Companies

Using Mria CRM · https://mriacrm.com/docs/companies/

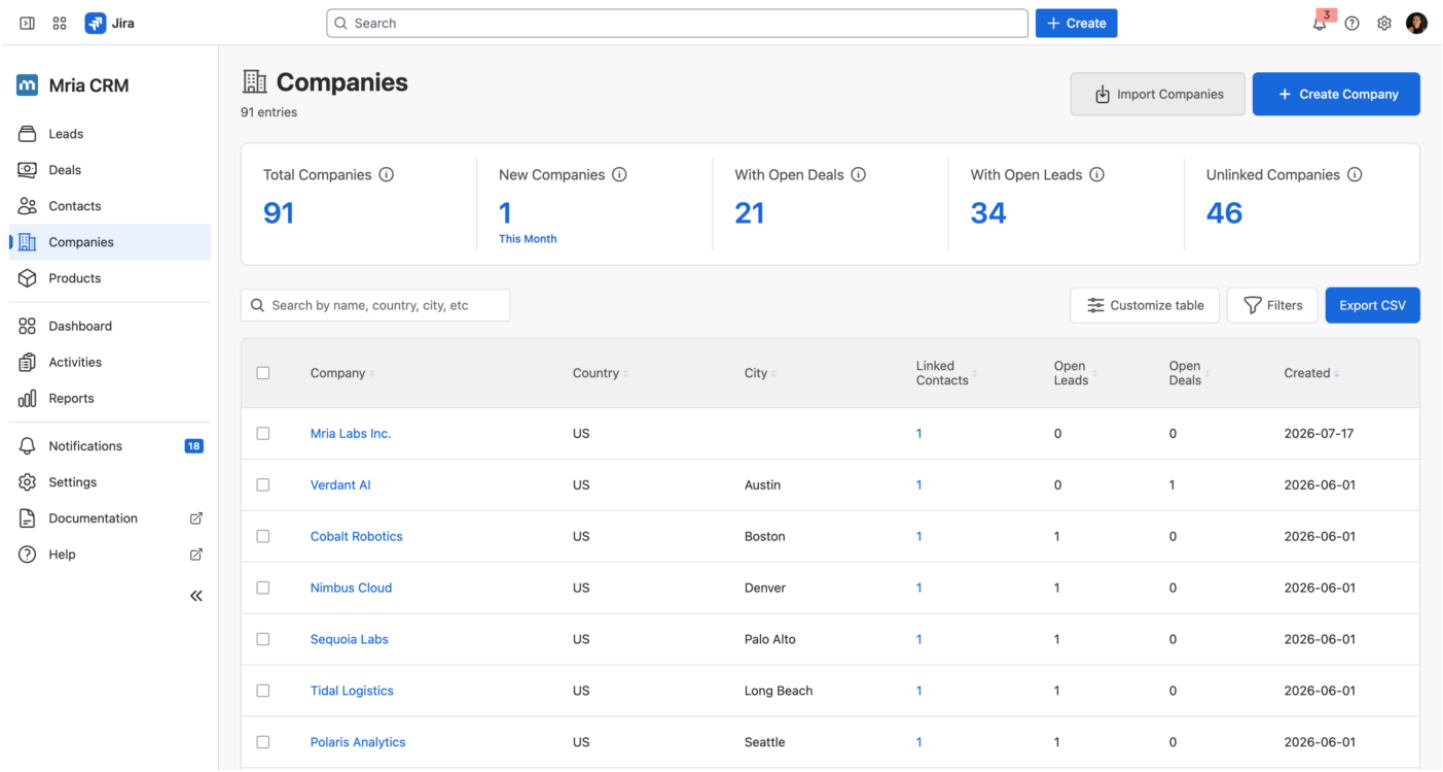
iHow to Manage Companies in Mria CRM for Jira

The **Companies** section lets you manage the organizations you're working with. Each Company can be linked to multiple **Contacts**, **Leads**, **Deals**, and **Products**, serving as the central account record.

1. Viewing Companies

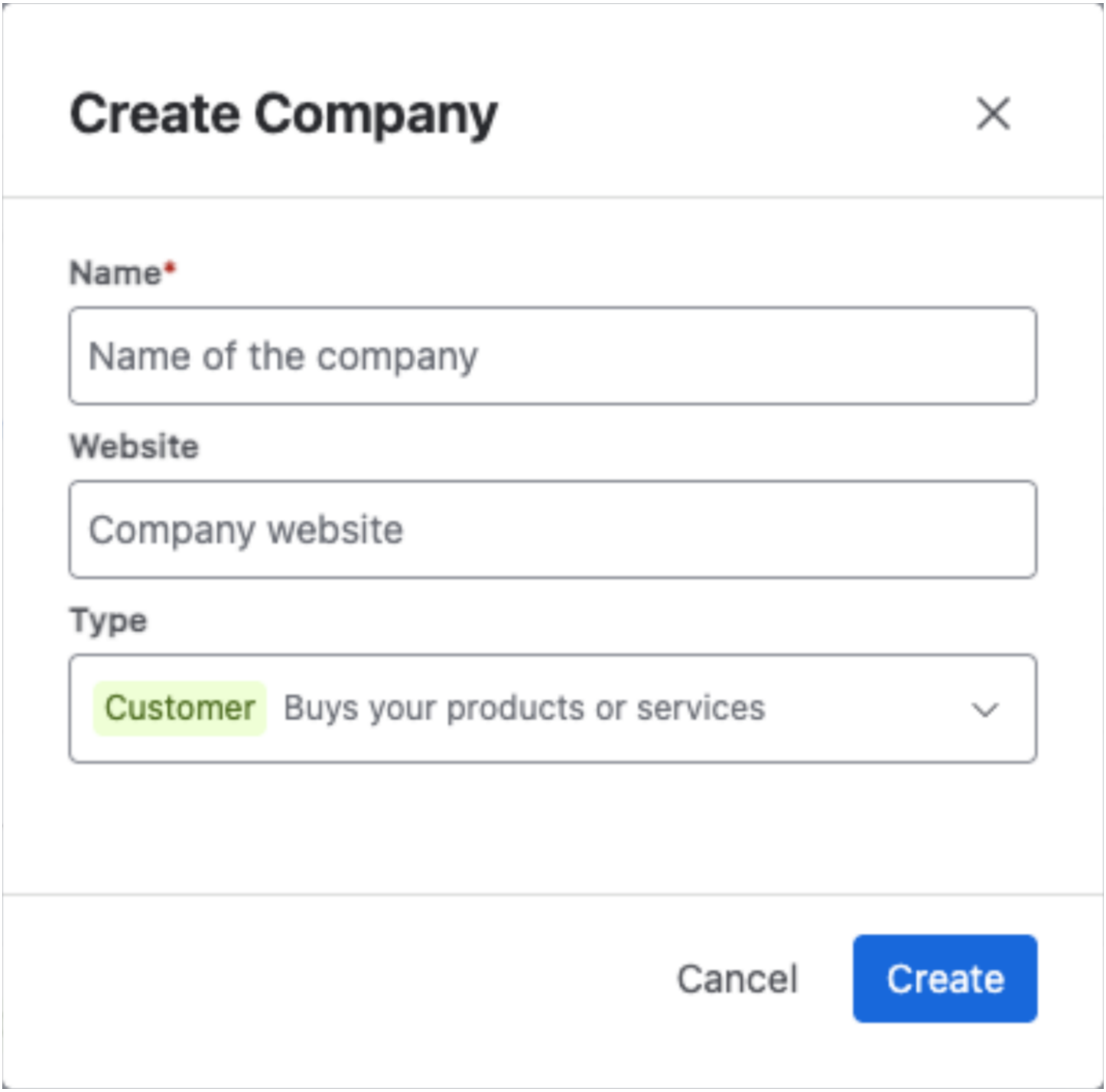
- Companies are displayed in a **table view** with key details:
  - Company Name
  - Type
  - Country
  - City
  - Linked Contacts (click on this link opens a filtered list of Contacts linked to this Company)
  - Open Leads
  - Open Deals
  - Created date
- At the top, you'll see summary stats:
  - Total Companies
  - New Companies (this month)
  - Companies with open Deals
  - Companies with open Leads
  - Unlinked Companies (no Contacts attached)

