

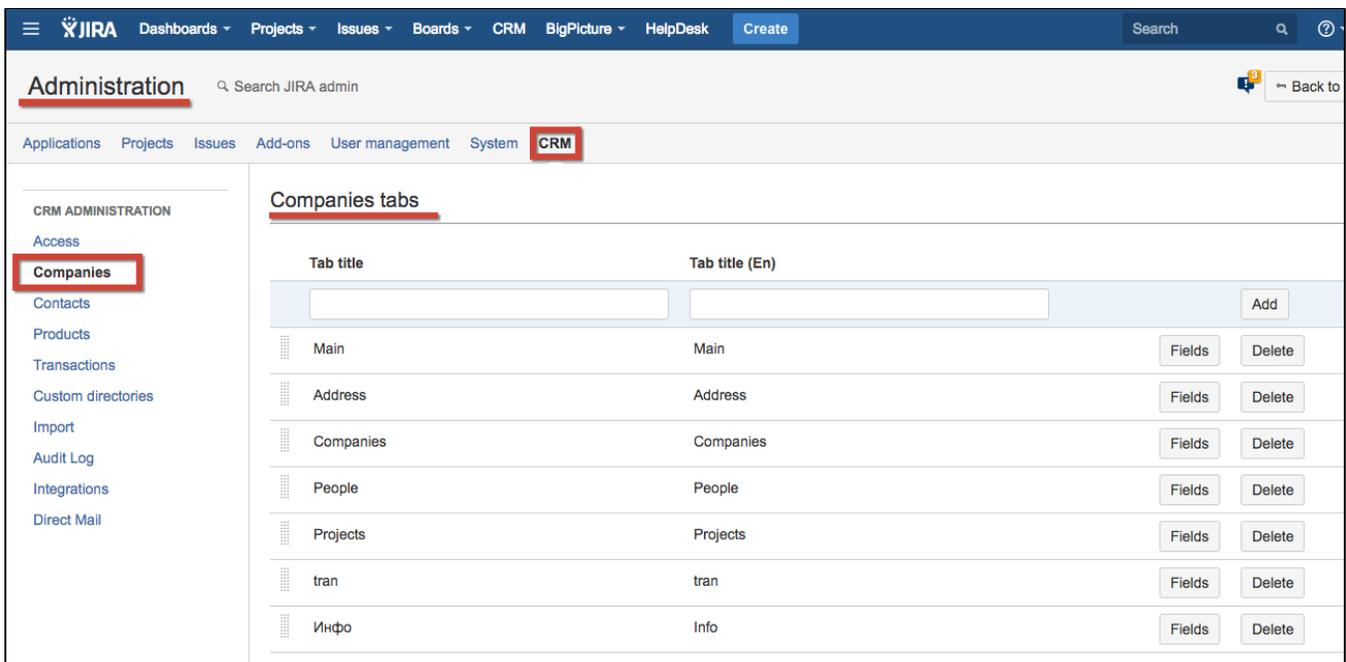
Set up Companies Directory

Companies in CRM have a set of attributes of different types. Use the following information to set up your Companies attributes, attributes' properties and to place attributes to different tabs of Company card. These settings can only be modified by JIRA administrators.

- [Set up Company Card Tabs](#)
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Set up Company Card Tabs

If you have many company attributes, it is a good idea to put them to different tabs. To organize company card tabs go to **"Administration\Add-ons\CRM\Companies"** menu, see below.

