

Release Notes

09 Feb 2023

New attribute: [JQL](#) type of attribute is available for Companies and Contacts directories.

26 Jan 2023

New directory: meet [Income & Expenses](#) to store and work on all your transaction flows in one place.

CRM web-section in the issue view is moved to the left side.

15 Dec 2022

Performance improvements (Companies and Contacts directories loading).

10 Oct 2022

New features:

- [Custom Directories](#) now supported as independent full-fledged dictionaries.
- New attributes: List (single choice) and List (multiple choices) are available (filtering on a grid is supported).
- Minor improvement: Templates are renamed for Layouts.
- Minor improvement: icon update.

07 Jul 2022

Table's [custom directory](#) type improvements:

- Table's template can be configured directly in the creation window.
- A new or existed table's record can be created, added and removed right from a company or contact card view.
- Table's content can be viewed and edited right in the web-section in the issue view.

25 Apr 2022

Major [Custom directories](#) improvements:

- Lists and Tables now are separated into two independent Main menu sections.
- Lists (single and multiselect) can be shown up on Companies/ Contacts grid.
- Tables can be viewed from an issue's web section via link.

Bug fix: "Add record" window behavior for Tables custom directories on a Company/Contact card is fixed.

28 Mar 2022

New major features:

- [Export](#) data from the Companies and Contacts directories to a CSV file:

CRM Contacts

Name contains... <input type="text"/>						+ Filters	4 entry(ies) selected			Add contact			Columns
						export							
<input checked="" type="checkbox"/>	Name	Description	Is Active	Companies	Phone	Email							
<input checked="" type="checkbox"/>	Daniel Smith	sed do eiusmod tempor incididunt ut labore et dolore magna aliqua		Alpha	14448592681	test@mail.ru	...						
<input checked="" type="checkbox"/>	Eva Green	Client		Beta		email@gmail.com	...						
<input checked="" type="checkbox"/>	John Doe	Lorem ipsum dolor sit amet, consectetur adipiscing elit		Google	19561861919	contact@gmail.com	...						
<input checked="" type="checkbox"/>	Robert Swanson	Partner		Gamma		robert.swanson@mail.com	...						

- Easily [import](#) your data from CSV file to fulfill the directories using our master import:

The screenshot shows a multi-step process for importing data. At the top, there are five steps: 'Upload a file' (active), 'Map attributes', 'Confirm', 'Import in progress', and 'Done'. Below the steps, the 'Upload a file' section explains that CSV column headers determine attribute labels and that the file must have 'id' and 'titles' columns. A link to 'Download CSV template' is provided. A file selection area shows a blue 'Select a file' button and the filename 'demo.csv'. Below this is an 'Advanced options' section with a 'CSV delimiter' dropdown menu set to ';'. At the bottom right are 'Next' and 'Cancel' buttons.

Upload a file Map attributes Confirm Import in progress Done

Upload a file

The CSVs column headers determine which attribute labels you will assign to the various directories (e.g., "Email" or "Address").

The file should have two mandatory columns: id and titles. To import new records, create an id column and leave it empty.

[Download CSV template](#)

Select a file demo.csv

Advanced options

CSV delimiter

;

Next Cancel

Bugfixes:

- Directories: confirmation window appearance for Delete action is fixed.
- Directories: data filter results now included both start and end dates.
- Directories: simultaneous deletion of large number of rows is fixed.

25 Jan 2022

- Performance was significantly improved.
- More than 1000 users/customers can now be synchronized with CRM contacts.
- Pop-up notification upon CRM entries deletion now displays linked objects and issues.
- Minor improvements

22 Dec 2021

- The "Add another" checkbox to create several entries in a row
- Minor improvements

15 Dec 2021

Handy filters are now available for Companies and Contacts.

CRM Companies

Name contains...

+ Filters

Industry: All

Contacts: All

Add company

Columns

<input type="checkbox"/> Type	Website	Status	Issues	Contacts	Description	Approved
<input type="checkbox"/> Partner	lecalon.zo	Appro		Andy Domee; Nathan Caruso; Volot Ns; Antonina Khirnaya	Praesent nec pretium magna, eu tempus tellus.	
<input type="checkbox"/> Client	barra.cuda	Appro	+2	Bob Marshall; Antonina Teamlead; Ivan Lebovka; Antonina Teamlead; Antonina Khirnaya	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	
<input type="checkbox"/> Client		Declined				
<input type="checkbox"/> Customer		Approved				

Search...

☐ Mark Corben
☐ Nathan Caruso
☐ Vanessa Ness
☐ Vladimir
☐ Volot Ns

02 Dec 2021

New custom field + section field: **Contact** information can now be displayed in issues.

CRM

Contact

James Pollock

Company

Apollo

+ Create

Cascade CRM info auto-populating is available:

Issue fields auto-populating

Note that change of settings will not update the existing issues.

Set contact by Reporter

requires users sync

Set company by contact

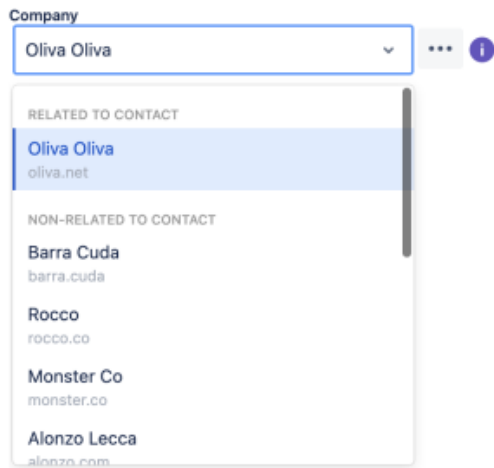
16 Nov 2021

A company entry can be created directly from an issue.