Export CSV: allows you to export the current list of Companies (based on applied filters and visible columns) as a `.CSV` file for external use.



2. Creating a Company

- Click **Create Company** to add a new record.
- Required field: **Company Name**.
- **Type** — the default type (Customer, unless an administrator has changed it) unless you pick another. See Company & Contact Types.
- You can also add optional details right away (Website, Country, Industry, etc.).
- Additional attributes (Company Size, Address, Social links) can be added later in the Company full view.



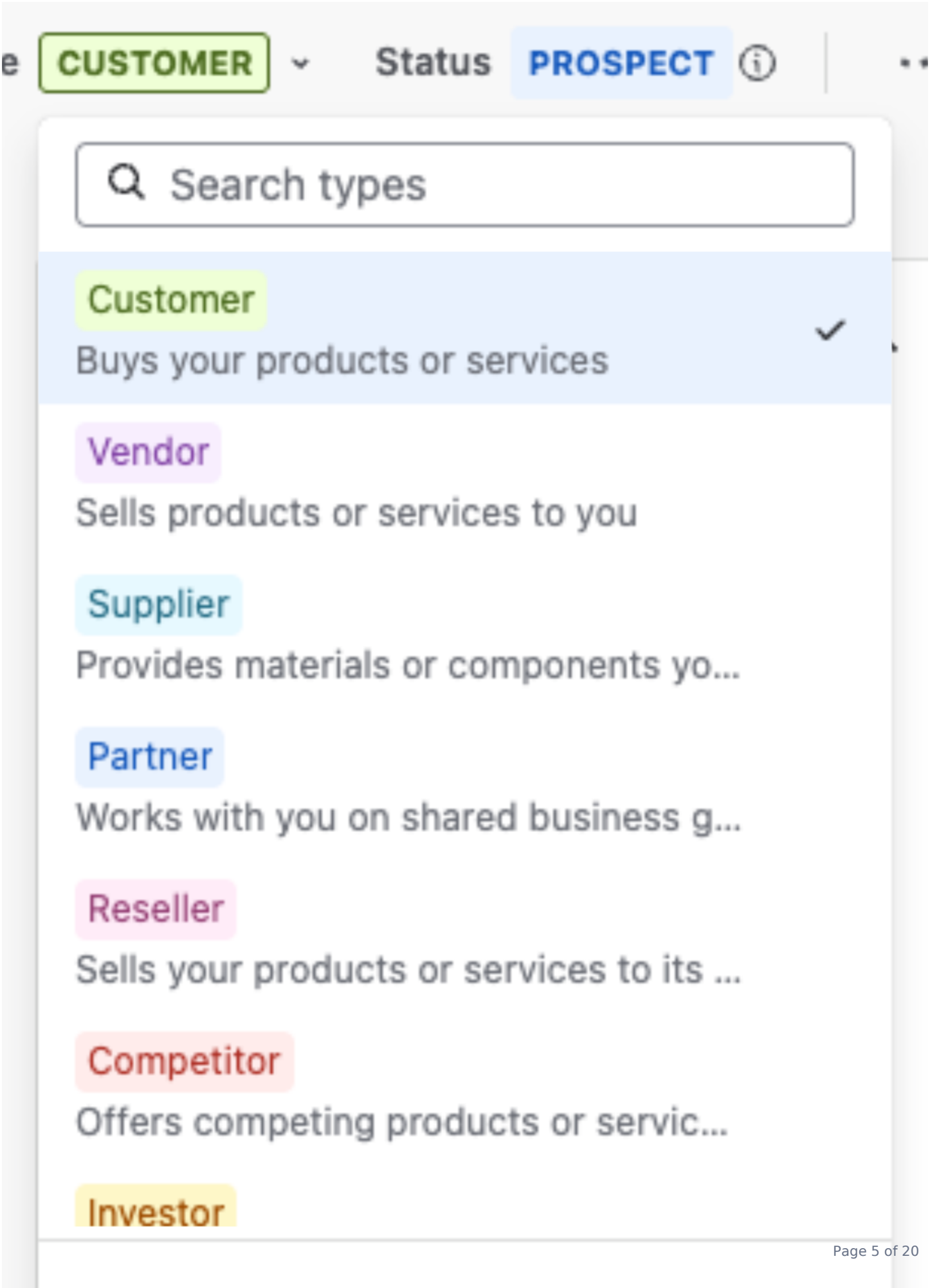
3. Company Full View

Opening a Company puts the whole account on one screen, split between a **main column** and a **details panel on the right**. The right-hand panel stays in place as you work down the page.

