




Defining a CRM User

CRM User allows JIRA-users make issues operations in CRM on behalf of CRM User. This user guaranteed has all required permissions and roles that regular users may not have.


Also some background operations with no logged JIRA user can be made by CRM User. For example during contacts synchronization or issues fields autocomplete, issues update when Company field is updated.

Look here an example:

Activity Stream





Today




CRM robot updated 3 fields of [SUPPORT-7326 - Не могу скачать BCE вложения со страницы Confluence](#)


- Updated the Время реакции
- Changed the Security to 'Публичный'
- Changed the Resolution to 'Fixed'

 5 hours ago




CRM robot updated the SLA-карма of [SUPPORT-7326 - Не могу скачать BCE вложения со страницы Confluence](#)

 5 hours ago



Антон Колин (Teamlead) closed [SUPPORT-7326 - Не могу скачать BCE вложения со страницы Confluence](#)

ЯСНО

 5 hours ago

You could define the CRM user here:

Administration

Search JIRA admin

Applications

Projects

Issues

Add-ons

User management

CRM

HelpDesk

CRM ADMINISTRATION

Access

Companies

Contacts

Products

Transactions

Custom directories

Import

Audit Log

Integrations

Direct Mail

Grant Permissions to groups

Permission	Groups	Company attributes
Access to main menu CRM	<div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div> <div>jira-software-users</div>	
Company card view	<div>jira-administrators</div> <div>helpdesk</div>	Sales Manager
Contact card view	<div>jira-administrators</div> <div>helpdesk</div> <div>jira-software-users</div>	Sales Manager
Order details edit	<div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Edit products and services	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Add products and services	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Remove products and services	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Edit contacts	<div>helpdesk</div> <div>jira-administrators</div>	
Add contacts	<div>jira-administrators</div> <div>jira-software-users</div>	
Remove contacts	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Edit companies	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	Sales Manager
Add companies	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Remove companies	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Edit the values in directories	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Add the values to directories	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Remove the values from directories	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Export	<div>jira-software-users</div> <div>jira-servicedesk-users</div> <div>helpdesk</div> <div>jira-administrators</div>	
Worklog Report Access	<div>jira-core-users</div> <div>jira-administrators</div> <div>helpdesk</div> <div>jira-servicedesk-users</div>	
Transactions page access	<div>jira-core-users</div>	

	jira-administrators helpdesk jira-servicedesk-users
View issue transactions	jira-core-users jira-administrators helpdesk jira-servicedesk-users
Add and edit issue transactions	jira-core-users jira-administrators helpdesk jira-servicedesk-users
Companies page access	jira-core-users jira-administrators helpdesk jira-servicedesk-users jira-servicedesk-users-1
Contacts page access	jira-core-users jira-administrators helpdesk jira-servicedesk-users jira-software-users
Products page access	jira-core-users jira-administrators helpdesk jira-servicedesk-users
Directories page access	jira-core-users jira-administrators helpdesk jira-servicedesk-users
Reports page access	jira-core-users jira-administrators helpdesk jira-servicedesk-users
Direct Mail	jira-administrators
View issue products&services	jira-core-users jira-administrators helpdesk jira-servicedesk-users

Jira user for CRM operations with tasks

Start typing a username to match