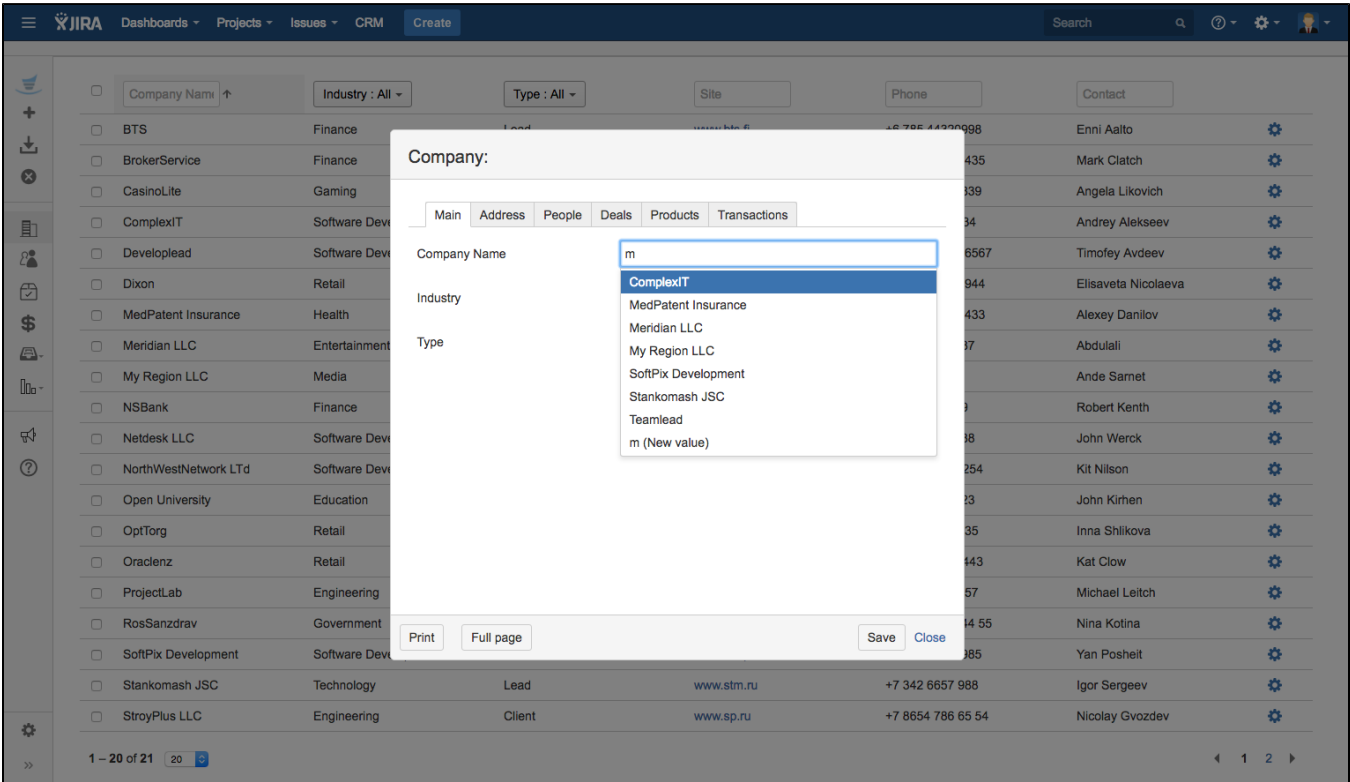


Features

- [Double Records Prevention](#)
- [Custom Dictionary Field](#)
- [Custom Field with Custom Dictionary Type](#)
- [Quick CRM record link](#)
- [Related Projects](#)

