

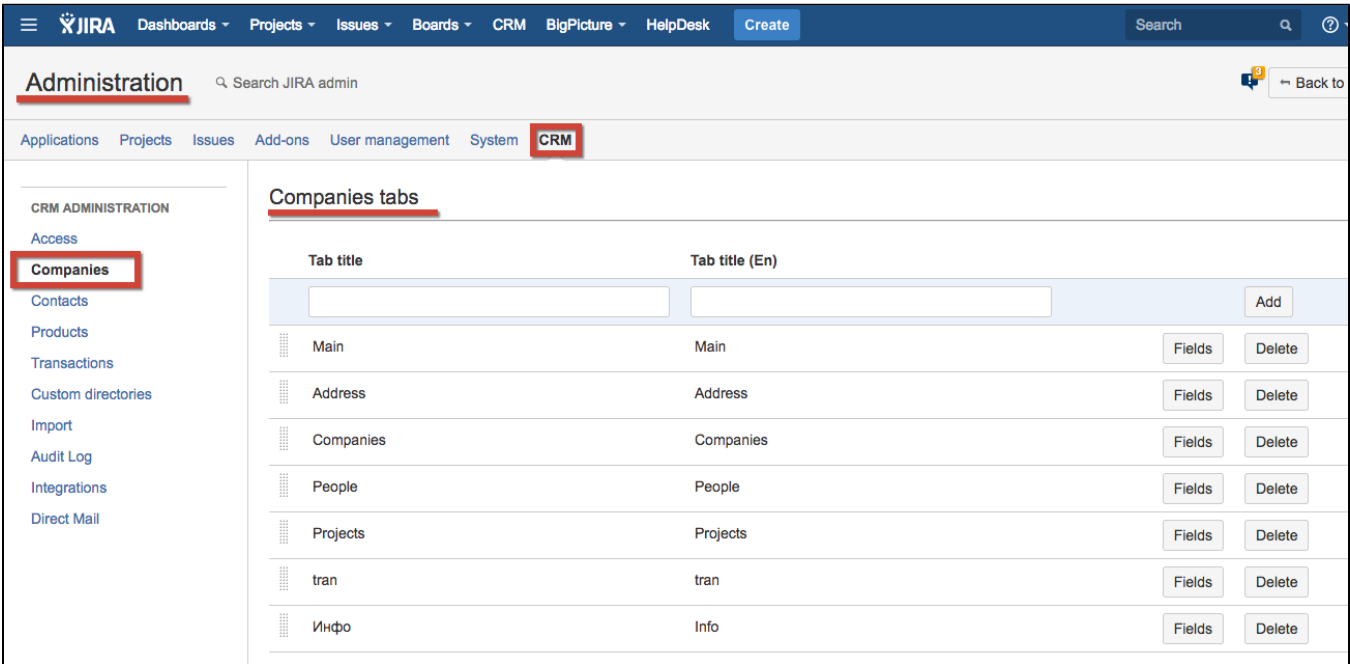
Set up Companies Directory

Companies in CRM have a set of attributes of different types. Use the following information to set up your Companies attributes, attributes' properties and to place attributes to different tabs of Company card. These settings can only be modified by JIRA administrators.

