

Initial Settings

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First steps

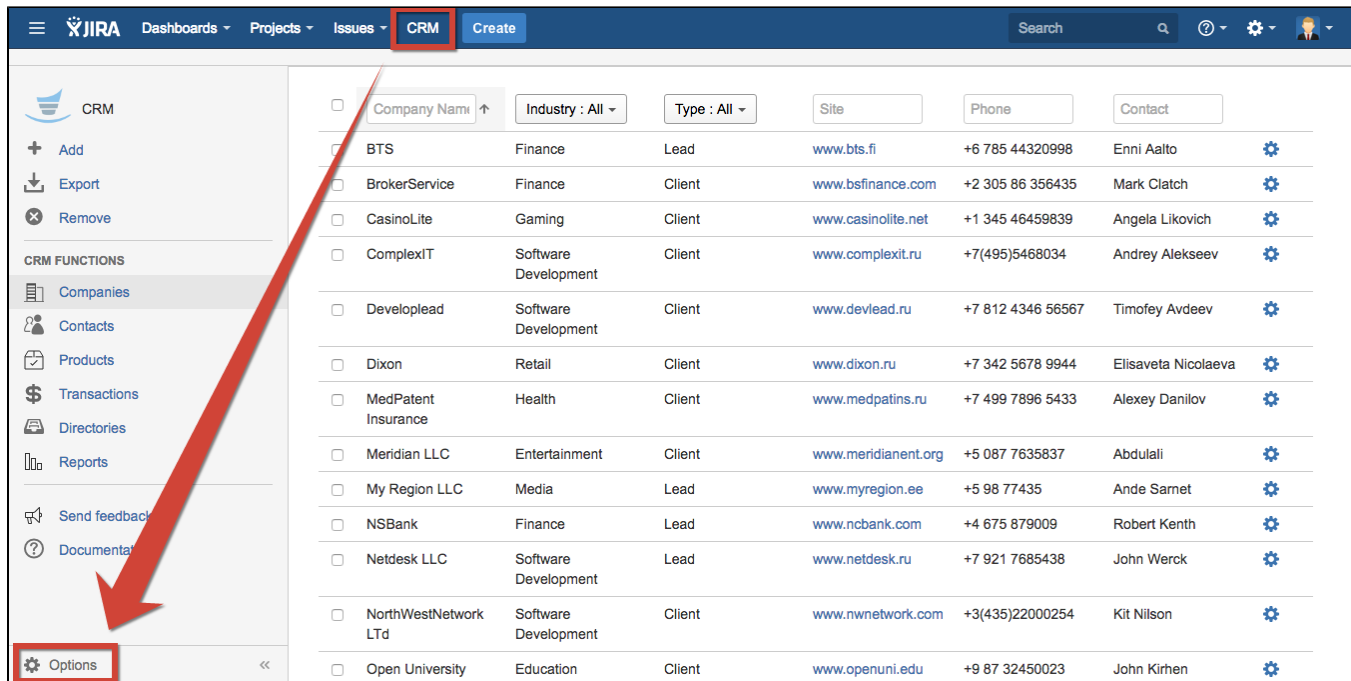
To start working with CRM objects, you need to perform these steps right after plugin installation:

1. [set up access to CRM's objects for groups and users](#)
2. [create dictionary fields and add them into desired projects](#)
3. [define a system CRM user](#)
4. [add your own attributes into dictionaries if needed](#)
5. [add your own custom dictionaries if needed](#)

Plugin Settings Menu

To get to the plugin's administration menu you can use gear button in the CRM main menu.

 CRM button will appear to users who have granted permission to Access main menu CRM. If you don't see this button, go to Manage Add-ons sections and configure permissions.



<input type="checkbox"/>	Company Name	Industry	Type	Site	Phone	Contact	
<input type="checkbox"/>	BTS	Finance	Lead	www.bts.fi	+6 785 44320998	Enni Aalto	
<input type="checkbox"/>	BrokerService	Finance	Client	www.bsfinance.com	+2 305 86 356435	Mark Clatch	
<input type="checkbox"/>	CasinoLite	Gaming	Client	www.casinolite.net	+1 345 46459839	Angela Likovich	
<input type="checkbox"/>	ComplexIT	Software Development	Client	www.complexit.ru	+7(495)5468034	Andrey Alekseev	
<input type="checkbox"/>	Develplead	Software Development	Client	www.devlead.ru	+7 812 4346 56567	Timofey Avdeev	
<input type="checkbox"/>	Dixon	Retail	Client	www.dixon.ru	+7 342 5678 9944	Elisaveta Nicolaeva	
<input type="checkbox"/>	MedPatent Insurance	Health	Client	www.medpatins.ru	+7 499 7896 5433	Alexey Danilov	
<input type="checkbox"/>	Meridian LLC	Entertainment	Client	www.meridianent.org	+5 087 7635837	Abdulali	
<input type="checkbox"/>	My Region LLC	Media	Lead	www.myregion.ee	+5 98 77435	Ande Samet	
<input type="checkbox"/>	NSBank	Finance	Lead	www.ncbank.com	+4 675 879009	Robert Kenth	
<input type="checkbox"/>	Netdesk LLC	Software Development	Lead	www.netdesk.ru	+7 921 7685438	John Werck	
<input type="checkbox"/>	NorthWestNetwork LTd	Software Development	Client	www.nwnetwork.com	+3(435)22000254	Kit Nilson	
<input type="checkbox"/>	Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	

Setting up Access

After plugin installation you must set up [access to plugin's objects and features](#), otherwise your users will not see CRM menu and its dictionaries.

