

Set up Contacts Directory

- [Synchronization Contacts with JIRA Users](#)
 - [Making JIRA User Active/Inactive by Changing CRM Contact Status](#)
- [Contact Card Tabs](#)
- [Active / Inactive contacts](#)
- [Contact Attributes](#)
- [Contact Field Autocomplete Settings](#)
- [Contact Card Size](#)

Synchronization Contacts with JIRA Users

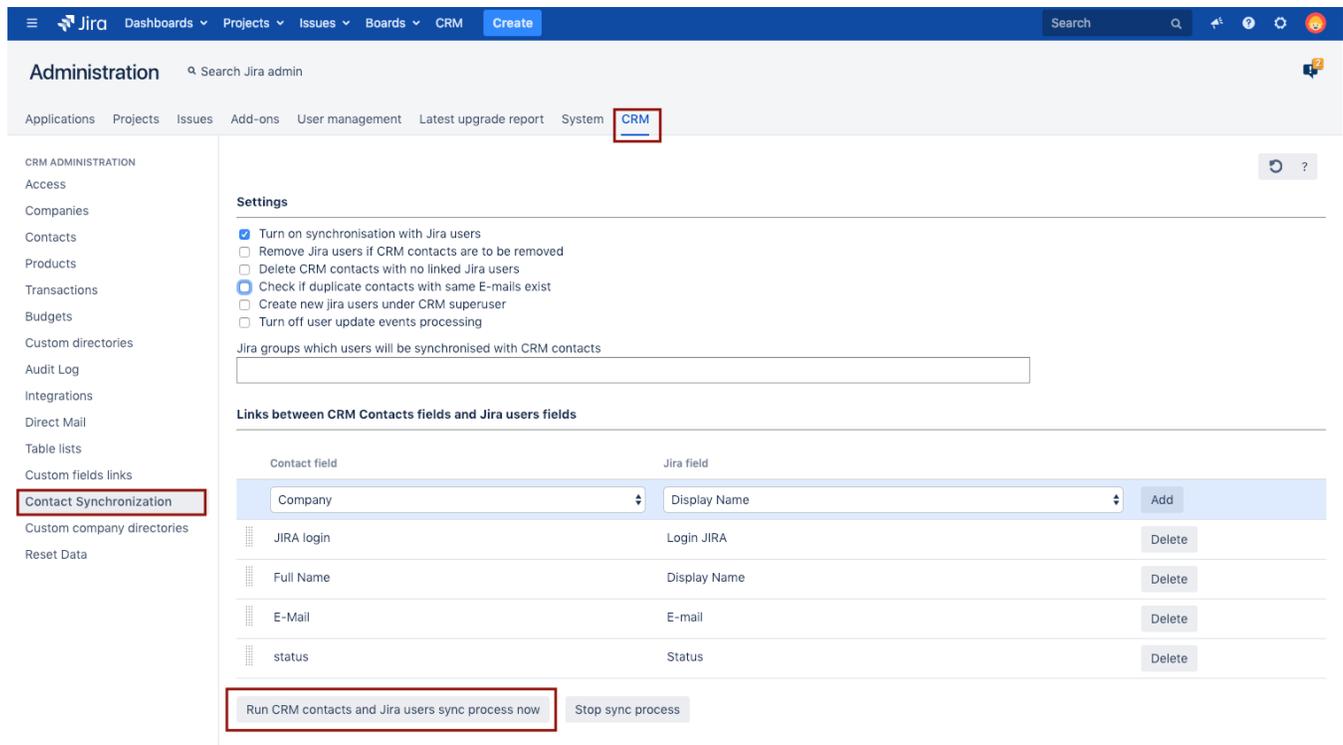
If you need auto determining of company by issue reporter in some projects - you should switch on contact dictionary synchronization with JIRA users dictionary. All existing JIRA users will be automatically imported to contacts dictionary and you will be able to edit their attributes.

Checkbox **'Turn on synchronization with JIRA users'** enabled automatically creates new JIRA user after CRM Contact creation.

If you need to sync contacts created earlier or JIRA users that already exist and don't have record in CRM Contacts Directory click on **'Run CRM contacts and JIRA users sync process now'**.

You can limit sync process by filling in **'JIRA groups which users will be synchronized with CRM contacts'** with needed groups. Contacts will be created for JIRA users only from selected groups, if no group is listed contacts will be created for all JIRA users.

 Warning! If you have JIRA administrator permission you can delete contact and a JIRA user if he do not have any issue reported or assigned in JIRA.



The screenshot shows the Jira Administration interface for CRM settings. The 'CRM' tab is selected in the top navigation bar. In the left sidebar, 'Contact Synchronization' is highlighted. The main content area is titled 'Settings' and contains several options:

- Turn on synchronisation with Jira users
- Remove Jira users if CRM contacts are to be removed
- Delete CRM contacts with no linked Jira users
- Check if duplicate contacts with same E-mails exist
- Create new jira users under CRM superuser
- Turn off user update events processing

Below these settings is a text input field for 'Jira groups which users will be synchronised with CRM contacts'. Underneath is a section titled 'Links between CRM Contacts fields and Jira users fields' with a table:

Contact field	Jira field	
Company	Display Name	Add
JIRA login	Login JIRA	Delete
Full Name	Display Name	Delete
E-Mail	E-mail	Delete
status	Status	Delete

At the bottom of the settings area, there are two buttons: 'Run CRM contacts and Jira users sync process now' and 'Stop sync process'.

