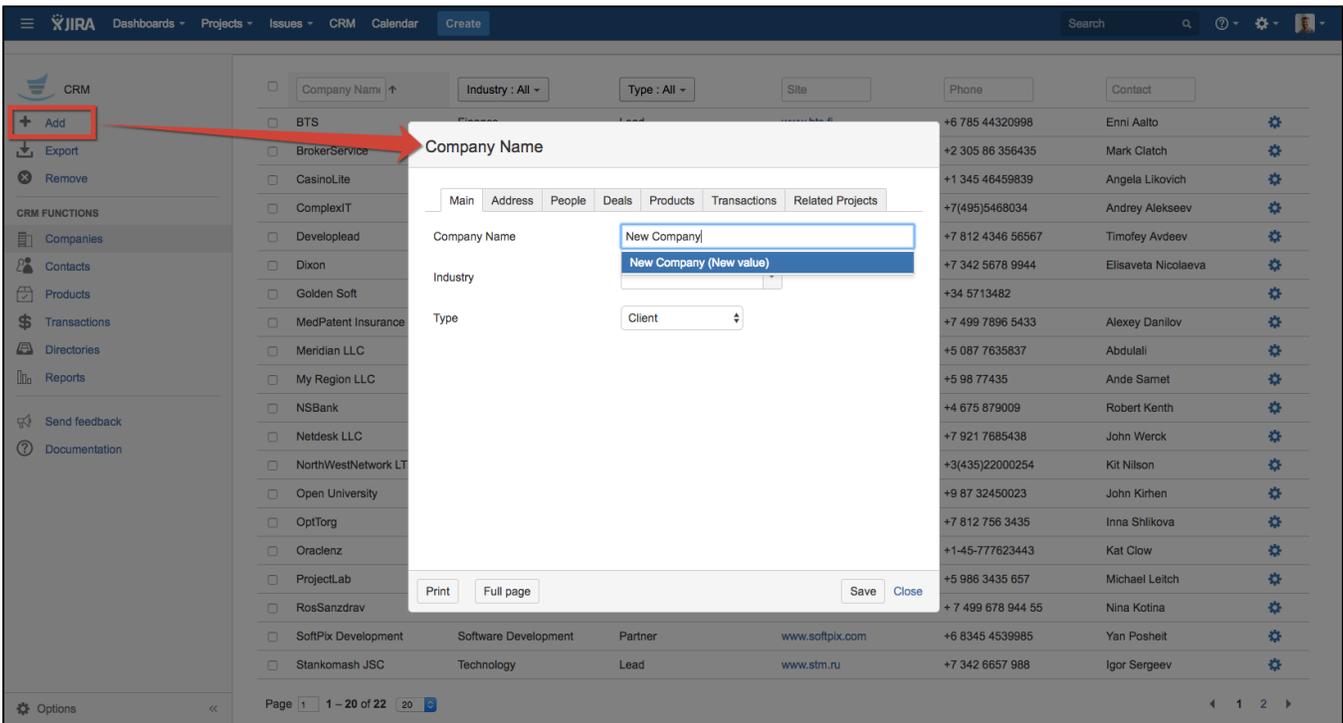
We solved this problems by using [CRM for JIRA \(EN\)](#). It allows your JIRA administrator to create contact and company dictionaries with the necessary attributes. Plugin setup takes about an hour. After that we can use dictionary records, search them and create new records on-the-fly from JIRA issue.