The header carries two chips. **Type** says what the Company is to you — click it to change it; **Manage types →** at the bottom of the picker opens the type list in Settings. **Status** is calculated (see CRM

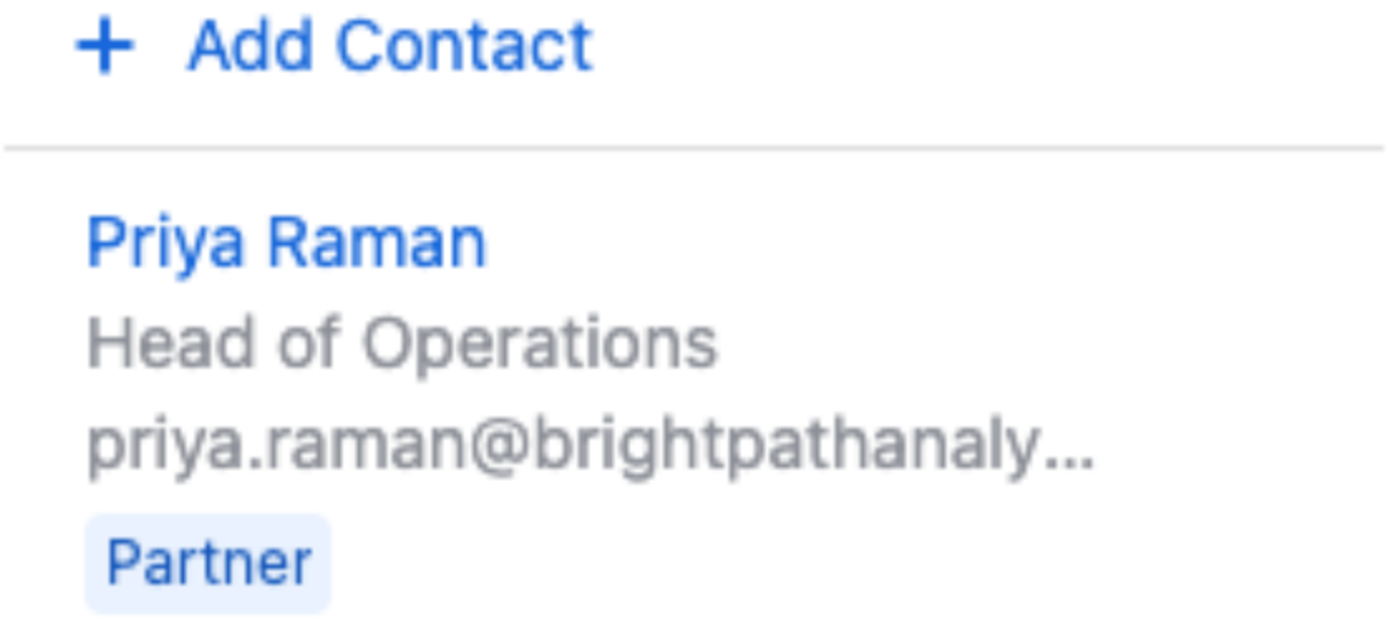
Statuses below).




e
CUSTOMER
Status
PROSPECT
Search types
Customer
Buys your products or services
Vendor
Sells products or services to you
Supplier
Provides materials or components yo...
Partner
Works with you on shared business g...
Reseller
Sells your products or services to its ...
Competitor
Offers competing products or servic...
Investor

Right-hand panel

- **Details** — Name, Type, Website, Phone, Industry (from the Industries list), Company Size, Tags, Country, City, ZIP, State, Address, and LinkedIn. Click any field to edit it inline.
- **More fields** — the custom fields configured for Companies (see **Custom Fields on Companies** below).
- **Contacts** — everyone linked to this Company, with their title, email and type, plus + Add Contact.
- **Products** — Products linked to the account, plus **+ Add Products**.



Creation and last-updated details sit at the very bottom of the panel.

