

Administrator's Guide

Installation

Licensing

Setting Up Features

- Initial Settings
- Defining a CRM User
- Setting up Access to Objects
- Configure CRM Directories
 - Setting Up Custom Directories (Dictionaries)
 - Setting Up Dictionary "Products & Services"
 - Set up Companies Directory
 - Set up Contacts Directory
 - Directory Attribute Types and Properties
 - Setting Up Custom Company Directories
- Setting Up Issue Custom Fields
 - Custom field - CRM Company
 - Custom field - CRM Contact
 - Custom field - CRM Property
 - Custom field - Contacts CRM
 - Custom field - CRM Products & Services
 - Custom field - CRM Custom Directory
 - Custom field - CRM Select Custom Field
 - Custom Field - Issue Picker
 - Custom field - CRM Transactions
 - Custom Field - CRM Companies Select
 - Company/Contact issue fields format
 - Custom Field - CRM Products Select / CRM Single Product Select
 - Custom Field - CRM Custom Company
 - Custom field - CRM UserPicker
- CRM's Post-Functions
 - CRM Copy Transactions and Products Custom Fields Values to Issue
 - Setting Up a Post-Function Cloning Issue
 - Setting Up CRM Copy Contacts to Users Postfunction
- Adding CRM Custom Fields to Email Template
- Set Companies Hierarchy
- Auto-adding Companies and Contacts from CRM to Service Desk Projects
- Table Lists
- Setting Up Budgets

Transactions

- Transactions Attributes
- Transactions Statuses
- Transactions Notifications
- Transactions Total Issue Fields

Backing Up CRM's Data

Importing/Exporting Data

Reset all settings to default

Audit Log

Board's Integration

CRM Security Levels

Direct Mail

- [Subscription Macro for Confluence](#)

Link CRM Custom Fields to Jira Custom Fields