

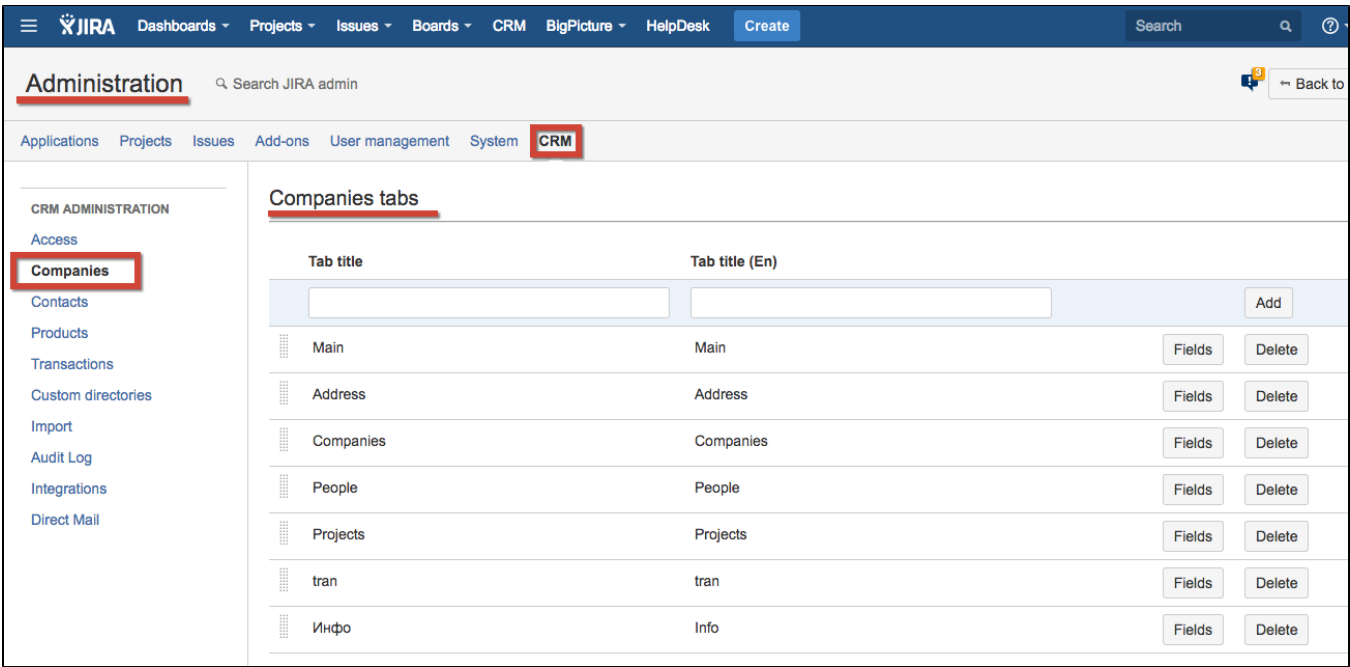
Set up Companies Directory

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](#)
- [Set up Company Attributes](#)
- [Set up Company Card Size](#)
- [Security Level](#)
- [Show only companies](#)
- [Synchronization from the Service Desk to CRM](#)

