Service Desk Requests to CRM

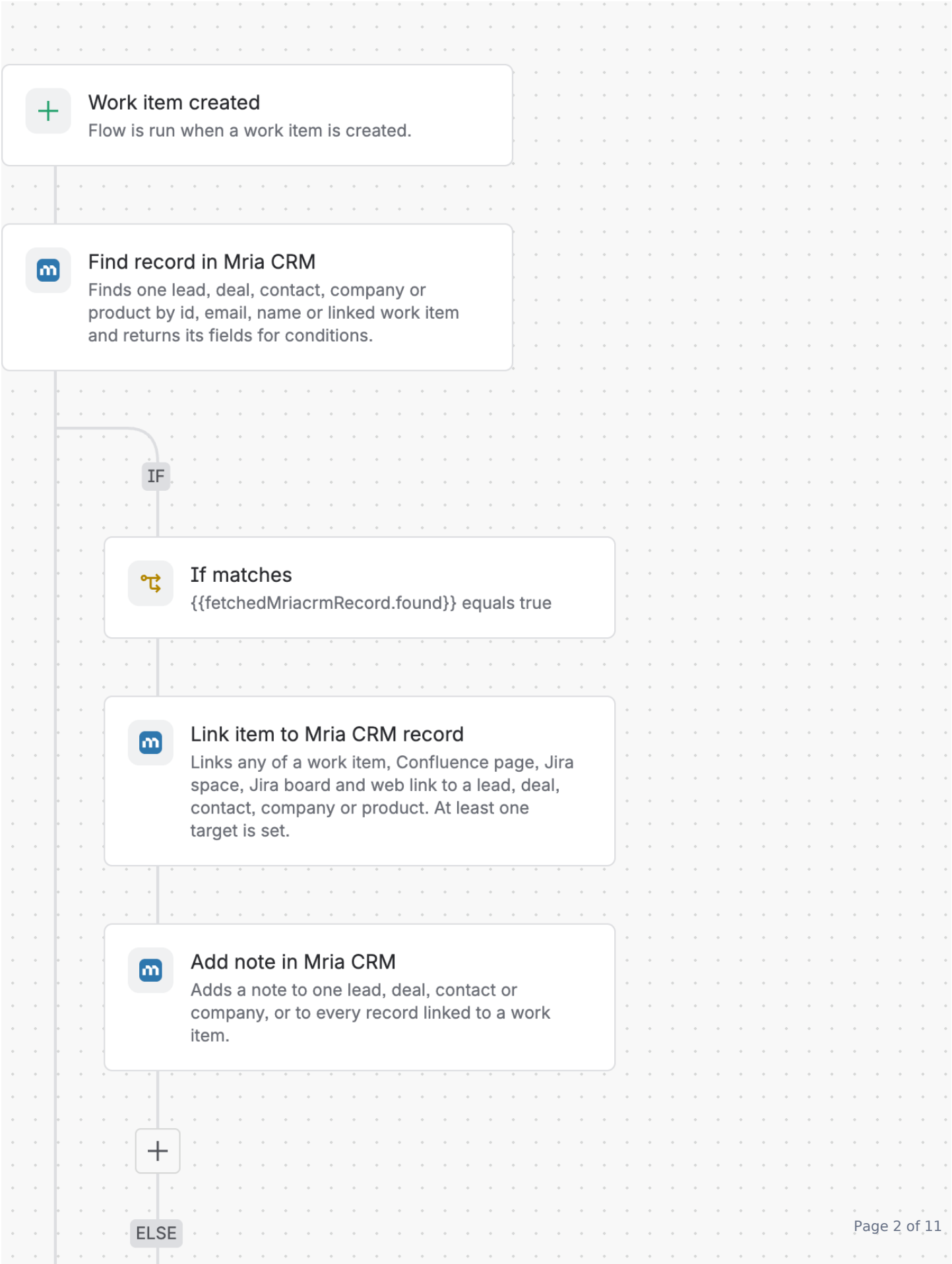
Jira Automation · https://mriacrm.com/docs/service-desk-requests-to-crm/

Service desk requests that land on the right customer

Support and sales look at the same customers from different tools. These flows close the gap from the service desk side: every new request is linked to the requester's Contact, a requester the CRM does not know yet becomes one, and an upgrade request opens a Deal for sales.

