# Contacts

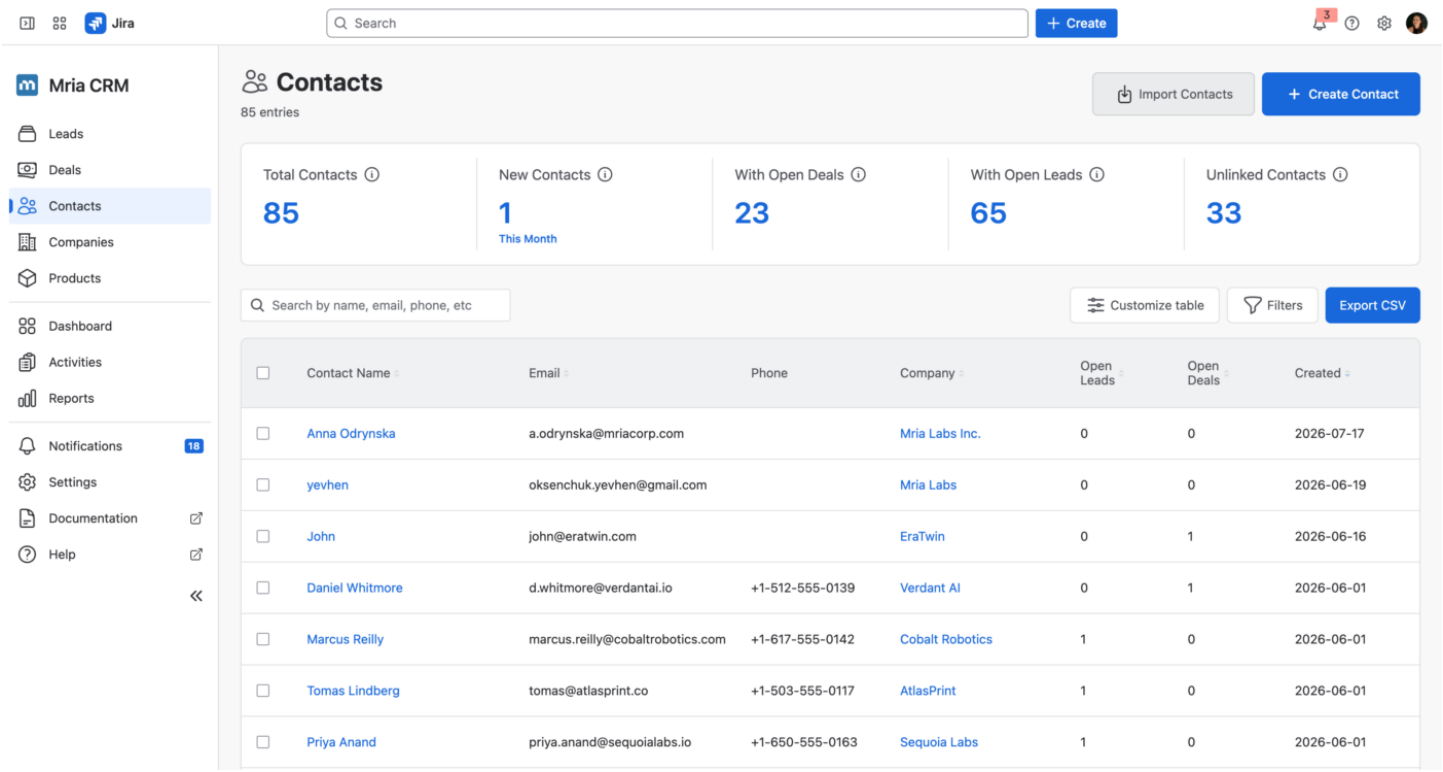
Using Mria CRM · https://mriacrm.com/docs/contacts/

### iHow to Manage Contacts in Mria CRM for Jira

The **Contacts** section allows you to manage all people you interact with during the sales process.

## 1. Viewing Contacts

- All Contacts are shown in a **table view** with key details:
  - Name
  - Type
  - Email
  - Phone
  - Linked Company
  - Open Leads
  - Open Deals
  - Created date
- The top summary shows totals: total contacts, new contacts (this month), contacts with open Deals, contacts with open Leads, and unlinked contacts.
- **Export CSV**: allows you to export the current list of Contacts (based on applied filters and visible columns) as a `.CSV` file for external use.




## 2. Creating a Contact

When creating a new Contact, you provide:

- **Name** (required)
- **Email** (required, should be unique - no duplicates allowed in CRM)
- **Company**
  - Select an **existing Company**
  - **Skip** for now (Contact will remain unlinked)
  - Or **create a new Company** directly during Contact creation
- **Type** — **Inherit** by default: the Contact takes its Company's type, or the default type without a Company. Pick a type to override it. See Company & Contact Types.
- Additional optional details (like Phone and Title) can be added.

# Create Contact

Name*

Full name (e.g., John Doe)

Email*

sample@email.com

Company

Company name (e.g., Acme Inc.)

Type

Inherit (Customer until a company is set)