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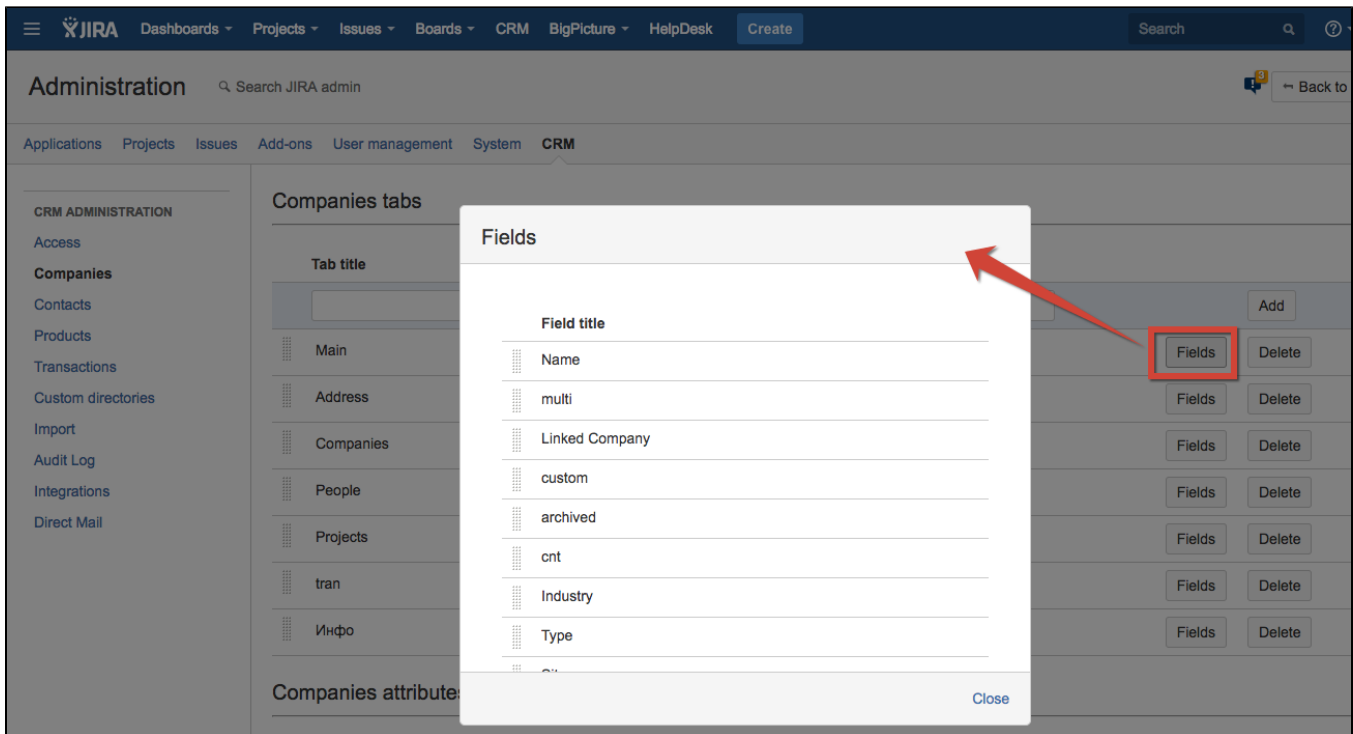
Set up Company Card Tabs

If you have many company attributes, it is a good idea to put them to different tabs. To organize company card tabs go to **"Administration\Add-ons\CRM\Companies"** menu, see below.



Tabs can be reordered by drag and drop.

Press "Fields" button to reorder fields from Company's attributes list (see below) in the Company card:



Set up Company Attributes

To set companies attributes go to **"Administration\Add-ons\CRM\Companies"** menu and scroll down to "Companies attributes" section.

The screenshot shows the 'Companies attributes' section in JIRA Administration. A table lists attributes with columns: Field title, Field type, Tab, Is required, Show in grid, and actions (Properties, Delete). Annotations highlight key features:

- Add a new attribute:** Points to the 'Add' button at the top right.
- Open attribute properties:** Points to the 'Properties' button for the 'Company Name' attribute.
- Delete an attribute:** Points to the 'Delete' button for the 'Type' attribute.
- "Title" attribute is highlighted:** Points to the 'Company Name' attribute row.
- Reorder attributes by drag&drop:** Points to the drag handle (three horizontal lines) on the left of the 'Company Name' attribute.

Field title	Field type	Tab	Is required	Show in grid	Properties	Delete
	string (255 symbols)		<input type="checkbox"/>	<input type="checkbox"/>		Add
Web-site	string (255 symbols)	5	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
project	Related projects	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
SLA	Dictionary	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Company Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Industry	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Type	list (format)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Site	Website	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Office Address	string (255 symbols)	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete
Phone	string (255 symbols)	Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Contact	Main contact	People	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete

Attributes order in the list defines order of columns in CRM Companies Directory.

When you create a new attribute you should define its properties. The list of attributes properties depends on the attribute type.

Full description of attributes types and properties you can find there: [Dictionary Attribute Types and Properties](#)

Set up Company Card Size

As it is impossible to forecast the number of tabs and attributes of the card you can set the size of the company card in **"Administration\Add-ons\CRM\Companies"** menu. Scroll down to **Card Size**:

Card Size

Width :

Height:

Save

Security Level

CRM can automatically fill a multiuser-picker customfield based on a Company Customfield in the issue. You can choose customfield for company people here:

Security level

Companies Users Field Type :

Save

Show only companies

It is possible to show not all companies in CRM Companies Directory. For example you don't need to be shown archived companies. Type your request in:

Show only companies where:

Show only companies where: :

Save

Use '=' or '!=' operators and only 'AND' operator if you need several conditions.

For example:

archived != true (It is more recommended to use 'true')

archived = true AND Type != Lead