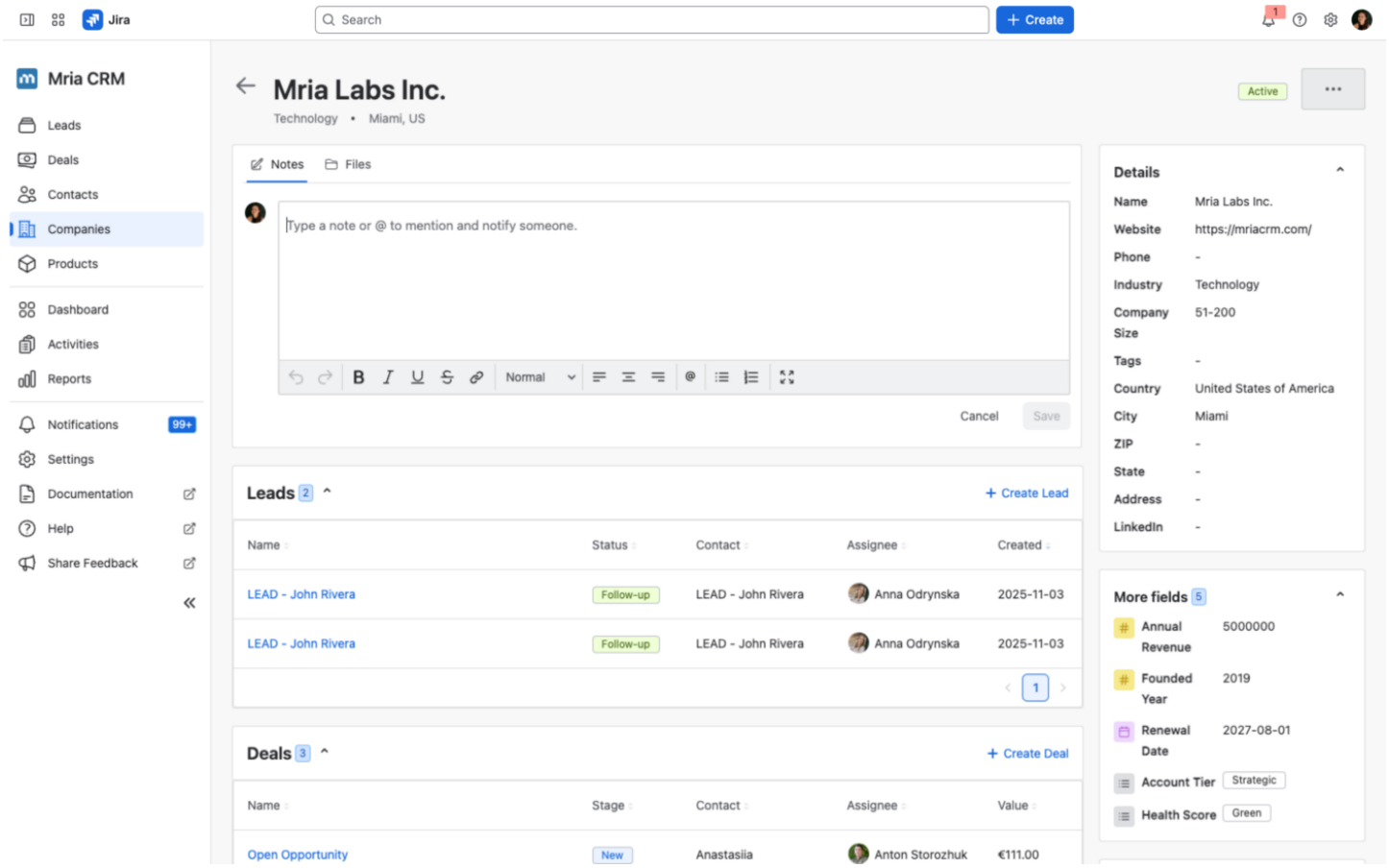
Main column

Working down the page:

- **Notes / Meetings / Tasks / Files tabs** — the strip above the note composer. Stay on **Notes** (or just start typing) to add a note; switch to **Files** to attach documents to the Company, or to **Meetings** and **Tasks** to book work against the account.
- **Leads** — every Lead linked to this Company with status, contact, assignee, and created date. Paginated, with **+ Create Lead**.
- **Deals** — stage, contact, assignee, and value, with **+ Create Deal**.

- **Linked items** — external references, grouped onto their own tabs: **Jira work items**, **Spaces**, **Boards**, **Web links**, and **Confluence**. Each tab shows a count, so you can see at a glance where the references are without clicking through. Use **+ Link item** to attach an existing one or **+ Create new** to make a Jira work item on the spot.
- **Timeline** — notes, finished meetings and tasks, and changes to the Company, newest first. A note you add appears here, and in the Notes block if an administrator has turned it on (see Layouts).

Each section header carries a **count badge** and a **collapse arrow**, so you can fold away the parts you aren't using and keep a busy account readable.



Files on Companies. The **Files** tab brings Company-level attachments in line with Leads and Deals — useful for contracts, NDAs, and other paperwork that belongs to the account rather than to one specific opportunity. The same **10 MB per file** limit applies; see Activities Breakdown.

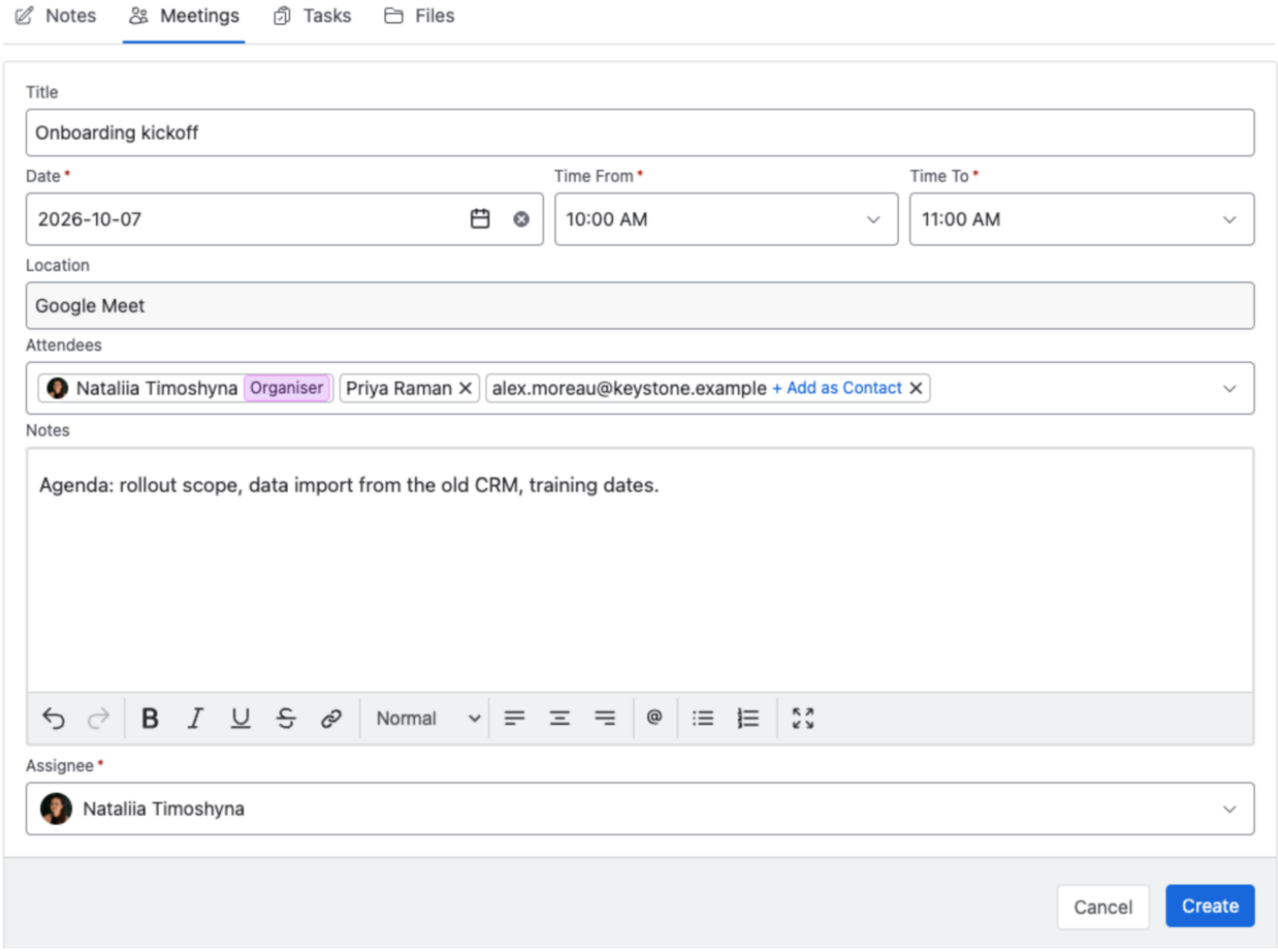
You can **link Products** to a Company from its full view. Linked Products show on the Company, and the Company appears under that Product's **Linked Companies** tab — see Products.