Phone

Contact phone

Title

Job title

Cancel

Create

# Create Contact

Name*

Patricia Parker

Email*

parker@gmail.com

Company

Software Plus New

Phone

+380671234567

Title

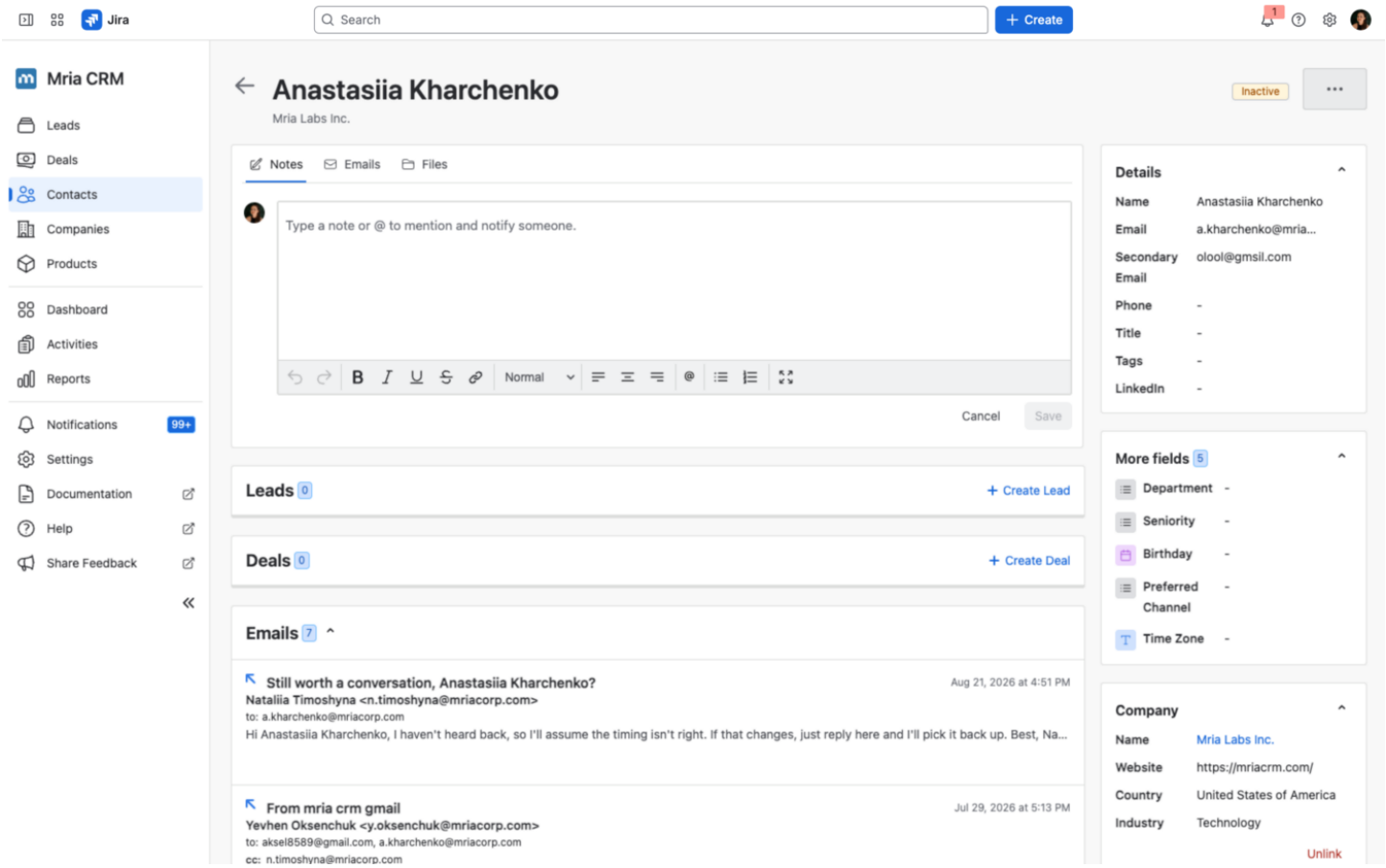
Manager

Cancel Create

## 2.1. Secondary email

Alongside the main **Email**, a Contact can hold a **secondary email address**. Use it when the same person reaches you from more than one mailbox — a work address and a personal one, an old address they still send from, or a shared team alias.

- The secondary email is **optional**. The main Email remains the required, unique identifier for the Contact.
- Add or change it from the **Contact full view** — it appears as **Secondary Email** in the Details panel. Click the field to edit it inline, the same as any other Contact detail.



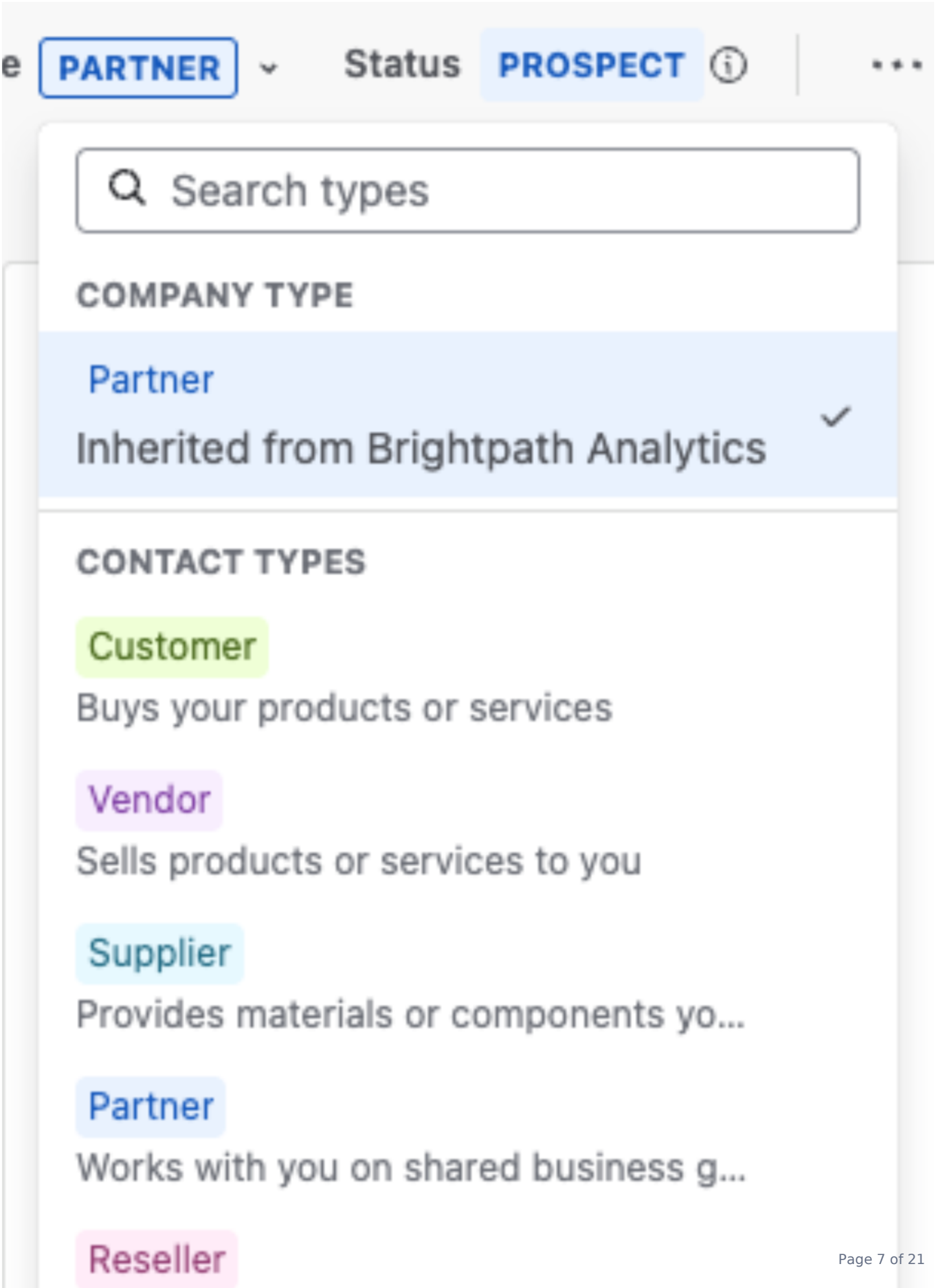

Adding a second address to an existing Contact is usually better than creating a duplicate record: the Contact keeps its full history of linked Leads, Deals, and Products in one place.

