Automation Actions Reference

Jira Automation · https://mriacrm.com/docs/automation-actions-reference/

Every Mria CRM automation action, field by field

This page lists every field, every output and the rules behind each of the nine Mria CRM actions in Jira Automation. For the big picture — connecting, who a step runs as, limits — start at Jira Automation.

Common to every action

- **Connection.** The line `Logged in to Mria CRM as <name>` at the top of each form names the account the step runs as. The pencil icon changes it.
- **Required fields** are marked with *. The **{ }** button next to a field opens the smart value panel.
- **Pickers store ids.** A pipeline, stage or lead status chosen from a list is stored by its id, so renaming the stage later does not break the flow.
- **Lead source and tags store names,** so a smart value can supply them. A lead source must match one configured in your workspace; tags that do not exist yet are created.
- **Assignee** is a user picker. Tick **Use a smart value** to enter an Atlassian account id instead, for example `{{issue.assignee.accountId}}`.
- **Lists** — tags, contacts, companies, work item keys — are comma-separated.
- **Dates** are ISO dates (`2026-10-31`) or a date smart value such as `{{issue.duedate}}` or `{{now.plusDays(14)}}`.
- **Amounts** are plain numbers in the workspace currency, up to two decimals.

1. Create lead

Creates a Lead. The Lead is named after the contact — `LEAD - Daniel Okafor` — and starts in the workspace's default status unless you pick one.

Create lead in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Contact name *

{{webhookData.name}}

Contact email *

{{webhookData.email}}

Company name

{{webhookData.company}}

Lead status

Select...

Default status for new leads when empty

Lead source

Website

Tags

Web form

Field	What it takes
Contact name *	The person's name.
Contact email *	A valid email address.
Company name	Stored on the Lead as text. No Company record is created.
Lead status	Pick from your lead statuses. Empty uses the default status for new Leads.
Lead source	Pick from your lead sources, or supply a source name with a smart value.
Tags	Comma-separated names. Missing tags are created.
Assignee	The owner. Empty creates the Lead unassigned.
Work item key	Links the new Lead to this work item. Leave it empty in flows that do not start from a work item.

Returns

Smart value	What it holds
`{{createdMriacrmLead.id}}`	Id of the new Lead.
`{{createdMriacrmLead.name}}`	Its name.
`{{createdMriacrmLead.url}}`	A link that opens it in Mria CRM.
`{{createdMriacrmLead.warning}}`	Set when a follow-up write — a link, tags, the source — was skipped. The Lead itself exists.

The connection owner needs Create on Leads, and Edit as well when you set a source, tags or a work item. The check runs before anything is written, so a refusal creates nothing.

2. Create deal

Creates a Deal in the pipeline and stage you pick. Only open stages are offered — a Deal cannot be created already Won or Lost.

Create deal in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Deal name *

Upgrade: {{issue.summary}}

Pipeline *

Main Pipeline

Stage *

Discovery

Amount

Closing date

{{issue.duedate}}

ISO date

Assignee

Pick a user

Field	What it takes
Deal name *	Up to 150 characters.
Pipeline *	Pick from your pipelines.
Stage *	An open stage of that pipeline.
Amount	A number in the workspace currency.
Closing date	ISO date or a date smart value.
Assignee	The owner. Empty creates the Deal unassigned.
Contacts	Comma-separated emails or contact ids. The first one becomes the primary Contact.
Companies	Comma-separated company names or ids. The first one becomes the primary Company.
Work item key	Links the new Deal to this work item. Leave it empty to create the Deal unlinked.

Returns

Smart value	What it holds
`{{createdMriacrmDeal.id}}`	Id of the new Deal.
`{{createdMriacrmDeal.name}}`	Its name.
`{{createdMriacrmDeal.url}}`	A link that opens it in Mria CRM.
`{{createdMriacrmDeal.warning}}`	Set when a follow-up write — the link, the closing date — was skipped. The Deal itself exists.

