Confluence Integration

Jira and Atlassian Integrations · https://mriacrm.com/docs/confluence-integration/

How to link Confluence pages — and Jira projects, boards and plain URLs — to Leads, Deals, Contacts and Companies in Mria CRM for Jira.

> **Preview Feature (Atlassian)**
> Confluence app connections are part of a new Atlassian platform capability that is still in Preview. Some inconsistencies or access-related issues may occur. This is expected until Atlassian finalizes the feature.

The Confluence Integration in **Mria CRM** lets you connect your CRM data — Leads, Deals, Contacts, and Companies — with Confluence content. Your team can now keep important documentation and CRM records connected in one workflow.

You can link and manage Confluence content directly inside Mria CRM.

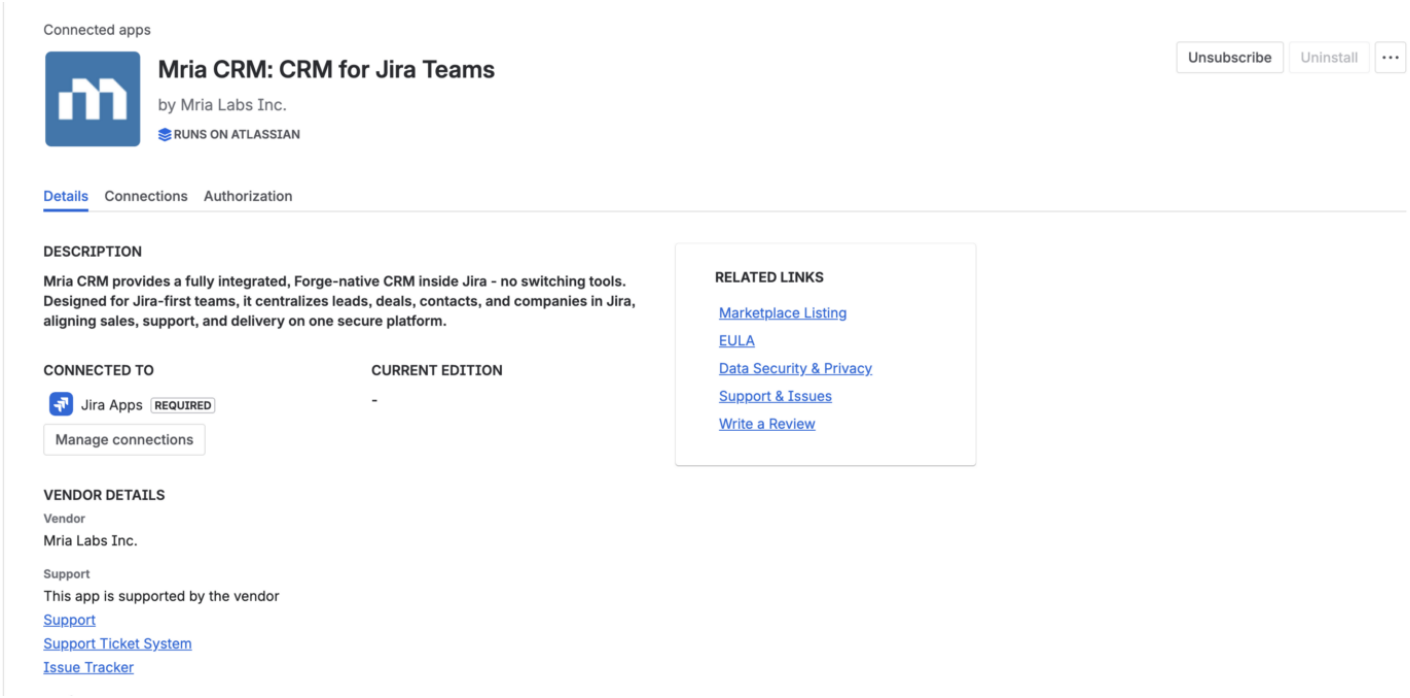
Setting Up the Confluence Connection

To use Confluence content linking, your Jira administrator must first connect Mria CRM to your Confluence site.