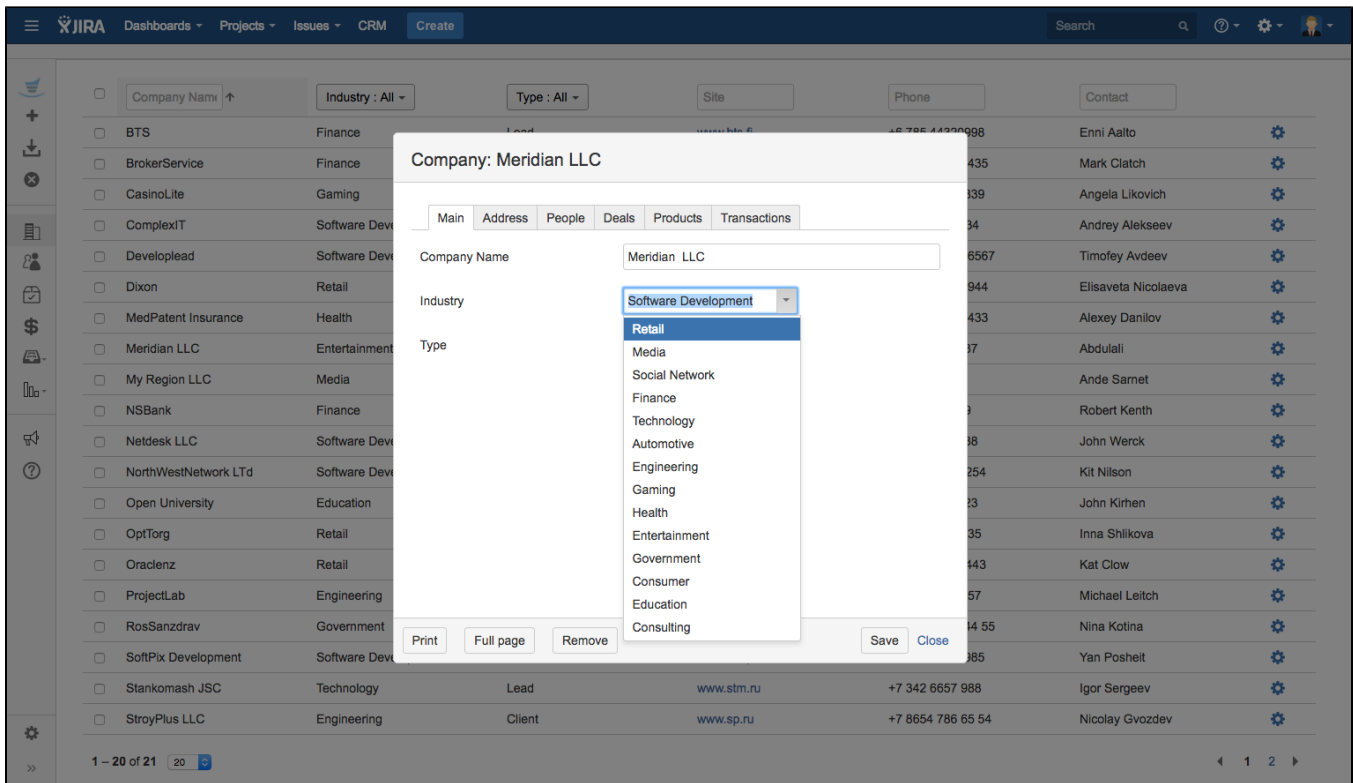
Double Records Prevention

In almost all CRM dictionaries there is mechanism that prevents creating doubled records. When creating contact, company or product system will suggest existing values that is similar to entered value.



