Company & Contact Types

Settings · https://mriacrm.com/docs/company-and-contact-types/

Say what a Company or Contact is to you

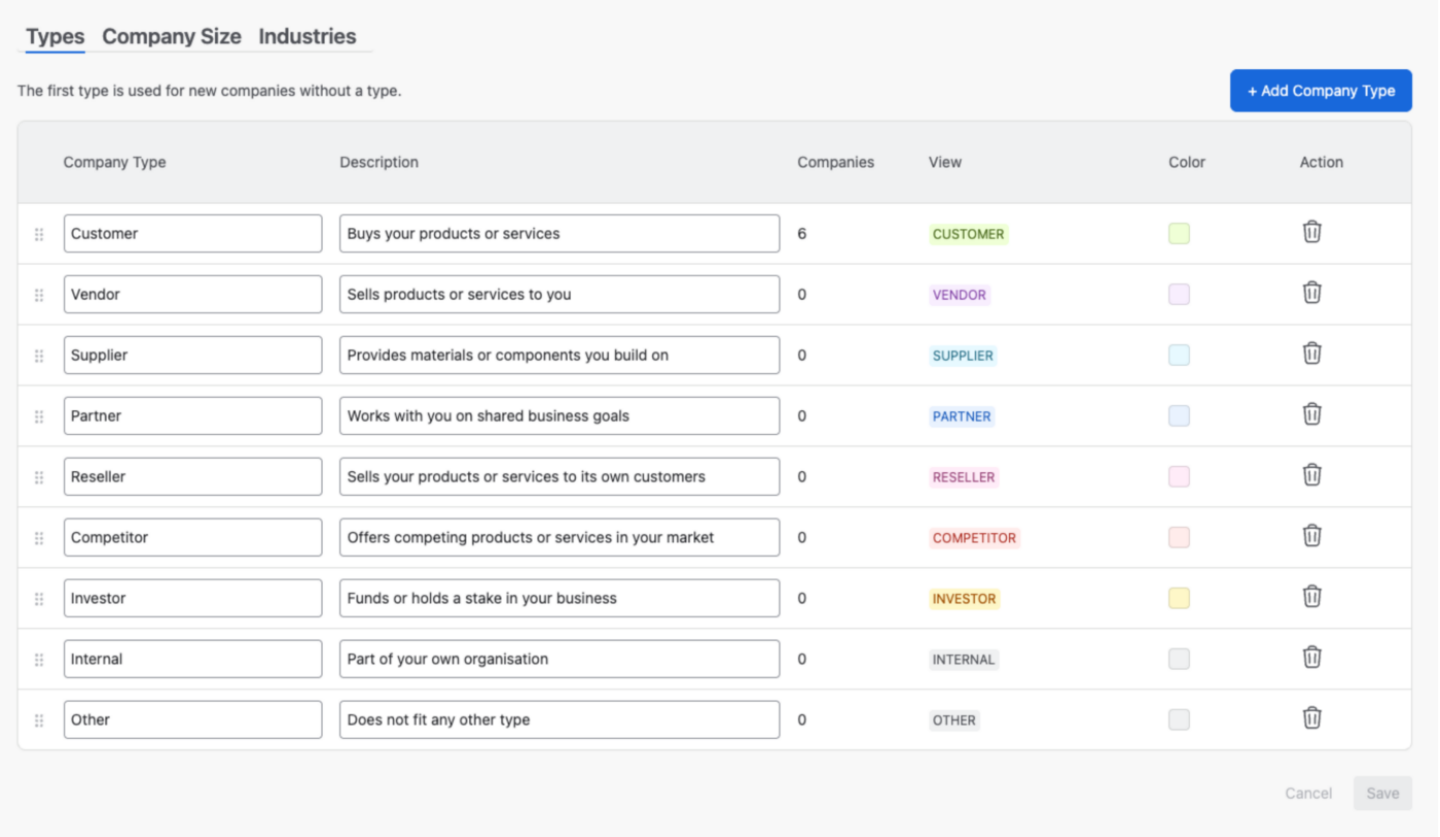
Every Company and Contact has a **Type** — Customer, Vendor, Supplier, Partner and so on. Unlike a tag, a type is one value from a list your administrators manage, so it can be filtered, reported on, queried from Jira and shown the same way everywhere.