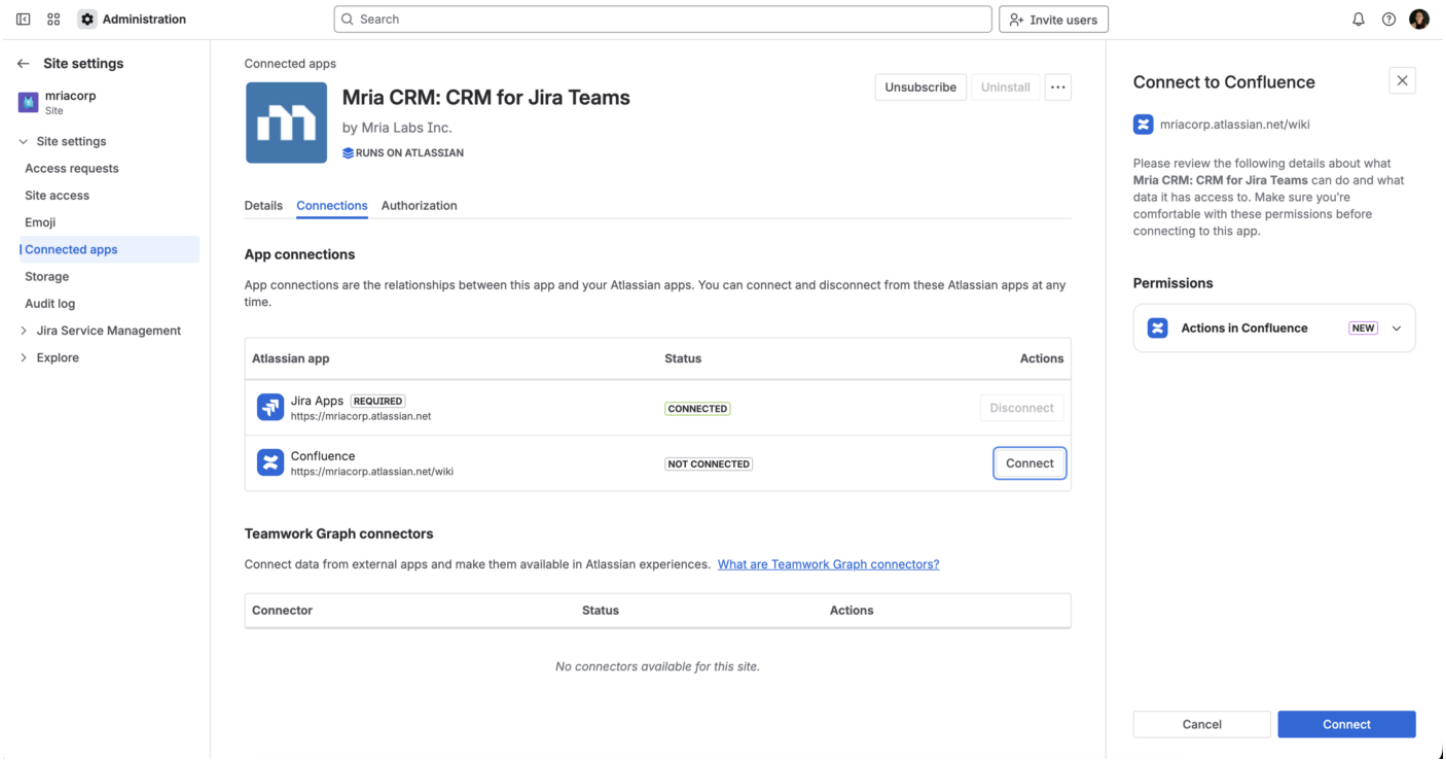
How to connect

Users with **Jira administrator permissions** can set up the connection:

- In Jira, go to **Apps** → **Manage your apps**, or open **Connected apps** directly in Atlassian Administration.
- Select **Mria CRM: CRM for Jira Teams**.