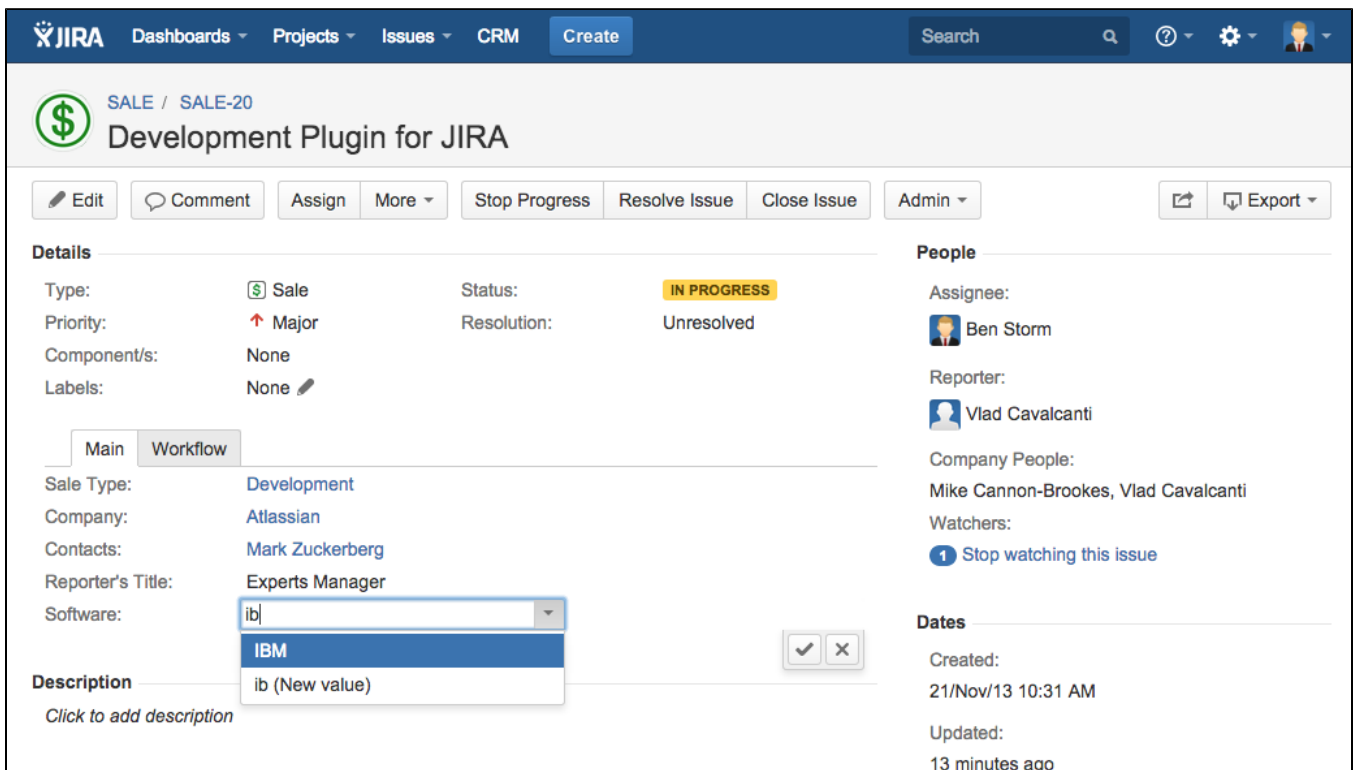
Custom Dictionary Field

In the company/contact or product card a user can use values from any custom dictionary. Additionally user can create new dictionary record by entering new unexisting value in the card field and saving the card. You can see the example the using of custom dictionary **"Software"** in the **Product/service Card**:



Custom Field with Custom Dictionary Type

Sometimes it is necessary to use "Select list" field in JIRA issue. But values for this field can be added by JIRA administrator only. Using the CRM plugin you can add Custom field with **Custom Dictionary type** to JIRA issue and link it to one of your custom dictionaries. In this case all CRM users can add new records to the dictionary when typing new unexisting values and clicking **+** button.



Quick CRM record link

The screenshot shows the JIRA CRM interface for a record titled "Development plugin for JIRA". The record is of Type "Sale", Priority "Major", and Status "REOPENED". The Reporter is Ben Storm. A red circle highlights the Reporter field, and another red circle highlights the "More" dropdown menu in the user profile card. The "More" menu is open, showing options like Profile, Current Issues, Administer User, and CRM, with the CRM option highlighted by a red circle. The "Dates" section shows the record was created on 22/Sep/13 at 6:32 PM.

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

SALE / SALE-13
Development plugin for JIRA

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

Details

Type: **Sale** Status: **REOPENED**
Priority: **Major** Resolution: **Unresolved**
Component/s: **None**
Labels: **None**

Main Workflow

Sale Type: **Development**
Company: **Facebook**
Contacts: **Bill Gates**
Reporter's Phone: **+4-400-334-44-00**
Reporter's Title: **Sales Manager**
Software: **Not defined**

Description
::

People

Assignee: **Ben Storm**
Reporter: **Ben Storm**

Ben Storm
anton@teamlead.ru
12:39 AM - Saturday - Yerevan

Activity More ▾

1 Stop watch

Dates

Created: **22/Sep/13 6:32 PM**
Updated:

Related Projects

The screenshot shows the JIRA CRM interface with a sidebar on the left. The sidebar contains icons for a company, contacts, and a highlighted gear icon. The main content area displays two related projects: "IBM : Software Vendor, Development" and "Microsoft : Hardware Vendor". Each project has an "Add contact" button and a table of contacts. The "IBM" project has one contact, John Travolta, with the role "Account Manager". The "Microsoft" project has a table with columns "Contact" and "Contact's role".

JIRA Dashboards ▾ Projects ▾ Issues ▾ Boards ▾ CRM Create

Add company

IBM : Software Vendor, Development ✎ ✕

Add contact

Contact **Contact's role**

John Travolta Account Manager

Microsoft : Hardware Vendor ✎ ✕

Add contact

Contact **Contact's role**