

CRM API

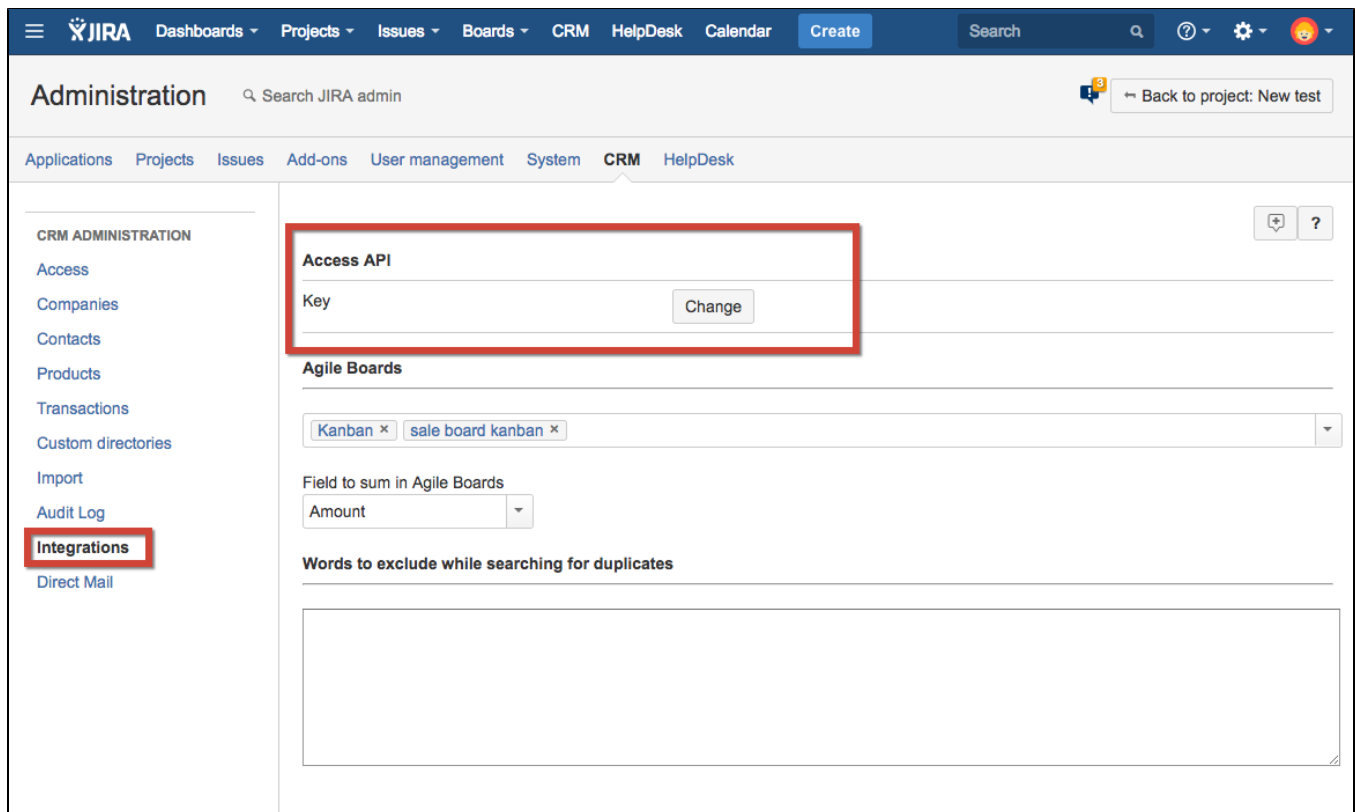
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What for need CRM API

It need that external applications can programmatically add and receive data to CRM. To work with the API, you must configure the security key (password) and the rights of the user that will be connected.

Setting access to API

For access to API you need to specify the API Key (password) in the Administration/CRM/Integrations:



The screenshot shows the JIRA Administration interface. The top navigation bar includes links for Dashboards, Projects, Issues, Boards, CRM, HelpDesk, and Calendar. The left sidebar lists various administration categories, with 'Integrations' highlighted in a red box. The main content area is titled 'Administration' and shows the 'CRM' section. Within the CRM section, the 'Access API' subsection is highlighted with a red box. It contains a 'Key' field and a 'Change' button. Below this, the 'Agile Boards' section is visible, showing a dropdown menu with 'Kanban' and 'sale board kanban' selected. The 'Field to sum in Agile Boards' is set to 'Amount'. The 'Words to exclude while searching for duplicates' section is also visible.

