Table of Contents

[Objective 2](#_Toc370222853)

[Typical Usage 2](#_Toc370222854)

[Key Features 2](#_Toc370222855)

[Pre-requisites 2](#_Toc370222856)

[Network Dependencies/Limitations 2](#_Toc370222857)

[System and Applications 3](#_Toc370222858)

[Installations 3](#_Toc370222859)

[Configurations 4](#_Toc370222860)

[Go2Group CRM Plugin (Jira) 4](#_Toc370222861)

[Initial Setup 4](#_Toc370222862)

[Case Options 4](#_Toc370222863)

[Comment Options 5](#_Toc370222864)

[Attachment Options 6](#_Toc370222865)

[JIRA/CRM Field mappings 6](#_Toc370222866)

[CRM Record Definitions 19](#_Toc370222867)

[Advanced Settings 20](#_Toc370222868)

[Customizations 20](#_Toc370222869)

[Jira 20](#_Toc370222870)

[Field Mapping 20](#_Toc370222871)

[Screen Mapping 21](#_Toc370222872)

[SalesForce 22](#_Toc370222873)

[Creating Custom Button 22](#_Toc370222874)

[Creating Custom Fields 24](#_Toc370222875)

[Custom Field Alignment for Case 35](#_Toc370222876)

[Notes 36](#_Toc370222877)

Sales Force and Jira Integration - Approach

# Objective

The Objective of this document is to ensure smooth replication of Jira and Salesforce bi-directional integration established between Production Jira and Salesforce. It states all the configurations and customizations required for the replication of the flow.

# Typical Usage

* Customer logs a product request using a salesforce.com case
* Support team receives Customer request, and begins reviewing the case
* The Support team realizes it needs to raise an issue with the Development team
* The Support team clicks the “Create JIRA Issue” button in salesforce.com
* The case is then replicated to a JIRA issue, where the Development team begins its work
* The Development and Support teams begin collaborating on the case / issue
* The Development team solves the issue, and marks it as resolved in JIRA
* The Support team is notified that the Case has been closed and begins working with the customer to resolve their request

# Key Features

1. Data Sync: Keep comments, attachments, and other artifacts in sync across Atlassian JIRA and your CRM system.
2. Many-to-One Linkage: Link multiple cases in salesforce.com to a single issue in Atlassian JIRA.

# Pre-requisites

1. Jira Application – Up & running
2. Salesforce Application – Up & running
3. Go2Group CRM Plugin - Plugin download, License Key

Note: Integration engineer should have administrative privileges on above mentioned applications to perform required configurations and customizations.

# Network Dependencies/Limitations

Handshake between Jira/CRM Plugin and Salesforce; Firewall constraints should be removed between Jira and Salesforce.

Salesforce create/update from outside of DealerTrack network doesn’t replicate the details to Jira. Firewall details need to be opened in order for the integration to work outside DealerTrack network, which includes all bi-directional synchronizations.

# System and Applications

1. Jira: <http://10.134.8.13:8080>
2. SalesForce: <ProductionURL>

# Installations

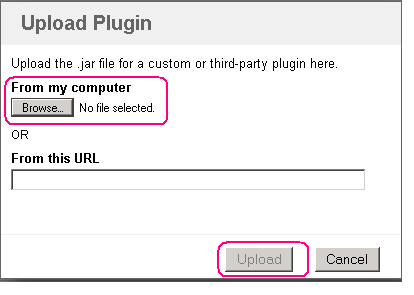
* Download Go2Group CRM plugin from <https://marketplace.atlassian.com/plugins/com.atlassian.jira.plugin.customfield.crm>
* Login to Jira > Click Administration > Click ‘Manage Add-ons’ under Plugins section



* Upload the plugin by clicking ‘Upload Plugin’



* Browse and select the plugin and Click ‘Upload’



* Now, plugin should be available under ‘User-installed Plugins’ section as shown below