Type says what the relationship is. The CRM **Status** next to it — Active, Prospect, Inactive — says where it stands, and is calculated for you. They are separate on purpose: a Supplier you never sell to stays Inactive, and that is fine.

1. The type lists

Administrators manage the lists under **Settings → Companies** and **Settings → Contacts**, on the **Types** tab. The two lists are separate, and each starts with the same nine types:

Type	Description	
Customer	Buys your products or services	Default — see below
Vendor	Sells products or services to you	
Supplier	Provides materials or components you build on	
Partner	Works with you on shared business goals	
Reseller	Sells your products or services to its own customers	
Competitor	Offers competing products or services in your market	
Investor	Funds or holds a stake in your business	
Internal	Part of your own organization	
Other	Does not fit any other type	



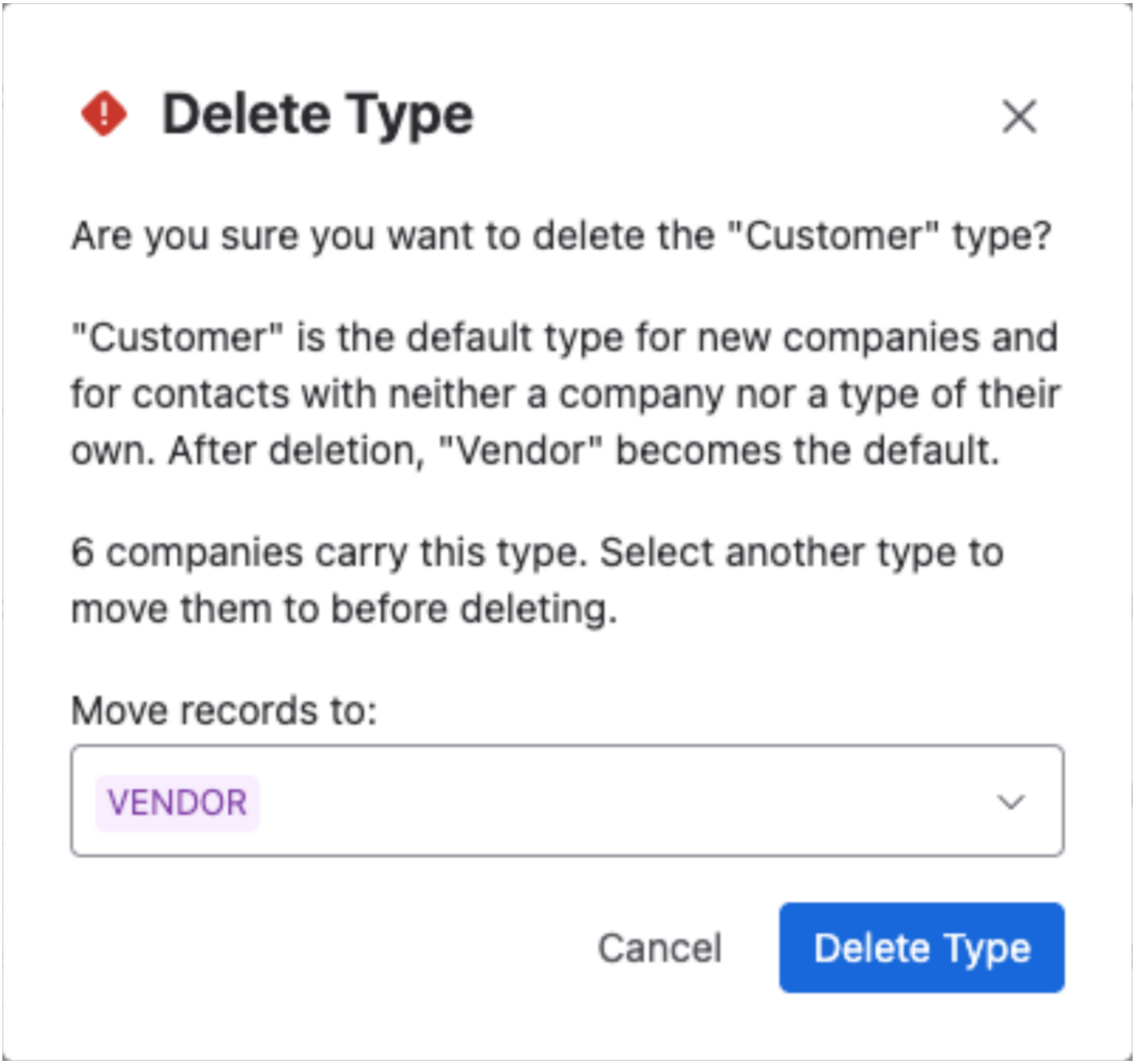
- **Add** a type with **+ Add Company Type** (or + Add Contact Type), and give it a description — it is shown in every type picker, so people choose the right one.
- **Rename, describe, recolor** any row in place, and **reorder** the list by dragging the grip on the left. The **View** column previews the chip. Click **Save** to keep your changes.
- **Companies / Contacts** counts the records that carry each type. For Contacts it counts only a type set on the Contact itself, not one inherited from its Company.
- **Every type can be renamed, recolored or deleted** — Customer and Other included.
- **The first type is the default.** The Companies list says so above the table — *The first type is used for new companies without a type.* New Companies start with it, and so does a Contact with neither a Company nor a type of its own. Drag another type to the top to make it the default. The Contacts list carries *Contacts without a type show their company's type.* — see section 3.