## 3. Contact Full View

The Contact full view has a **Notes / Emails / Meetings / Tasks / Files** tab strip at the top of the main column, with linked records stacked below and a Details panel on the right.

In the Contact full view, you can:

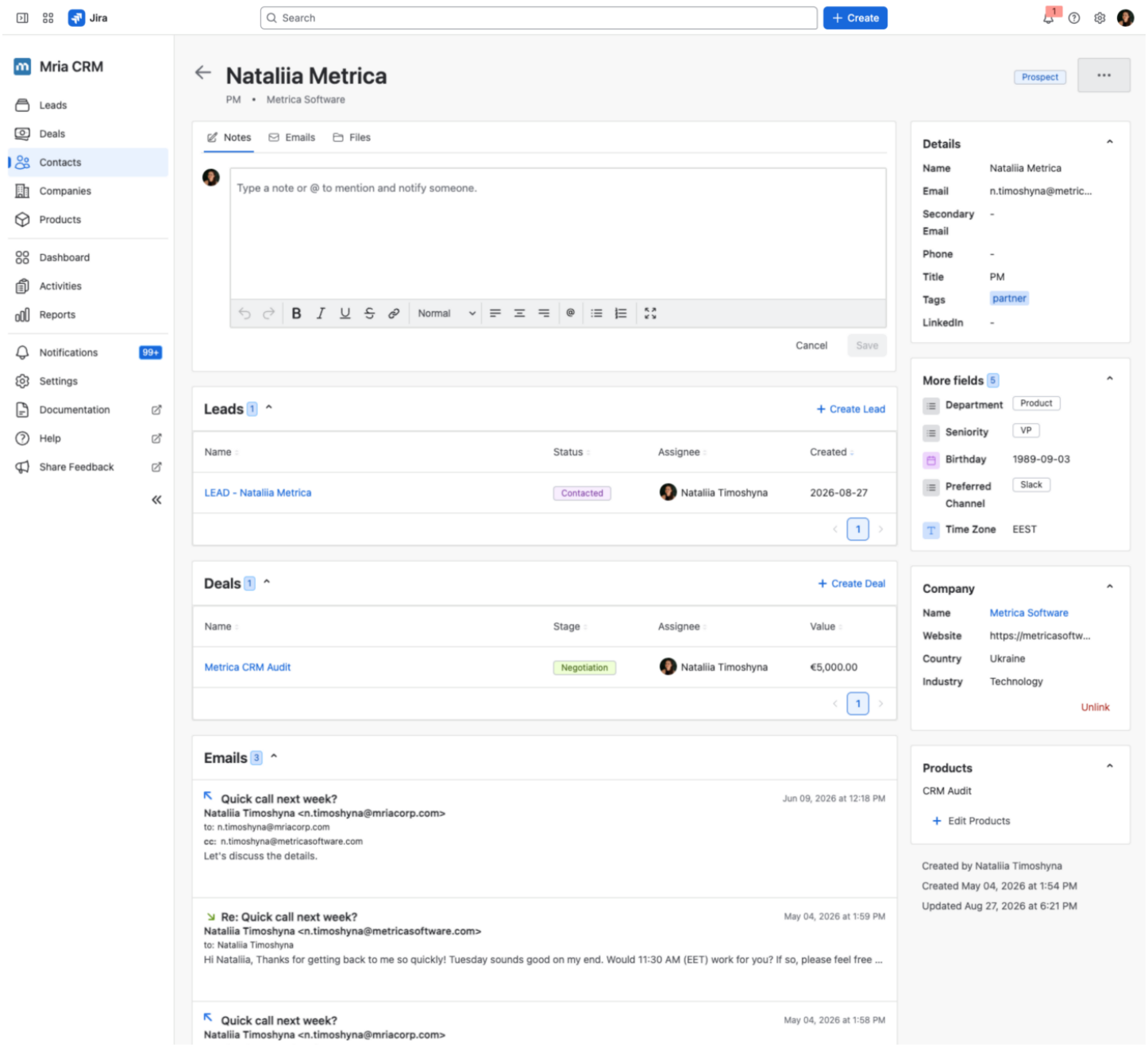
- See linked **Leads**, **Deals**, and **Products**.
- See and change the Contact's **Type** in the header, next to its Status. The picker shows whether the type is inherited from the Company.
- View and edit **Contact details** (Name, Email, Secondary Email, Phone, Title, Tags, LinkedIn, etc.).
- View linked **Company details**.
- Add Notes, attach Files, send or read Emails, and book Meetings and Tasks against the Contact.


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

Each Contact always shows its relationship to:

- **Leads** (where they're involved)
- **Deals** (associated opportunities)
- **Products** (items or services the Contact is linked to)
- **Company** (the organization they belong to)
- **Jira work items**

