

Overview

This Flask application is designed to seamlessly integrate with Jira and SharePoint, specifically generating "Testing Only Quote" documents in Word and PDF formats. It automates the generation of these quotes by extracting critical information from Jira issues, including items, quantities, and units. Utilizing a webhook, the script references pricing, descriptions, and shipping information from Dynamics 365 (D365) to create a detailed and accurate quote table with up-to-date pricing and delivery methods.

These quotes are posted within the Jira Issue and archived within SharePoint. Furthermore, additional logic within the application performs distinct actions depending on the Quote's overall total.

Sample:

Phigenics_LLC_AT-29.pdf

Local Version:

[Local Save Version \(Quote Generator\)](#)

Key Functionalities

- **Data Extraction:** This function extracts items, quantities, and units directly from Jira issue fields to dynamically populate the quote.
- **Integration with D365 via Jira Assets:** Connects to D365 via Assets to fetch real-time pricing, descriptions, and shipping details, ensuring the quote reflects the latest data.
- **Template Utilization:** The template uses a predefined Word document template from Confluence to ensure consistent formatting and structure for each quote.

Automated Document Management

1. **Document Creation:** The application generates a detailed quote document by populating a Word template with extracted data and additional computed fields such as total costs.
2. **Document Conversion:** Converts the Word document into a PDF for easy distribution and viewing.
3. **Document Upload:** Uploads both Word and PDF versions of the quote document to a specified SharePoint location for record-keeping and easy access.
4. **If statement actions:** customizes quote with logic placed such as “if the quote includes phi-collect,” “if total is greater than \$4,000”, etc

Current Debugging Fixes

- Changes to the script include using Confluence to store the template instead of SharePoint.
- A temp file of both the PDF and Word documents is created before uploading to SharePoint and Jira. The temp files are then cleared from local storage.