

Setting Up Dictionary "Products & Services"

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Order Attributes

In the "Administration\CRM\Products" menu you can set up order attributes that will appear in the "Products & Service" type field in JIRA issues.

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Order attributes

Field title	Field title (En)	Field type	Is read only	show in order		
		string (255 symbx	☐	☐	Add	
Quantity	Quantity	number	☒	☒	Properties	Delete
Price	Price	number	☒	☒	Properties	Delete
Summ	Summ	number	☒	☒	Properties	Delete
Net Amount	Net Amount	number	☒	☒	Properties	Delete
Gross Amount	Gross Amount	number	☒	☒	Properties	Delete

Products tabs

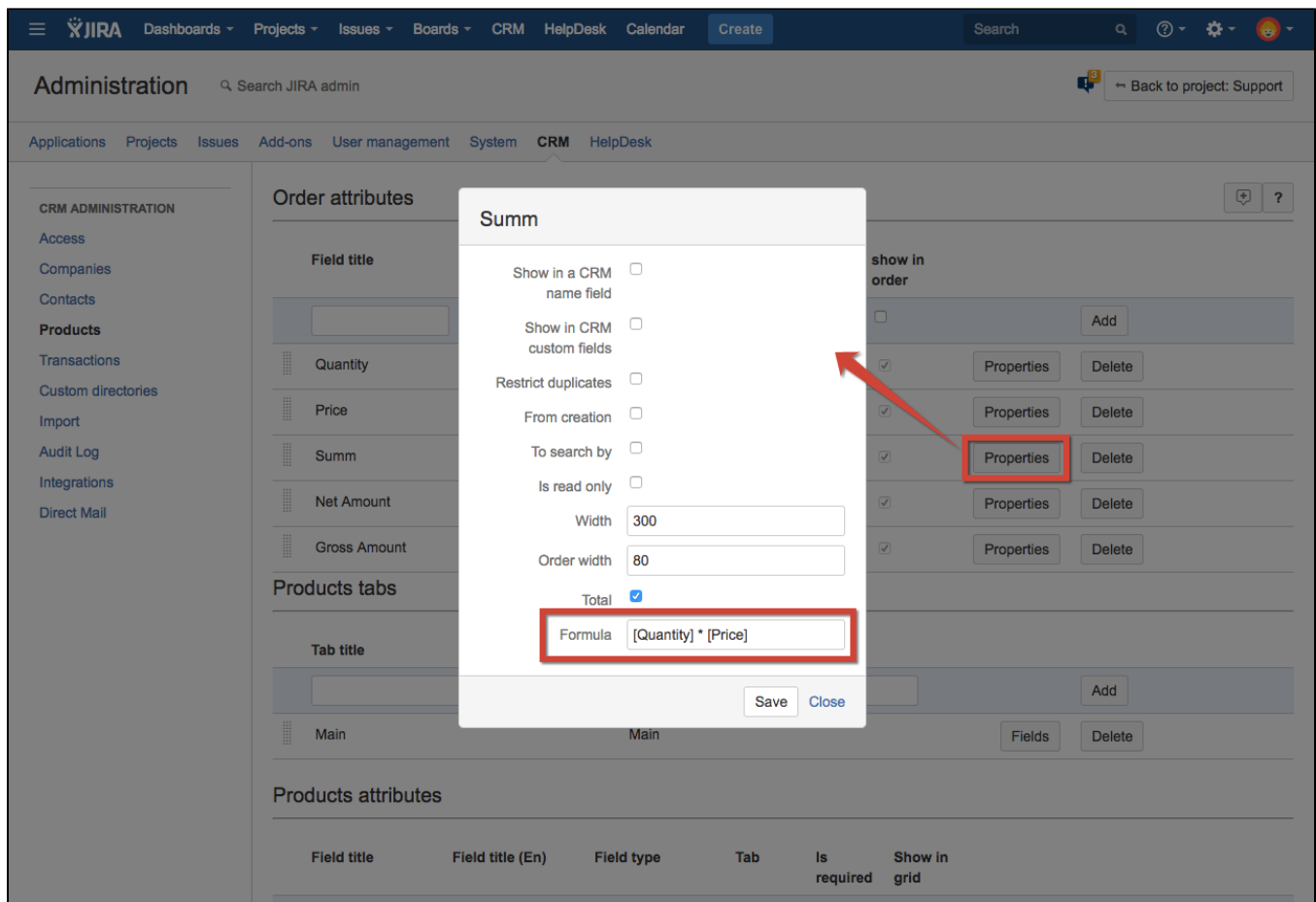
Tab title	Tab title (En)		
		Add	
Main	Main	Fields	Delete

Products attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid
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Calculated attributes

You may set calculated attributes. Formula should be based on other numeric attributes of orders. Use numeric attribute titles with [] and basic arifmetic operations. See example on screenshot below.



If you update CRM from version older than 1.4.0 please check the formula - it might be wrong.

Product/Service Card Tabs

if you have many product attributes it is a good idea to put them to different tabs. To do this you can determine tabs of product card in the **"Administration\Plugins\CRM\Products"** menu.

Products tabs

Tab title

Main

Product/Service Attributes

Every company has its own set of attributes when managing list of products and services. So in the **"Administration\Plugins\CRM\Products"** menu you can determine your attributes, their type and put them to different tabs of product or service card. See also [Dictionary attribute types](#).

Products attributes

Field title	Field type	Tab	Is required	Show in grid		
	string (255 syn ▾)		☐	☐	<button>Add</button>	
Product Name	string (255 symbols)	Main	☒	☒	<button>Properties</button>	<button>Delete</button>
Price	number	Main	☒	☒	<button>Properties</button>	<button>Delete</button>
Vendor	Dictionary	Main	☐	☒	<button>Properties</button>	<button>Delete</button>

☐ Allow dub order records

Products and services details form size

Width :

Height: Save

An example of creating new attribute **"Product Name"**:

Products attributes

Field title	Field type	Tab	Is required	Show in grid		
Product Name	string (255 syn ▾)	Main ▾	☐	☐		
Price	number	Main	☒	☒	<button>Properties</button>	<button>Delete</button>
Vendor	Dictionary	Main	☐	☒	<button>Properties</button>	<button>Delete</button>

Products tabs

Tab title

Main

Products attrib

Field title

Product Name

Price

Vendor

☐ Allow dub order

Products and services details form size

Width : 600

Height: 400

Save

Product Name

Is title ☒

To search by ☒

Is read only ☐

Width 300

show in order ☒

Order role Order field

Order width 300

Save Close

Properties Delete

Properties Delete

Properties Delete

Product/Service Card Size

As it is impossible to forecast the number of tabs and attributes of the card you can set the size of the product card in "Administration\Plugins\CRM\Products" menu.

Products and services details form size

Width : 600

Height: 400

Save

Allow duplicates in the Custom Field "Products & Services"

We can allow/disallow duplicates of goods in the Order field:

