JSM Integration

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

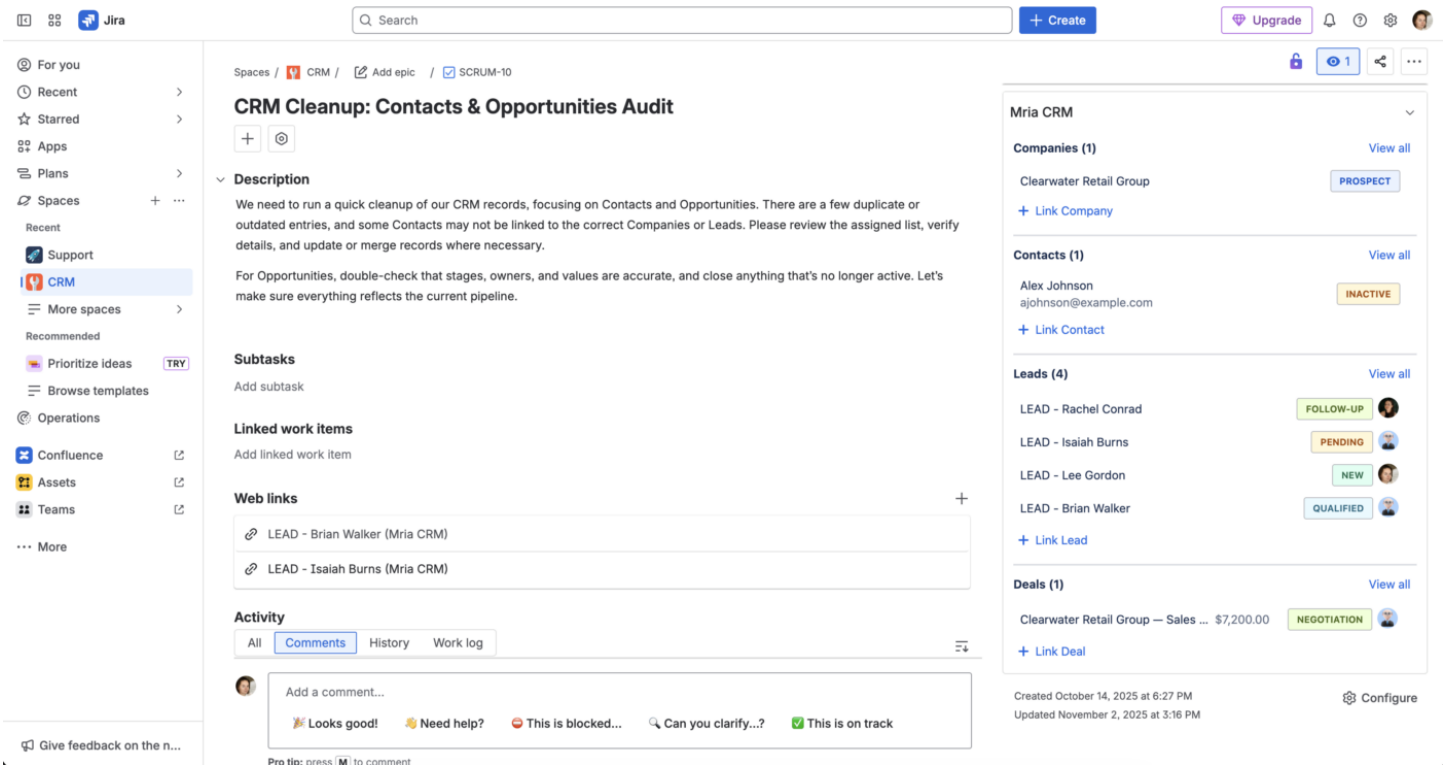
JSM Integration extends the functionality of the core Jira Integration and brings Mria CRM capabilities directly into **Jira Service Management** (JSM) and **Customer Service Management** (CSM) request views.
It includes all the main features already available in Jira issues — the CRM panel, entity linking, quick navigation, and status insights.

Below is an overview of what is shared with Jira Integration, and what is uniquely available for JSM and CSM teams.

Shared functionality (from Jira Integration)

JSM Integration includes all core features that are available in Jira issues:

- A dedicated **Mria CRM panel** on the right side
- Visibility into linked **Companies, Contacts, Leads, and Deals**
- Ability to **link and unlink** CRM entities
- Status badges for CRM objects such as *Prospect*, *Active*, or *Inactive*
- Quick navigation into CRM records
- Consistent sync: updates made from Jira appear in CRM and vice-versa



Where the requester's email comes from

Matching starts from the email address on the ticket, so it matters which address Mria CRM reads:

- **Jira Service Management** requests — the **Customer** (requester) email is used.
- **Customer Service Management (CSM)** tickets — the **Reporter's** email is used instead. On CSM tickets the Customer field points at the organization's account record rather than the person who actually raised the ticket, so the Reporter is the address that identifies the individual you want to match, create, or link.