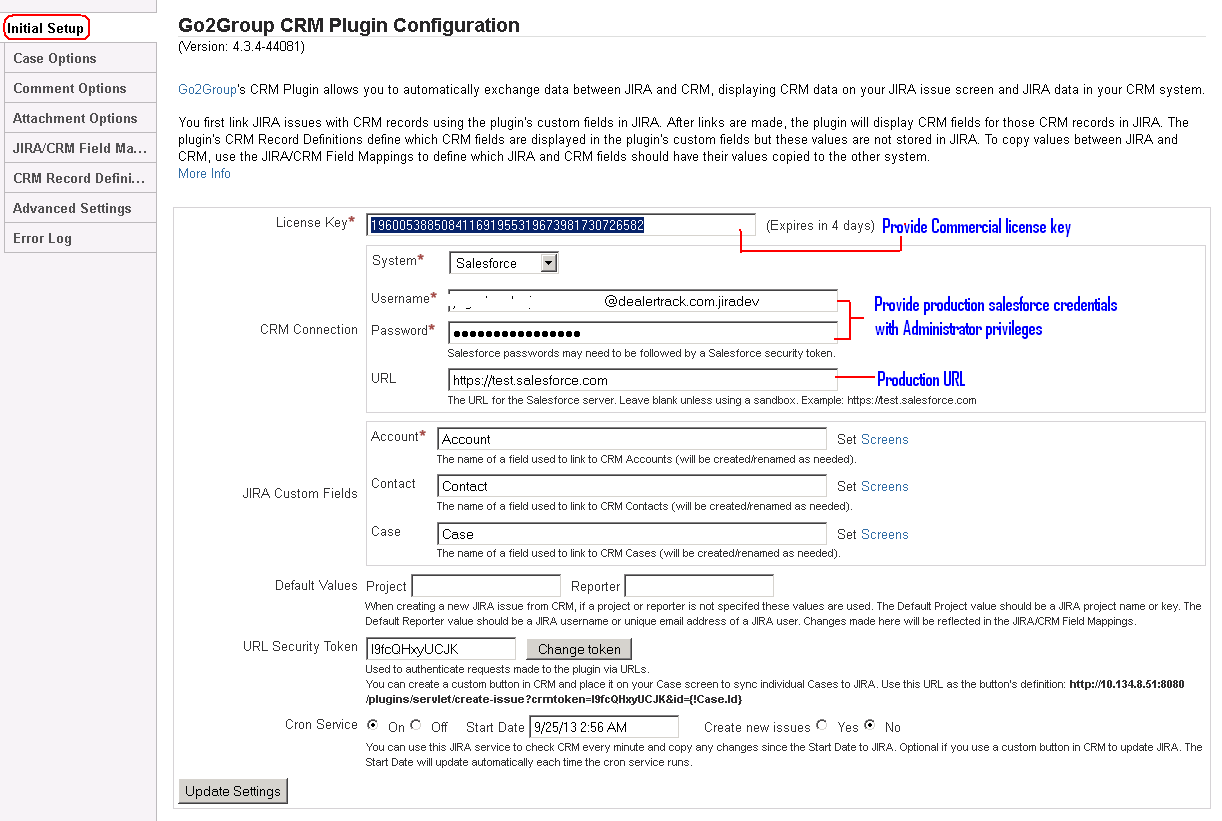
# Configurations

## Go2Group CRM Plugin (Jira)

### Initial Setup

Click Configure and provide the relevant information as shown below

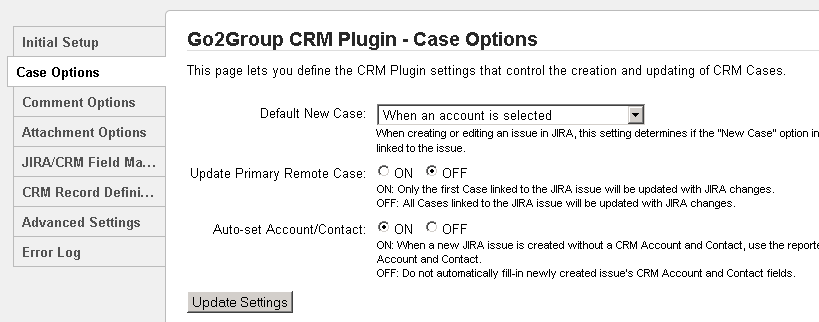
### 



### Case Options

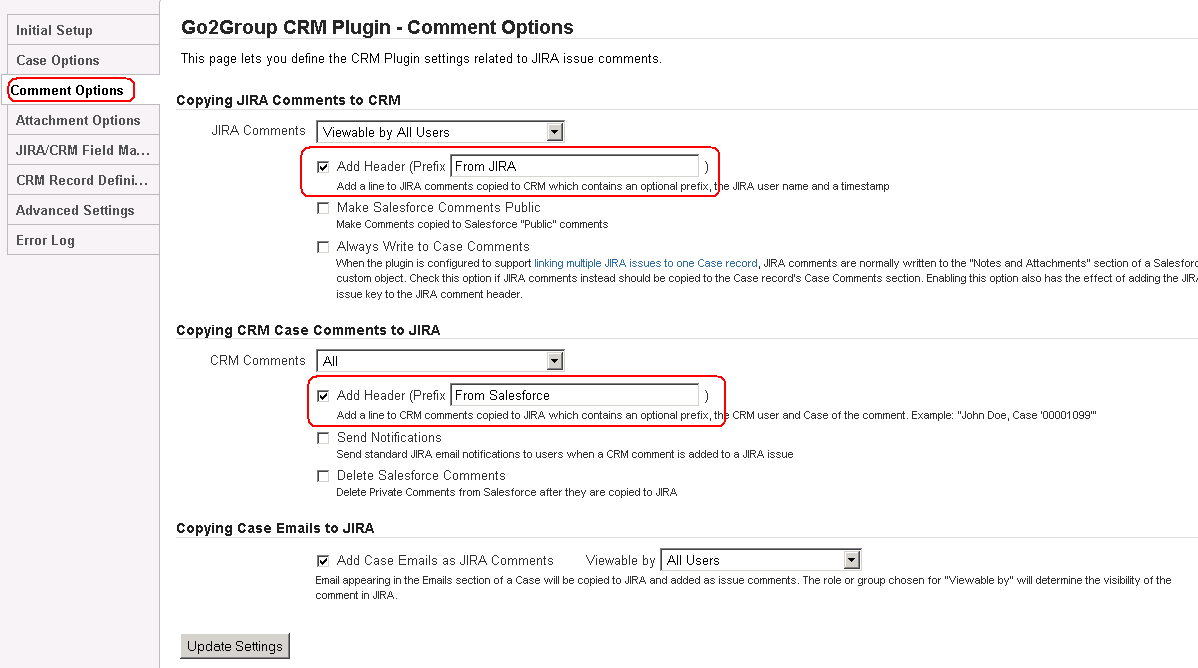
The Go2Group CRM Plugin allows users to define settings that control the creation and updating of Sales force Cases.

