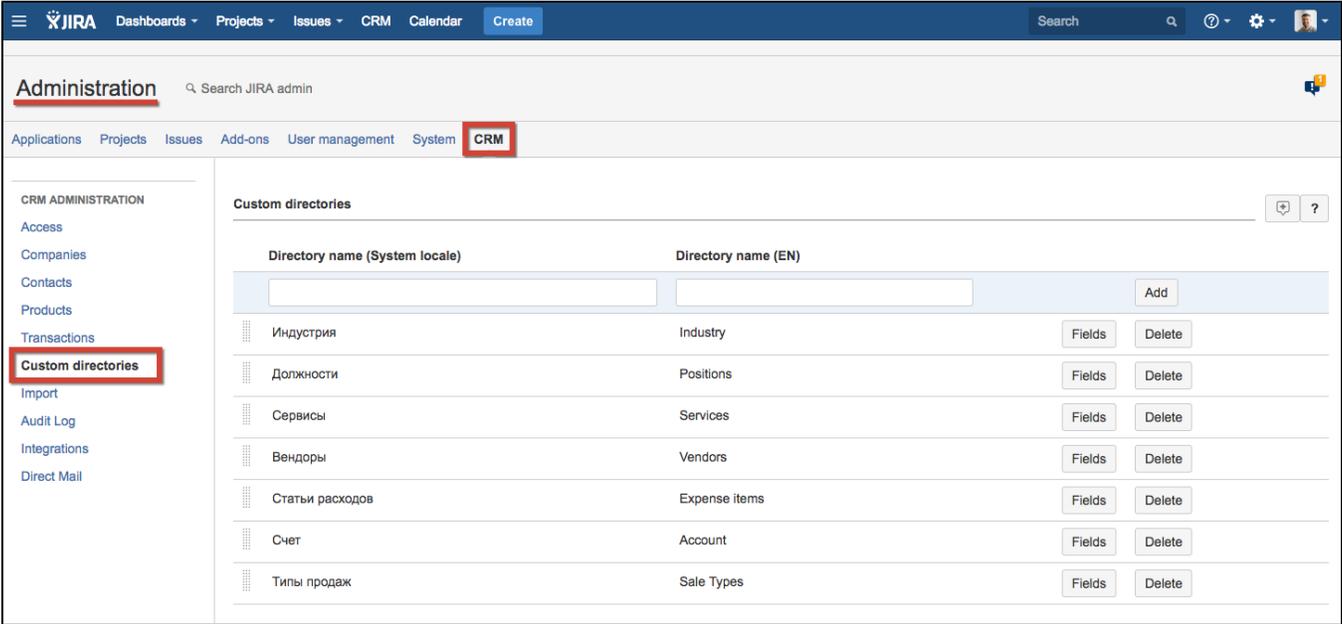


Setting Up Custom Directories (Dictionaries)

- [Adding a New Custom Dictionaries](#)
- [Fields Setting](#)
- [Using a Custom Dictionary](#)

Adding a New Custom Dictionaries

In the "Administration\Plugins\CRM\Custom Directories" menu you can create custom dictionaries with flat list of values. To do this you must specify a unique directory code and its name.



Fields Setting

Click on "Fields" button to configure what fields will be presented on Custom Directory page.

Fields

Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
<input type="text"/>	<input type="text"/>	string (255 sy)	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Add"/>
Имя	Name	System	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>
Имя (En)	Name (En)	English name	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
Текст	Text	string (255 symbols)	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
Пользователь	User	Jira user	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
Активный	Active	checkbox	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
Руководитель	Head	Jira user	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>

[Close](#)

Create fields you want and make them required or visible in the grid (on Custom Directory page). You can configure field's properties by pressing 'Properties' button. If no additional fields are created, there will be only 'Name' by default.

Field Types	Description
System	'Name' field. This field is created by default and can not be deleted.
String	Text field. One line, no more than 255 symbols.
English name	Text field to store English field's name. Is used for JIRAs where English is not default language. Don't forget to check 'To search by' in field's properties to have field searchable with English turned on in your system.
JIRA User	JIRA User picker field.
Checkbox	Checkbox
Date	Date field
Number	Number field
List of values	Create a dropdown list with values to select. The same as for Companies Directory's 'List of values'. Example of list: "1:Lead;2:Client;3:Concurrent;4:Partner;" - type it into Properties / 'Field values'.
Directory	Select Custom Directory to take values from it.

Using a Custom Dictionary

You can add, delete or edit custom dictionary records through "CRMDirectories\Custom Directories" menu.

The screenshot shows the JIRA CRM interface. The top navigation bar includes 'JIRA', 'Dashboards', 'Projects', 'Issues', 'CRM', and a 'Create' button. The left sidebar lists 'CRM FUNCTIONS' with items: Companies, Contacts, Products, Transactions, Directories (highlighted with a red box), Industry, Positions, Services (highlighted with a red box), Vendors, Sale Types, Expense Items, Account, and Reports. The main content area is titled 'Services' and contains a table with columns 'Name' and 'By default'. The table lists various service types with 'Delete' buttons for each.

Name	By default	
<input type="text"/>	<input type="checkbox"/>	Add
Company	<input type="checkbox"/>	Delete
Consulting	<input type="checkbox"/>	Delete
Development	<input type="checkbox"/>	Delete
Hosting	<input type="checkbox"/>	Delete
Licensing	<input type="checkbox"/>	Delete
Support	<input type="checkbox"/>	Delete
Training	<input type="checkbox"/>	Delete
test	<input type="checkbox"/>	Delete