Everything else on this page — suggestions, one-click linking, manual linking — behaves the same way in both project types.

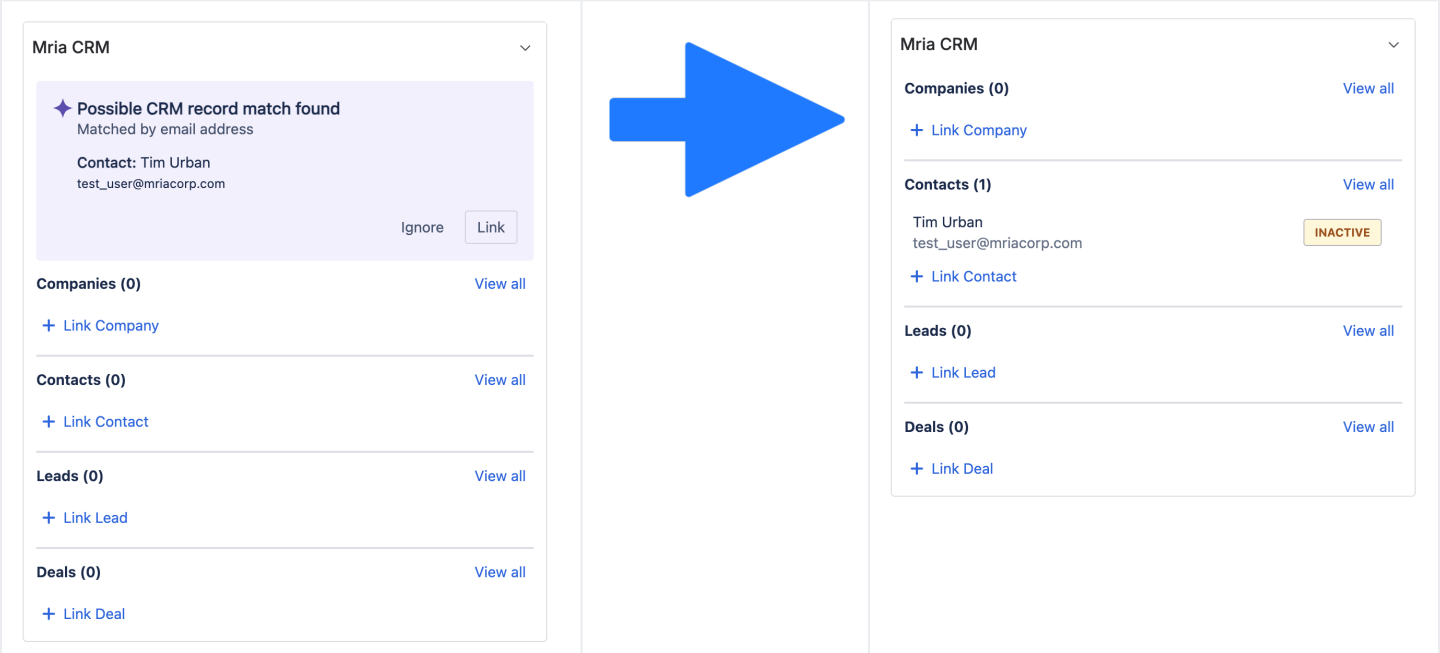
JSM and CSM functionality: Suggestions & easy CRM creation

When a support team receives a new request in JSM or CSM, it's not always clear whether the requester is:

- an existing Contact in your CRM,
- a potential customer with open Deals or Leads, or

- a completely new person who should be added to the CRM.

JSM Integration helps resolve this uncertainty through **intelligent suggestions** shown in the Mria CRM panel.