Meetings, Tasks and Timeline

A **Company** is not only a record to read — it is something you work on. Meetings and Tasks can be booked against it directly, the same way they can on a Lead or a Deal.

Adding a Meeting

Open the **Meetings** tab. The composer opens ready to use: today's date, a start time, and an end time exactly one hour later. Move **Time From** and **Time To** follows it, keeping the hour, so a straightforward meeting needs nothing but a title and an assignee.



- **Assignee** is required — **Assign to me** is the quickest way to set it. (A Task does not require one.)
- **Title** and **Location** are optional. Location is where a video call link belongs.

- **Attendees** — Mria CRM users, Contacts, or any email address. The assignee is added automatically, badged **Organiser**. Nothing is sent to anyone: attendees are recorded on the meeting, not invited.
- **Notes** — an agenda before, the outcome after. The same editor as a Note, @mentions included.
- If something required is still missing when you press Create, the form says so against the field rather than doing nothing.

Adding a Task

The **Tasks** tab works the same way. A task needs a **Title** and a **Due Date**; **Status** starts at **To Do** and the assignee is optional, so a task can be captured first and handed to someone later.

Where they show up

- **Planned** — a section on the record itself listing everything still open, with its status and due date. It only appears when there is something open, so an empty Company stays uncluttered.
- Activities — the workspace-wide view. Meetings and Tasks booked on a Company appear there alongside those from Leads and Deals, including under **Assigned to me**.

Timeline

Below Planned, the **Timeline** records what has happened to this company over time — when it was created, when links were added, and other changes to the record. Use **Filters** to narrow it to the kinds of activity you care about.

A change of Type is recorded there too, for example `Type changed from "Customer" → "Partner"`.

> The Timeline records events from the point it started keeping them, so a company that has been sitting in your CRM for a while will look empty until something next happens to it. That is expected — it is a log, not a reconstruction of the past.

> **Arranging this page**
> Administrators can move, hide or collapse the blocks of the Company page and reorder the fields in Details — in Settings → Layouts, or from ⚙ **Configure** at the foot of the side panel. See

Layouts.