Settings → Companies also has a **Company Size** tab next to Types — see Configurable Lists.

Deleting a type

A type nobody uses is deleted after a confirmation. A type in use asks where its records should go: pick a type under **Move records to** and click **Delete Type**. Deleting the default also says which type

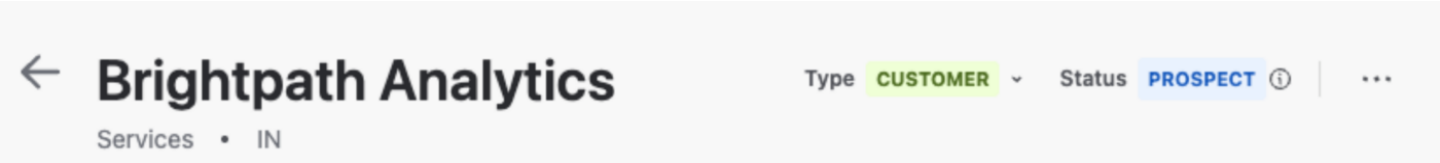
takes over:



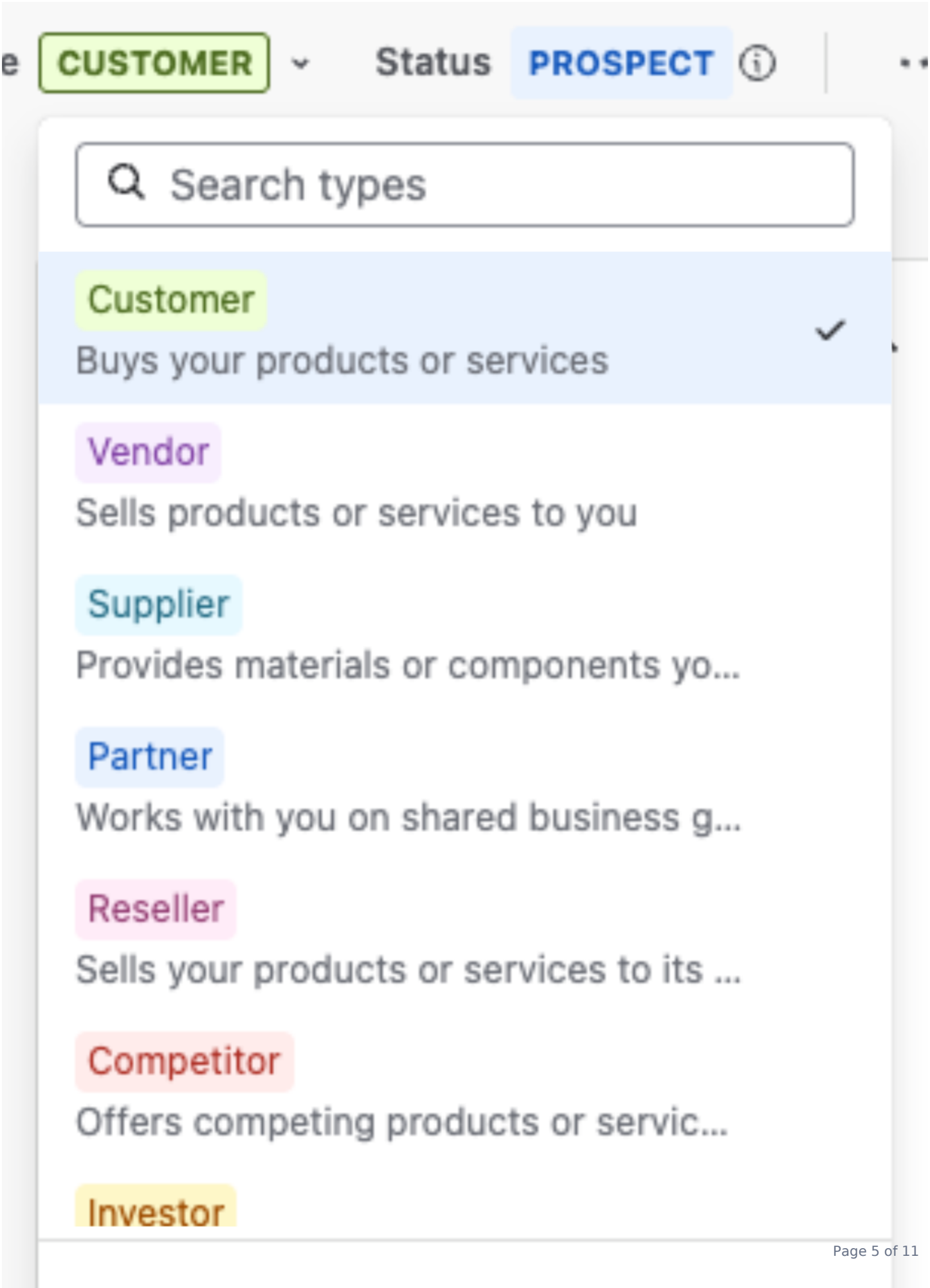
- **The last type stays.** When only one type is left, its delete control is disabled: *This is the only type in the list and cannot be deleted*.
- **Save first.** A type can't be deleted while the list has unsaved edits — *Save or cancel your changes before deleting a type*.