- Every Contact and Company you list must already exist — matched exactly, ignoring case. An entry that matches nothing, or an email two Contacts share, stops the step before the Deal is created. Nothing is created on the fly.
- The Deal's probability comes from its stage, as when you create a Deal by hand.

3. Create contact

Creates a Contact and, if you give a company name, attaches it to that Company.

Create contact in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Name *

{{reporter.displayName}}

Email *

{{reporter.emailAddress}}

Phone

Job title

Company

{{issue.Organizations.first.name}}

Links the company with this name

If no company has this name

- ( ) Create it
- (•) Keep the name on the contact only

Type

Inherit from company

Empty takes the company's type, or Customer without a company

Work item key

Field	What it takes
Name *	Up to 150 characters.
Email *	Must not belong to another Contact in the workspace.
Phone	Up to 50 characters.
Job title	Up to 100 characters.
Company	A company name. The Contact is linked to the Company with exactly this name, ignoring case.
If no company has this name	**Create it** makes a new Company. **Keep the name on the contact only** stores the text on the Contact and creates no Company — useful when the names come from a public form. Appears once a company is entered.
Type	The contact type. **Inherit from company** (the default) takes the Company's type, or Customer without a Company.
Work item key	Links the new Contact to this work item. Leave it empty to create it unlinked.