They work in any Jira Service Management space. Manual linking and the Mria CRM panel on requests are on JSM Integration.

1. Link every request to the customer's Contact



Trigger: Work item created, scoped to your service space.

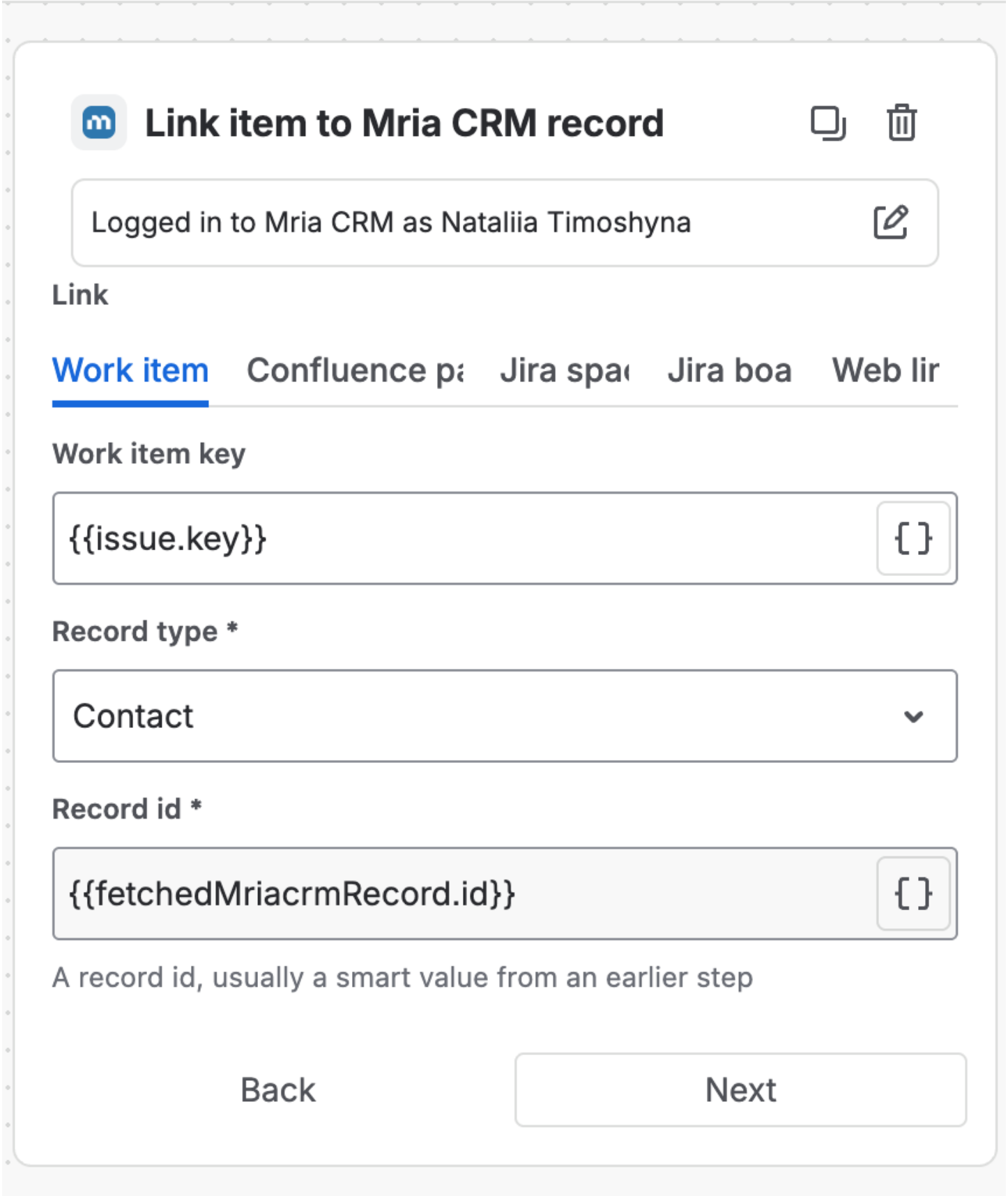
Find the requester

Find record in Mria CRM — Find by Email, Record type Contact, Email `{{reporter.emailAddress}}`.