The image below describes the required and optional fields needed to complete this section.



### Comment Options

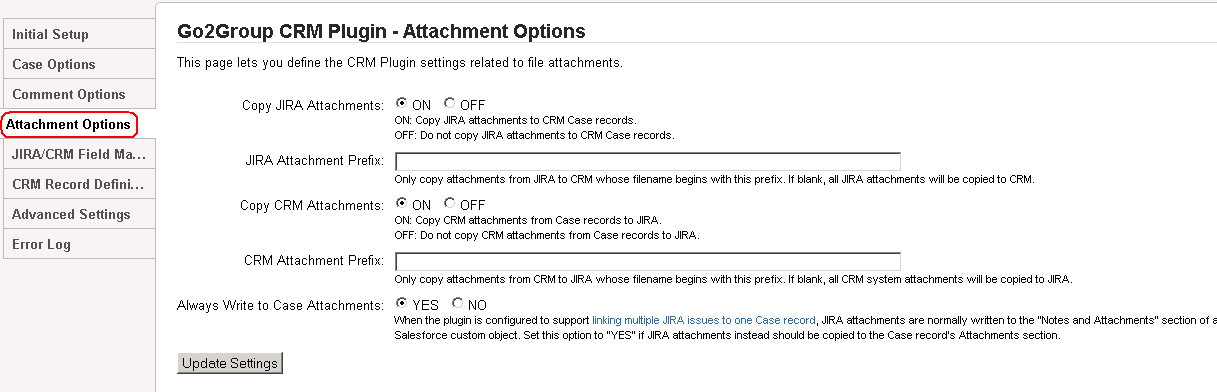
* The Go2Group CRM Plugin allows users to define settings related to JIRA issue comments. The image below describes the required and optional fields needed to complete this section.
* Prefix the headers as shown below and Click on Update Settings to update the changes.