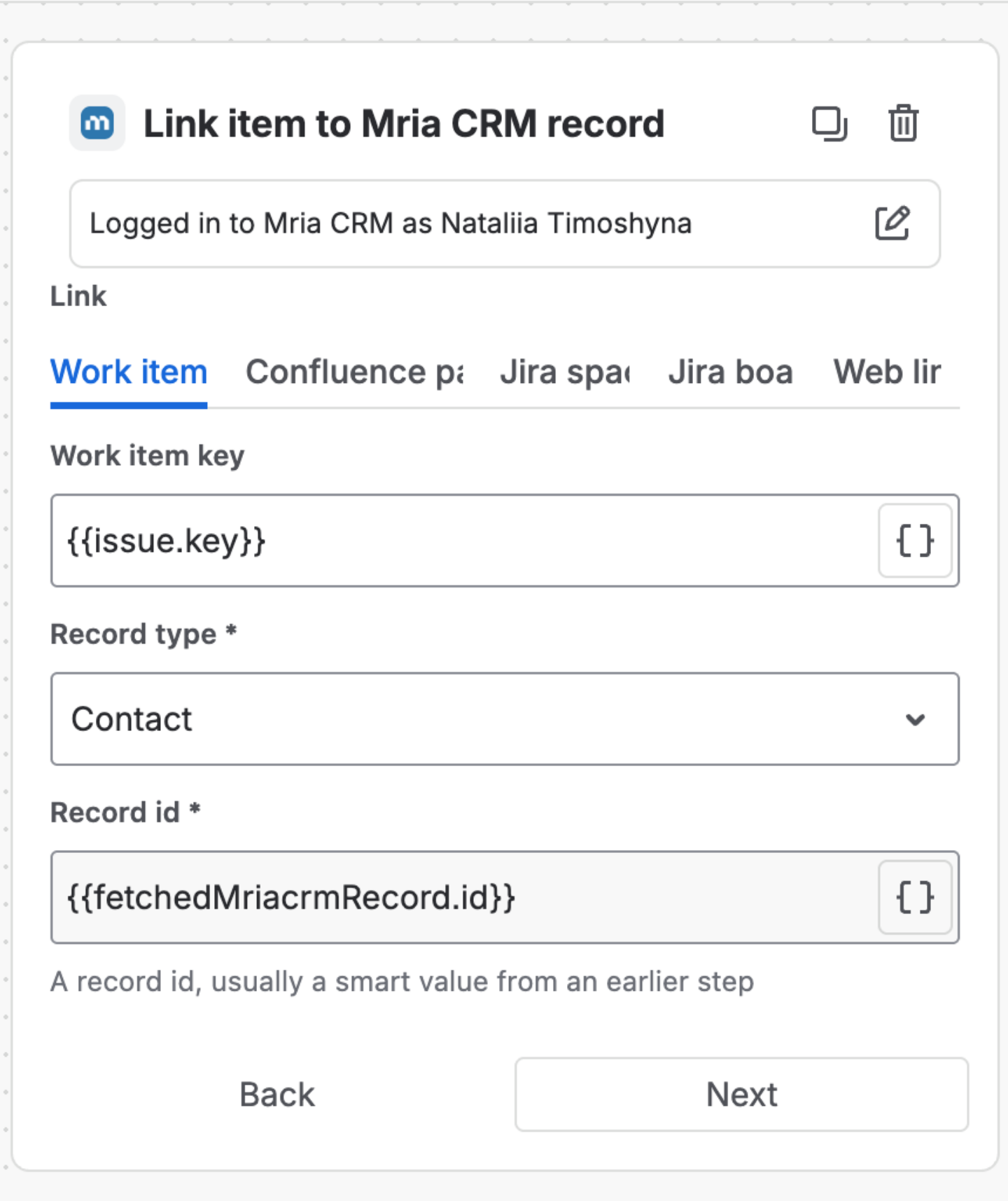
Returns

Smart value	What it holds
`{{createdMriacrmContact.id}}`	Id of the new Contact.
`{{createdMriacrmContact.name}}`	Its name.
`{{createdMriacrmContact.url}}`	A link that opens it in Mria CRM.
`{{createdMriacrmContact.warning}}`	Set when a follow-up write was skipped. The Contact itself exists.

A Contact's email is unique, so a second Create contact for the same person fails. Put Find record by email in front of it and create only when nothing was found.

4. Link item to record

Links things to any Lead, Deal, Contact, Company or Product — the same links you add by hand in the record's Linked items section. Fill in one or more tabs; a tab you have filled shows a tick.



Field	What it takes

Work item key	Tab Work item. The work item to link, for example {{issue.key}} or {{createdIssue.key}}.
Page	Tab Confluence page. A link to a page on this site, its id (the number after /pages/ in the URL), or a smart value.
Space key	Tab Jira space. Its name is read from Jira.
Board id	Tab Jira board. The number in the board's URL.
URL and Link text	Tab Web link. A full http(s) address and the text to show for it.
Record type *	Lead, Deal, Contact, Company or Product.
Record id *	Usually a smart value from an earlier step, such as {{fetchedMriacrmRecord.id}}.