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



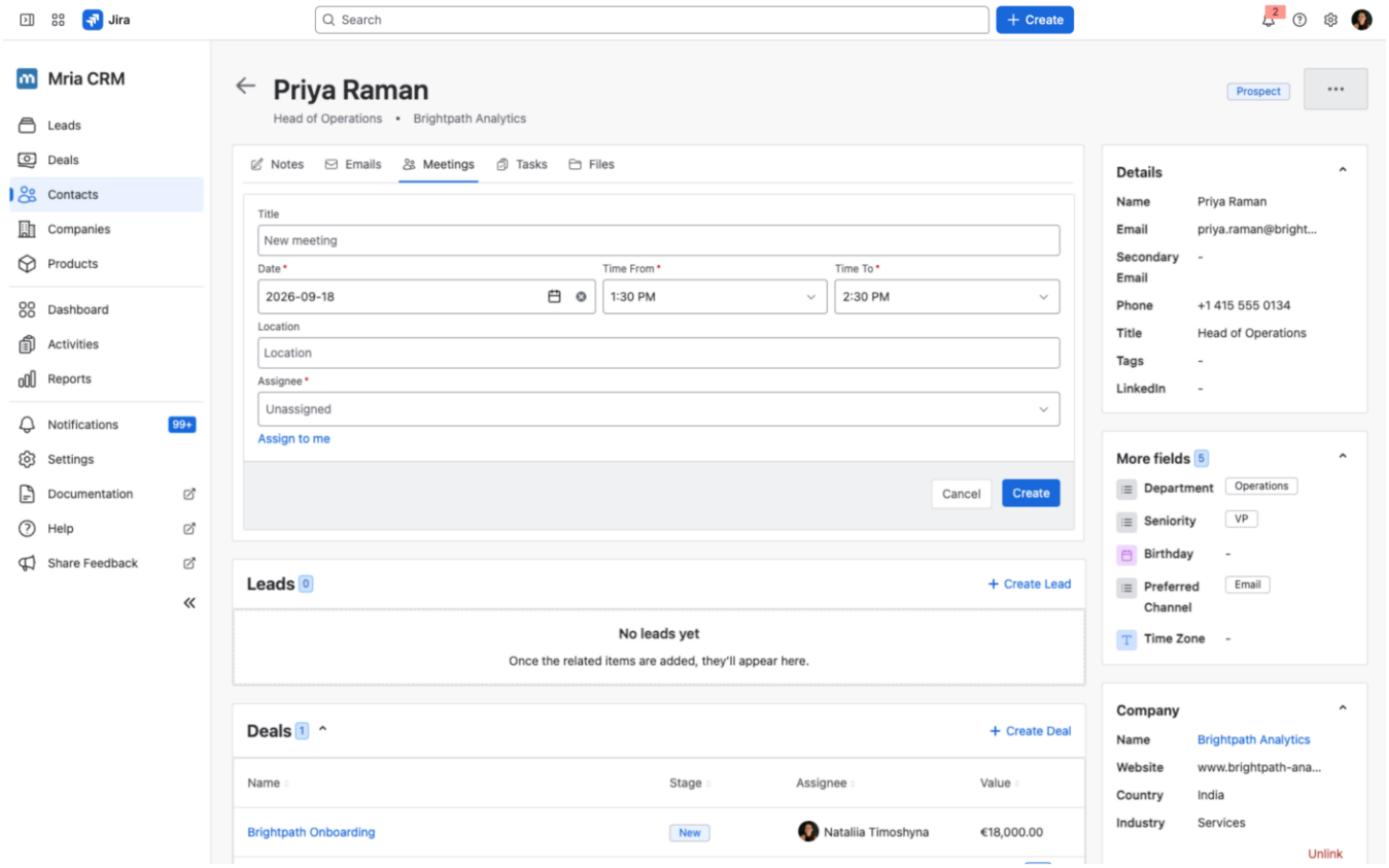

# Meetings, Tasks and Timeline

A **Contact** 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.



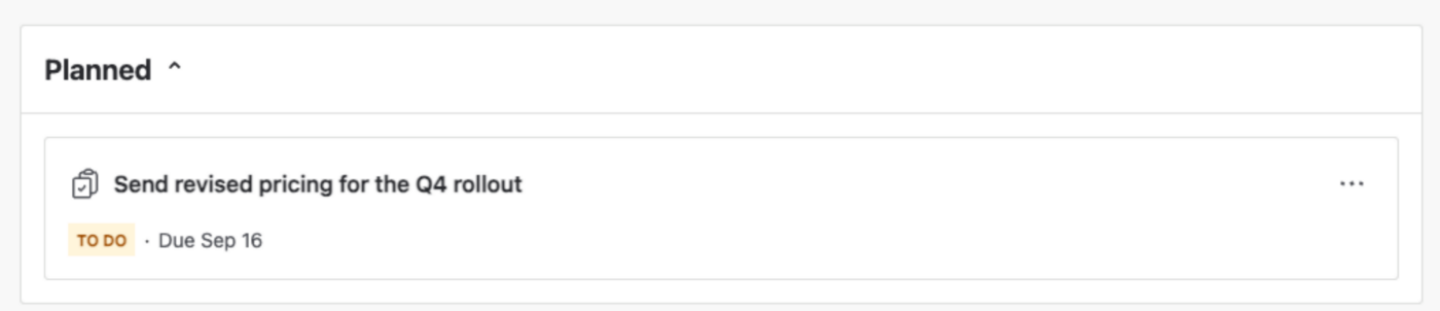

- **Assignee** is required — **Assign to me** is the quickest way to set it. (A Task does not require one.)
- **Title** and **Location** are optional. Location is where a video call link belongs.
- **Attendees** — Mria CRM users, Contacts, or any email address. The assignee is added automatically, badged **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 Contact stays uncluttered.
- A meeting this Contact attends, booked on another record, shows here too — for example `Meeting on Company - Brightpath Analytics`.
- Activities — the workspace-wide view. Meetings and Tasks booked on a Contact appear there alongside those from Leads and Deals, including under **Assigned to me**.




## Timeline

Below Planned, the **Timeline** records what has happened to this contact 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.

The Timeline records events from the point it started keeping them, so a contact 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 Contact page and reorder the fields in Details — in Settings → Layouts, or from ⚙ **Configure** at the foot of the side panel. See Layouts.