### Attachment Options

The Go2Group CRM Plugin allows users to relate to file attachments.

The image below describes the required and optional fields needed to complete this section.



### JIRA/CRM Field mappings

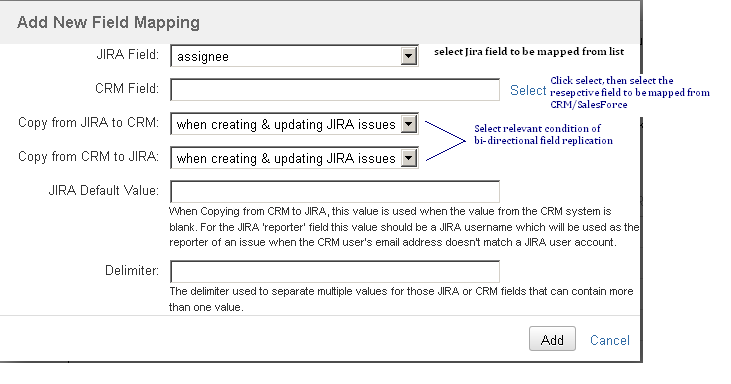
**Note**: Before proceeding with field mappings, ensure customizations are incorporated at Jira and SalesForce. Refer ‘**Customizations**’ section, page no.20

The Go2Group CRM Plugin allows users to define which CRM data fields should be copied to which JIRA fields and respective field values, and if the copy should happen just for new records, just for changed records, or for both.

The image below describes the required and optional fields needed to complete this section.

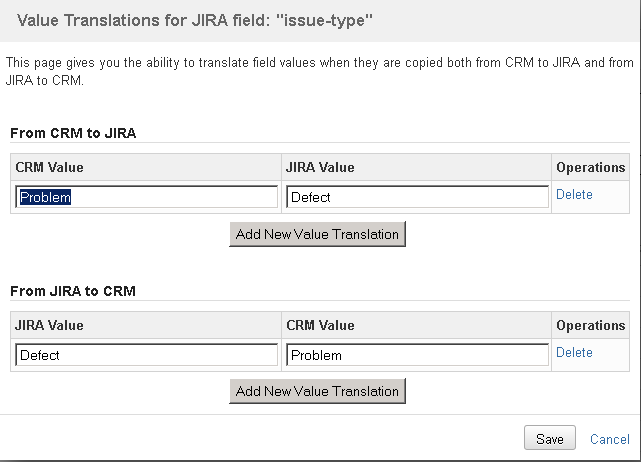


Note: Mapping available in above snapshot with reference to test instance of SalesForce; Use relevant production SalesForce custom fields for mapping.

* If an additional mapping needs to be done, click ‘Add Field Mapping’ button to begin selecting the required JIRA and CRM fields. Please refer the example snapshots below,
* To map the value transitions between Jira and CRM, click ‘Value Transitions’ link



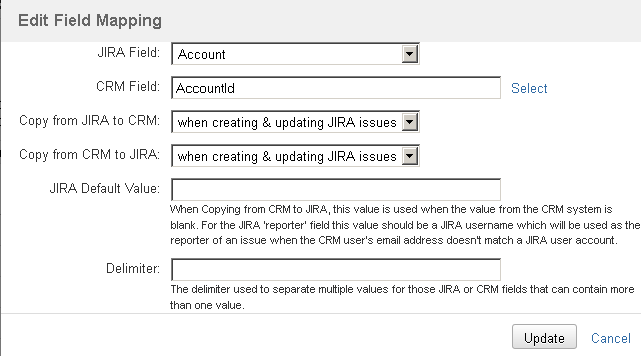
* Mention the field values to mapped while replicating bi-directional