If the Contact exists: link and note

If/else block, If: `{{fetchedMriacrmRecord.found}}` equals `true`. Inside it:

- **Link item to Mria CRM record** — Work item key `{{issue.key}}`, Record type Contact, Record id `{{fetchedMriacrmRecord.id}}`.
- **Add note in Mria CRM** — One record by id, Contact, `{{fetchedMriacrmRecord.id}}`, content `New request {{issue.key}}: {{issue.summary}}`.


Link item to Mria CRM record
Logged in to Mria CRM as Nataliia Timoshyna
Link
Work item
Confluence pa
Jira spa
Jira boa
Web lir
Work item key
{{issue.key}}
Record type *
Contact
Record id *
{{fetchedMriacrmRecord.id}}
A record id, usually a smart value from an earlier step
Back
Next

Else: add the requester to the CRM

Create contact in Mria CRM in the Else part:

Field	Value
Name	`{{reporter.displayName}}`
Email	`{{reporter.emailAddress}}`
Company	`{{issue.Organizations.first.name}}` — the request's organization, if your space uses organizations
If no company has this name	Keep the name on the contact only
Type	Inherit from company
Work item key	`{{issue.key}}` — the new Contact is linked straight away

Create contact in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Name *

{{reporter.displayName}}

Email *

{{reporter.emailAddress}}

Phone

Job title

Company

{{issue.Organizations.first.name}}

Links the company with this name

If no company has this name

- ( ) Create it
- (•) Keep the name on the contact only

Type

Inherit from company

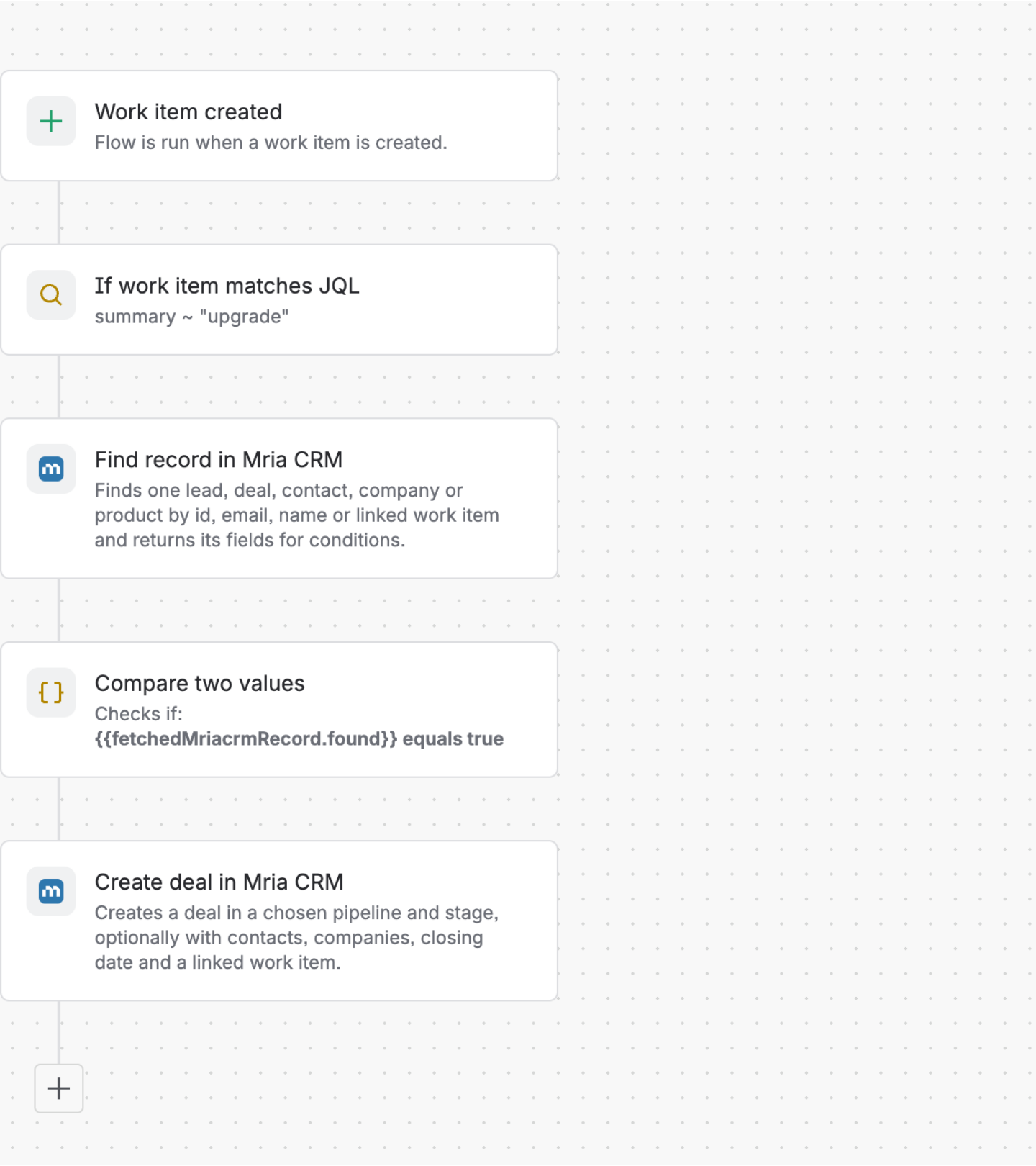
Empty takes the company's type, or Customer without a company