11 Nov 2021

- One contact can now be included in several companies
- Changes in the logic of [company auto-populating](#) in issues ("by Reporter" mode):
 - if there is a company associated with the reporter, the Company field will be auto-populated
 - if there are 0 or 2+ companies associated with the reporter, the Company field will not be auto-populated (selecting a company manually will link it with the Reporter)

- An extra parameter (i.e. domain) can be displayed along with the Company name in the Company select list in the issue section.



21 Oct 2021

- [Background users/customers to contacts synchronization](#) was added.
- Minor improvements.

03 Sep 2021

- New view for the [Companies](#) and [Contacts](#) directories.
- Bulk deletion for entries is now available.
- A direct link for an entry is now available:

<input type="checkbox"/>	Name	Type	Industry	
<input type="checkbox"/>	Alonzo Lecca	Partner	IT	
<input type="checkbox"/>	Barra Cuda	Client	Legal	Copy link
<input type="checkbox"/>	Benga	Client		Edit
<input type="checkbox"/>	Castorio	Customer	Mark	Delete
<input type="checkbox"/>	Cobra	Client		

13 Jul 2021

CRM section performance improvement. The "Linked Issues" attribute now stores data instead of calculating.

["Issue Group Statistics" gadget](#) minor improvements.

21 May 2021

- Improved connection security
 - HSTS included
 - TLS version 1.2 is now used

20 May 2021

Improvements in CRM section in issue:

- Now it is possible to open a Company card directly in the CRM issue section.
- The company field value can be cleared in the case when field autocomplete is disabled.
- Minor UI improvements.

28 Dec 2020

- A new [attribute type](#) Linked Issues that displays issues linked o the particular company. The attribute allows navigating quickly to those issues.
- A new [dashboard gadget](#) to display various sales statistics.

24 Apr 2020

1. Availability to add values in a "List field" during the creation of new records in directories.
2. Manual link [issues to a Company](#).
3. Sync values in company directory with "Company" custom field.
4. Bug fixes.

04 Mar 2020

1. Availability to create links between [directories](#).
2. Sync between Custom company field and company catalog.
3. Availability to rename the company's value and Custom directory names.
4. Improvements in the search in a companies catalog.
5. Bug fixes.

09 Dec 2019

1. New field types: [List and Table list](#).
2. Bug fixes.

With the new fields, you can gather information about your Companies and customers in a more structured way.

1. You can classify roles, segments, etc.
2. Additionally, you can add more complex information in the form of a table: deliverables, software versions, etc.

Jira Software

Back

Teamlead CRM Test

MAIN

- Companies
- Contacts
- Directories (Beta)

SETTINGS

- Tabs and Fields
- Sync Jira Users

SUPPORT

- Feedback
- Documentation

CRM Companies

Search...

Add company

Name	Info	Street	Index	City	Date	contact
Teamlead	Demo	Spb	190000	Spb	2019-09-25	✕
Apple	Info	City	1234556	City	2019-09-27	✕

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27 Sep 2019

Highlights

1. IU improvements.
2. Bug fixes.

26 Jun 2019

Highlights

1. New field types.
2. IU improvements.
3. Bug fixes.

New field types

We added new popular field types such as:

1. Date.
2. Link.
3. E-mail.
4. Checkbox.

The screenshot shows the Jira 'Company creation tabs' configuration page. The left sidebar contains the Jira navigation menu, with 'Settings' > 'Tabs and Fields' selected. The main content area has tabs for 'Companies' and 'Contacts'. Under 'Company creation tabs', there's a 'Tab Title' input with 'Title' and an 'Add' button. Below, a 'Main' tab is listed. The 'Fields configuration' section has a table with columns: Field Title, Field Type, Field Tab, and Is Title. A dropdown menu for 'Field Type' is open, showing options: String, Number, CRM Contacts, Link, Date, E-mail, and Checkbox. The table lists fields: Title, New, Name, Date, and Site, each with a corresponding field type and tab assignment.

Field Title	Field Type	Field Tab	Is Title
Title	Select...	Select...	<input type="checkbox"/>
New	String	in	<input type="checkbox"/>
Name	CRM Contacts	in	<input checked="" type="checkbox"/>
Date	Date	in	<input type="checkbox"/>
Site	Checkbox	in	<input type="checkbox"/>


07 Jun 2019





Highlights

New UI

SETTINGS (Admin menu)

We've unified configuration of Companies and Contacts on the one Tab.



Jira

Back

Teamlead CRM Test





MAIN

Companies

Contacts

SETTINGS

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SUPPORT

Feedback

Documentation

CRM Settings - Tabs & Fields

Companies



Contacts

Company creation tabs

Tab Title




Title

Add

Tab Title	Edit
Main	
Contact	

Fields configuration

Field Title	Field Type	Field Tab	Is Title	
Title	Select...	Select...	<input type="checkbox"/>	Add

Field Title	Field Type	Field Tab	Is Title	Edit
Name	String	Main	<input checked="" type="checkbox"/>	
Type	String	Main	<input type="checkbox"/>	
City	String	Contact	<input type="checkbox"/>	

MAIN

We've updated UI of Companies and Contacts view. Now you can enjoy a new fresh look.

Jira

☆

🔍

+

Teamlead CRM Test

MAIN

Companies

Contacts

SETTINGS

Tabs and Fields

Sync Jira Users

SUPPORT

Feedback

Documentation

CRM Companies

Add company

e-mail	Street	City	Type	Name	Edit
info@teamlead.ru	B.Sampsonievskiy, 68	St. Petersburg	Software	Teamlead	<div>✕</div>
info@AtlasSoft.ru	Tsvetnoy b-r	Moscow	Licenses	AtlasSoft	<div>✕</div>

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