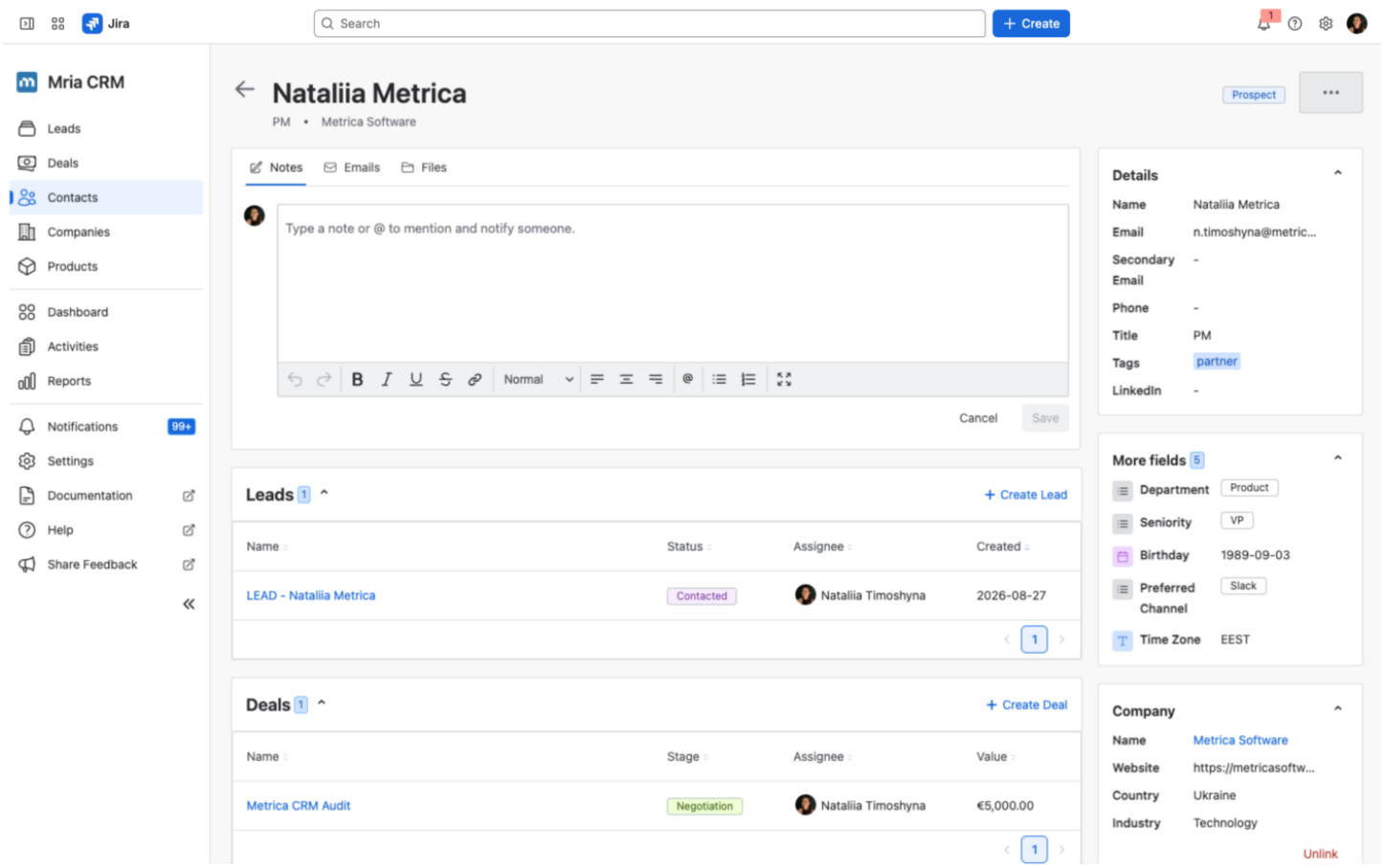
## 4. Custom Fields on Contacts

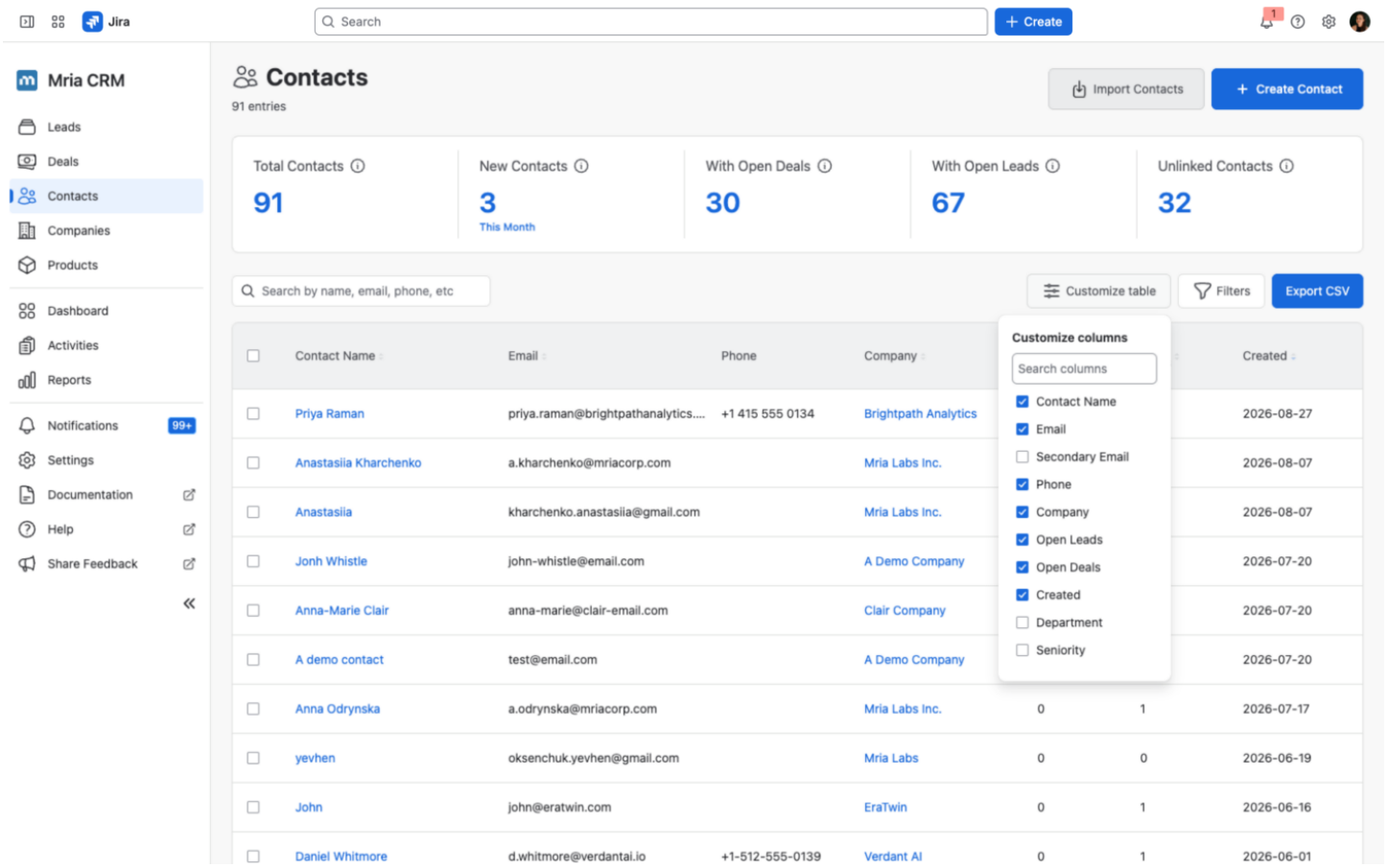
Custom fields let your team capture extra information on every Contact beyond the standard fields. For example, you can add **Department** and **Seniority** to segment by role, **Preferred Channel** to record how the Contact likes to be reached, or **Time Zone** to coordinate meetings.