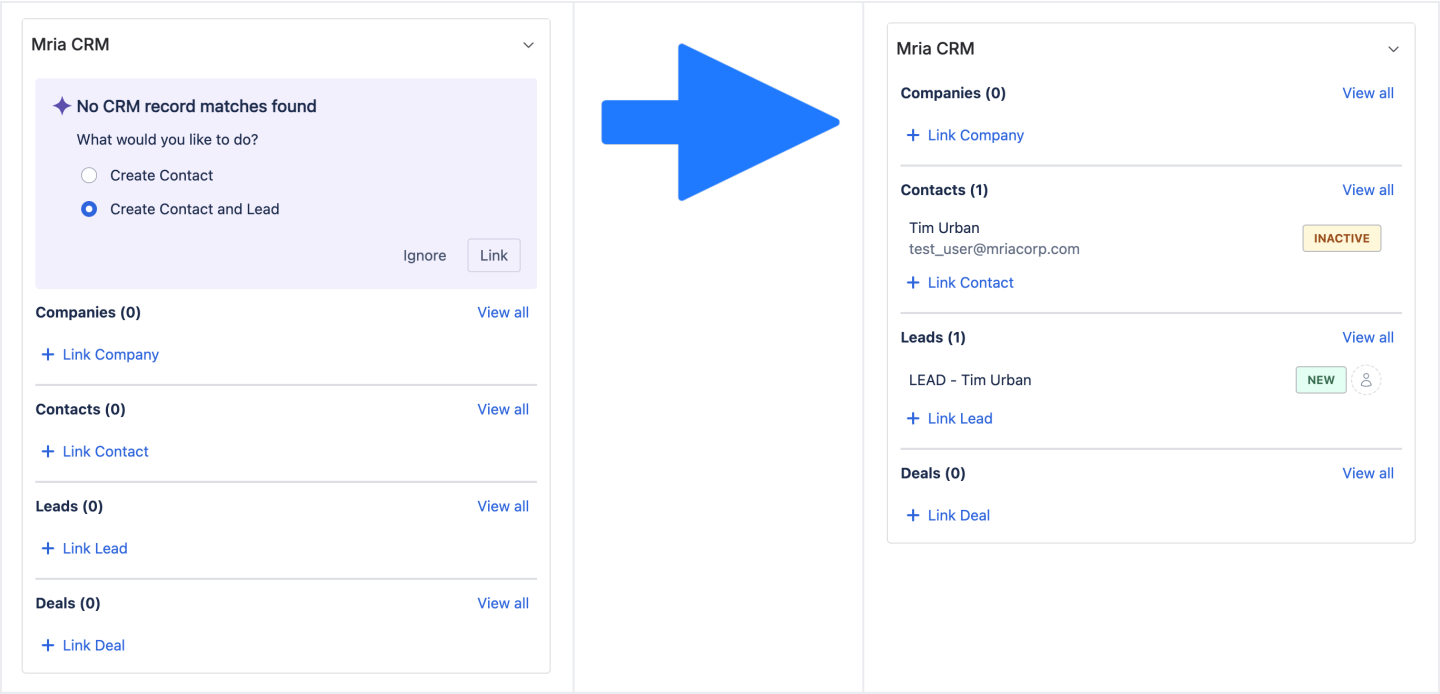
How Suggestions Work

When a request is opened, the CRM panel automatically checks whether the requester's email matches any existing CRM Contact.

If no match is found

The suggestion box appears, offering the support agent (with *User*-level CRM permissions) the option to:

- **Create a new Contact**, or
- **Create a new Contact and Lead**,
  and link them directly to the JSM or CSM request.