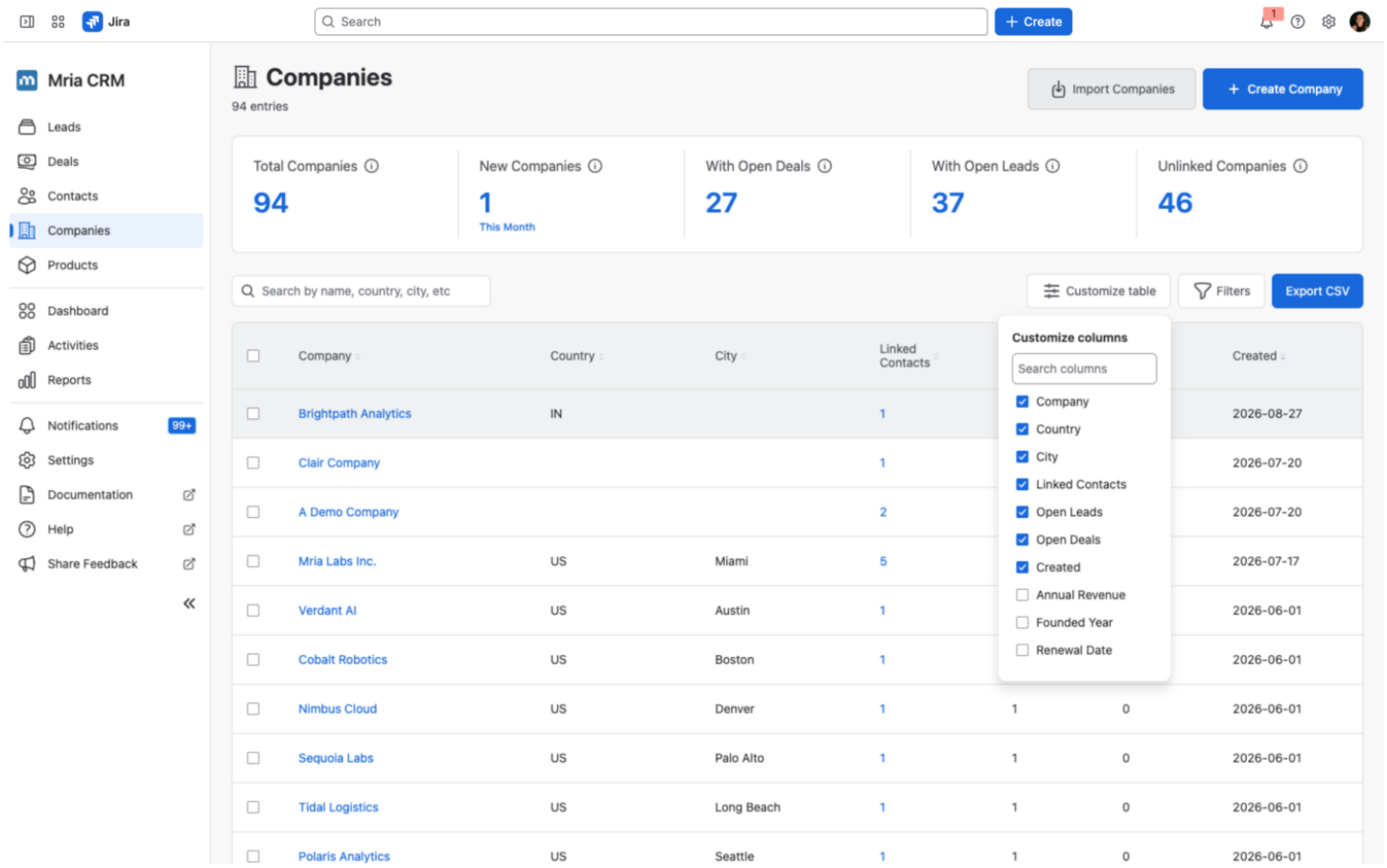
4. Custom Fields on Companies

Custom fields let your team capture extra information on every Company beyond the standard fields. For example, you can add **Annual Revenue** to track account size, **Account Tier** to segment by importance, **Health Score** to flag at-risk accounts, or **Renewal Date** to plan customer success outreach.

Custom fields are managed by administrators under **Settings → Custom Fields**. See Custom Fields for the full setup guide and field type reference.

Once a custom field is created on the Company entity, it shows up in several places:

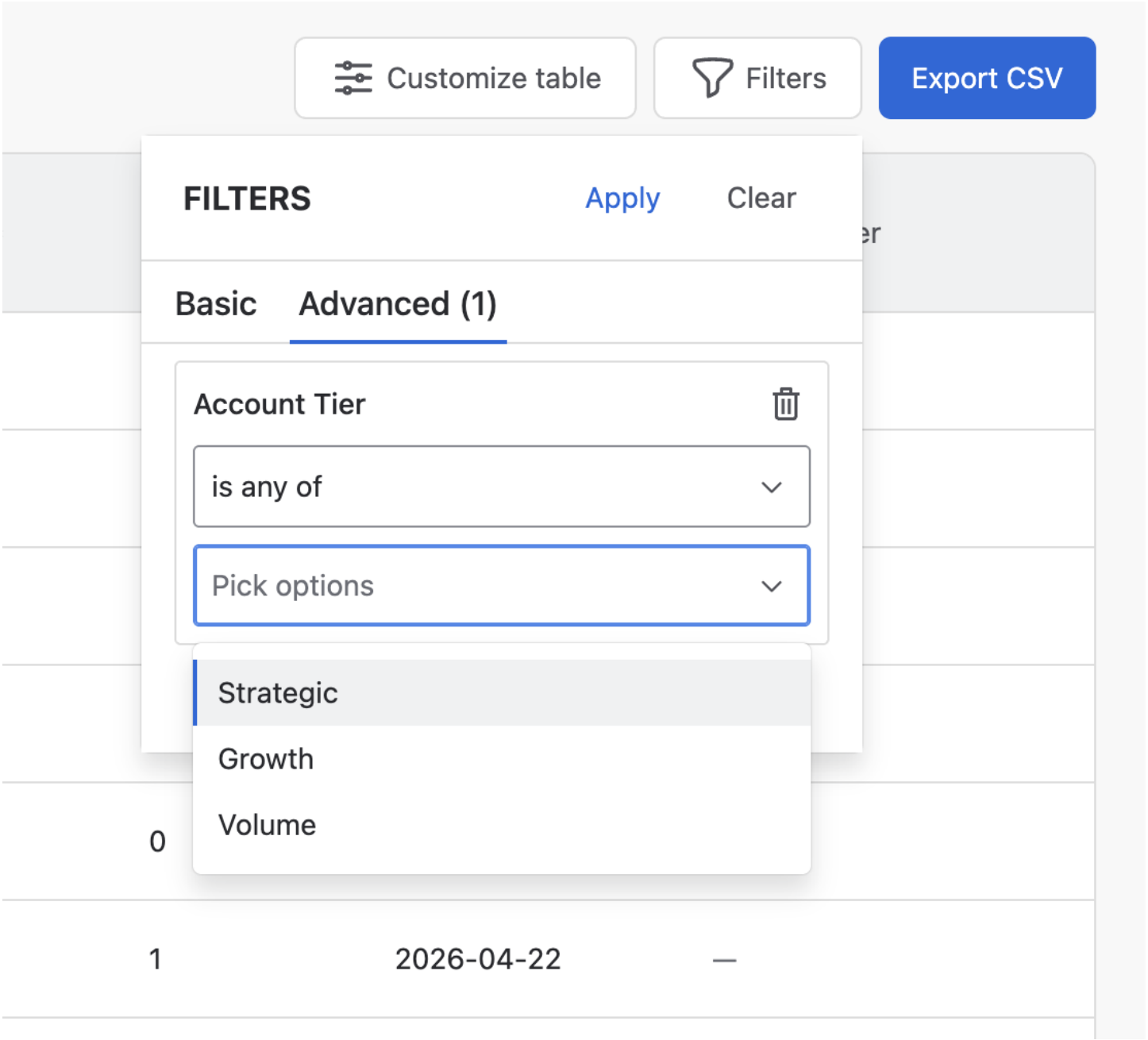
- **Company full view** — populated values appear in the **More fields** section on the right-hand panel. Click any field to edit inline.
- **Table view** — open the **Customize table** menu and toggle any custom field on to add it as an optional column.
- **Filters panel** — every custom field appears under the **Advanced** tab as a filterable criterion (see Filtering Companies below).
- **CSV export** — visible columns are included in the export, so custom fields show up in the CSV when they're toggled on in the table view.
- **Companies Import** — custom fields can be mapped during bulk import. See Companies Import.