Access rights to CRM objects

To receive data via API, you can use different users with different access rights. Access rights to the objects defined in the Administration/CRM/Access:

Administration

Search JIRA admin

Applications
Projects
Issues
Add-ons
User management
System
CRM
HelpDesk

CRM ADMINISTRATION

Access

Companies

Contacts

Products

Transactions

Custom directories

Import

Audit Log

Integrations

Direct Mail

Permission	Groups	Company attributes
Access to main menu CRM	jira-administrators helpdesk jira-servicedesk-users jira-software-users	
Company card view	jira-administrators helpdesk	Sales Manager
Contact card view	jira-administrators helpdesk jira-software-users	Sales Manager
Order details edit	jira-administrators helpdesk jira-servicedesk-users	
Edit products and services	jira-core-users jira-administrators helpdesk jira-servicedesk-users	

Supported methods

Method's name	User right	Description
getcompanybyname	CRM Main Menu	Return company by name or ID
getcontactbyname	CRM Main Menu	Return contact by name or ID
getcompanies	CRM Main Menu	Return all companies
getcontacts	CRM Main Menu	Return all contacts
sync	CRM Main Menu	Start synchronization of JIRA users
setcrmproperties	CRM Main Menu	Set custom field type "Crm Property" in issue
addcompany	Add companies	Add company
addcontact	Add contact	Add contacts

setcontact	Add existing contact to company	Set company for contacts
addictionaryvalue	Add the values to dictionaries	Add new value to a custom dictionary
removedictionaryvalue	Remove the values from dictionaries	Remove value from a custom dictionary
searchentities	Search CRM objects by parameters	Search CRM objects by parameters
editcontact	Edit contacts	Ability to pass value parameters to the api methods by field codes or by field names
editcompany	Edit companies	Ability to pass value parameters to the api methods by field codes or by field names
updateOrCreateEntity	Add / Edit Objects	<p>Example:</p> <pre>/plugins/servlet/crm/api?command=updateOrCreateEntity&userName=&apiKey=&tableName=PRODUCTS&crm_param_1=Product%20Name&crm_param_1_value=Test&id=&crm_param_2=Price&crm_param_2_value=10&crm_param_3=Vendor&crm_param_3_value=Atlassian&crm_param_4=area&crm_param_4_value=area</pre> <p>tableName - record type</p> <p>crm_param_1 - name of the first field</p> <p>crm_param_1_value - value of the first field</p> <p>Also, you can set the id for the existing record.</p>
transactionsList	Search CRM transactions	Search CRM transactions by given parameters

Calls examples

Start synchronization:

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}&command=sync
```

Register organization "Adobe" to contact "Ted Johnson":

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}&command=setcontact&companyName=Adobe&contactName=TedJohnson
```

Add contact with ID=6 to organization with ID=15:

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}&command=setcontact&companyId=15&contactId=6
```

Add contact with the specified attributes.

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=addcontact&userName=${userName}&apiKey=${apiKey}&clients-contact_name=new  
contact&clients-contact_company=newCompany&view-clients-contact_company=newCompany&clients-contact_email=new@new.com
```

Add company with the specified attributes.

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}&command=addcompany&clients-  
org_name=test Company Name&clients-org_www=test.com&tableName=CLIENTS&view-clients-org_industry=Consulting&view-  
clients-org_sla=SLA-1 Free
```

Receive all organizations:

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}&command=getcompanies
```

Receive all contacts:

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}&command=getcontacts
```

Receive organization with ID=2:

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}  
&command=getcompanybyname&companyId=2
```

Receive organization with name "Teamlead":

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}  
&command=getcompanybyname&companyName=Teamlead
```

Receive contact with ID=2:

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}  
&command=getcontactbyname&contactId=2
```

Receive contact with name "Vladimir Putin":

```
http://YOURDOMAIN/plugins/servlet/crm/api?apiKey=${apiKey}&userName=${userName}  
&command=getcontactbyname&contactName=Vladimir Putin
```

Add value "Green" to the custom dictionary "Colors":

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=adddictionaryvalue&userName=${userName}&apiKey=${apiKey}  
&dictionaryName=Colors&newvalue=Green
```

Remove value "Green" from the custom dictionary "Colors":

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=removedictionaryvalue&userName=${userName}&apiKey=${apiKey}  
&dictionaryName=Colors&valuetoremove=Green
```

Search for all contacts of "Teamlead" organization:

```
http://YOURDOMAIN/plugins/servlet/crm/api?
command=searchEntities&crm_param_1=Company&crm_param_1_value=Teamlead&tableName=CONTACTS&userName=${userName}&apiKey=${apiKey}
```

Edit contact:

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=editcontact&apiKey=${apiKey}&userName=${userName}&contactId=${contactId}
&view-clients-contact_position=${position}&clients-contact_position=${position}&clients-contact_email=${email}&clients-contact_login=${userName}
```

Edit company:

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=editcompany&apiKey=${apiKey}&userName=${userName}&companyId=${companyId}&view-
clients-clients_field_d1facd51-01e0-4a68-a4f3-4aa3641a590e=Development,Training&clients-clients_field_d1facd51-01e0-4a68-a4f3-
4aa3641a590e=Development,Training
```

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=editcompany&apiKey=${apiKey}&userName=${userName}&companyId=${companyId}&clients-
clients_field_d8927b73-09ba-4094-b281-af6738e4432d=testtest
```

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=editcompany&apiKey=${apiKey}&userName=${userName}
&companyId=${companyId}&company_name=${companyName}
```

Search CRM transactions

```
http://YOURDOMAIN/plugins/servlet/crm/api?command=transactionslist&userName=${userName}&apiKey=${apiKey}
&saleVal=${issuekey}
```

where:

- \${apiKey} - API Key (password) in the Administration/Plugins/CRM/Access
- \${userName} - JIRA user's login