Work item key

Why keep the name only? Organization names typed by customers are not always the names in your CRM. Keeping the text on the Contact lets someone match it to the right Company later, instead of the flow creating near-duplicates. Choose **Create it** if your organizations mirror your Companies exactly.

Result: every request shows up in the Contact's Linked items and in the Mria CRM panel on the request, and the Contact's timeline reads as a history of what the customer asked for.

2. Upgrade request → upsell Deal



A customer asking support for a bigger plan is a sales conversation. This flow hands it over.

1. **Trigger:** Work item created, scoped to the service space.
2. **If work item matches JQL:** `summary ~ "upgrade"`. With a dedicated request type, test the request type instead.
3. **Find record in Mria CRM** — Email, Contact, `{{reporter.emailAddress}}`.
4. **Compare two values:** `{{fetchedMriacrmRecord.found}}` equals `true` — only known customers get a Deal.
5. **Create deal in Mria CRM:**

Field	Value
Deal name	`Upgrade: {{issue.summary}}`
Pipeline / Stage	Main Pipeline / Discovery
Contacts	`{{reporter.emailAddress}}` — becomes the primary Contact
Work item key	`{{issue.key}}`

Create deal in Mria CRM

Logged in to Mria CRM as Nataliia Timoshyna

Deal name *

Upgrade: {{issue.summary}}

Pipeline *

Main Pipeline

Stage *

Discovery

Amount

Closing date

{{issue.duedate}}

ISO date

Assignee

Pick a user

Set **Assignee** to the account manager, or leave it empty for the team to pick up. The Deal is linked to the request, so support sees it in the request's Mria CRM panel and sales can read the request from the Deal.

3. More recipes

Close the loop when a request is resolved

Trigger: Work item transitioned to Resolved. **Add note in Mria CRM** — Records linked to a work item, Record type All (linked to the work item), content `{{issue.key}} resolved: {{issue.resolution.name}}`. Every Contact, Company and Deal the request touches gets the outcome on its timeline.

Flag tickets that put a big Deal at risk

Trigger: Field value changed — Priority. Then **Find record** by Work item, Record type Deal; a condition that `{{fetchedMriacrmRecord.amount}}` is greater than 50000; then a Jira comment or a Slack message to the owner and an **Add note** on the Deal. Support sees revenue exposure without leaving the queue.

Put the account manager on the ticket

Find record by Email, Record type Company, `{{reporter.emailAddress}}` — a Company is found by the email's domain. Then **Link item** to that Company and Jira's **Edit work item** to set a user field to `{{fetchedMriacrmRecord.assigneeAccountId}}`.

Related Pages

- JSM Integration — Mria CRM inside the service desk.
- Automation Actions Reference — every field of the actions used here.
- Contacts — Contact types, statuses and linked items.