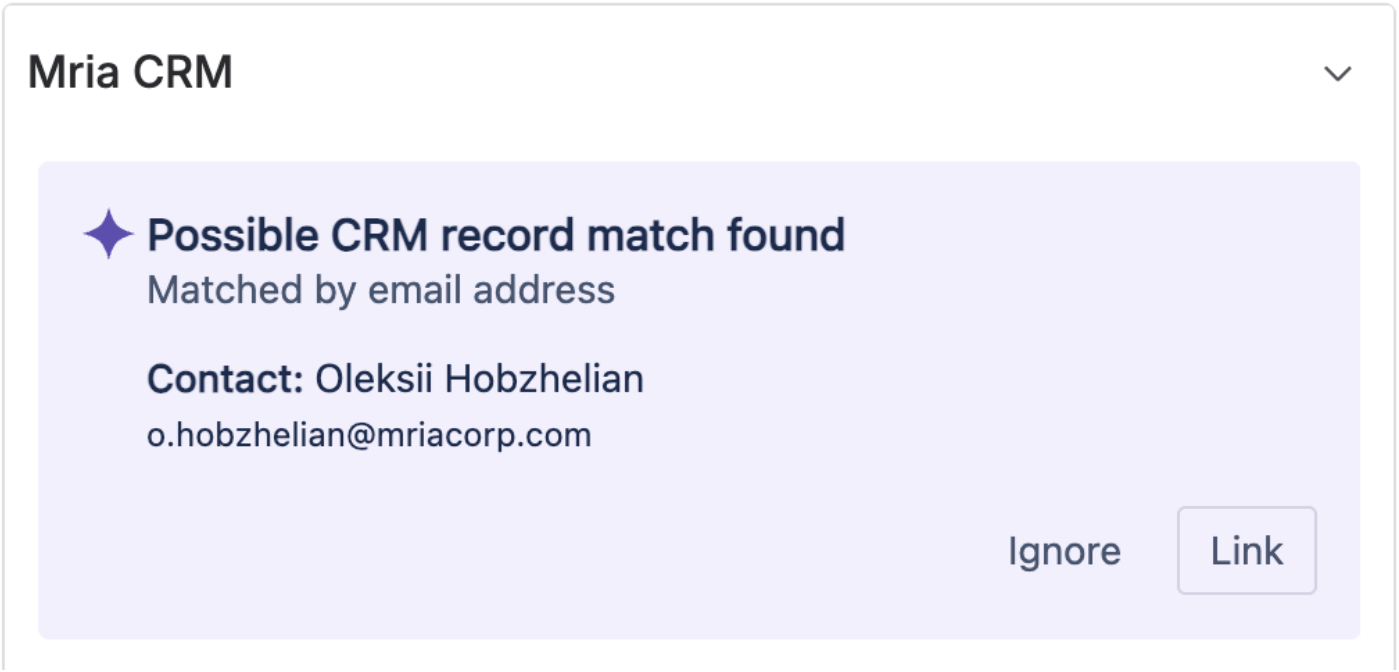


This helps the sales team immediately see that a new inbound interaction has arrived and follow up accordingly.

If a match *is* found

The panel surfaces the existing Contact and allows the support agent to **link it to the request** with one click.

If that Contact is already associated with a Company, the link action automatically connects **both** the Contact and the Company to the ticket — keeping everything in sync.

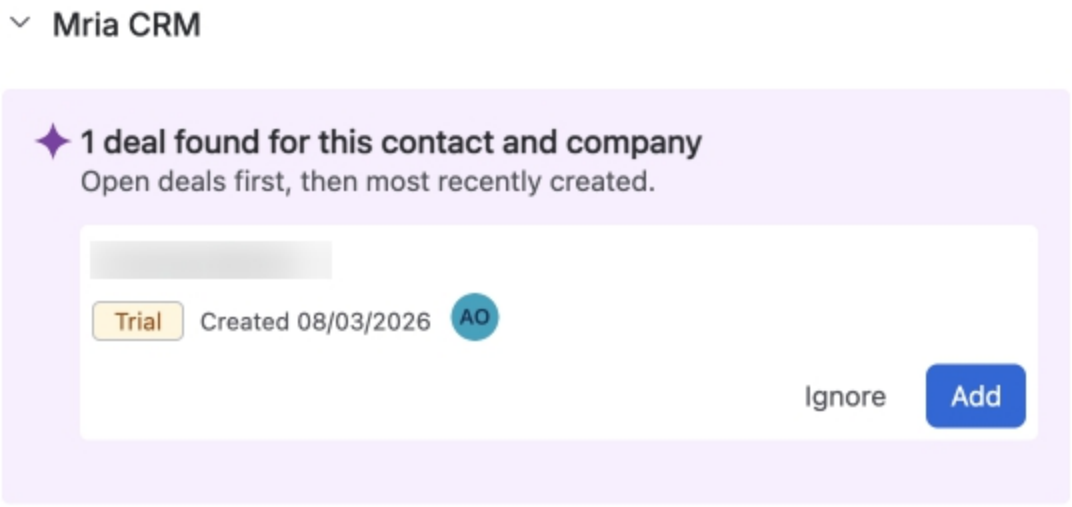


Suggested Deals

Once a **Contact** or **Company** is linked to the ticket, the Mria CRM panel also surfaces that customer's **Deals**, so an agent can see the commercial context of the request without leaving the ticket.

- The panel lists the **three most recent Deals** for the linked Contact or Company, ordered by **created date**.
- Alongside them you'll see the **total number of Deals** for that customer, so it's obvious when there's more history than the three on screen.
- Any suggested Deal can be **linked to the ticket in one click**, exactly like a suggested Contact.

This is what tells a support agent that the person raising a ticket is in the middle of a live negotiation, or is an existing customer with a long history — useful context before replying, and an easy way to keep the Deal's activity trail complete.

