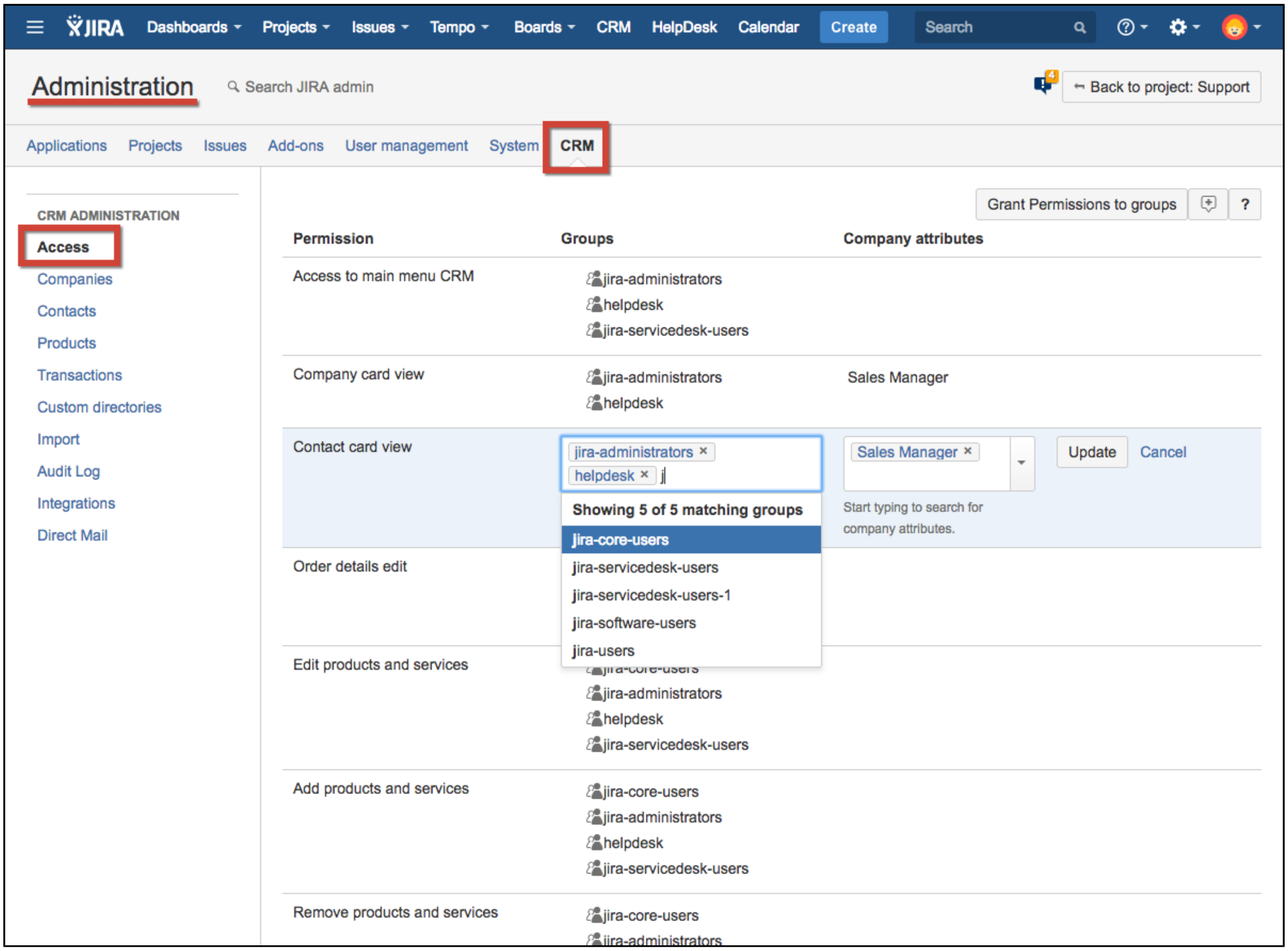
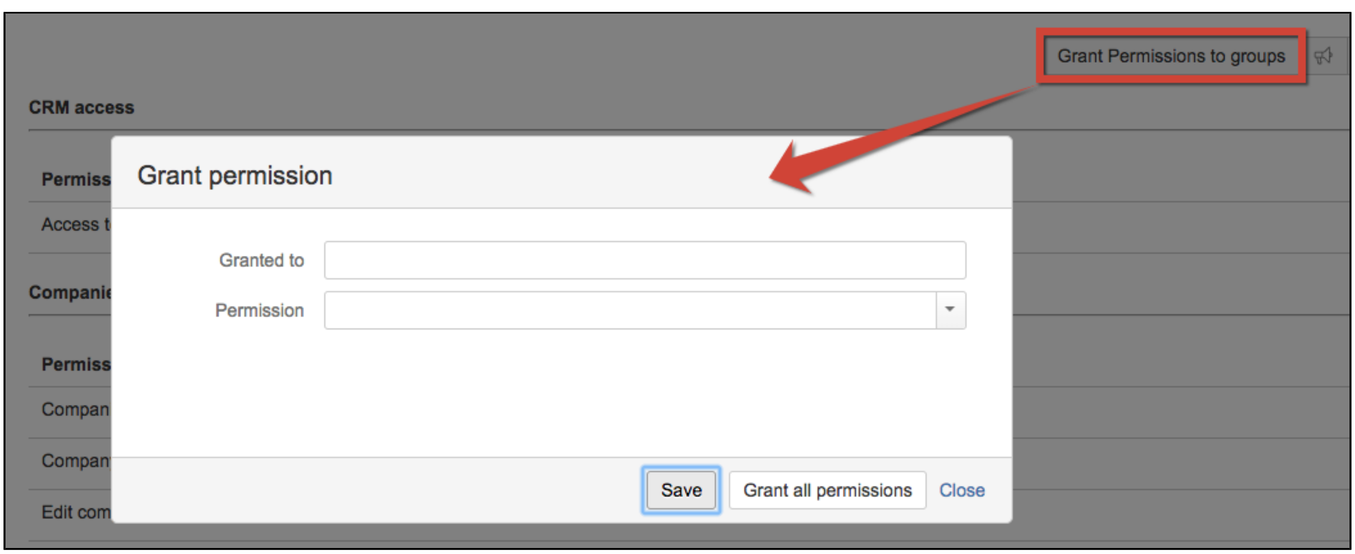
Setting up Access to Objects