3. Open the **Manage connections** section
4. Click **Connect** next to **Confluence**



5. Review the permissions and confirm

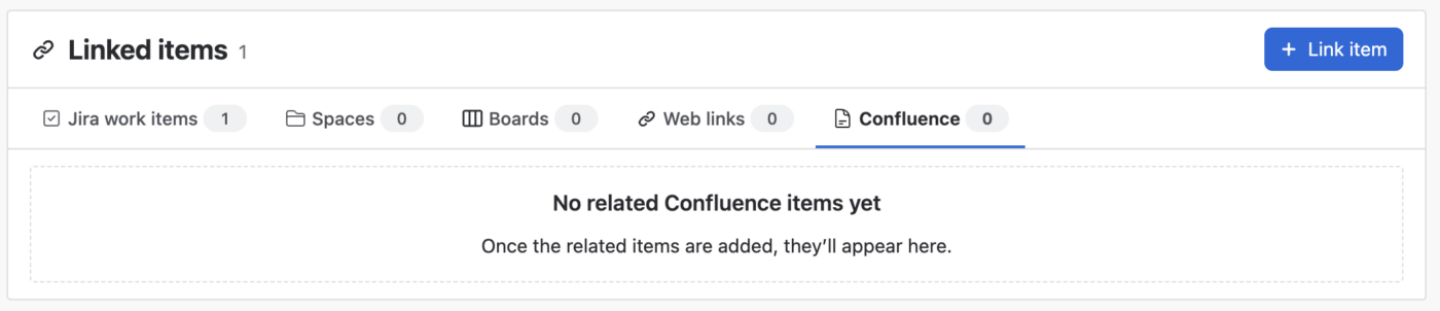
Once connected, CRM users will gain the ability to search, view, and link permitted Confluence content directly from CRM records.

No connection required for Web Links

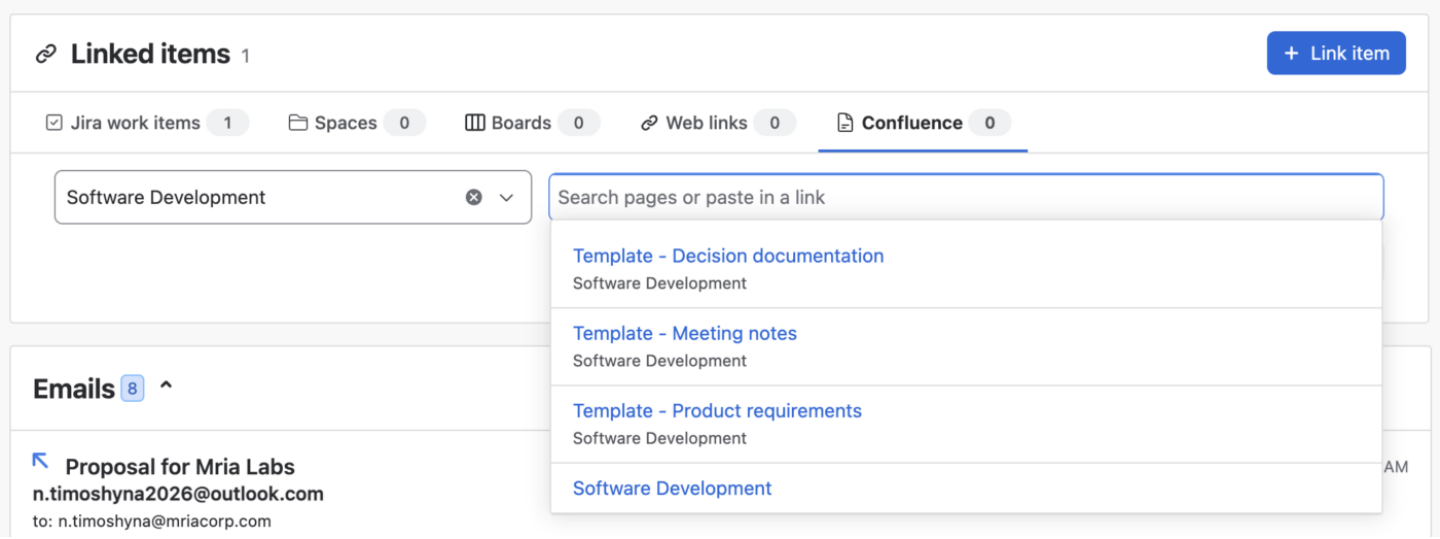
If you only need to attach general URLs (not tied to Confluence search and permissions), users can still use **Add Web Link** even without connecting Confluence.

