

# Linking Issues & CRM entries

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## Linking a Company/Contact to an issue

You can find a CRM section to the left side of an issue of any kind of project.

The section allows:

- to link contact and/or company to the issue, change the selection or remove the link
- to browse the details of the selected contact/company
- to create a new company via the issue

The screenshot shows a Jira issue titled "Equipment sale" within the "SALE" project. The CRM section is active, displaying a "Contact" field with "Zelda Vasco" and a "Company" field with "Memetic". A dropdown menu is open for the "Company" field, showing a list of companies: "Memetic" (under "RELATED TO CONTACT"), "Alonzo Lecca", "Barilla", and "Barra Cuda" (under "NON-RELATED TO CONTACT"). Red arrows indicate the flow from the "Link issue" button to the "CRM" section and then to the "Company" field.

Projects / SALE / SALE-1

### Equipment sale

Attach Link issue CRM

**Description**  
Need to provide the research results to the client. Transportation is on our side. Due date: 3/25/23.

**CRM**

Contact ⓘ  
Zelda Vasco

Company ⓘ  
Memetic

Income & Expenses ▾

RELATED TO CONTACT  
Memetic

NON-RELATED TO CONTACT  
Alonzo Lecca  
Barilla  
Barra Cuda



Note that CRM section permissions are aligned with the project permissions: only a user with the "Edit issues" permissions can edit the section fields.

## Displaying an extra attribute for companies

A company name is not always enough to select a company correctly. You can select an attribute to be displayed along with the company name (*CRM Settings* → *Jira Issue Features*):

## Additional Company field attribute.

Select an attribute that will be displayed along with the company name in the Company select list in issues.

Domain



### Company

Oliva Oliva



#### RELATED TO CONTACT

Oliva Oliva

oliva.net

#### NON-RELATED TO CONTACT

Barra Cuda

barra.cuda

Rocco

rocco.co

Monster Co

monster.co





Alonzo Lecca

alonzo.com

## Automatically linking mode

As an administrator, you can set the rules of linking CRM entities to issues. Besides the basic manual mode, you can set automatically link CRM contact and/or company to issues upon issue creation and certain issue changes.

The rules can be set in CRM Settings → Jira Issue Features:

SETTINGS	<b>Issue fields auto-populating</b>
Templates	Note that change of settings will not update the existing issues.
Jira User Syncing	<b>Set contact by Reporter</b>  
Manage Company Field	requires users sync
<b>Jira Issue Features</b>	<b>Set company by contact</b>  

## Set contact by reporter

In case the [synchronization of Jira users and CRM contacts](#) is on, you can set contacts to be auto-defined (and therefore auto-linked) in issues according to the Reporter.

The auto-linking works **upon issue creation** and **upon changing the Reporter**. Besides that, a user can change the linked contact as required (even if the relevance to the Reporter will be lost).

## Set company by contact

If enabled, this setting will update the company by the contact selected in the issue.

The company associated with the issue contact will be automatically linked to an issue upon setting/changing the contact:

- if there is a company associated with the contact, the Company field will be auto-populated
- if there are 0 or 2+ companies associated with the contact, the Company field will not be auto-populated (selecting a company manually will link it with the contact)



Note that changes in this section will not affect the existing issues unless you edit their contact directly.