

Using CRM's Fields within Issues

- [Manual Input of Company](#)
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There are two ways of working with Company field in JIRA issues:

- Manual input of company by user;
- Auto determining of company by issue reporter.

Manual Input of Company

While creating new Company or editing existing one a user can fill in **Company type** field with **Company Dictionary** value. To do this he must start typing company name from any part of its name. The system will offer matching results that a user can specify.

If system do not offer any matching results a user can create new company with entered name. To do this he must click **+** button on the right from Company field.

The screenshot displays the JIRA 'Edit Issue' interface for issue SUP-48. The 'CRM Company' field is the primary focus, showing a dropdown menu with suggestions. The 'Single Product' field is set to 'Developlead'. The 'Comment' field contains 'MedPatent Insurance'. The 'Version' is 'None', 'Issues' is empty, 'start' is '19/May/16 11:00', and 'finish' is '19/May/16 16:00'. The 'Epic/Theme' field is empty. The right sidebar shows issue details: Assignee: Antonio Domingez, Reporter: Ted Johnson, Due: 19/May/16, Created: 20/Apr/14 12:43, Updated: 30/May/16 16:40, start: 19/May/16 11:00, finish: 19/May/16 16:00. Time Tracking shows Estimated: 1w 7h 59m, Remaining: 1w 7h 59m, Logged: Not Specified. The bottom of the sidebar has a 'Connect' button for HipChat discussions.

Auto-determining Company by Issue Reporter

To turn on auto determining of company by issue reporter you need to enable this feature at **"CRM\Company"** menu for desired project. See Autocomplete setting in [Custom field - CRM Company](#)

Support / SUP-254
Training for JIRA Software Users

Edit Comment Assign More Stop Progress Resolve Issue Close Issue Admin

Details

Type: + New Feature Status: DELIVERING (View Workflow)
 Priority: ^ Major Resolution: Unresolved
 Affects Version/s: None Fix Version/s: None
 Component/s: None Security Level: Company Specific
 Labels: None
 CRM Company: Oraclenz

Description

Click to add description

Attachments

Drop files to attach, or browse.

Issue Links

relates to \$ DEAL-44 Training for JIRA Software Users ^ CLOSED

Sub-Tasks

1. Prepare documents POTENTIAL Antonio Domingez ...

Activity

All Comments Work Log History Activity

People

Assignee: Antonio Domingez
 Reporter: Kat Clow
 Watchers: 1 Stop watching this issue

Dates

Due: 24/May/16
 Created: 09/Feb/16 16:56
 Updated: 1 minute ago
 start: 23/Nov/16 10:00
 finish: 25/Nov/16 19:00

Time Tracking

Estimated: 1w 7h 59m
 Remaining: 1w 7h 59m
 Logged: Not Specified
☒ Include sub-tasks

HipChat discussions

Do you want to discuss this issue? Connect to HipChat.
 Connect Dismiss

💡 If issue reporter is changed - then the company will be automatically changed too.

If issue reporter is not associated with any company - system will prompt to create new company or to select an existing.

Editing Company Details within Issue

On the view issue screen a user can click on the company name to edit its attributes. To open **Company Card** a user must have appropriate access that is set in **"CRMAccess"** menu.

JIRA

Dashboards

Projects

Issues

CRM

Create

Search

SALES MANAGEMENT / DEAL-2

JIRA plug-ins Script

Edit

Comment

Assign

M

Details

Type: Deal

Priority: Major

Component/s: None

Labels: None

Company: NSBank

Services: Licensing

Sum: 100

CRM Transactions:

Client

Note

NSBank

Invoice #243

Products:

Product Name

Issues:

No issues

Company: NSBank

Main

Address

People

Deals

Products

Transactions

Company Name

NSBank

Industry

Finance

Type

Lead

Print

Full page

Remove

Save

Close

Anna Lokteva

Assign to me

Robert Kenth

Start watching this issue

31/Mar/16

18/Mar/16 14:00

2 hours ago

Not Specified

0m

50m

Do you want to discuss this issue? Connect to HipChat.

Connect

Dismiss