Linking Confluence Content from CRM

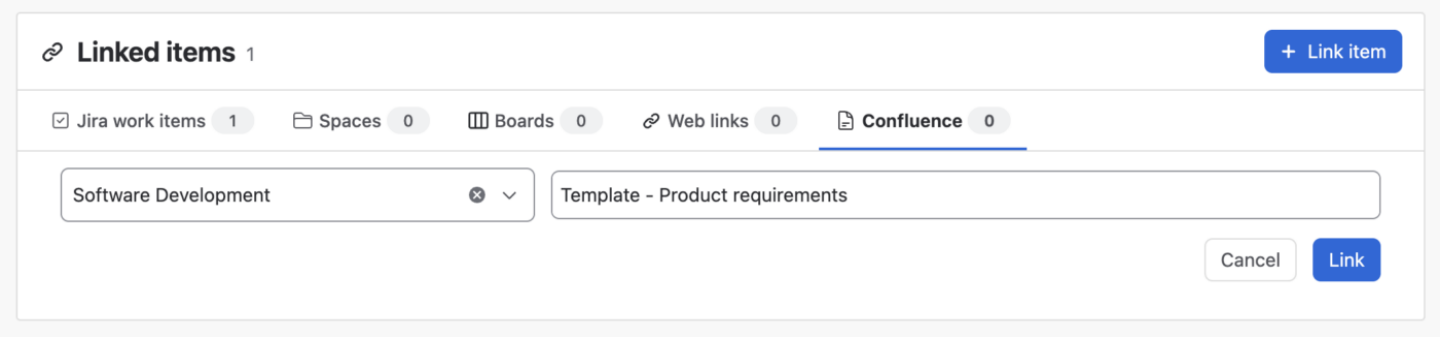
Confluence content is attached in the **Linked items** section of any CRM record. Open the **Confluence** tab there and click **+ Link item**.



+ Link item opens a search dialog. Narrow it with the **Filter by space** dropdown, or paste a Confluence link straight into the search box.



Pick the page you want and click **Link** — the button stays disabled until something is selected. Only pages you have permission to see appear in the results, exactly as in Confluence itself.



- **Confluence** — Confluence pages, by search or pasted link.
- **Spaces** — note that this tab links a *Jira* project (a “space” in the new Jira navigation), not a Confluence space.
- **Boards** — Jira boards.

Permission Behavior

The integration strictly follows Jira/Confluence permissions:

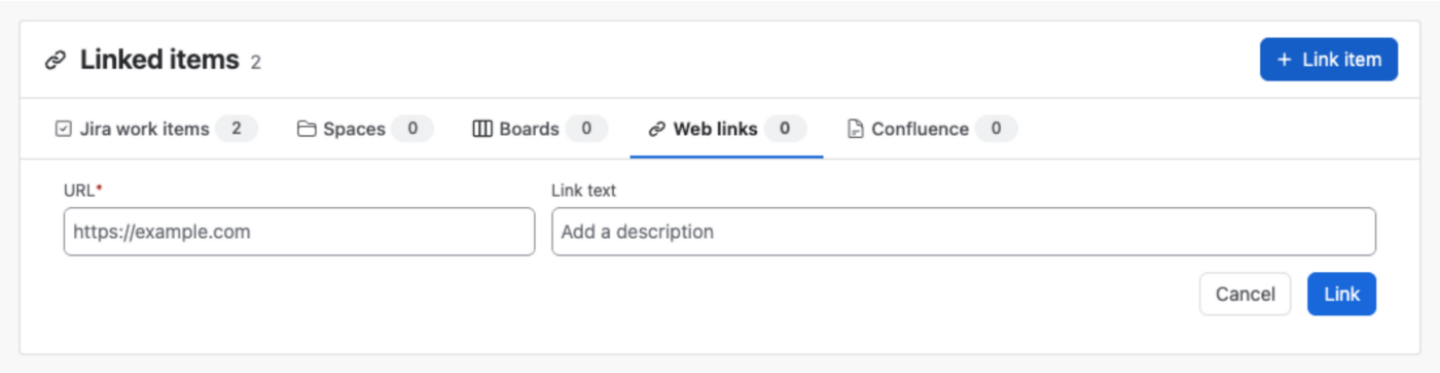
- If a user can access a page in Confluence → they can see and link it in CRM.
- If a user cannot access a page → they won’t see it at all in CRM search or results.
- To add a link that should appear for everyone, even when the content itself is restricted, use the **Web links** tab instead.