Let's get your CRM plugin ready to use by setting up users' permissions to plugin's data and features in **"Administration\CRM\Access"** menu.

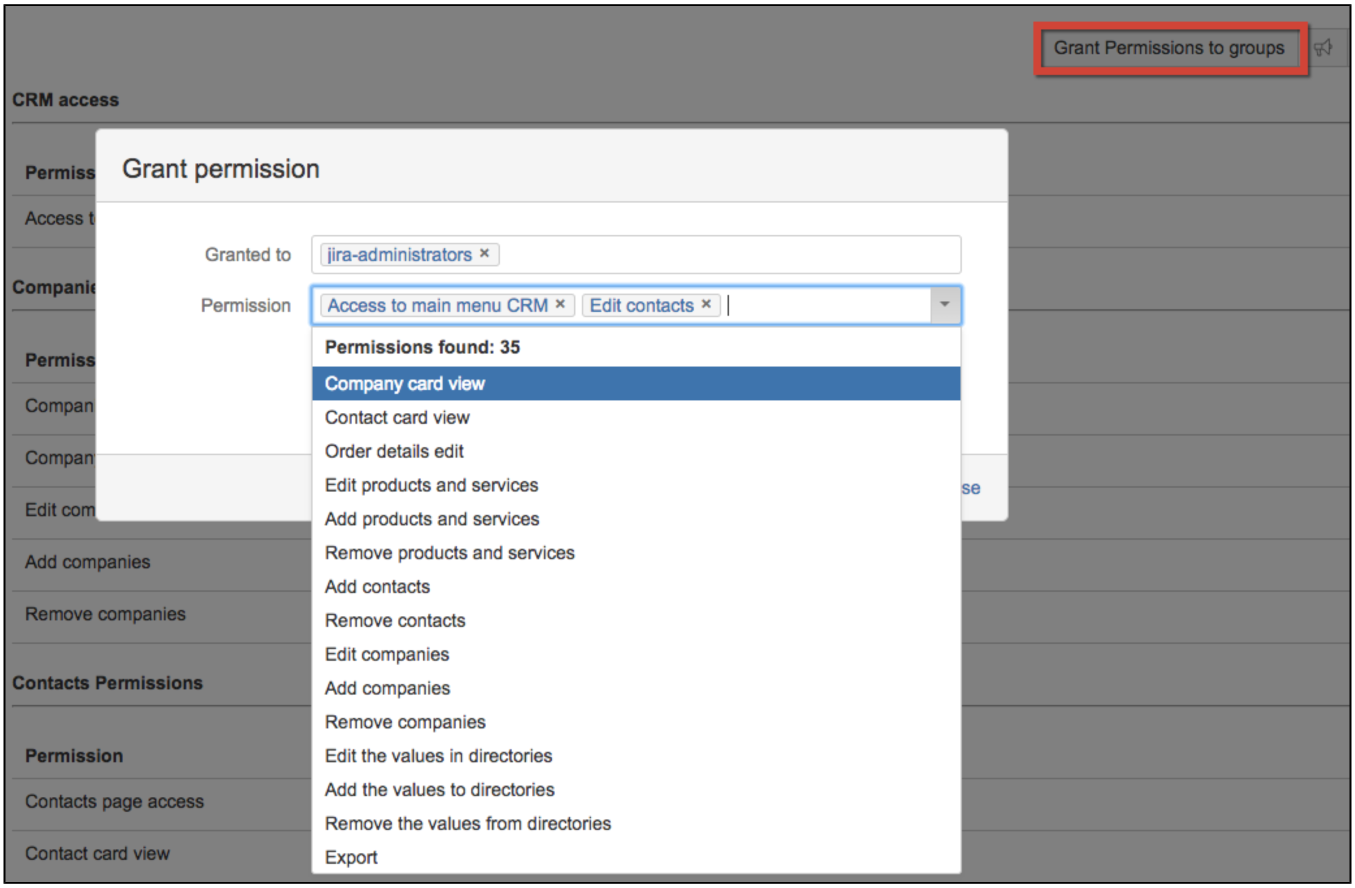
The Access rights can be edited by pressing edit icon in permission you need:



Or several permissions can be granted to different groups at one time by pressing "Grant permissions to groups" button:



Choose one or several groups to set permissions for, choose permissions and press "Save". To give access to all permissions in the list select groups and press "Grant all permissions".



There is a list of permissions in CRM, see detailed description in the table below. Each permission can be assigned to:

1. JIRA group - column "Groups" (the first column in the screenshots above). Group permissions have the highest priority.

2. Members of any Company attribute with "JIRA user" or "JIRA group" types - column "Company attributes" (the second column on the screenshots above). It's a dynamic permission assignment.
   See screenshots above, with these kind of permission assignment all users can see companies list and details, but only Sales manager of specific company (and administrators) have permissions to change Company details, add contacts.
   "Sale manager" is a Company attribute with "JIRA user" type. See more Set up Companies Directory

The full list of permissions is below.

Permission	Explanation
Access to main menu CRM	Users without this permission can't see CRM menu in top navigation bar of JIRA, so they can't work directly with CRM dictionaries (Companies, Contacts and others).
Company card view	Permission to open Company card with detailed Company data. In case the user don't have **Edit companies** permission, the Company card will be open in read-only mode.
Contact card view	Permission to open Contact card with detailed Contact data. In case the user don't have **Edit contacts** permission, the Contact card will be open in read-only mode.
Company details edit	Permission to edit records of products&services table in issues.
Edit products and services	Permission to edit Products and Service dictionary records.

Add products and services	Permission to add Products and Service dictionary records.
Remove products and services	Permission to remove Products and Service dictionary records.
Edit contacts	Permission to edit Contacts Dictionary records.
Add contacts	Permission to add new Contacts Dictionary records.
Remove contacts	Permission to remove Contacts Dictionary records.
Edit companies	Permission to edit Companies Dictionary records.
Add companies	Permission to add new Companies Dictionary records.
Remove companies	Permission to remove Companies Dictionary records.
Edit the values in dictionaries	Permission to edit records in custom dictionaries.
Add the values to dictionaries	Permission to add values to custom dictionaries.
Remove the values from dictionaries	Permission to remove values from custom dictionaries.
Export	Permission to export Companies and Contacts dictionaries (see Importing/Exporting Data)
Worklog Report Access	Permission to create worklog report (see CRM Worklog Report)
View issue transactions	Permission to view transactions in issues (CRM Transactions field type)
Add and edit issue transactions	Permission to add/edit transactions in issues (CRM Transactions field type). Notice that Add and edit issue transaction right should be given with View issue transactions right.
Order details edit	Permission to edit field CRM Products & Services in issues
Transactions page access	Permission to view Transactions directory
Companies page access	Permission to view Companies directory
Contacts page access	Permission to view Contacts directory
Products page access	Permission to view Products & Services directory
Directories page access	Permission to view Custom Directories
Reports page access	Permission to view Reports directory
View issue products&services	Permission to view CRM Products & Services field inside JIRA issues
Products Report Access	Permission to create products report (see CRM Products Report)
View budget	Permission to view budgets
Add budget	Permission to add budgets
Edit budget	Permission to edit budgets
Remove budget	Permission to remove budgets
Show feedback button	Permission to view Feedback button in CRM side menu
Import	Permission to import Companies, Contacts dictionaries and Transactions list (see Importing/Exporting Data)

Disable ability to create new CRM records via CRM fields in JIRA issues setting can be used when you want your users to create Companies and Contacts only via CRM dictionaries, not via Jira issues.