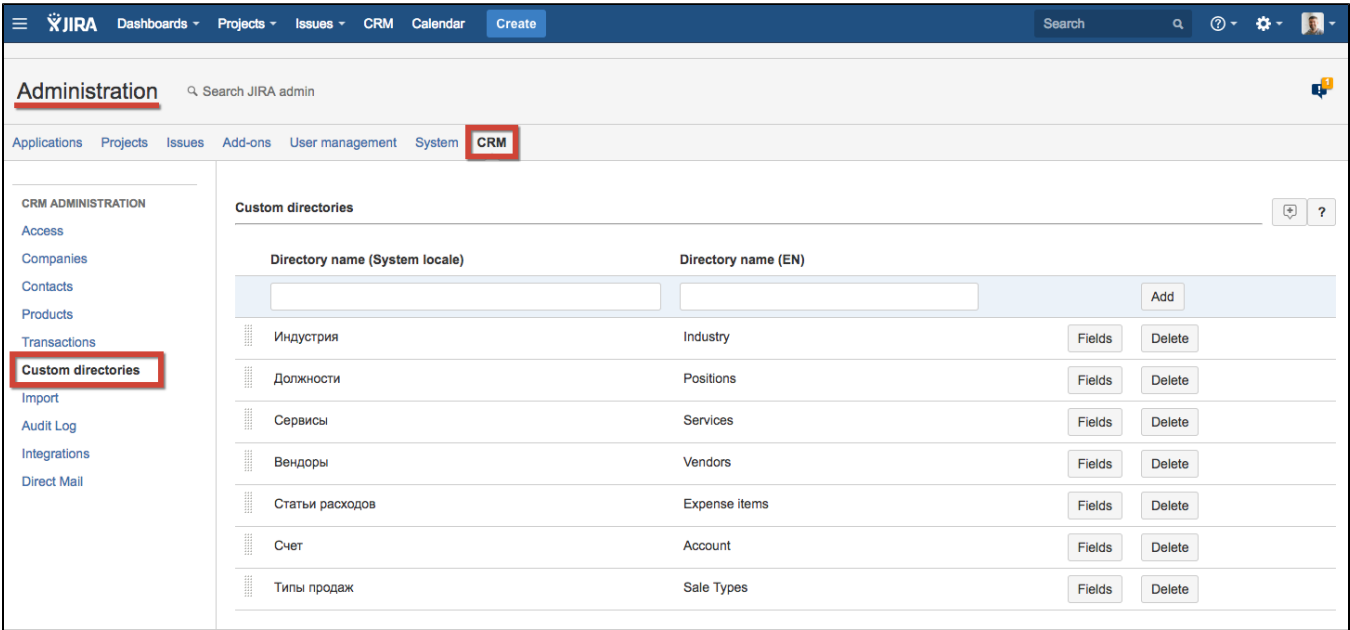


Setting Up Custom Directories (Dictionaries)

- [Adding a New Custom Dictionaries](#)
- [Fields Setting](#)
- [Using a Custom Dictionary](#)

Adding a New Custom Dictionaries

In the "Administration\Plugins\CRM\Custom Directories" menu you can create custom dictionaries with flat list of values. To do this you must specify a unique directory code and its name.



Fields Setting

Click on "Fields" button to configure what fields will be presented on Custom Directory page.

Fields

	Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
			string (255 sy		☐	☐	Add
	Имя	Name	System	Main	☒	☒	Properties
	Имя (En)	Name (En)	English name	Main	☐	☒	PropertiesDelete
	Текст	Text	string (255 symbols)	Main	☐	☒	PropertiesDelete
	Пользователь	User	Jira user	Main	☐	☒	PropertiesDelete
	Активный	Active	checkbox	Main	☒	☒	PropertiesDelete
	Руководитель	Head	Jira user	Main	☐	☒	PropertiesDelete

Close

Create fields you want and make them required or visible in the grid (on Custom Directory page). You can configure field's properties by pressing 'Properties' button. If no additional fields are created, there will be only 'Name' by default.

Field Types	Description
System	'Name' field. This field is created by default and can not be deleted.
String	Text field. One line, no more than 255 symbols.
English name	Text field to store English field's name. Is used for JIRAs where English is not default language. Don't forget to check 'To search by' in field's properties to have field searchable with English turned on in your system.
JIRA User	JIRA User picker field.
Checkbox	Checkbox
Date	Date field
Number	Number field
List of values	Create a dropdown list with values to select. The same as for Companies Directory 's 'List of values'. Example of list: "1:Lead;2:Client;3:Concurrent;4:Partner;" - type it into Properties / 'Field values'.
Directory	Select Custom Directory to take values from it.

Using a Custom Dictionary

You can add, delete or edit custom dictionary records through "CRMDirectories\Custom Directories" menu.

JIRA

Dashboards

Projects

Issues

CRM

Create

Search

CRM

CRM FUNCTIONS

Companies

Contacts

Products

Transactions

Directories

Industry

Positions

Services

Vendors

Sale Types

Expense Items

Account

Reports

Services

Name	By default	
	☐	Add
Company	☐	Delete
Consulting	☐	Delete
Development	☐	Delete
Hosting	☐	Delete
Licensing	☐	Delete
Support	☐	Delete
Training	☐	Delete
test	☐	Delete