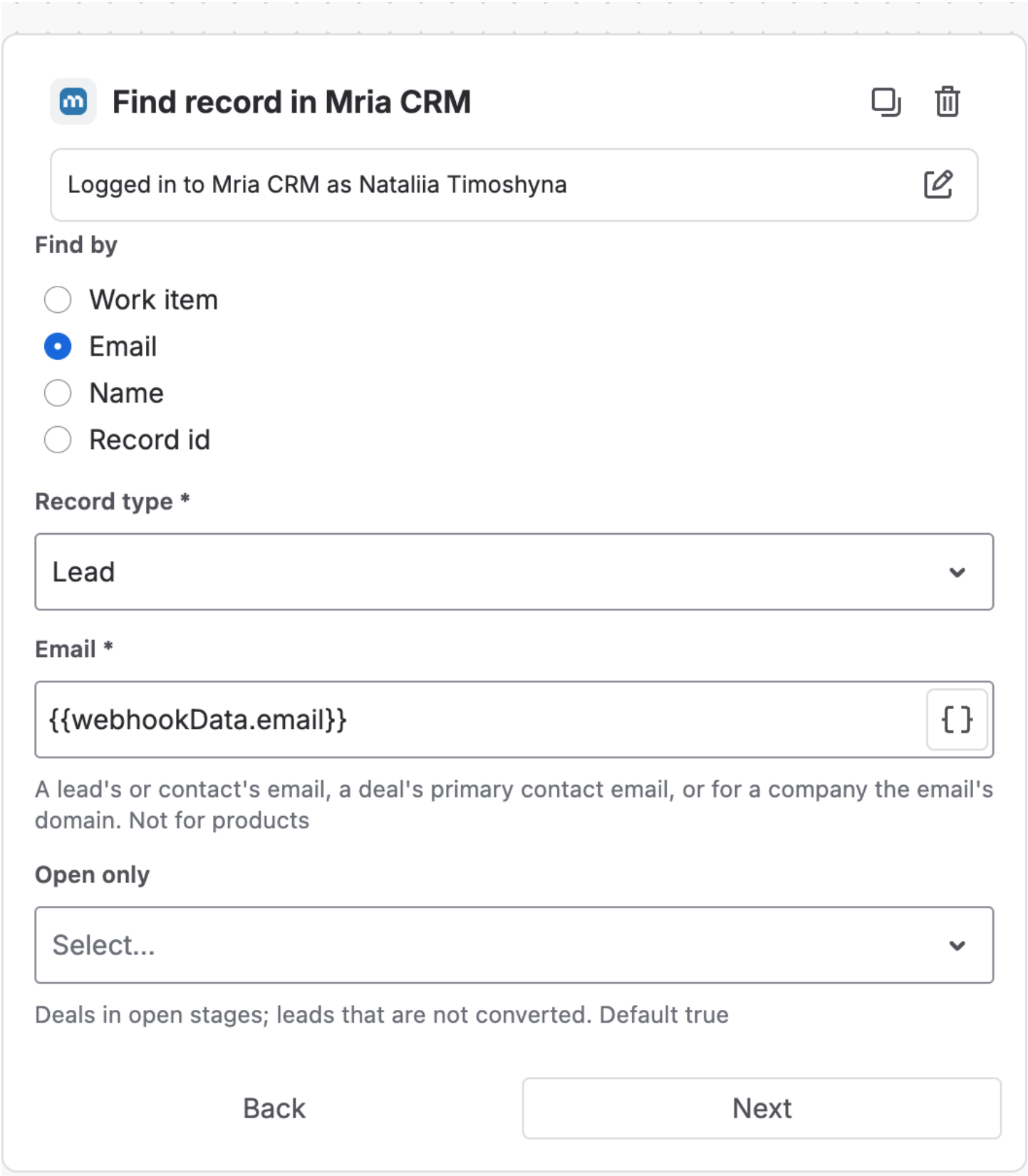
Returns

Smart value	What it holds
`{{updatedMriacrmLink.linkedCount}}`	How many targets are linked, including links that already existed.
`{{updatedMriacrmLink.linkTypes}}`	Which kinds were linked, comma-separated: issue, page, space, board, web.
`{{updatedMriacrmLink.warning}}`	Set when some targets were not linked; the others were.

- A link that already exists is left alone, so re-running the step is harmless — except for web links, which are added again on every run.
- A space or board the connection owner cannot see in Jira stops the step before anything is linked.

5. Find record

Looks up one record so later steps can use its fields. A miss is not an error: the step succeeds with `found` set to false, and the flow branches on it.



Field	What it takes

Find by	Work item, Email, Name or Record id.
Record type *	Lead, Deal, Contact, Company or Product. Product is not available when finding by email.
Work item key *	When finding by work item: a record of this type linked to it. Default {{issue.key}}.
Email *	When finding by email: a Lead's or Contact's email, a Deal's primary Contact email, or — for a Company — the email's domain.
Name *	When finding by name: the exact name, ignoring case.
Record id *	When finding by id.
Open only	True (the default) skips Deals in a Won or Lost stage and Leads already converted.