The screenshot shows the JIRA Administration interface, specifically the CRM section. The left sidebar lists CRM Administration options: Access, Companies, Contacts, Products, Transactions, Custom directories, Import, Audit Log, Integrations, and Direct Mail. The main content area displays a table of permissions.

Permission	Groups	Company attributes
Access to main menu CRM	jira-administrators helpdesk jira-servicedesk-users	
Company card view	jira-administrators helpdesk	Sales Manager
Contact card view	jira-administrators helpdesk	Sales Manager
Order details edit	jira-administrators helpdesk jira-servicedesk-users	
Edit products and services	jira-core-users jira-administrators helpdesk jira-servicedesk-users	
Add products and services	jira-core-users jira-administrators helpdesk jira-servicedesk-users	
Remove products and services	jira-core-users jira-administrators helpdesk jira-servicedesk-users	

Buttons at the top right: Grant Permissions to groups, ?

Do Not Show Directories

In some versions of CRM add-on you can find a checkbox "Do not show" on top of each directory in CRM Administrator menu. Checking this checkbox you can restrict showing directories in CRM.

The screenshot shows the JIRA Administration interface, specifically the Add-ons section. The left sidebar lists ATlassian Marketplace options: Find new add-ons and Manage add-ons. The main content area displays a list of add-ons with tabs for Access, Companies, Contacts, Products, Transactions, Custom directories, Import, Audit Log, and Integrations. The 'Companies' tab is selected, and a checkbox labeled "Do not show" is visible, with a red arrow pointing to it.

When checked the selected directory is not showing in CRM for all users. This doesn't mean restricted access to data in that directory (if user has rights to browse company/contacts cards or transactions then all this data would be accessible from issue or from other CRM directories).

Default Settings

After plugin installation, there will appear settings and data in CRM dictionaries as an example. You can delete them or add your own settings.

	Company Name	Industry : All	Type : All	Site	Phone	Contact	
<input type="checkbox"/>	BTS	Finance	Lead	www.bts.fi	+6 785 44320998	Enni Aalto	
<input type="checkbox"/>	BrokerService	Finance	Client	www.bsfinance.com	+2 305 86 356435	Mark Clatch	
<input type="checkbox"/>	CasinoLite	Gaming	Client	www.casinolite.net	+1 345 46459839	Angela Likovich	
<input type="checkbox"/>	ComplexIT	Software Development	Client	www.complexit.ru	+7(495)5468034	Andrey Alekseev	
<input type="checkbox"/>	Developlead	Software Development	Client	www.devlead.ru	+7 812 4346 56567	Timofey Avdeev	
<input type="checkbox"/>	Dixon	Retail	Client	www.dixon.ru	+7 342 5678 9944	Elisaveta Nicolaeva	
<input type="checkbox"/>	MedPatent Insurance	Health	Client	www.medpatins.ru	+7 499 7896 5433	Alexey Danilov	
<input type="checkbox"/>	Meridian LLC	Entertainment	Client	www.meridianent.org	+5 087 7635837	Abdulali	
<input type="checkbox"/>	My Region LLC	Media	Lead	www.myregion.ee	+5 98 77435	Ande Sarnet	
<input type="checkbox"/>	NSBank	Finance	Lead	www.ncbank.com	+4 675 879009	Robert Kenth	
<input type="checkbox"/>	Netdesk LLC	Software Development	Lead	www.netdesk.ru	+7 921 7685438	John Werck	
<input type="checkbox"/>	NorthWestNetwork LTd	Software Development	Client	www.nwnetwork.com	+3(435)22000254	Kit Nilson	
<input type="checkbox"/>	Open University	Education	Client	www.openuni.edu	+9 87 32450023	John Kirhen	
<input type="checkbox"/>	OptTorg	Retail	Client	www.opttorg.ru	+7 812 756 3435	Inna Shlikova	
<input type="checkbox"/>	Oraclenz	Retail	Client	www.oraclenz.com	+1-45-777623443	Kat Clow	
<input type="checkbox"/>	ProjectLab	Engineering	Lead	www.prolab.com	+5 986 3435 657	Michael Leitch	
<input type="checkbox"/>	RosSanzdrav	Government	Lead	www.rsz.ru	+ 7 499 678 944 55	Nina Kotina	
<input type="checkbox"/>	SoftPix Development	Software Development	Partner	www.softpix.com	+6 8345 4539985	Yan Posheit	
<input type="checkbox"/>	Stankomash JSC	Technology	Lead	www.stm.ru	+7 342 6657 988	Igor Sergeev	
<input type="checkbox"/>	SroyPlus LLC	Engineering	Client	www.sp.ru	+7 8654 786 65 54	Nicolay Gvozdev	

Setting up Records Attributes

Before start to work you should also set up [contacts](#) and [companies](#) dictionary attributes.