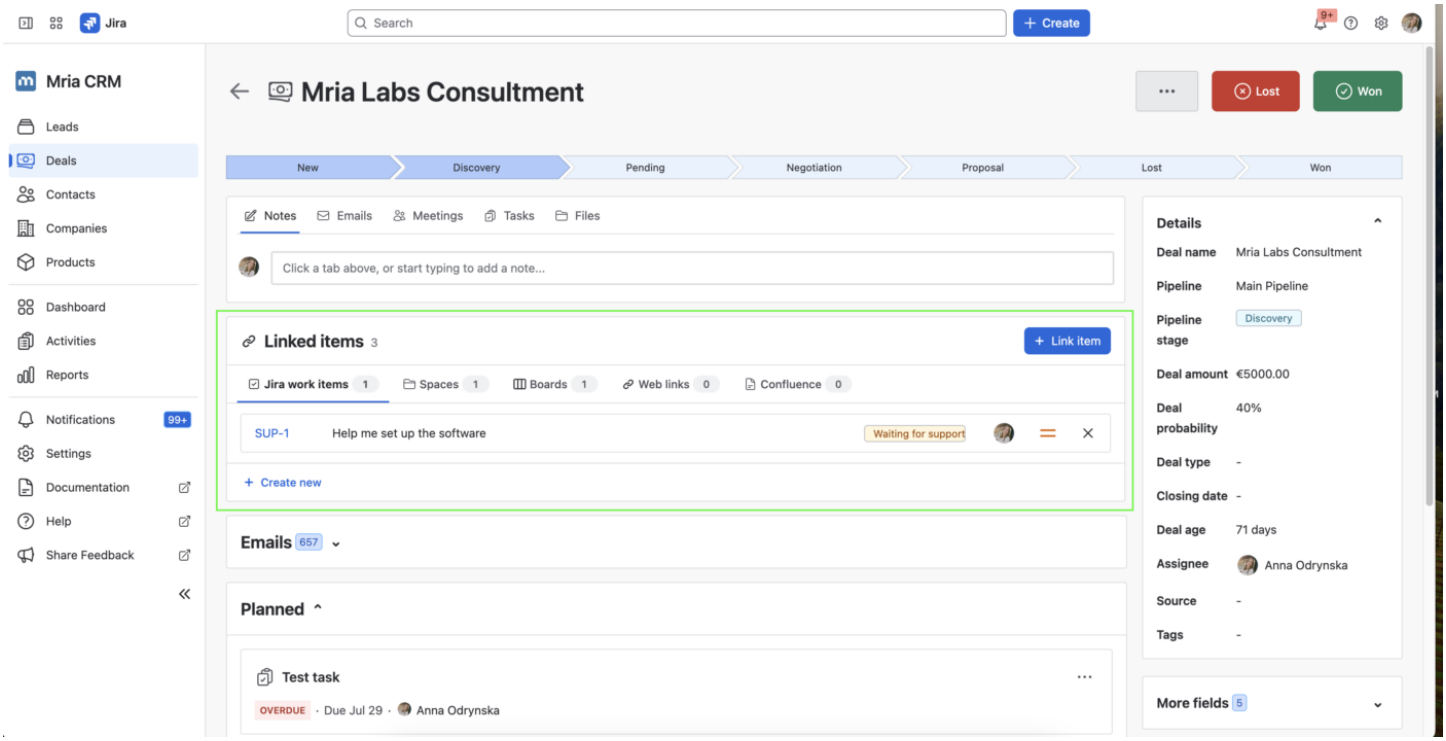


Manual linking always available

If the suggestion doesn't reflect what the agent needs, or if they prefer to choose manually, the panel includes **Link Company**, **Link Contact**, **Link Lead**, and **Link Deal** actions — exactly as in the standard Jira Integration. Use these when the customer has more Deals than the three suggested, or when the right record isn't in the list.

2-way JSM and CSM integration

The JSM integration works both ways, keeping customer context connected across Jira Service Management, Customer Service Management and Mria CRM.
Once a JSM or CSM request is linked to a Contact, Company, Lead, or Deal, the request becomes fully visible from the corresponding record in Mria CRM.



This gives teams a complete view of the customer relationship, including related support activity, without needing to switch between JSM or CSM and Mria CRM.

Important note about suggestions

Suggestions are meant to **assist**, not automate decisions.

Support or sales teams should always review the information, validate that the matched or suggested entity is correct, and decide whether to:

- **Accept** the suggestion,
- **Ignore** it, or
- **Search and link CRM entities manually**, depending on their workflow and judgment.

JSM Integration offers guidance, but responsibility for correct linking and CRM data quality remains with the team.