2. Setting a type

A Company's type sits in its header, next to the Status chip:



Click the type chip to change it. The picker lists every type with its description, and **Manage types →** opens the Settings tab for administrators:

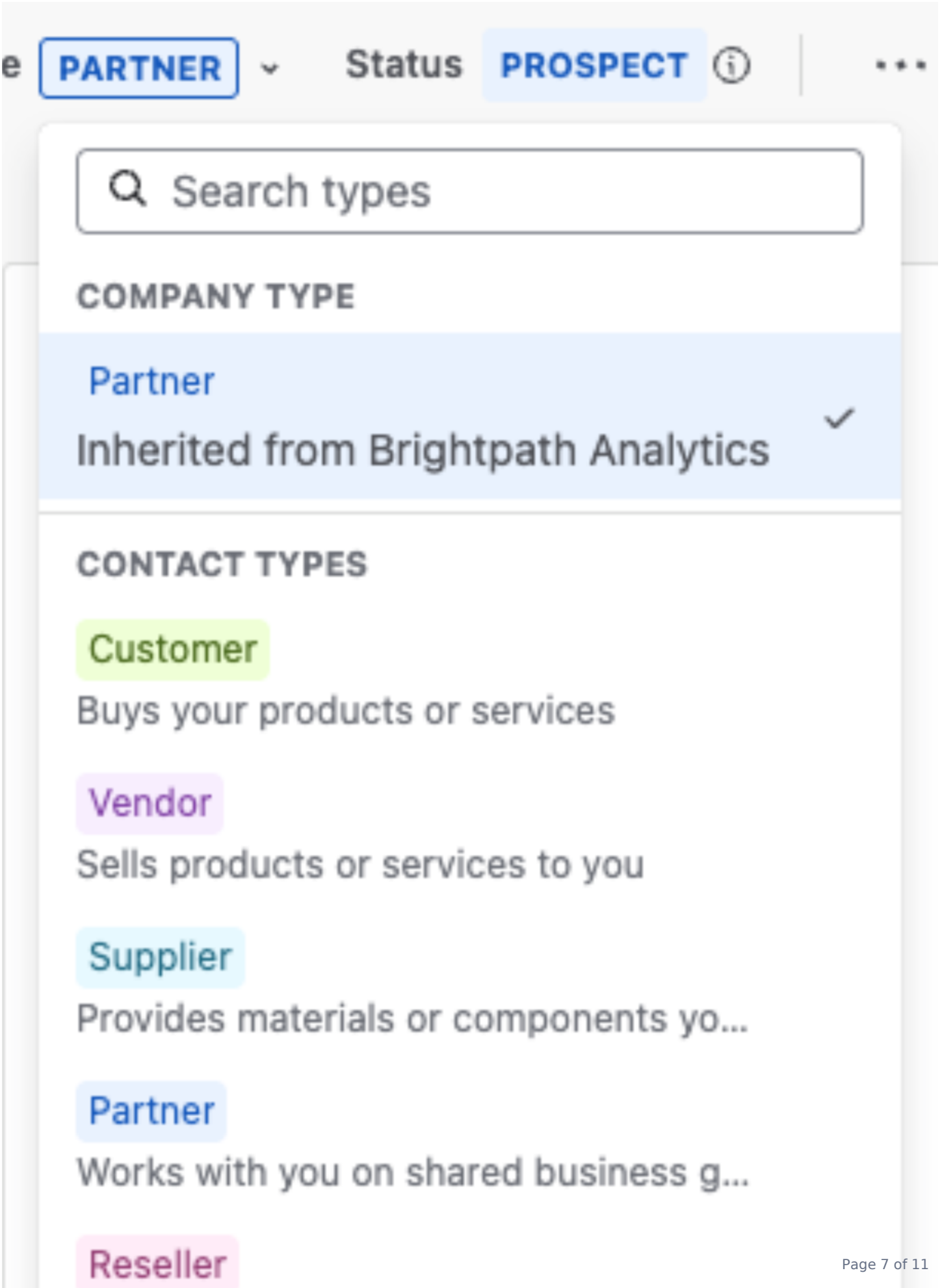

e
CUSTOMER
Status
PROSPECT
Search types
Customer
Buys your products or services
Vendor
Sells products or services to you
Supplier
Provides materials or components yo...
Partner
Works with you on shared business g...
Reseller
Sells your products or services to its ...
Competitor
Offers competing products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

- **On create:** Create Company has a Type field, set to the default type. Create Contact has one set to **Inherit** — the default type until a Company is chosen.
- **In the Details panel:** a Type row directly below Name.
- **In bulk:** select rows in the Companies or Contacts list and choose **Edit fields → Type**.
- **On import:** map a Type column; see section 5.
- **From Jira Automation:** the Create contact action takes a type, or inherits the Company's.

A change of type is recorded on the record's timeline, for example `Type changed from "Customer" → "Partner"`.

3. Contacts inherit their Company's type

A Contact takes its Company's type until someone picks a different one for the Contact itself. The picker shows where the type comes from:

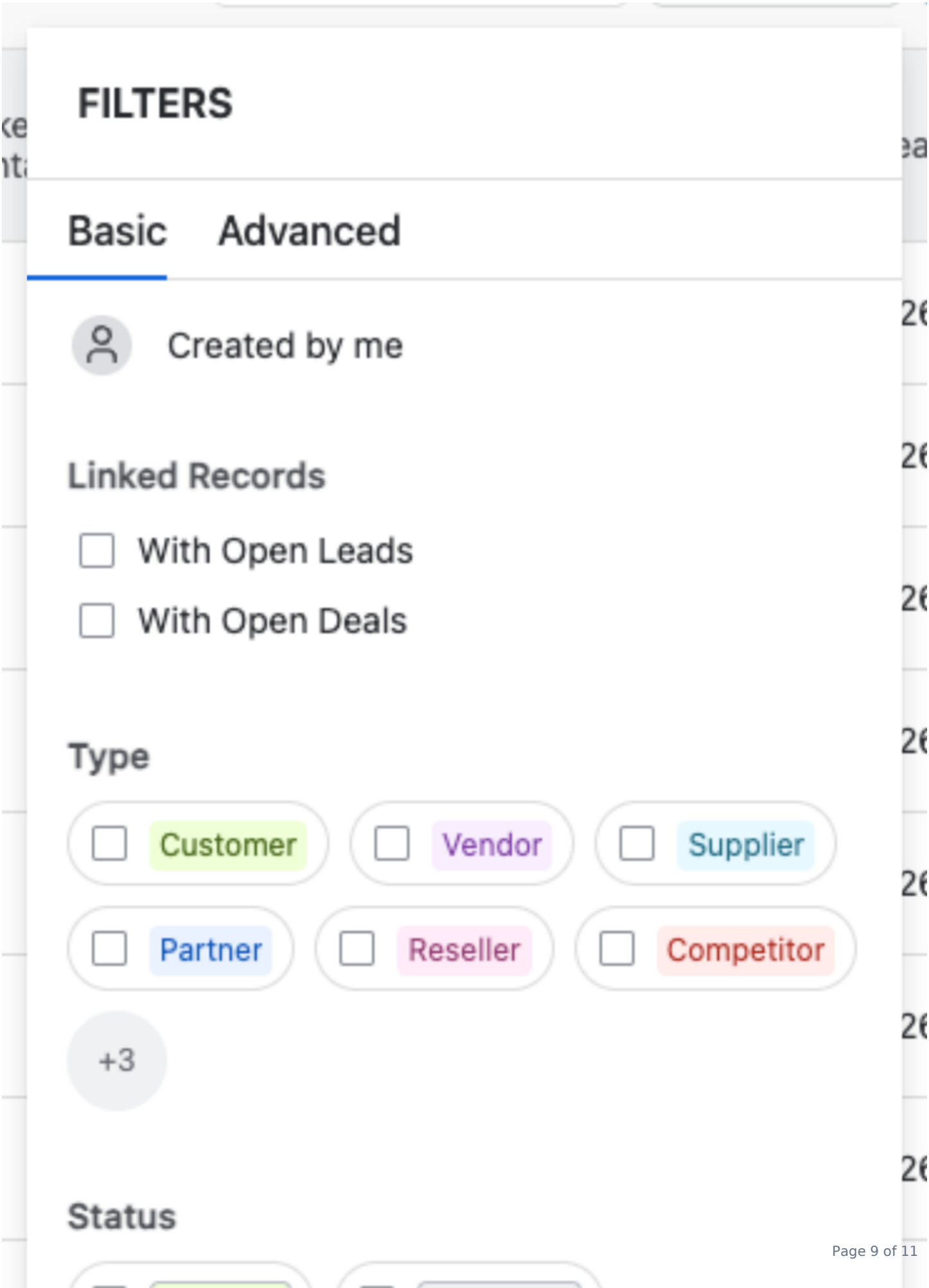

e
PARTNER
Status
PROSPECT
Search types
COMPANY TYPE
Partner
Inherited from Brightpath Analytics
CONTACT TYPES
Customer
Buys your products or services
Vendor
Sells products or services to you
Supplier
Provides materials or components yo...
Partner
Works with you on shared business g...
Reseller

- Under **COMPANY TYPE**, the inherited value and its source — `Inherited from Brightpath Analytics`.
- Under **CONTACT TYPES**, the Contact list's own types. Pick one to override the Company's.
- A Contact without a Company has the default type until you choose otherwise.
- Changing the Company's type changes every Contact that still inherits it.

4. Finding records by type

- **Lists:** Companies and Contacts both show a **Type** column.
- **Filters → Basic:** Companies have **Type** and **Status** facets. Contacts have **Contact types**, **Company types** and **Status** — so "every Contact at a Partner" is one click.
- **Dashboards:** the **Companies by Type** widget counts Companies per type.
- **Jira:** the Mria CRM custom fields carry the type, so JQL can use it:

```
"Mria CRM Companies.Type" = "Partner"
"Mria CRM Contacts.Type" in ("Vendor", "Supplier")
```

