

Custom field - CRM Property

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What is it?

This field shows attribute of record from dictionaries. For example, we can show **Reporter's Phone** or **Company's Address** or something like that:

The screenshot shows the JIRA issue view for 'Please add REST API' (SUP-2). The interface includes a top navigation bar with 'JIRA', 'Dashboards', 'Projects', 'Issues', 'CRM', and a 'Create issue' button. A search bar is also present. The issue details are displayed in a card-like format with tabs for 'Main' and 'Workflow'. The 'Main' tab is active, showing fields for Type (Bug), Priority (Major), Labels (None), Status (Reopened), and Resolution (Unresolved). A red arrow points to the 'Reporter's Phone' field, which is highlighted with a red box. Other fields include 'Reporter's Title' (Co-Founder), 'Company' (Teamlead), 'Reaction Time' (SLA-3 Premium: 10m), 'Schedule date' (28/02/2014 17:18), 'Time spent' (23m), 'Time remains' (-13m), 'SLA Karma' (1), 'Assignee' (Anton Kolin), 'Reporter' (Anton Kolin), 'Company People' (Anton Kolin), 'Votes' (0), and 'Watchers' (1). The 'Dates' section shows 'Created' (07/Dec/13 8:54 PM) and 'Updated' (a few seconds ago). The 'Description' section is at the bottom with a 'Click to add description' link.

Field	Value
Type	Bug
Priority	Major
Labels	None
Status	Reopened
Resolution	Unresolved
Reporter's Phone	+79602766760
Reporter's Title	Co-Founder
Company	Teamlead
Reaction Time	SLA-3 Premium: 10m
Schedule date	28/02/2014 17:18
Time spent	23m
Time remains	[-13m]
SLA Karma	1
Assignee	Anton Kolin (Teamlead)
Reporter	Anton Kolin (Teamlead)
Company People	Anton Kolin (Teamlead)
Votes	0
Watchers	1 Stop watching this issue
Created	07/Dec/13 8:54 PM
Updated	a few seconds ago

Adding the field to issue View Screen

i We can use this field just for read only on the **View Issue Screen**. To add this field to an issue screen go to **JIRA Administration menu/Custom Fields**:

Select a Field Type

Q

crm

All

Standard

Advanced

No field preview

Company CRM

Company CRM

No field preview

Contact CRM

Contact CRM

No field preview

CRM Products & Services

CRM Products & Services

No field preview

CRM Property

Custom field to get CRM property from CRM entities.

No field preview

Crm Select Custom Field

Crm Select Custom Field

Find More Custom Fields

Next

Cancel

After that go to the field **Configure**:

Field Configuration Schemes	Products	CRM Products & Services	Issue type(s): Project(s):	- Sale (Workflow) - Support (Workflow)	
ISSUE ATTRIBUTES					
Statuses	Reaction Time	CRM SLA	Issue type(s): Global (all issues)	- Sale (Main) - Support (Main)	
Resolutions	Reporter Title	CRM Property	Issue type(s): Global (all issues)	- Default Screen - Resolve Issue Screen - Sale (Main) - Support (Main) - Support - Create Screen - Workflow Screen	
Priorities	Reporter's Phone	CRM Property	Issue type(s): Global (all issues)	- Default Screen - Resolve - Sale (Main) - Support - Support - Workflow	Configure Edit Translate Screens Delete
Issue Security Schemes	SLA Karma	Number Field	Issue type(s): Global (all issues) Project(s):	- Sale (Main) - Support (Main)	
Notification Schemes	Sale Type	Custom dictionary	Issue type(s): Project(s):	- Sale (Main) - Support (Main)	
Permission Schemes	Total Duration	CRM SLA	Issue type(s): Global (all issues)	- Sale (Workflow) - Support (Workflow)	

and define a **field attribute** you want to show in the field:

The screenshot shows the JIRA Administration interface. The top navigation bar includes 'Dashboards', 'Projects', 'Issues', 'CRM', and a 'Create Issue' button. A search bar is on the right. The left sidebar lists various administration categories: ISSUE TYPES, WORKFLOWS, SCREENS, and FIELDS. Under FIELDS, 'Custom Fields' is selected. The main content area is titled 'Configure Custom Field: Reporter's Phone'. It explains that custom field configuration schemes are applicable for various issue types. Below this, there are links to 'Add new context' and 'View Custom Fields'. A section titled 'Default Configuration Scheme for Reporter's Phone' shows the default configuration generated by JIRA. It lists 'Applicable contexts for scheme' as 'Global (all issues)' and 'Default Value' as 'Edit Default Value'. A red arrow points to the text 'Set up CRM property field: Edit Set up CRM property field reporter: contact_phone'.

Here you must define a **field attribute** (you could find it in the **JIRA Administration menu/Plugins/CRM**):

The screenshot shows the JIRA Administration interface for the 'Set up CRM property field: Reporter's Phone' configuration. The top navigation bar includes 'Dashboards', 'Projects', 'Issues', 'Boards', 'CRM', and a 'Create' button. A search bar is on the right. The left sidebar lists various administration categories: Applications, Projects, Issues, Add-ons, User management, and System. The main content area is titled 'Set up CRM property field: Reporter's Phone'. It contains two dropdown menus: 'CRM source field:' with 'Contact' selected, and 'CRM field attribute:' with 'Tel' selected. At the bottom, there are 'Save' and 'Cancel' buttons.

Value will have filled after creating and editing issue.

Search issues by CRM Property field

To find issues just add the field to the search conditions:

JIRA

Dashboards

Projects

Issues

CRM

Create issue

Quick Search

FILTERS

<<

New filter

Find filters

My Open Issues

Reported by Me

Recently Viewed

All Issues

FAVORITE FILTERS

All Sales

Closed Sales

Closed Support

Potential Sales

Sales in Progress

SLA Violations

Support In Progress

Support New Issues

Search

Save as

Share

Export

Tools

Project: All

Type: All

Status: All

Assignee: All

Contains text

More

Advanced

Reporter's Phone: +7960276...

+79602766760

Update

Close

	Summary	Status	Due	Company	Reporter's Phone	
28/02/2014 17:20 10m / Overdue	SUP-2 Great idea	Reopened		Teamlead	+79602766760	
28/02/2014 17:18 10m / Overdue	SUP-2 Please add REST API	Reopened		Teamlead	+79602766760	

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