Transactions Total Issue Fields

This feature allows you to place as many Automatic Amount Custom fields as you need. First create Custom fields and add them to screens where you need them to be filled in automatically with transactions sums according to set conditions.

After that go to CRM Admin Menu/Transactions:

≡ ÄIIRA Dashboards -	Projects - Issues - Boa	rds - CRM HelpDesk Calendar	Create				
Administration							
Applications Projects Issues	Add-ons User managemen	m CRM					
CRM ADMINISTRATION	Transactions tabs						
Companies	T , atle		Tab title (En)				
Contacts							
Products Transactions	Main		Main				
Custom directories	history		history				
Import							
Audit Log	Transactions attrib	utes					
Integrations							
Direct Mail	Field title	Field title (En)	Field type Tab				
			String (255 symbols)				
	epic	epic	Epic Main				

And find Transactions Total Issue Fields section:

Transactions Total Issue Fields				
Custom Field		Filter		
Amount	\$		Add	
Sale Sum		Direction = Income	Delete	
Total sum			Delete	
Total Income Plan		Direction = Income AND Status = Plan	Delete	

As conditions use formula: Transaction Attribute = Attribute Value

For example:

Condition	Result	
Direction = Income	Sum of all incoming transactions in issue	
Direction = Expense AND Status = Fact	Sum of expenses with only 'Fact' status	
Empty	Sum of all transactions in issue	

To recalculate Total issue fields use "Totals recalculate" button. The feature allows to recalculate all total fields in issues if there are some changes of formulas.

For example you as an administrator edit the filters and then click on "Totals recalculate".

Transactions Total Issue Fields				
Totals recalculation				
Custom Field	Filter			
Income	÷	Add		
Income	Direction = Income AND Status != Archive	Delete		
Profit	Status != Archive	Delete		