Returns

Smart value	What it holds
`{{fetchedMriacrmRecord.found}}`	True when a record matched.
`{{fetchedMriacrmRecord.ambiguous}}`	True when more than one matched; the most recently updated is returned.
`{{fetchedMriacrmRecord.id}}`	Id of the record.
`{{fetchedMriacrmRecord.name}}`	Name of the record.
`{{fetchedMriacrmRecord.url}}`	A link that opens it in Mria CRM.
`{{fetchedMriacrmRecord.status}}`	Lead status, Deal stage, or the Contact's or Company's status.
`{{fetchedMriacrmRecord.stageType}}`	Deals only: OPEN, CLOSED_WON or CLOSED_LOST.
`{{fetchedMriacrmRecord.amount}}`	Deal amount or product price.
`{{fetchedMriacrmRecord.email}}`	Contact email, Lead contact email, or the Deal's primary Contact email.
`{{fetchedMriacrmRecord.assigneeAccountId}}`	Atlassian account id of the owner.

To test the result, add a **Compare two values** condition — or an **If/else block** — with `{{fetchedMriacrmRecord.found}}` equals `true` or `false`. A record the connection owner cannot see counts as not found.

6. Search records

Returns a list of records rather than one. Set at least one filter besides Limit. Filters that do not apply to the chosen type — a stage for Leads, say — are refused by name, never silently ignored.

Search records in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Record type *

Lead

"All" lists every record linked to the work item; lead status and stage filters do not apply, and tags leave out products

Work item key

Comma-separated keys; records linked to any of them. Leave empty to search by the other filters

Search term

Name, contact, company or email

Lead status

New

Tags

Field	What it takes
Record type *	Lead, Deal, Contact, Company, Product, or All (linked to the work item). With All, lead status and stage filters do not apply and tags leave out Products.
Work item key	Comma-separated keys: records linked to any of them. Leave empty to search by the other filters.
Search term	Matches name, contact, company or email.
Lead status	Leads only.
Pipeline, Stage, Stage type	Deals only. Stage type is Open, Closed Won or Closed Lost.
Tags	Comma-separated; a record with any of them matches.
Updated before	An ISO date. For "no activity for 30 days" use `{{now.minusDays(30)}}`.
Closing date before	Deals only.
Limit	Rows returned, most recently updated first. Default 50, at most 150.