After switching on the synchronization you need to associate attributes of a contact and a JIRA user. To do this -

1. **Add** three attributes (Full name, E-mail and JIRA login);
2. **Associate** it with these JIRA user's attributes. The plugin checks values uniqueness by login.

i Warning! If the synchronization is switched on all the changes applied to contact will also be applied to JIRA user. New users will be added to jira-users group. Deleting contact or user is standard procedure. If user has any reported or assigned issue - the system will not let you to delete the user.

Create new JIRA users under CRM superuser enabled allows all users to create JIRA users on behalf of CRM superuser which is set on [Access Tab](#) in CRM Admin menu.

New JIRA users created via CRM Contacts synchronization will be added to selected groups by default:

Default groups for new users

Send E-mail to a Jira user after a connected CRM contact creation:

Choose group:

1. **Select group** from the list and click 'Add'. You can add several groups or none of them. Groups can be deleted by clicking red 'X', then click 'OK' or 'Cancel' in dialog.
2. **Enable checkbox** 'Send E-mail to a JIRA user after a connected CRM contact creation' to send informational letter to new JIRA user on contact's E-mail address.

Making JIRA User Active/Inactive by Changing CRM Contact Status

To synchronise CRM Contact's status with JIRA user status create new attribute Checkbox [Type](#) for contacts in **CRM Administration/Contacts/Contacts Attributes** as a status of contact. Next step is to link contact's status to JIRA user Status field.

While Status checkbox is checked, synchronised JIRA user is active in JIRA. If it is un-checked, the JIRA user becomes inactive and has no access to your system any more.

Contact Card Tabs

If you have many enough contact attributes it is a good idea to put them on different tabs. To do this you can design tabs of new contact card in **Administration\Plugins\CRM\Contacts** menu.

Contact tabs

Tab title	Tab title (En)	
<input type="text"/>	<input type="text"/>	Add
Main	Main	Fields Delete
test	test	Fields Delete

You can reorder tabs by drag and drop and this order defines tabs order in Contact's Card. Click "Fields" button to reorder fields on these tabs as well. The fields are taken from Contacts Attributes section (see below).

Active / Inactive contacts

To display the card as an "Active" or "Inactive" Jira user:

- Go to **Administration\Plugins\CRM\Contacts**;

- Create a contact attribute of type "String";

Contact attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
Status	Status	String (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	Add
Full Name	Full Name	String (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Company	Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Position	Position	Directory	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
E-Mail	E-Mail	E-mail	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
JIRA login	JIRA login	String (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
phone	phone	String (255 symbols)	test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete

- Recommendation - select "read-only" in the **Properties**;
- Go to **Administration\Plugins\CRM>Contact Synchronization**
- **Link** the Contact field to the Jira "Status" field

Links between CRM Contacts fields and Jira users fields

Contact field	Jira field	
status	<input checked="" type="checkbox"/> Display Name <input type="checkbox"/> Login JIRA <input type="checkbox"/> E-mail <input checked="" type="checkbox"/> Status	Add
JIRA login		Delete
Full Name	Display Name	Delete
E-Mail	E-mail	Delete

Run CRM contacts and Jira users sync process now Stop sync process

Contact Attributes

In every company there is a different set of attributes when managing list of contacts. So in the "**Administration\Plugins\CRM\Contacts**" menu you can determine your attributes, their type and put them to different tabs of Contact card. See also [Directory Attribute Types and Properties](#).

Contact attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
		Checkbox		<input type="checkbox"/>	<input type="checkbox"/>	Add
Full Name	Full Name	String (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Company	Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Position	Position	Directory	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
E-Mail	E-Mail	E-mail	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
JIRA login	JIRA login	String (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
phone	phone	String (255 symbols)	test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
status	status	String (255 symbols)	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete

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

An example of creating new attribute "Site":

Contact attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
Site	Site	Website		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Add
Full Name	Full Name	String (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Company	Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties
Position	Position	Directory	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
E-Mail	E-Mail	E-mail	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
JIRA login	JIRA login	String (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
phone	phone	String (255 symbols)	test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
status	status	String (255 symbols)	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete

Site

Show in a CRM name field

Restrict duplicates

From creation

To search by

Is read only

Width 200

Save Close

Contact Field Autocomplete Settings

It is possible to autocomplete of contact for projects

Contact Field Autocomplete Settings

Project

Support

Add

Contact Card Size

As it is impossible to forecast the number of tabs and attributes of the card you can set the size of the contact card in "Administration\Plugins\CRM\Contacts" menu.

Contact attributes

Field title	Field title (En)	Field type	Tab	Is required	Show in grid	
<input type="text"/>	<input type="text"/>	Checkbox	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Add"/>
Site	Site	Website		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
Full Name	Full Name	String (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>
Company	Company	Company	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/>
Position	Position	Directory	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
E-Mail	E-Mail	E-mail	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
JIRA login	JIRA login	String (255 symbols)	Main	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
phone	phone	String (255 symbols)	test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>
status	status	String (255 symbols)	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Properties"/> <input type="button" value="Delete"/>

Contact Field Autocomplete Settings

Project

Card Size

Width

Height