5. Filtering Companies

Companies can be narrowed down with filters to quickly find what you need. The Filters panel has two tabs:

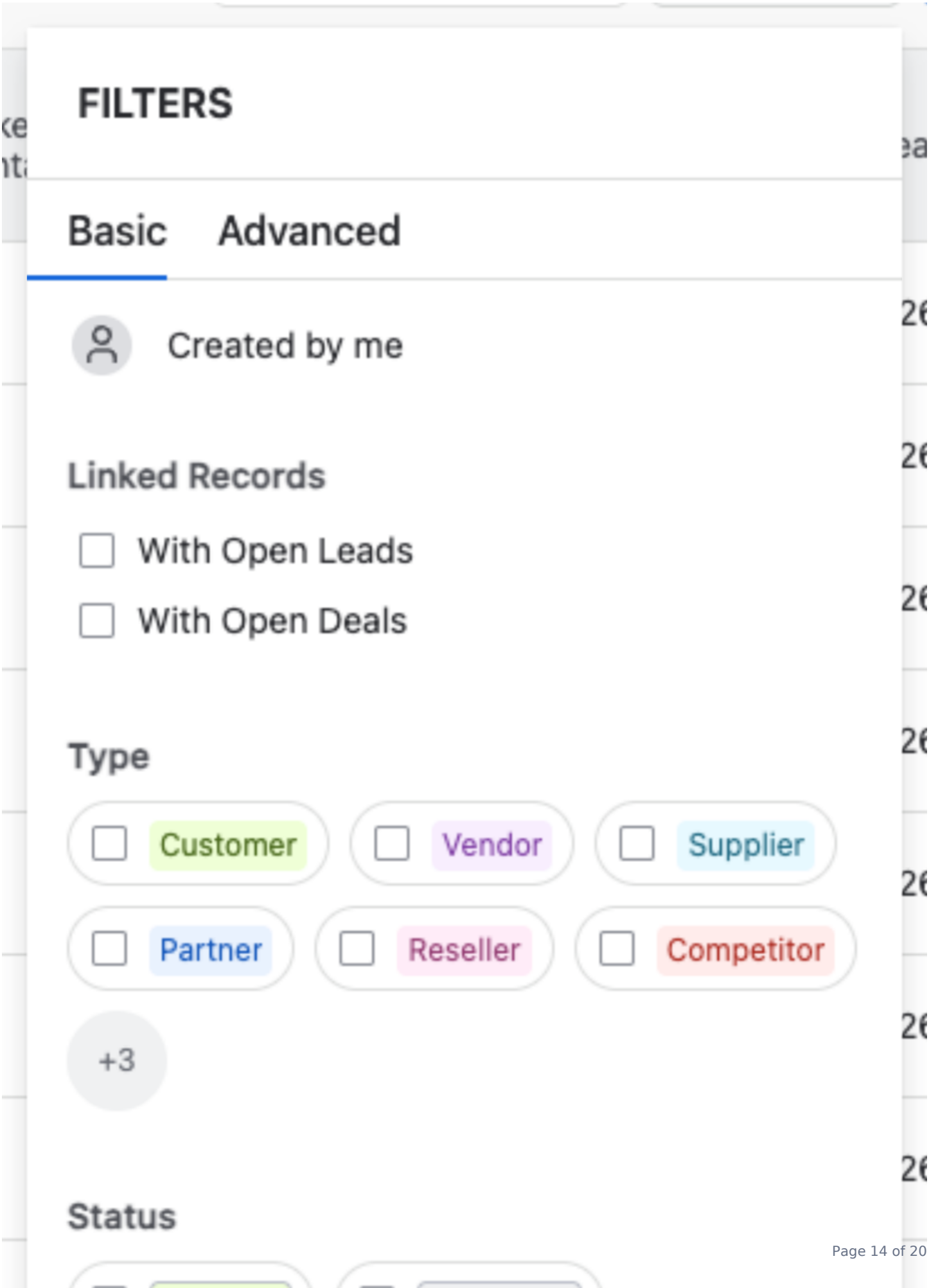
- **Basic** — the standard filter set, always available.
- **Advanced** — every custom field on the Company is automatically available here as a filterable criterion. The available comparators depend on the field type (for example, dropdowns use **is any of**, numbers use **is greater than**, dates use **is on or before**).



Available **Basic** filters include:

- **Created by me** – show only Companies created by you.
- **Linked Records** – filter by Companies with open Leads or open Deals.
- **Type** – one or more company types.
- **Status** – Active, Prospect or Inactive.
- **Tags** – filter by any custom tags.
- **Linked Contacts** – filter by the number or presence of associated Contacts.

- **Country / City** – limit the list to specific locations.
- **Created date** – select a time range when the Company record was created.


FILTERS
Basic
Advanced
Created by me
Linked Records
With Open Leads
With Open Deals
Type
Customer
Vendor
Supplier
Partner
Reseller
Competitor
+3
Status

These filters are optional and don't affect the underlying data – they just make it easier to focus on what's relevant at the moment.

6. Linking Jira work items

You can connect a Company to related Jira work items directly from the **Linked items** section, on its **Jira work items** tab.

Click **+ Link item**, then start typing to search by:

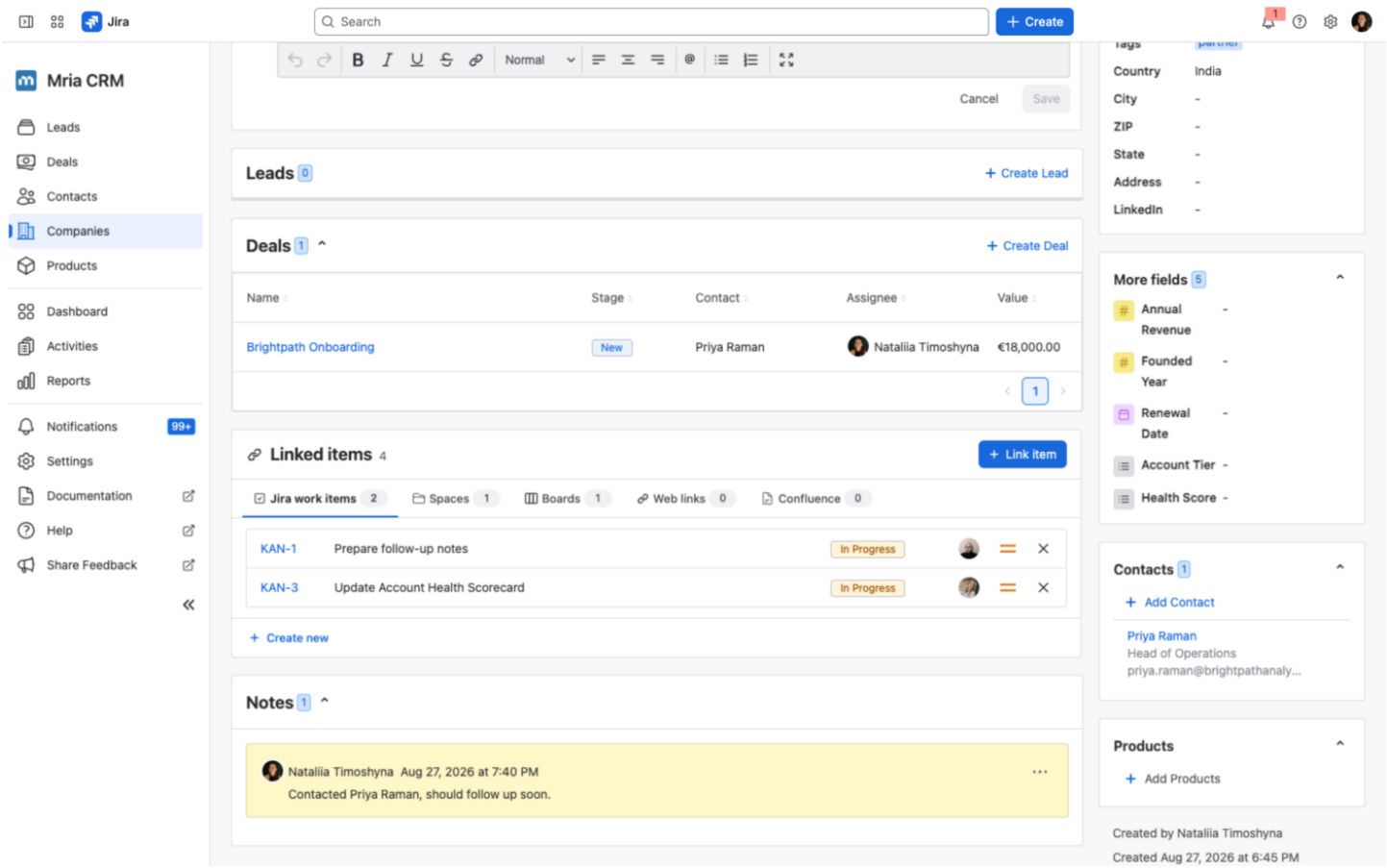
- Jira issue key (e.g., `SCRUM-9`),
- issue summary, or
- paste a direct link to the Jira work item.

You can also click **+ Create new** to create a Jira work item and link it to the Company in one step.

Once linked, the connection appears:

- in the **Company's Linked items** section inside Mria CRM, showing the issue key, summary, and status,
- in the **Mria CRM panel** on the Jira issue's right sidebar.

➡ Learn more about the Jira panel on the Jira Integration page.



7. CRM Statuses

For Contacts and Companies, Mria CRM automatically calculates a status based on their activity history. It appears as the **Status** chip in the header, next to the Type chip; its explains the result, for example `Prospect — has 0 Leads and 1 Deal. Calculated automatically.`. Status cannot be set by hand — Type is the field you choose.

Status	Condition
Active	Has at least one *Deal won*.
Prospect	Has at least one *open or lost Lead* or *open/lost Deal*.
Inactive	Default state before any Leads or Deals are created.

8. Deleting a single Company

To delete one Company, open the `...` **menu in the top right corner** of a Company full view and select **Delete**.

- Companies with linked items (Contacts, Leads, or Deals) cannot be deleted. You'll see a warning.
- Companies without links can be hard deleted.

9. Bulk actions

From the **table view** you can update or delete many Companies at once — normalizing country and city data after an import, re-tiering a segment, or clearing out duplicates.

Selecting Companies

1. Apply **Filters** if you want to target a specific set.
2. Tick the checkbox on each row. The **header checkbox** selects every Company **on the current page**.
3. A bulk actions bar appears at the bottom showing the count, for example **2 selected**. Click **Select all N** in that bar to extend the selection to **every Company matching your current filters**.
4. The **×** at the end of the bar clears the selection.

> **The count in the bar is the number you're about to act on.** Read it before you click anything, especially before Delete.

Edit fields

Click **Edit fields** to open a panel that applies your changes to every selected Company. Every field starts at **Keep as is**, so nothing changes unless you deliberately set it.

Fields available on Companies:

- Type
- **Country**
- **City**
- **State**
- **Company Size**
- **Industry**
- **Tags**

- **Products**

Edit fields | 2 Companies

Country

Keep as is

Clear

City

Keep as is

Clear

State

Keep as is

Clear

Company Size

Keep as is

Clear

Industry

Keep as is

Type

Keep as is

Tags

Country, City, State, and Company Size also offer a **Clear** link to empty them across the selection. **Tags** and **Products** offer the multi-value choices — **Add new**, **Replace all**, **Find and remove**, and **Remove all** — described on the Leads page.

> The location fields make this especially useful after a Companies Import: filter by the import file, then set **Country** once for the whole batch instead of opening each record.

Below the fields, **Add links** attaches the same link to every selected Company — a **Jira work item**, **Jira space**, **Jira board**, **Confluence page**, or **Web link**.

Click **Next** to review, then confirm to apply.

Delete

Click **Delete** in the bulk actions bar and confirm.

> **Linked Companies are skipped, not blocking.** The same rule as single deletion applies to every record in the batch: a Company that still has Contacts, Leads, or Deals attached is left in place, and Mria CRM continues with the remaining selection rather than failing the whole operation. Unlink or delete those records first if you need the Company gone.

> Bulk delete is **permanent** and cannot be undone. Review your filters and the selected count before confirming.

Companies act as the "umbrella" entity:

- **Contacts** belong to Companies.
- **Leads** and **Deals** are associated with both Contacts and Companies — and a Deal can carry **several** Companies, with one marked Primary. See Deals.