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 Contact entity, it shows up in several places:

- **Contact 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 Contacts 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.
- **Contacts Import** — custom fields can be mapped during bulk import. See Contacts Import.

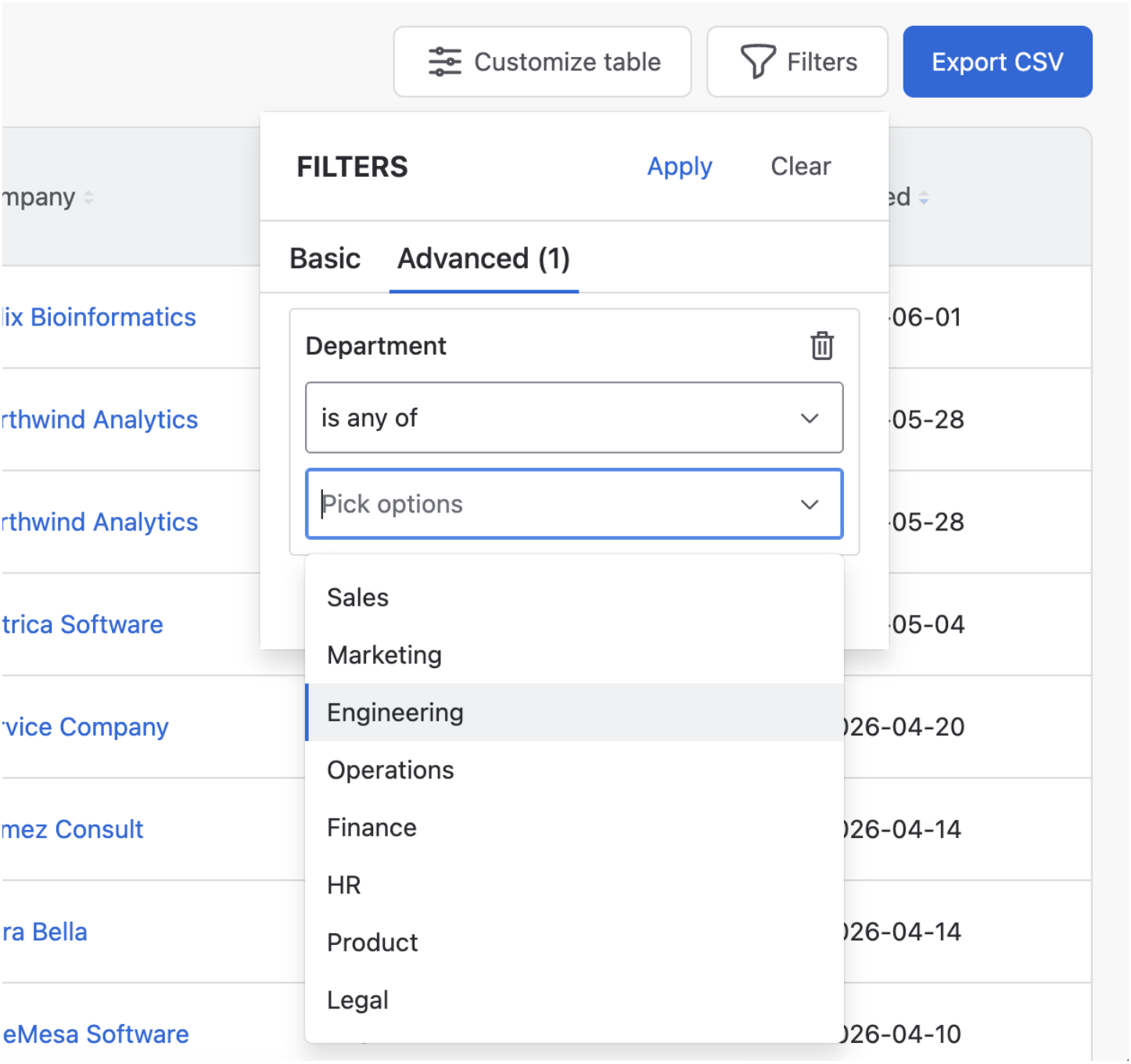

Jira
Search
Create
Mria CRM
Leads
Deals
Contacts
Companies
Products
Dashboard
Activities
Reports
Notifications
99+
Settings
Documentation
Help
Share Feedback
Nataliia Metrica
PM • Metrica Software
Prospect
Notes
Emails
Files
Type a note or @ to mention and notify someone.
Normal
Cancel
Save
Details
Name Nataliia Metrica
Email n.timoshyna@metric...
Secondary Email -
Phone -
Title PM
Tags partner
LinkedIn -
More fields 5
Department Product
Seniority VP
Birthday 1989-09-03
Preferred Channel Slack
Time Zone EEST
Leads 1
+ Create Lead
Name
Status
Assignee
Created
LEAD - Nataliia Metrica
Contacted
Nataliia Timoshyna
2026-08-27
Deals 1
+ Create Deal
Name
Stage
Assignee
Value
Metrica CRM Audit
Negotiation
Nataliia Timoshyna
€5,000.00
Company
Name Metrica Software
Website https://metricasoftw...
Country Ukraine
Industry Technology
Unlink