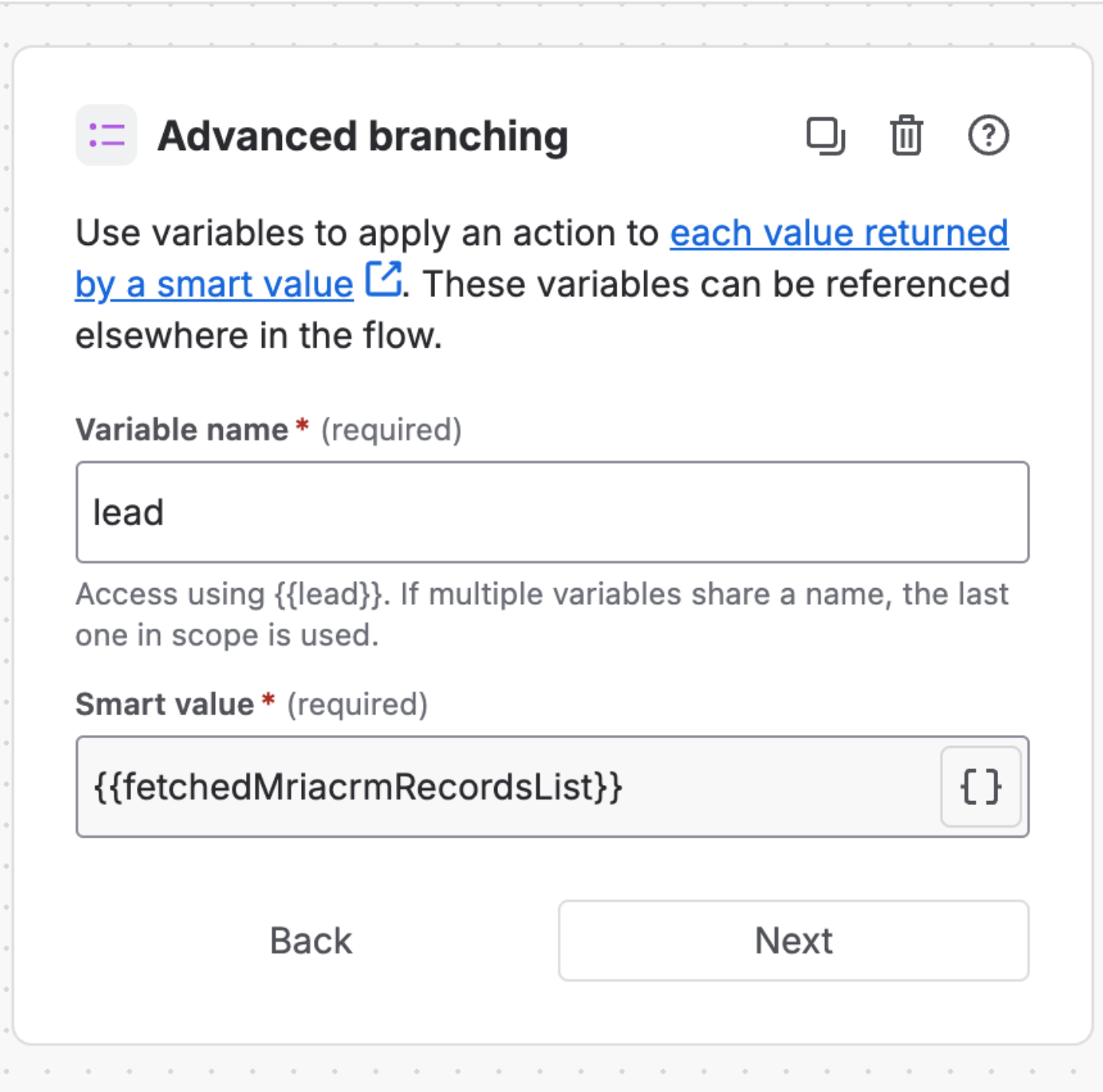
Returns

A list, `{{fetchedMriacrmRecordsList}}`. Every row carries:

Field	What it holds
`entityType`	lead, deal, contact, company or product.
`id`, `name`, `url`	The record, and a link to it.
`status`	Lead status, Deal stage, or the Contact's or Company's status.
`stageType`	Deals only: OPEN, CLOSED_WON or CLOSED_LOST.
`amount`	Deal amount or product price.
`closingDate`	Deals only.
`email`	Contact, Lead contact or primary Contact email.
`assigneeAccountId`	Atlassian account id of the owner.

Use the list in three ways:

- **Loop over it.** Add an Advanced branching step with Smart value `{{fetchedMriacrmRecordsList}}` and a variable name such as `lead`. Steps inside the branch run once per row and read it as `{{lead.id}}`, `{{lead.name}}` and so on.
- **Count it.** `{{fetchedMriacrmRecordsList.size}}` is the number of rows — compare it with 0 to act only when something was found.
- **Pick one row.** `{{fetchedMriacrmRecordsList.get(0).name}}` reads the first row's name.



7. Update lead

Changes one Lead, or every open Lead linked to a work item. Set at least one field to change; fields you leave empty are not touched.

Field	What it takes

Update	Leads linked to a work item, or One lead by id.
Work item key / Record id *	The reference for the option you picked. By work item, every linked Lead that is not converted is updated, at most 150.
Lead status	The new status.
Lead source	The new source.
Assignee	The new owner. Leave empty to keep the owner.
Tags	Comma-separated names. Missing tags are created.
Tags mode	Add (the default), Remove or Replace. Appears once tags are entered.