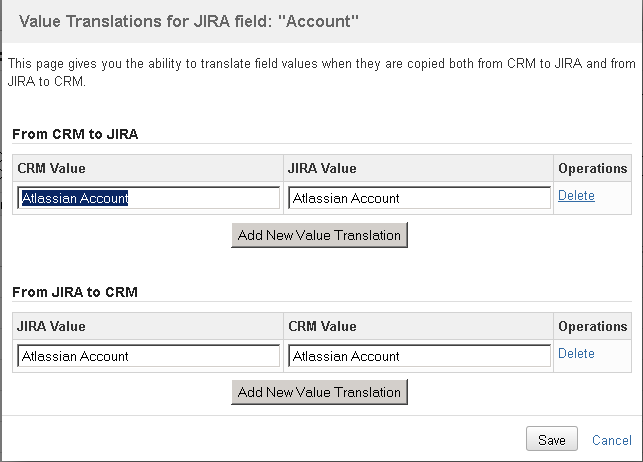
In above case, when Case type ‘Problem’ created in SalesForce will be replicated to Jira as ‘Defect’ and vice versa

**Please refer snapshots below for existing field mappings and Value Transitions,**

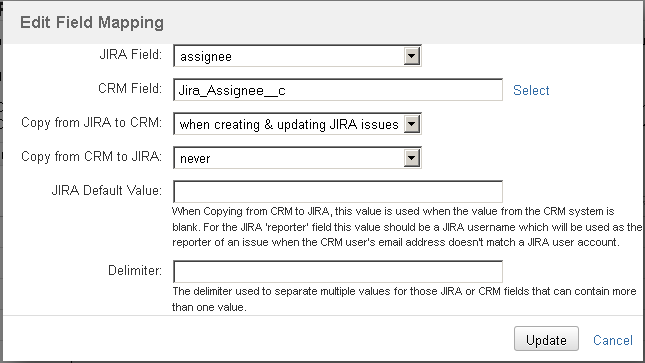
#### Field: Account



##### Value Transitions



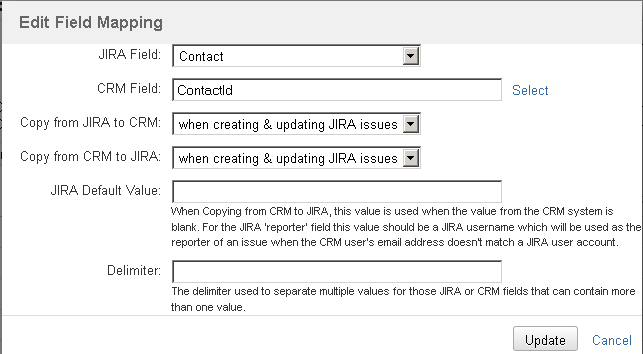
#### Field: Assignee



##### Value Transitions

-None-

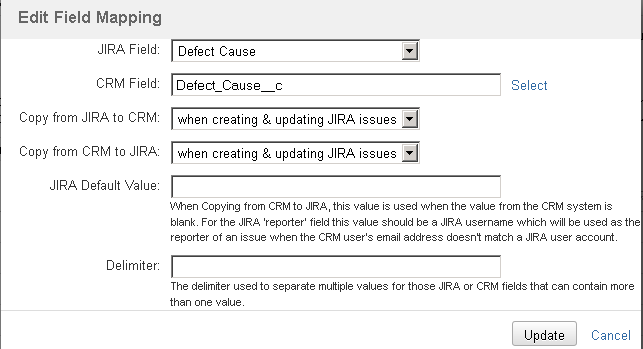
#### Field: Contact



##### Value Transitions

* None –