How It Works

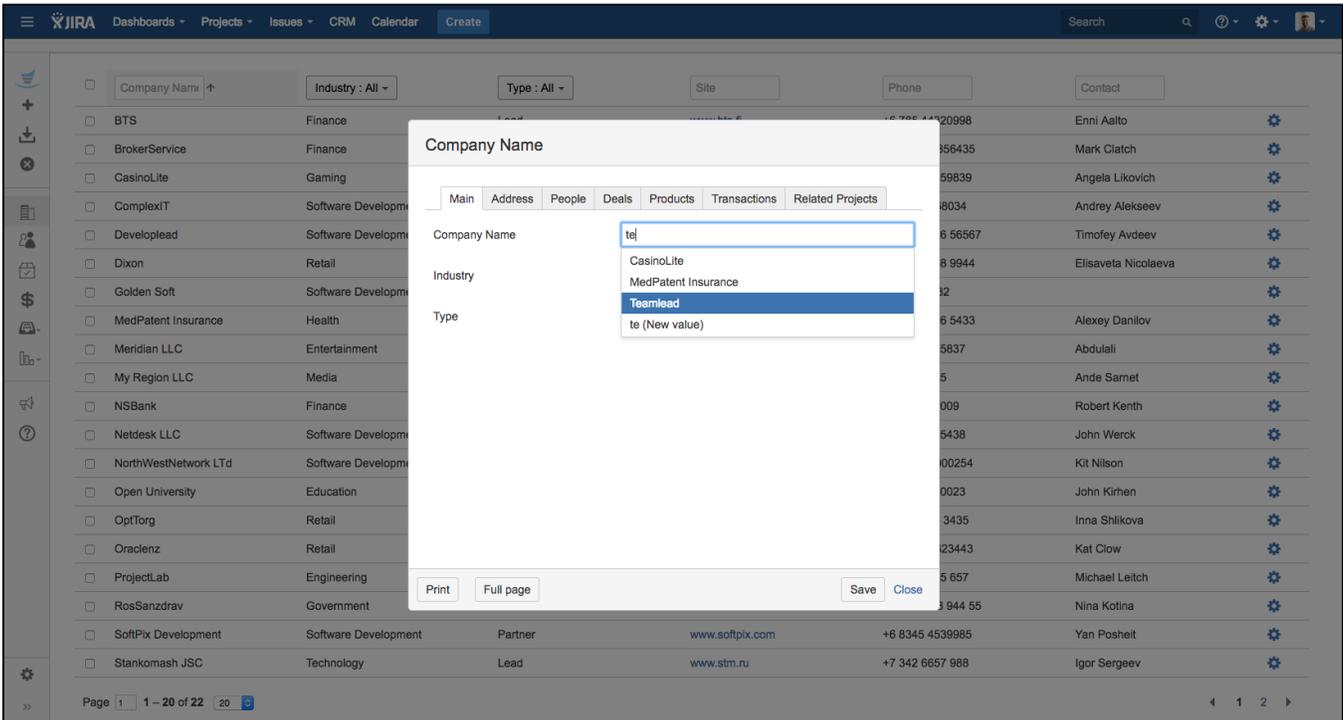
Let's take a look at how we create new company in CRM. This can be done 3 ways:

- 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

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: Retail

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**

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

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

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**

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

Description

Attachments

Activity

All Comments
 There are no comments

Comment

CasinoLite
 Developlead
 MedPatent Insurance
 Meridian LLC
 NSBank
 Oraclenz
 ProjectLab
 RosSanzdrav
 Stankomash JSC
 Teamlead
 a (New value)

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 titled "Developing plugin for JIRA" with a status of "OPEN". The issue is assigned to Anton Kolin and reported by Anton Kolin. The details section includes fields for Type (Sale), Priority (Major), Labels (None), Company (New), Contact (New (New value)), Reporter's Phone (+4-400-334-44-00), Reporter's Title (Sales Manager), and Software (Not defined). The description section is currently empty, and the activity section shows no comments yet.

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 the JIRA CRM Contacts Dictionary interface. It features a search bar with the text "team" and several filters: "Industry: All", "Type: All", "Site", "Phone", and "Contact". A table below displays a single contact entry for "Teamlead" with details such as "Software Development", "Client", "http://www.teamlead.ru", "+7 812 3092957", and "Antonio Domingez". The interface also includes a sidebar with navigation icons and a pagination control showing "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

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

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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:

Search results for 'Support' type, 'All' status, and 'All' assignee, filtered by 'Company OR: Teamlead'.

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	...

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

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