

Set up Contacts Directory

- [Synchronization Contacts with JIRA Users](#)
 - [Making JIRA User Active/Inactive by Changing CRM Contact Status](#)
- [Contact Card Tabs](#)
- [Default Groups for a new JIRA Users](#)
- [Contact Attributes](#)
- [Contact Field Autocomplete Settings](#)
- [Contact Card Size](#)

Synchronization Contacts with JIRA Users

If you need auto determining of company by issue reporter in some projects - you should switch on contact dictionary synchronization with JIRA users dictionary. All existing JIRA users will be automatically imported to contacts dictionary and you will be able to edit their attributes.

Checkbox 'Turn on synchronization with JIRA users' enabled automatically creates new JIRA user after CRM Contact creation. If you need to sync contacts created earlier or JIRA users that already exist and don't have record in CRM Contacts Directory click on 'Run CRM contacts and JIRA users sync process now'. You can limit sync process by filling in 'JIRA groups which users will be synchronized with CRM contacts' with needed groups. Contacts will be created for JIRA users only from selected groups, if no group is listed contacts will be created for all JIRA users.

⚠ Warning! If you have JIRA administrator permission you can delete contact and a JIRA user if he do not have any issue reported or assigned in JIRA.

Administration Search JIRA admin Back to project: Support

Applications Projects Issues Add-ons User management System **CRM**

CRM ADMINISTRATION

- Access
- Companies
- Contacts**
- Products
- Transactions
- Custom directories
- Import
- Audit Log
- Integrations
- Direct Mail

Settings

☒ Turn on synchronisation with Jira users

- ☐ Remove Jira users if CRM contacts are to be removed
- ☐ Delete CRM contacts with no linked Jira users
- ☐ Check if duplicate contacts with same E-mails exist
- ☐ Create new jira users under CRM superuser

Jira groups which users will be synchronised with CRM contacts

Links between CRM Contacts fields and Jira users fields

Contact field	Jira field	
E-mail is valid	Display Name	Add
FullName	Display Name	Delete
E-Mail	E-mail	Delete
JIRA login	Login JIRA	Delete

Run CRM contacts and Jira users sync process now

After switching on the synchronization you need to associate attributes of a contact and a JIRA user. To do this - add three attributes (Full name, E-mail and JIRA login) and associate it with these JIRA user's attributes. The plugin checks values uniqueness by login.

⚠ Warning! If the synchronization is switched on all the changes applied to contact will also be applied to JIRA user. New users will be added to jira-users group. Deleting contact or user is standard procedure. If user has any reported or assigned issue - the system will not let you to delete the user.

Create new JIRA users under CRM superuser enabled allows all users to create JIRA users on behalf of CRM superuser which is set on [Access Tab](#) in CRM Admin menu.

New JIRA users created via CRM Contacts synchronization will be added to selected groups by default:

Default groups for new users

Send E-mail to a Jira user after a connected CRM contact creation:

Choose group:

jira-administrators

Add

helpdesk

Select group from the list and click 'Add'. You can add several groups or none of them. Groups can be deleted by clicking red 'X', then click 'OK' or 'Cancel' in dialog.

Enable checkbox 'Send E-mail to a JIRA user after a connected CRM contact creation' to send informational letter to new JIRA user on contact's E-mail address.

Making JIRA User Active/Inactive by Changing CRM Contact Status

To synchronise CRM Contact's status with JIRA user status create new attribute Checkbox [Type](#) for contacts in **CRM Administration/Contacts/Contacts Attributes** as a status of contact. Next step is to link contact's status to JIRA user Status field.

While Status checkbox is checked, synchronised JIRA user is active in JIRA. If it is un-checked, the JIRA user becomes inactive and has no access to your system any more.

Contact Card Tabs

If you have many enough contact attributes it is a good idea to put them on different tabs. To do this you can design tabs of new contact card in **"Administration\Plugins\CRM\Contacts"** menu.

Contact tabs

Tab title	Tab title (En)	
<input type="text"/>	<input type="text"/>	Add
Main	Main	Fields Delete
Sales	Sales	Fields Delete
Info	Info	Fields Delete


You can reorder tabs by drag and drop and this order defines tabs order in Contact's Card. Click "Fields" button to reorder fields on these tabs as well. The fields are taken from Contacts Attributes section (see below).

Default Groups for a new JIRA Users

When you create a new Contact a new JIRA user are created. You can define default JIRA groups for him here:

Default groups for new users






Send E-mail to a Jira user ☒
after a connected CRM contact
creation:

Choose group:
customers 

Contact Attributes

In every company there is a different set of attributes when managing list of contacts. So in the **"Administration\Plugins\CRM\Contacts"** menu you can determine your attributes, their type and put them to different tabs of Contact card. See also [Dictionary Attribute Types and Properties](#).

Contact attributes

Field title	Field type	Tab	Is required	Show in grid		
<input type="text"/>	<input type="text" value="string (255 sym"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Add"/>	
 Full Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>	<input type="button" value="Delete"/>
 Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>	<input type="button" value="Delete"/>
 Position	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>	<input type="button" value="Delete"/>
 E-Mail	E-mail	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>	<input type="button" value="Delete"/>
 JIRA login	string (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Properties"/>	<input type="button" value="Delete"/>

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

An example of creating new attribute **"Site"**:

Contact attributes						
Field title	Field type	Tab	Is required	Show in grid		
Site	Website	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Add	
Full Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
Position	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
E-Mail	E-mail	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
JIRA login	string (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete

Phone

Is title

☐

Show in a custom field

☒

To search by

☐

Is read only

☐

Width

Save

Close

Phone

☐

☒

☒

☒

☒

☒

☐

Add

Properties

Delete

Properties

Delete

Properties

Delete

Properties

Delete

Properties

Delete

Properties

Delete

Contact Field Autocomplete Settings

It is possible to autocomplete of contact for projects

Contact Field Autocomplete Settings

Project

Support

Add

Contact Card Size

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

Contact attributes

Field title	Field type	Tab	Is required	Show in grid		
<input type="text"/>	string (255 syr <div></div>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>		Add
<div></div> Site	Website	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
<div></div> Full Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
<div></div> Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
<div></div> Position	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
<div></div> E-Mail	E-mail	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties	Delete
<div></div> JIRA login	string (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties	Delete

Contact Field Autocomplete Settings

Project

Support

Add

Card Size

Width:

Height:

Save