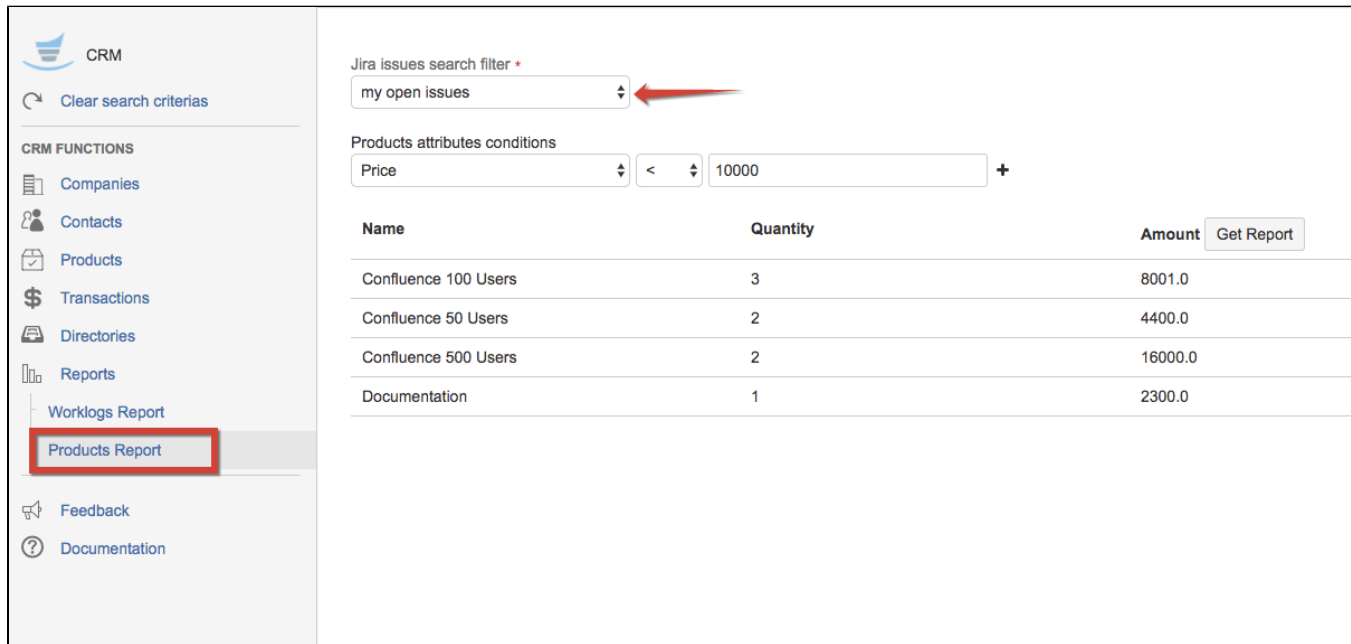


# CRM Products Report

## Products Report in CRM

CRM starting from version 1.8.9 can create report about products mentioned in issues in [Custom field - CRM Products & Services](#). The access to the report is set in CRM Administrator menu / [Access](#).

Select Reports menu / Products Report in CRM, then select a filter from dropdown list of saved filters. In this case you'll receive list of all products that are in issues that correspond to selected filter result.



The screenshot displays the CRM interface for generating a Products Report. On the left, the 'CRM FUNCTIONS' sidebar includes links for Companies, Contacts, Products, Transactions, Directories, Reports, Worklogs Report, and Products Report (which is highlighted with a red box). Below these are Feedback and Documentation links. The main content area features a 'Jira issues search filter' dropdown menu currently set to 'my open issues', indicated by a red arrow. Below this is the 'Products attributes conditions' section, showing a condition: 'Price' < '10000'. A table lists the resulting products with columns for Name, Quantity, and Amount. A 'Get Report' button is located to the right of the table.

| Name                 | Quantity | Amount  |
|----------------------|----------|---------|
| Confluence 100 Users | 3        | 8001.0  |
| Confluence 50 Users  | 2        | 4400.0  |
| Confluence 500 Users | 2        | 16000.0 |
| Documentation        | 1        | 2300.0  |

Also you can add some conditions to the report. Products attributes are taken from "[Products & Services](#)" directory settings. To add one more condition click on "+", the conditions will be added with 'AND' operator.

## Products Report Gadget

The same as report you can add a gadget to JIRA dashboards with filtered data.

Find 'CRM products report' in gadgets list

Add a gadget

Manage gadgets X

crm product

CATEGORIES

All1

Charts0

JIRA1

Other0

Wallboard0

1 Consulting Service

2 Development plugin

3 Testing

Crm products report

By Teamlead • Local

List of Crm products from Jira issues according chosen filter

Show XML link

Add gadget

Select filter ar project to search by and other filter conditions you need

| Products report      |          |          |
|----------------------|----------|----------|
| Product Name ~ e     |          |          |
| Price < 9999         |          |          |
| Name                 | Quantity | Amount   |
| Confluence 100 Users | 16       | 8014.0   |
| Confluence 50 Users  | 2        | 4400.0   |
| Confluence 500 Users | 3        | 8002.0   |
| Documentation        | 1        | 2300.0   |
| JIRA 500 Users       | 22       | 176000.0 |