When to use Web Links instead

If you need to attach a link that should be visible to everyone, even when the page itself is restricted, use the **Web links** tab instead.

Open **Linked items** → **Web links** → **+ Link item**, enter the **URL** (required) and optionally some **Link text** to describe it.

This stores the address as given — nothing is loaded from Confluence and no permission check is applied, so the link shows for every user who can see the record.



How Linked Content Appears

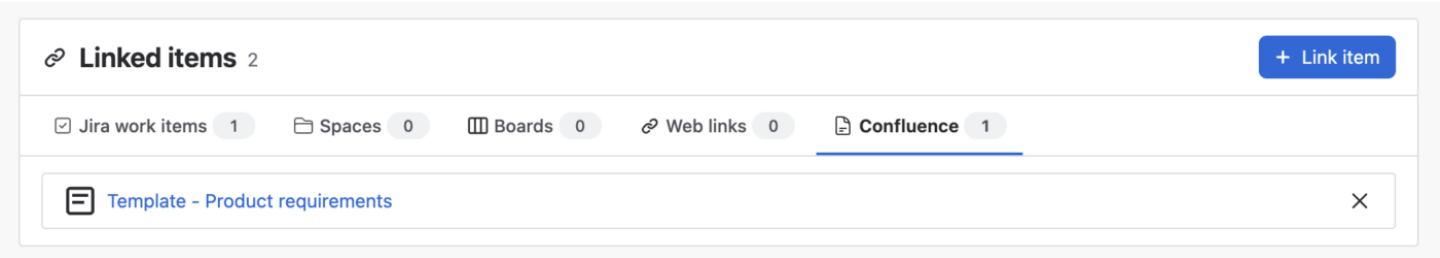
Linked pages are listed in the **Confluence** tab of **Linked items**, and the tab carries a count so you can see at a glance whether a record has any.

Users can:

- Click an entry to open the page in Confluence.
- Remove a link with the × at the end of its row.
- Add more with **+ Link item**.

The other tabs behave the same way, so Jira issues, Jira projects, boards, web links and Confluence pages are all managed in one place.

Each tab is paginated, with an items-per-page control once there is more than one page, and there is no cap on how many pages a record can hold — see Jira Integration.



Supported Entities

You can attach Confluence content to:

- Leads
- Deals

- Contacts
- Companies
- Products

Each of them has its own **Linked items** section, so documentation stays reachable from the record it belongs to. On a Product the section sits below the linked Deals, Leads, Companies and Contacts counts.

Troubleshooting

I don’t see the Confluence tab

Check the **More** overflow first — this is almost always the answer.

> The **Linked items** tab strip collapses when the window is too narrow to show every tab. Confluence is the last tab, so it is the first one to be folded away. On a browser window around 1280px wide the strip reads *Jira work items · Spaces · Boards · Web links · More 1* — and that **More** is where Confluence has gone. Widen the window, collapse the Jira sidebar, or open **More** and pick it.

If Confluence is not under **More** either, work through these in order:

1. **Is the connection set up?** The Confluence tab only does anything once a Jira admin has connected Mria CRM to Confluence — see *Setting Up the Confluence Connection* above.
2. **Are you looking at an entity that has it?** Leads, Deals, Contacts, Companies and Products all have Linked items.
3. **Is the app current?** Only if none of the above applies. Open *Apps → Manage your apps* in Jira, or *Connected apps* in Atlassian Administration, select **Mria CRM: CRM for Jira Teams**, and click **Update** if an update is offered.

Confirm app update

The latest version of Mria CRM: CRM for Jira Teams includes updates to its capabilities. Review the following to proceed:

The latest version of Mria CRM: CRM for Jira Teams includes new connections.

New connections available

This app update includes the ability to connect this app to **Confluence**. After updating, you can install this app via the **Connections** tab.



Permissions

Analytics

Sending of analytics is currently enabled. You can change this in the app details before updating the app or at any time after updating.

Analytics NEW

Cancel Update