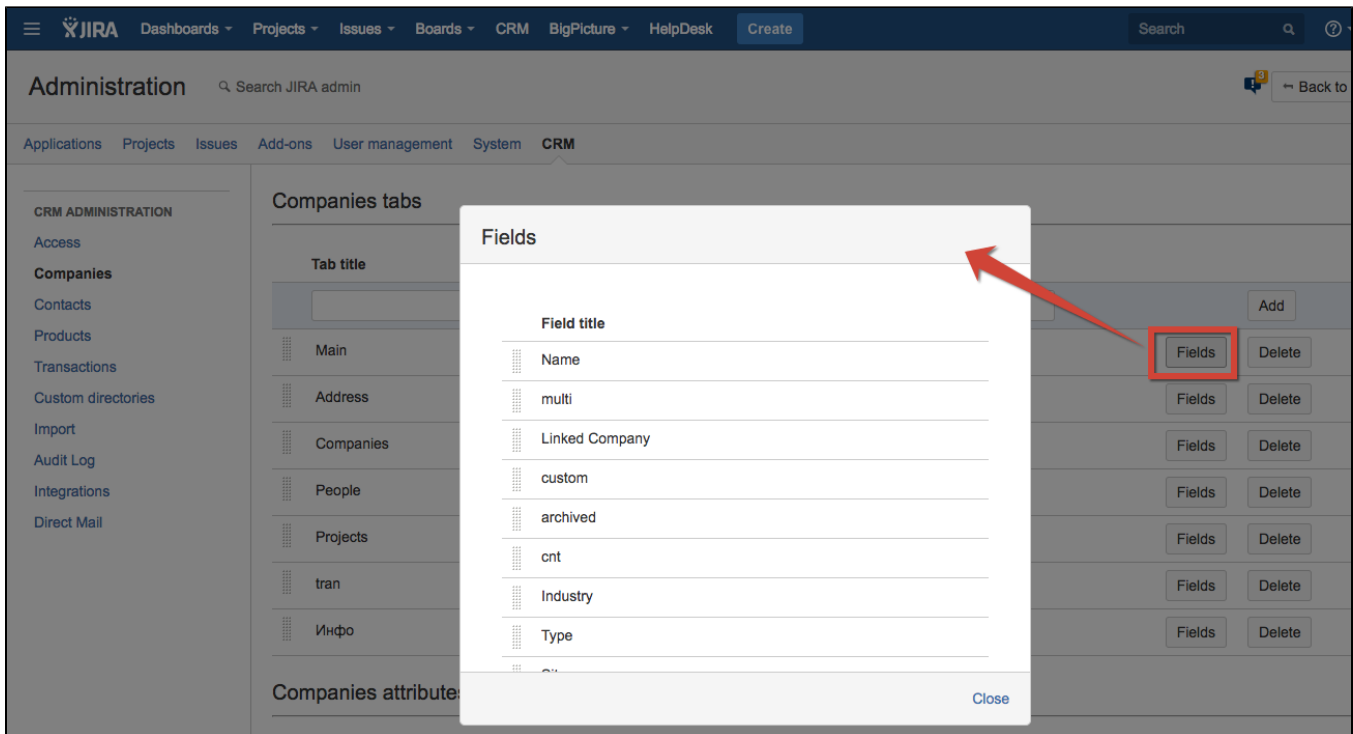
Set up Company Card Tabs

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.



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.

The screenshot shows the 'Companies attributes' section in JIRA Administration. The table lists various attributes with columns for Field title, Field type, Tab, Is required, and Show in grid. Red annotations highlight specific actions: 'Add a new attribute', 'Open attribute properties', 'Delete an attribute', 'Title attribute is highlighted', and 'Reorder attributes by drag&drop'.

Field title	Field type	Tab	Is required	Show in grid	
	string (255 symbols)		<input type="checkbox"/>	<input type="checkbox"/>	Add
Web-site	string (255 symbols)	5	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
project	Related projects	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
SLA	Dictionary	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
Company Name	string (255 symbols)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Industry	Dictionary	Main	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Type	list (format)	Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Site	Website	Main	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
Office Address	string (255 symbols)	Address	<input type="checkbox"/>	<input type="checkbox"/>	Properties Delete
Phone	string (255 symbols)	Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete
Contact	Main contact	People	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Properties Delete

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:

Save

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 :

Save

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: :

Save

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

ApplicationsProjectsIssuesAdd-onsUser managementLatest upgrade reportSystemCRM

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 Synch SD to CRM

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

Built-in Services

Schedule

Daily

Days per Week

Days per Month

Advanced

Interval 0 0/5 **** ?

Cron Expression

Add Service

Here is result of creation your Service in picture below.

Administration

Search JIRA admin

Back to project: Pilot

ApplicationsProjectsIssuesAdd-onsUser managementLatest upgrade reportSystemCRM

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 organizationsAdd 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
 Юзеф Юзерович (user@teamlead.ru)	0 open	0

1-5 of 5

... 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 ↑

Industry : All ↓

Main Contact

Web-site

Клиент

Winterfall

⚙

Page 1 1 – 1 of 1 20

◀ 1 ▶