

CRM for JIRA (EN)

What is CRM for JIRA?

CRM for JIRA provides a great opportunity to track companies, contacts, goods, etc. You should use these records within JIRA issues.

If you track support issues in JIRA, you could get a statistic through companies or contacts. Although, you can manage **SLA's** by your clients.

If you manage projects or sales in JIRA, you could get the information about sales by current client or his project history.

And now you can enable a special security level "Reporter's Colleagues", so all people from Reporter's Company will have got access to the issues.

Create Issue

Configure Fields

Project*

SALE

Issue Type*

Sale

Summary*

Support JIRA - Walmart - 2years

Sale Type

Support

Contacts

h

Helen Sanderson

John Drebih

Robin Sherwood

Ted Johnson

h (New value)

Description

Create another

Create

Cancel

JIRA

Dashboards ▾

Projects ▾

Issues ▾

CRM

Create

Search

?

⚙

👤

Companies

Contacts

Products

Dictionaries ▾

Reports ▾

+ Add

↕ Export

⚙

?

Company Name	Industry : All ▾	Type : All ▾	Site	Phone	Contact	
Adobe	Software Development	Type		408-536-6000	Helen Sanderson	⚙
Apple	Engineering	<input type="checkbox"/> Lead		+1(23)300-3434	Ted Johnson	⚙
Atlassian	Software Development	<input checked="" type="checkbox"/> Client		+61 2 9262 1443	Vlad Cavalcanti	⚙
Dell	Manufacturing	<input type="checkbox"/> Competitor		+1(20)770-23-50	Robin Sherwood	⚙
Ebay	Retail	<input type="checkbox"/> Partner				⚙
Facebook	Social Network	<input type="checkbox"/> Empty			Mark Zuckerberg	⚙
Google	Software Development	Client	www.google.com	+1 650-253-0000	Sergey Brin	⚙
IBM	Software Development	Competitor	www.ibm.com	-34246452	John Drebih	⚙
Microsoft	Software Development	Competitor	www.microsoft.com	+7 495 916-71-71	Bill Gates	⚙
Oracle	Software Development	Client	www.oracle.com	-777623487	Bob Rodger	⚙
Teamlead	Consulting	Partner	www.teamlead.ru	+7(812)309-29-57	Oxana Alexeenko	⚙
Wikipedia	Education	Lead	www.wikipedia.org		Jimmy Wales	⚙

CRM Feedback

Dictionaries in JIRA

You can track all your clients and contacts in JIRA now. Although, there are next dictionaries: Products, SLA's and Custom Dictionaries. The last one provides a simple track your own records such as: hardware, types of companies, people titles or something like that.

All dictionaries could be defined for your specific requirements. For example, you can add new attributes for company and define look and feel of record cards.

To find a record you should just start writing. It is simple, like a google search. If you want find records by several conditions you can use attributive search. It doesn't mean how many records do you have, hundreds or thousands. Just start looking..

SLA Management

If you want to do the best support in the word, you should manage and control issue reaction time. There is a powerful SLA custom field where you could define your own rules, time intervals, color schemes of priorities and work time calendars.


But SLA couldn't be linked with a company or contact SLA. You can use common JQL-queries to determine rules. For example, you can set up reaction time depends on issue type or project or something else.









You can control SLA violations by special report on the dashboard. Here you can find who is the most bad or well Assignee.

Support


Filter Results: Support New Issues						
Reaction Time ↑	T	Key	Summary	Company	Reporter	SLA Karma
01/02/2014 21:24 10m / Overdue	<input type="checkbox"/>	SUP-3	Bug in the add-on	Teamlead	Anton Kolin (Teamlead)	-1
19/02/2014 11:59 10m / 0s	<input type="checkbox"/>	SUP-1	Error in the CRM field	Microsoft	Bill Gates (Microsoft)	-3
19/02/2014 12:10 10m / 10m	<input type="checkbox"/>	SUP-2	Please add REST API	Teamlead	Bob Rodger (Oracle)	-2
19/02/2014 12:20 30m / 20m	<input type="checkbox"/>	SUP-5	Can't load the report	Facebook	Mark Zuckerberg	0
19/02/2014 12:50 1h / 50m	<input checked="" type="checkbox"/>	SUP-8	CRM Billing report	Oracle	Bob Rodger (Oracle)	-2
1-5 of 5						


JIRA Dashboards Projects Issues CRM **Create Issue** Quick Search ? ⚙️ 👤


 SALE / SALE-9
Maintenance Consulting (Atlassian JIRA) in the Microsoft

 Edit  Comment  Assign  More  Stop Progress  Resolve Issue  Workflow  Export

Details

Type:  Sale

Priority:  Major

Labels: None 


Sale Type: Support

Company: Microsoft

Contacts: Not defined


Budget: 4,300


Products:

Status:  In Progress
(View Workflow)


Resolution: Unresolved


Security Level: Company People

Assignee:  Sales Manager
Assign to me

Reporter:  CRM Admin

Company People: Bill Gates, CRM Admin, Mark Zuckerberg, Sales Manager ...

Votes:  Vote for this issue

Watchers:  Stop watching this issue

	<input type="checkbox"/>	Product Name ↑	Quantity	Price	Total
1	<input type="checkbox"/>	Consulting Service	1.00	3 400.00	3 400.00
					3 400.00

Page 1 of 1 20 View 1 - 1 of 1

Security Level by Company

Are you doing support for a many companies? Are there a lot of reporters in these companies? You must separate access to their issues!

To do it just add multiuser picker field in the issue and CRM will be done it. All reporter's colleagues will be filled this field. After that you should add this field in a security scheme to prevent access for other people.

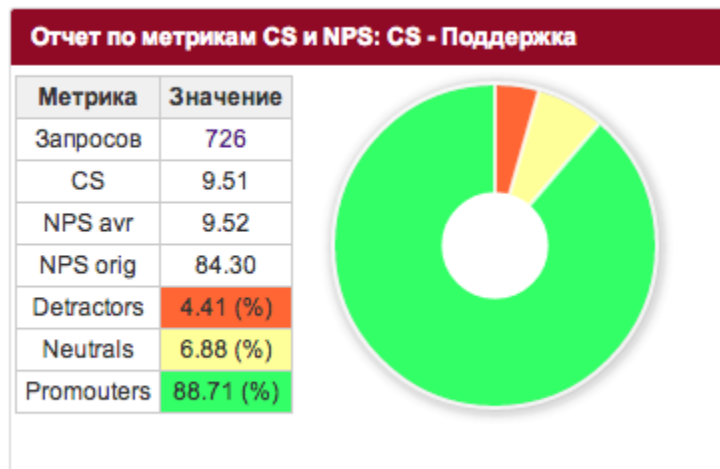
Reporter's colleagues are storing in the company card and when they are changing, issues will be updated automatically.

Customer Satisfaction

If you want listen to customer voices, you should send them a simple survey. There are just two questions:

- What is the our solution like?
- Will you recommend us?

A lot of voices will do your support best. All points are storing in the issue and could be used in a report. Report shows us very useful data: Promoters, Neutrals and Detractors of you service.



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