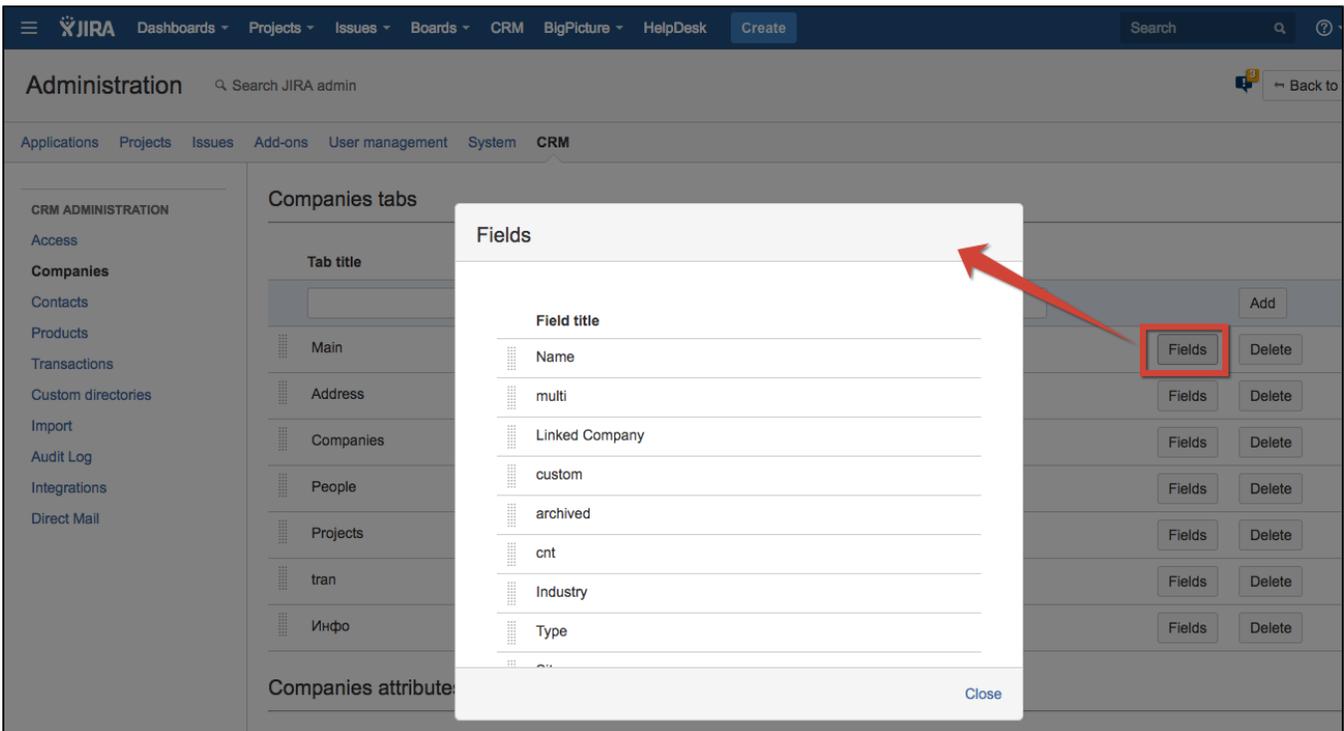


The screenshot shows the JIRA Administration interface. The top navigation bar includes 'JIRA', 'Dashboards', 'Projects', 'Issues', 'Boards', 'CRM', 'BigPicture', 'HelpDesk', and 'Create'. The 'Administration' section is active, with a search bar and a 'Back to' button. The 'CRM' tab is selected in the sub-navigation. The left sidebar shows 'CRM ADMINISTRATION' with 'Companies' highlighted. The main content area is titled 'Companies tabs' and contains a table with columns 'Tab title' and 'Tab title (En)'. The table lists several tabs: 'Main', 'Address', 'Companies', 'People', 'Projects', 'tran', and 'Инфо'. Each row has 'Fields' and 'Delete' buttons. An 'Add' button is located at the top right of the table.