Returns

Smart value	What it holds
`{{updatedMriacrmLead.id}}`	Id of the updated Lead, or of the first when several were updated.
`{{updatedMriacrmLead.updatedCount}}`	How many Leads were updated. 0 when the work item has no open Lead — the step still succeeds.
`{{updatedMriacrmLead.url}}`	A link that opens the Lead.

8. Update deal

Changes one Deal, or every open Deal linked to a work item. Picking a Won or Lost stage closes the Deal.

Update deal in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Update

- (•) Deals linked to a work item
- ( ) One deal by id

Work item key *

{{issue.key}}

Updates every open deal linked to the work item

Pipeline

Main Pipeline

Narrows the stages below

Stage

Negotiation

A deal in another pipeline moves there. A Won or Lost stage closes the deal

Amount

Field	What it takes
Update	Deals linked to a work item, or One deal by id.
Work item key / Record id *	By work item, every linked Deal in an open stage is updated, at most 150.
Pipeline	Narrows the stage list below.
Stage	A Deal in another pipeline moves to this one. A Won or Lost stage closes the Deal.
Loss reason	Appears under a Lost stage: No Budget, Chose Competitor, Product Fit Issue, Timing Not Right, No Decision, No Response or Other.
Amount	The new amount. Required to close a Deal that has none.
Probability	A whole number, 0 to 100. Overrides the stage's default probability.
Closing date	ISO date. A Deal closed without one gets today's date.
Assignee	The new owner. Leave empty to keep the owner.
Tags / Tags mode	As for Update lead.

Returns

Smart value	What it holds
`{{updatedMriacrmDeal.id}}`	Id of the updated Deal, or of the first when several were updated.
`{{updatedMriacrmDeal.updatedCount}}`	How many Deals were updated. 0 when the work item has no open Deal — the step still succeeds.
`{{updatedMriacrmDeal.closed}}`	True when this step closed at least one Deal.
`{{updatedMriacrmDeal.url}}`	A link that opens the Deal.

A Deal that is already Won or Lost is never reopened or closed a second time; by work item, closed Deals are simply skipped.

9. Add note

Adds a plain-text note, the same kind you write on the record's Notes tab.

Field	What it takes
Add to	Records linked to a work item, or One record by id.
Record type *	Lead, Deal, Contact or Company — or, by work item, All (linked to the work item). Products have no notes.
Work item key / Record id *	By work item, every linked record of the type gets the note, at most 150.
Content *	Plain text, up to 10,000 characters. Smart values are filled in before the note is saved.

Returns

Smart value	What it holds
`{{createdMriacrmNote.noteId}}`	Id of the first note added.
`{{createdMriacrmNote.notesCreated}}`	How many notes were added. 0 when nothing is linked — the step still succeeds.
`{{createdMriacrmNote.skippedCount}}`	Linked records the connection owner could not write to — no edit right, or a Lead already converted.

Line breaks in Content are kept. Text from the work item is added as text and never becomes formatting or a link.

When a step fails

A failed step stops the flow. The audit log shows the step with `Action failed due to invalid input` and one line saying why — the missing permission, the record that could not be found, the field that did not validate — and Jira emails the flow owner as set in the flow's details.

You see	What to change
`Set exactly one of Record id and Work item key.`	Clear one of the two fields.
A missing permission, such as Create on Leads	Give the connection owner that right in Roles & Permissions, or switch the step to another connection.

You see	What to change
A Contact email that already exists	Find the Contact first and create only when found is false.
A lead source that does not exist	Pick a source from the list, or add the name under Settings.
Closing a Deal with no amount	Set Amount in the same step.

Some outcomes are not failures, so the flow carries on: Find record with nothing found, an update or note by work item with nothing linked, and a create whose follow-up write was skipped (check the step's `warning`).

Related Pages

- Jira Automation — connecting, who a step runs as, limits and good habits.
- Capture Leads from Web Forms — Find record, Create lead and Add note working together.
- Mria CRM Custom Fields in Jira — reading CRM data in JQL and conditions without a Mria CRM step.