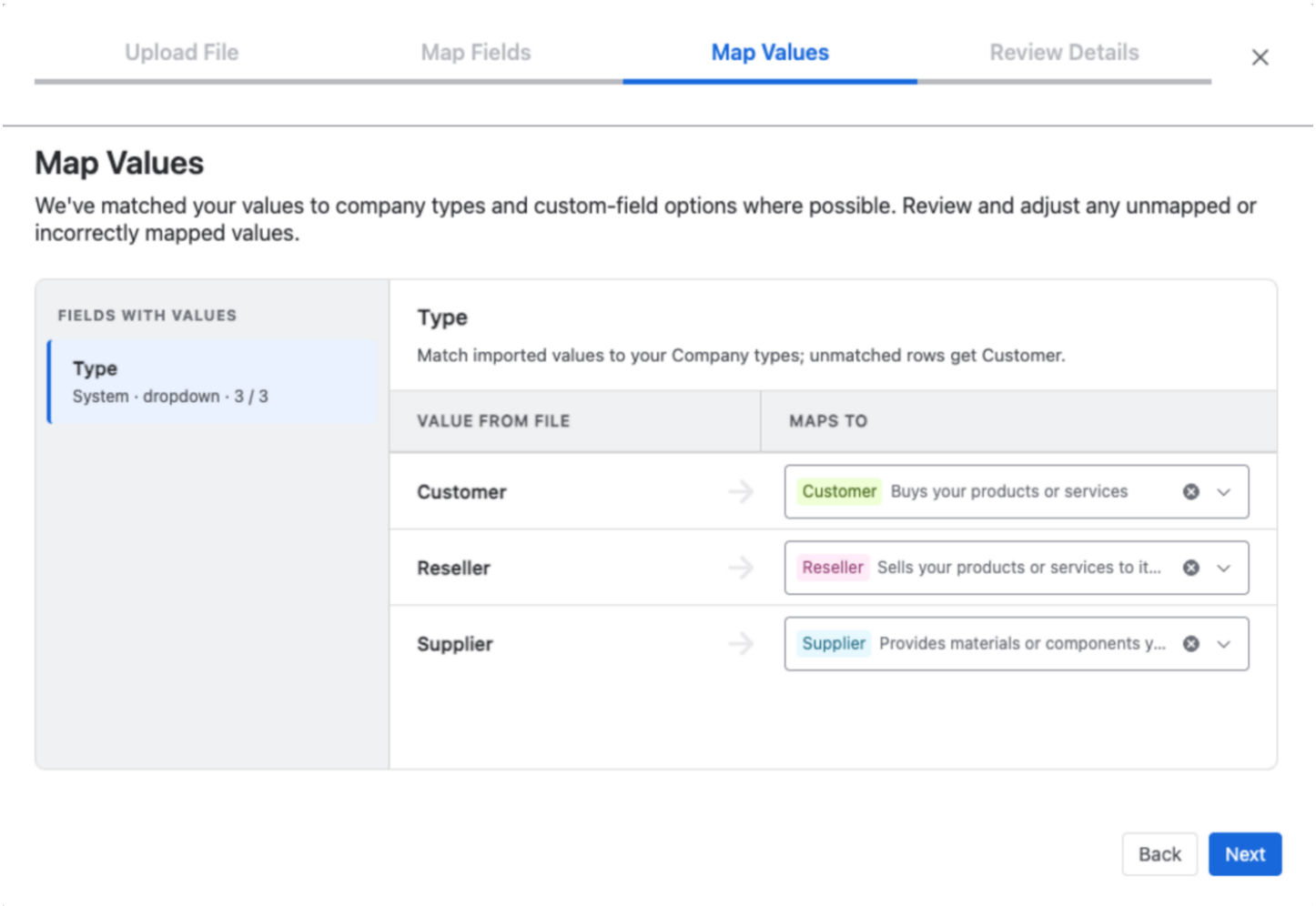

FILTERS
Basic
Advanced
Created by me
Linked Records
With Open Leads
With Open Deals
Type
Customer
Vendor
Supplier
Partner
Reseller
Competitor
+3
Status

5. Importing types

The Companies and Contacts import wizards accept a Type column. On **Map Values** each value from the file is matched to one of your types. What happens to a value that matches none differs:

- **Companies:** the row gets the default type.
- **Contacts:** the Contact inherits its Company's type.

Check the mapping before you import:



See Companies Import and Contacts Import.

6. Type and Status side by side

	Type	Status

What it says	What the relationship is	Where it stands in your pipeline
Values	Your list: Customer, Vendor, Partner …	Active, Prospect, Inactive
Who sets it	People, imports and automation	Mria CRM, from the record's Leads and Deals
In the header	A chip with a chevron — click to change	A chip with explaining why, e.g. "Prospect — has 0 Leads and 1 Deal. Calculated automatically."

The Status rules are on Companies.

Related Pages

- Companies — the Company full view and list.
- Contacts — the Contact full view and list.
- Mria CRM Custom Fields in Jira — Type in JQL.
- Jira Automation — creating Contacts with a type from a flow.