Tab title	Tab title (En)	Fields	Delete
<input type="text"/>	<input type="text"/>	Add	
Main	Main	Fields	Delete
Address	Address	Fields	Delete
Companies	Companies	Fields	Delete
People	People	Fields	Delete
Projects	Projects	Fields	Delete
tran	tran	Fields	Delete
Инфо	Info	Fields	Delete

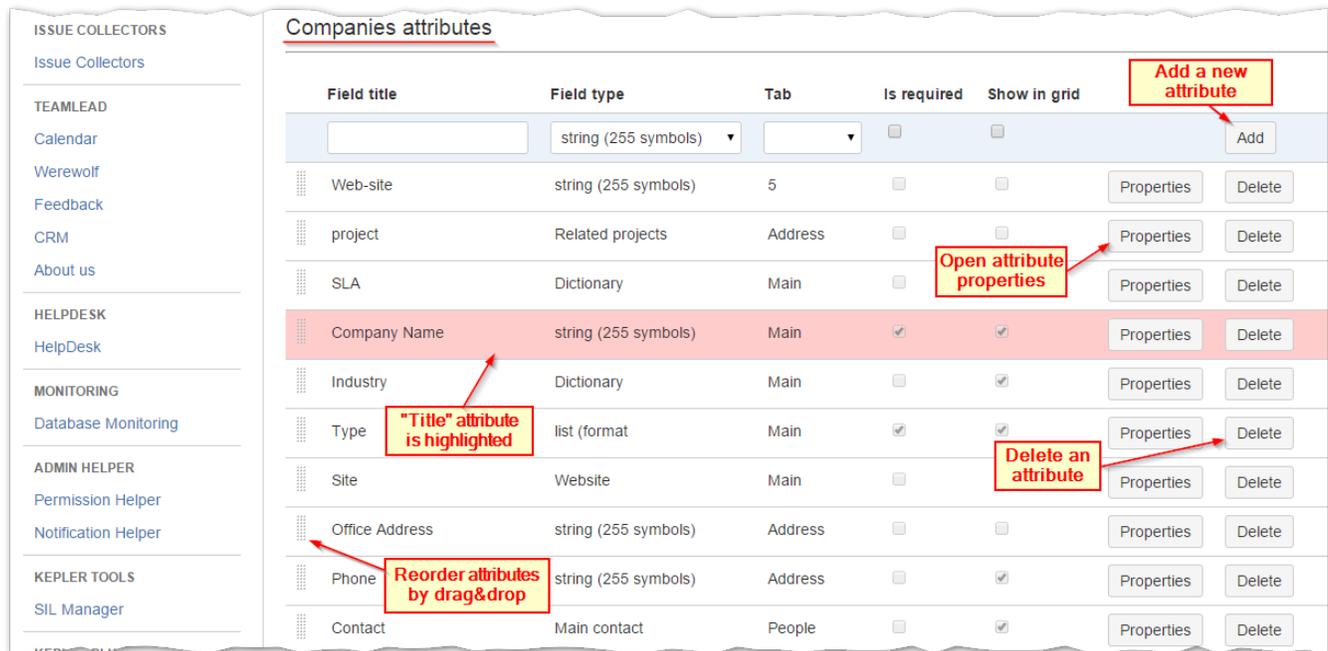
Tabs can be reordered by drag and drop.

Press "Fields" button to reorder fields from Company's attributes list (see below) in the Company card:



Set up Company Attributes

To set companies attributes go to **"Administration\Add-ons\CRM\Companies"** menu and scroll down to "Companies attributes" section.



Attributes order in the list defines order of columns in CRM Companies Directory.

When you create a new attribute you should define its properties. The list of attributes properties depends on the attribute type.

Full description of attributes types and properties you can find there: [Directory Attribute Types and Properties](#)

Set up Company Card Size

As it is impossible to forecast the number of tabs and attributes of the card you can set the size of the company card in **"Administration\Add-ons\CRM\Companies"** menu. Scroll down to **Card Size**:

Card Size

Width :

Height:

Security Level

CRM can automatically fill a multiuser-picker customfield based on a Company Customfield in the issue. You can choose customfield for company people here:

Security level

Companies Users Field Type :

Show only companies

It is possible to show not all companies in CRM Companies Directory. For example you don't need to be shown archived companies. Type your request in:

Show only companies where:

Show only companies where: :

Use '=' or '!=' operators and only 'AND' operator if you need several conditions.

