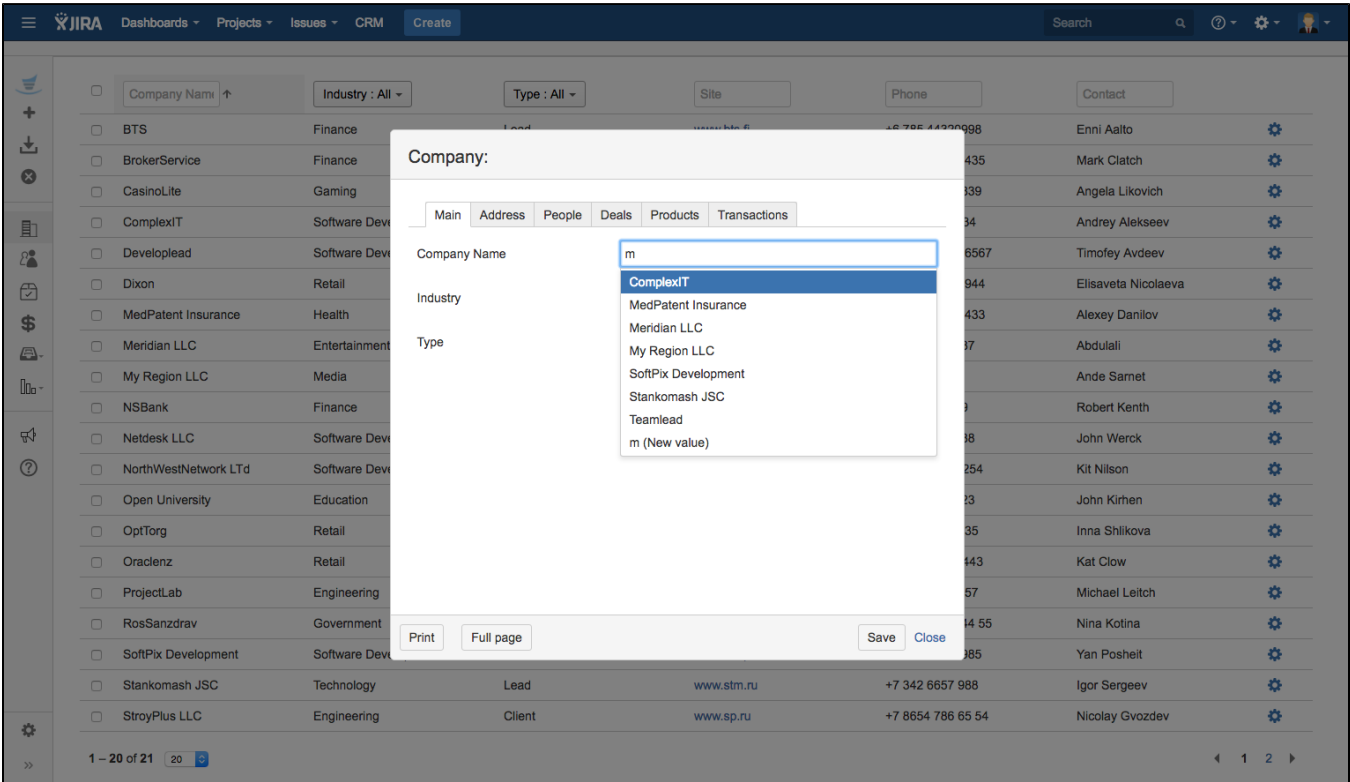


Features

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

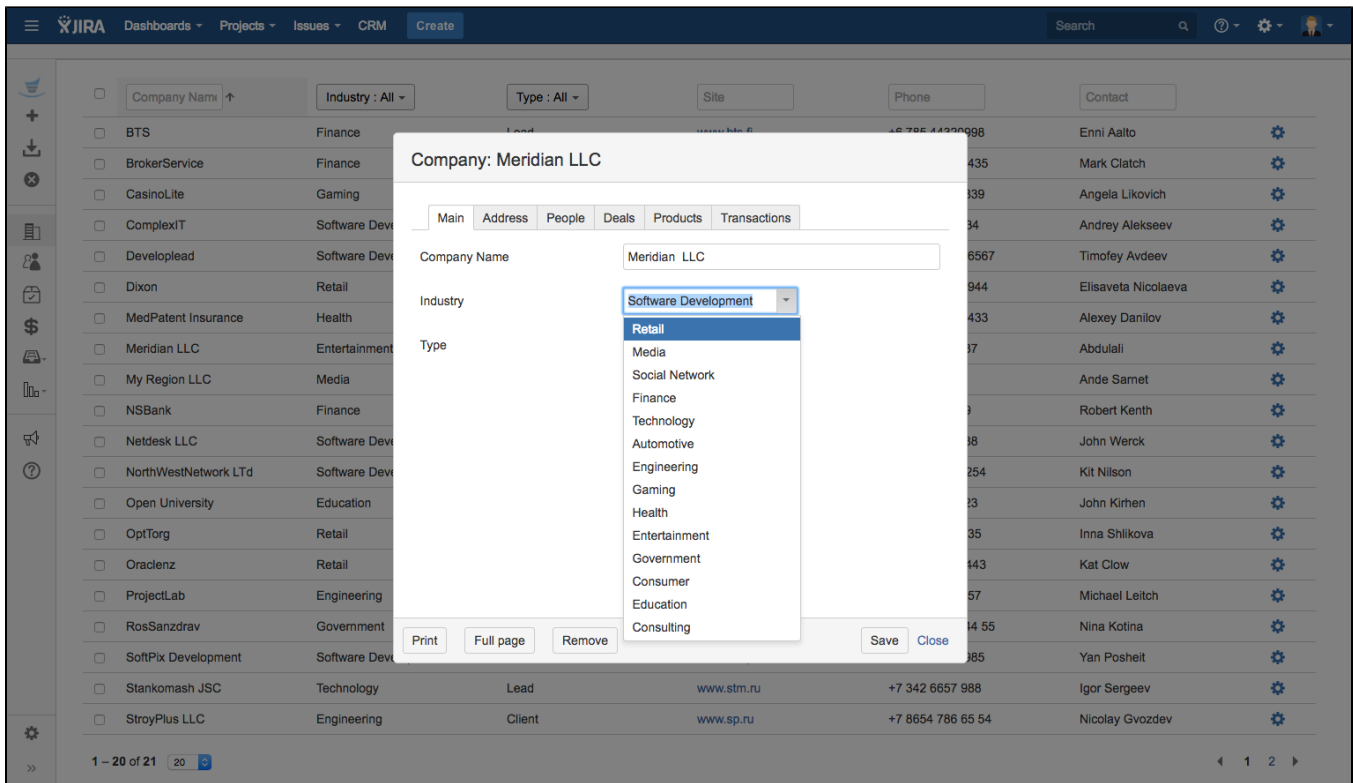
Double Records Prevention

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.



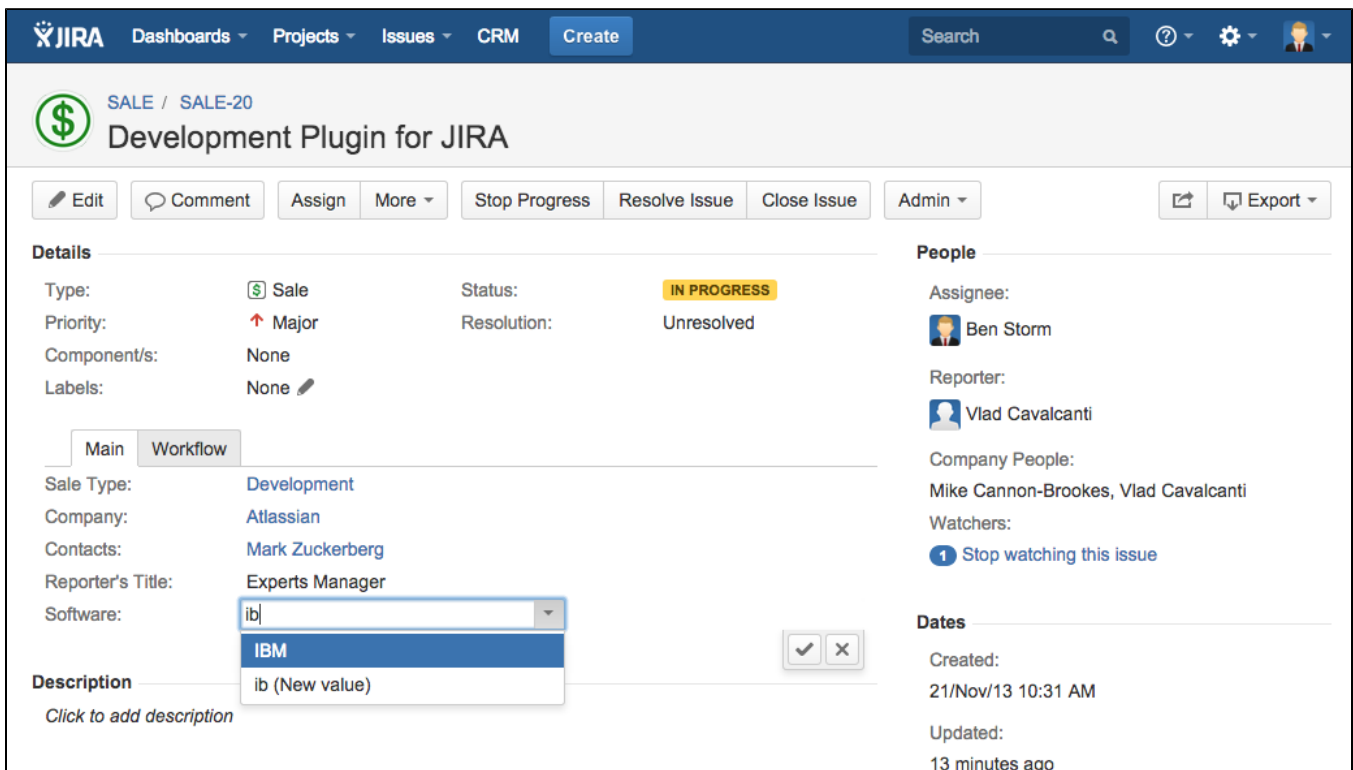
Custom Dictionary Field

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 'SALE / SALE-13'. The record is of Type 'Sale', Priority 'Major', and Status 'REOPENED'. The reporter is Ben Storm. A red circle highlights the 'More' button in the user profile dropdown menu, and another red circle highlights the 'CRM' link in the dropdown menu. The 'CRM' link is highlighted in blue.

Details

Type: SALE 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

Activity

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 containing icons for various functions. The main content area displays a list of related projects and contacts. The 'Microsoft : Hardware Vendor' entry is highlighted with a red box. The 'Contact's role' column shows 'Account Manager' for the first entry.

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