## 5. Filtering Contacts

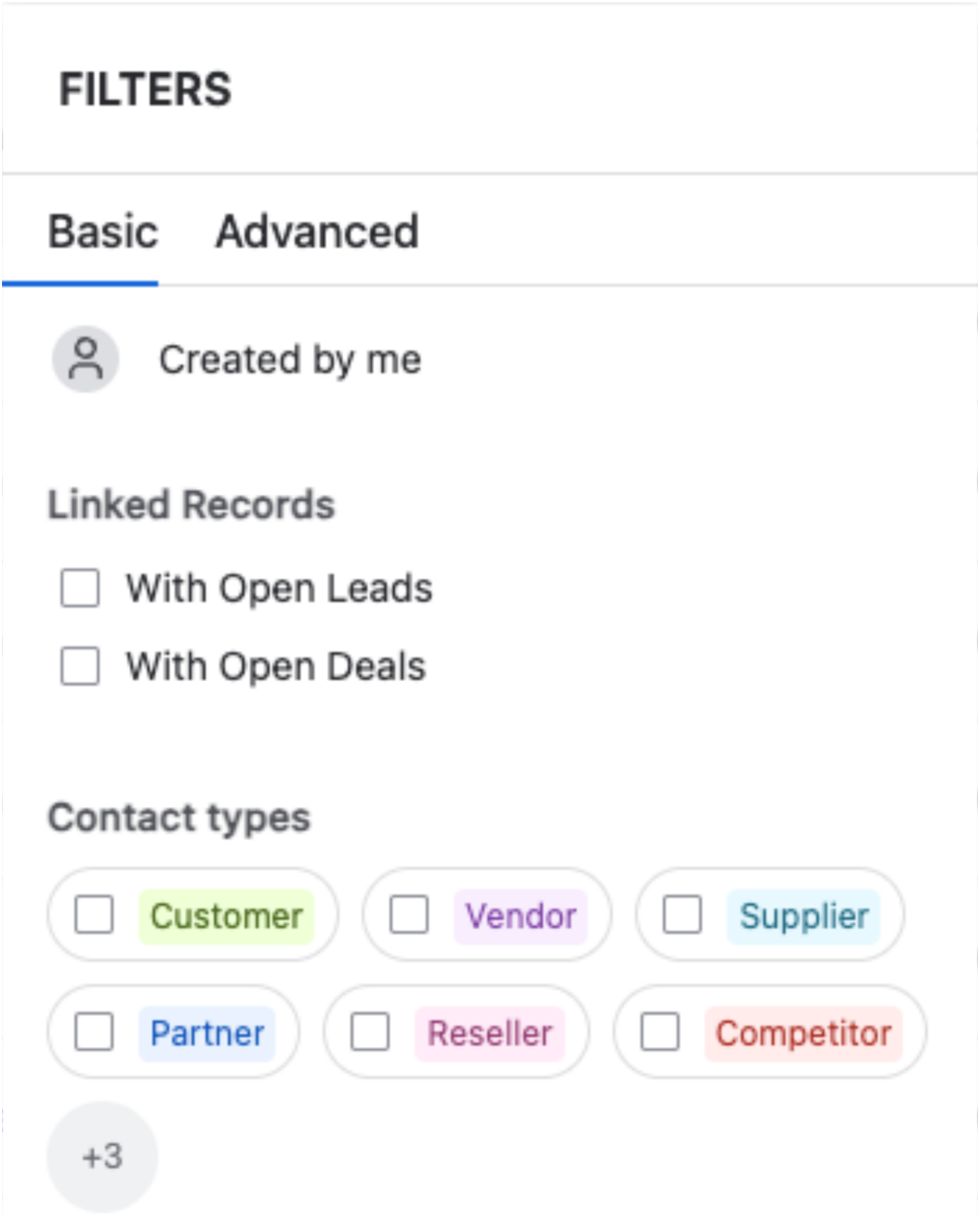
You can use the **Filters** panel to quickly narrow down your Contacts list. The Filters panel has two tabs:

- **Basic** — the standard filter set, always available.
- **Advanced** — every custom field on the Contact 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 Contacts you created.
- **Linked Records** – filter Contacts that are linked to open Leads or open Deals.
- **Contact types / Company types** – Contacts by their own type, or by the type of their Company.
- **Status** – Active, Prospect or Inactive.
- **Linked Company** – show only Contacts from a specific Company.
- **Created** – limit results by creation date range.


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

Filters are for display purposes only — they don't affect the underlying Contacts data.

## 6. Linking Jira work items

You can connect a Contact to related Jira work items directly from the **Linked work items** section.

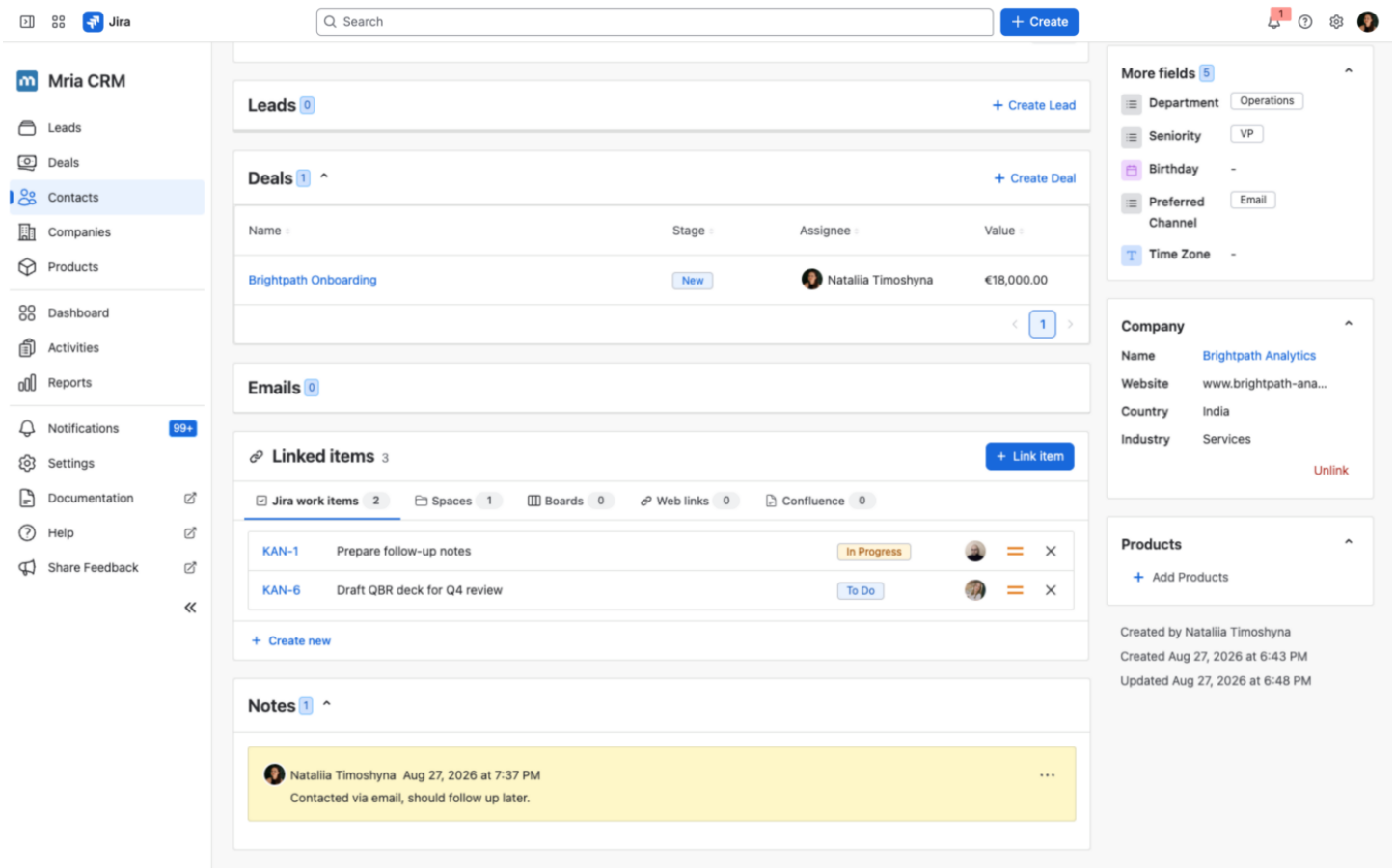
Click **+ Link New Item**, then start typing to search by:

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

Once linked, the connection appears:

- in the **Contact's Linked work items** section inside Mria CRM,
- 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 Contact

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

- **Primary Contacts** (the main link for a Company, or the Primary Contact on a Deal) cannot be deleted. You'll see a warning.
- **Secondary Contacts** can be deleted. They'll be removed and unlinked from Deals, Leads, and Companies.
- **Orphaned Contacts** (not linked to any Company) stay in the system and can be linked later.

# 9. Bulk actions

From the **table view** you can update or delete many Contacts at once — re-homing people after a company merger, tagging a segment, or clearing out an import that went wrong.

## Selecting Contacts

1. Apply **Filters** if you want to target a specific set.
2. Tick the checkbox on each row. The **header checkbox** selects every Contact **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 Contact matching your current filters**.
4. The ✕ at the end of the bar clears the selection.

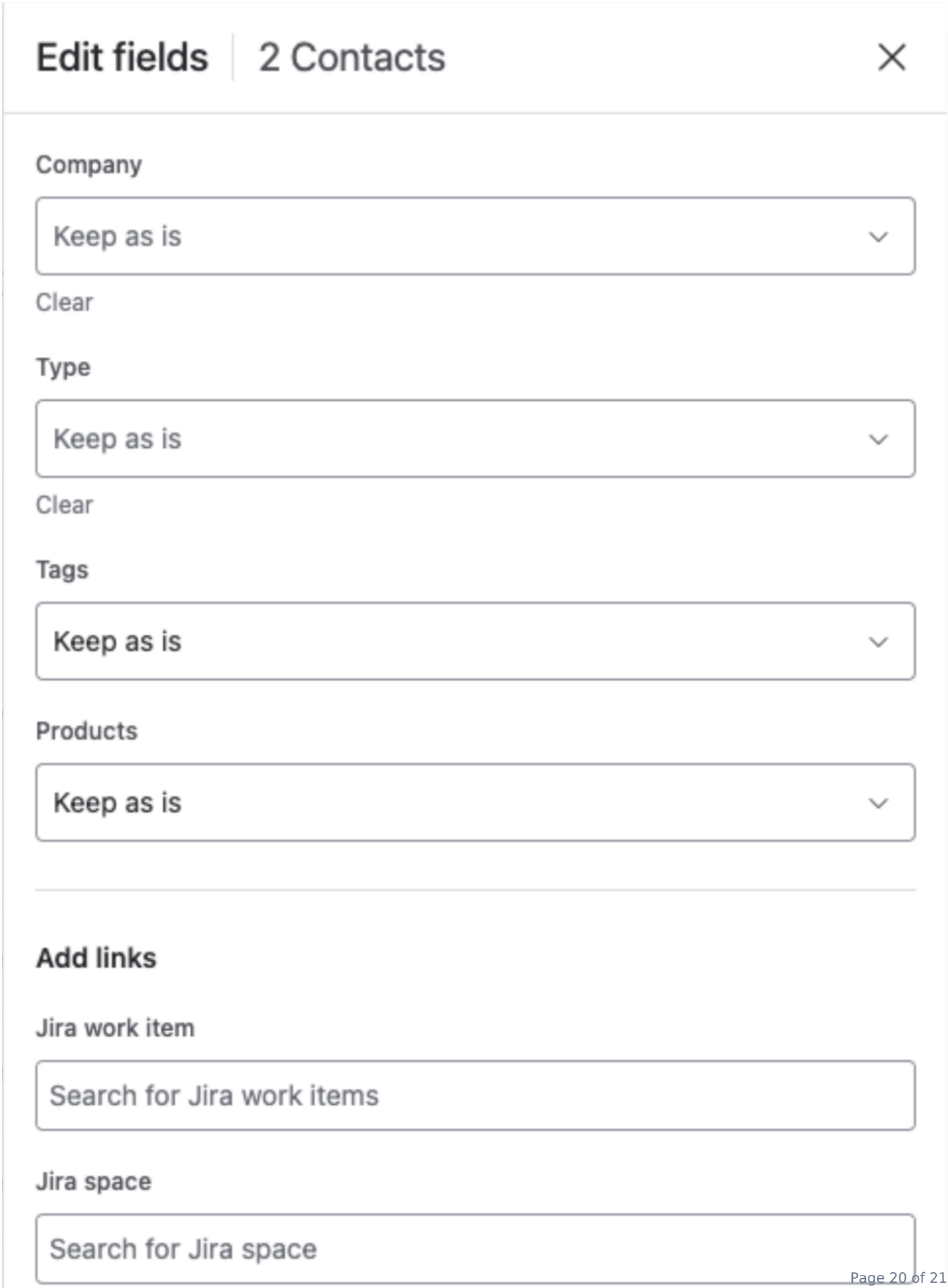
> **The count in the bar is the number you're about to act on.** Read it before you click anything, especially before Delete.

## Edit fields

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

Fields available on Contacts:

- **Company** — reassign the selected Contacts to a different Company, or use **Clear** to unlink them.
- **Type** — set one type on every selected Contact, or use Clear to remove the type set on the Contacts themselves.
- **Tags**
- **Products**


Edit fields
2 Contacts
Company
Keep as is
Clear
Type
Keep as is
Clear
Tags
Keep as is
Products
Keep as is
Add links
Jira work item
Search for Jira work items
Jira space
Search for Jira space

**Tags** and **Products** offer the multi-value choices — **Add new**, **Replace all**, **Find and remove**, and **Remove all** — described on the Leads page.

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

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

> Name, email, and phone are **not** bulk-editable — they identify the individual, so setting them across a batch would never be right. Edit those on the Contact itself.

## Delete

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

> **Protected Contacts are skipped, not blocking.** If a selected Contact can't be deleted — for example, it's still the Primary Contact on a Company or a Deal — Mria CRM leaves that record in place and carries on with the rest of the batch. One protected record never cancels the whole operation.

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

This makes Contacts the core link between Leads, Deals, and Companies.