For example:

archived != true (It is more recommended to use 'true')

archived = true AND Type != Lead

Synchronization from the Service Desk to CRM

To synchronize SD companies you need to create JIRA Service with class

```
ru.teamlead.jira.plugins.listener.crm.CRMSDIntegration
```

Go to **"Administration\System\Services"** and click **Add service** menu, see below.

Administration Search JIRA admin Back to project: Pilot

Applications Projects Issues Add-ons User management Latest upgrade report System CRM

General configuration Find more admin tools

SYSTEM SUPPORT

System info Instrumentation JMX Monitoring Database monitoring Integrity checker Logging and profiling Scheduler details Troubleshooting and support tools Audit Log

SECURITY

Project roles Global permissions Password Policy User sessions Remember my login Whitelist

Issue collectors

AUTOMATION FOR JIRA

Automation rules

USER INTERFACE

Default user preferences

Services

Name / Class	Properties	Schedule	
Mail Queue Service com.atlassian.jira.service.services.mail.MailQueueService		0 **** ?	Edit
Backup Service com.atlassian.jira.service.services.export.ExportService		0 0 3/12 *** ?	Edit Delete
Audit log cleaning service com.atlassian.jira.service.services.auditing.AuditLogCleaningService		Daily at 3:00 am	Edit Delete
Служба Резервного Копирования com.atlassian.jira.service.services.export.ExportService	• USE_DEFAULT_DIRECTORY: true	0 0 3/12 *** ?	Edit Delete

Add Service

Add a new service by entering a name and class below. You can then edit it to set properties. Mail handlers should be added or edited via our new [Incoming Mail](#) section.

Name

Class [Built-in Services](#)

Schedule Daily
 Days per Week
 Days per Month
 Advanced

Interval
Cron Expression

Here is result of creation your Service in picture below.

Administration Search JIRA admin Back to project: Pilot

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General configuration Find more admin tools

SYSTEM SUPPORT

System info Instrumentation JMX Monitoring Database monitoring Integrity checker Logging and profiling Scheduler details Troubleshooting and support tools Audit Log

SECURITY

Project roles

Services

Name / Class	Properties	Schedule	
Mail Queue Service com.atlassian.jira.service.services.mail.MailQueueService		0 **** ?	Edit
Backup Service com.atlassian.jira.service.services.export.ExportService		0 0 3/12 *** ?	Edit Delete
Audit log cleaning service com.atlassian.jira.service.services.auditing.AuditLogCleaningService		Daily at 3:00 am	Edit Delete
Служба Резервного Копирования com.atlassian.jira.service.services.export.ExportService	• USE_DEFAULT_DIRECTORY: true	0 0 3/12 *** ?	Edit Delete
Synch SD to CRM ru.teamlead.jira.plugins.listener.crm.CRMSDIntegration		0 0/5 *** ?	Edit Delete

Then all your companies from Service Desk Projects...

DEMO

- Queues
- Customers
- Reports
- Raise a request
- Knowledge base
- Customer channels
- Invite team
- Welcome guide

PROJECT SHORTCUTS

Add a link to useful information for your whole team to see.

+ Add link

Customers

Add organizations Add customers

This service desk is open to customers who are added to the project. [Change permissions.](#)

Name	Open requests	Closed requests
Winterfall	0 open	0
Helen Lambert (cindy@teamlead.com)	0 open	0
Mark Berger (mark@facebook.com)	0 open	0
Nicolas Harris (tom@teamlead.com)	0 open	0
юзер юзерович (user@teamlead.ru)	0 open	0

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... will synchronize to CRM Company directory.

CRM

- + Add record
- Export
- Import
- Clear search criterias
- Find Duplicates
- Add filter
- Companies
- Contacts
- Products
- Transactions
- Budget
- Directories
- Reports
- Documentation

Type : All ↑ Winterfall
Industry : All ↓
Main Contact
Web-site

Клиент Winterfall ⚙

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