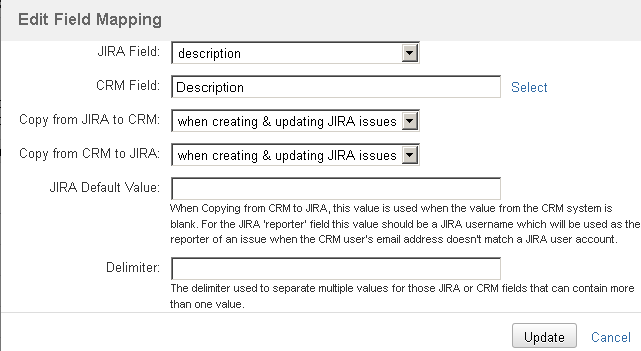
#### Field: Defect Cause



##### Value Transitions

-None-

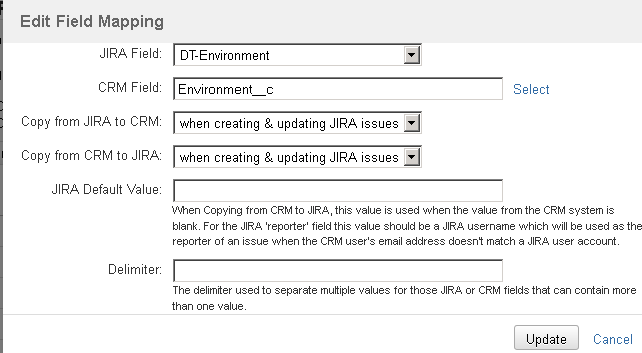
#### Field: Description



##### Value Transitions

-None-

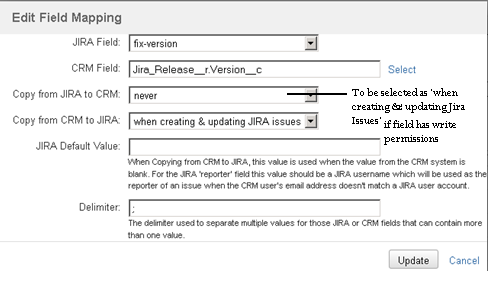
#### Field: Environment



##### Value Transitions

-None-

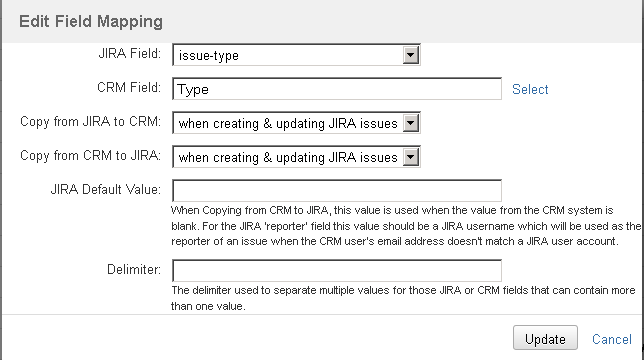
#### Field: Fix Version



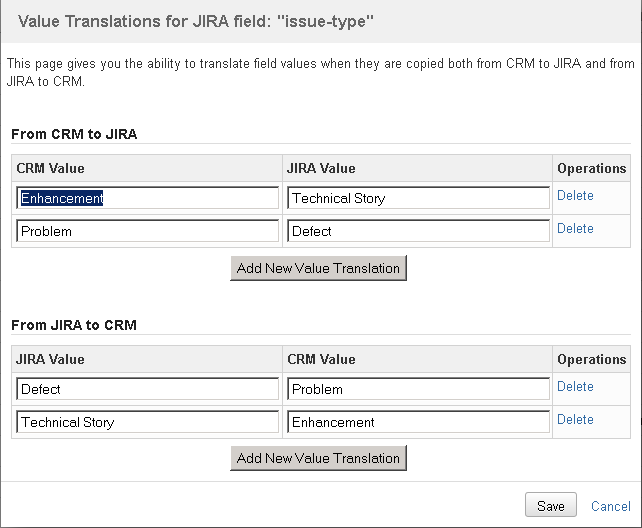
##### Value Transitions

-None-

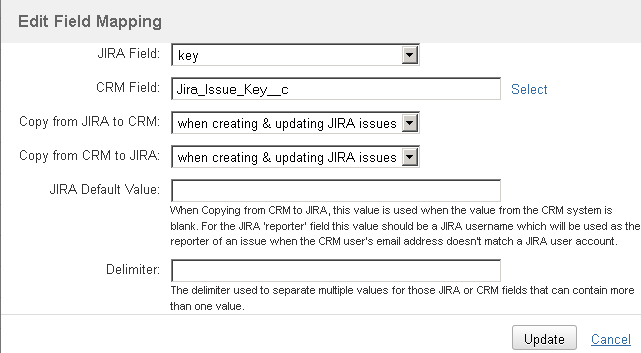
#### Field: Issue Type



##### Value Transitions



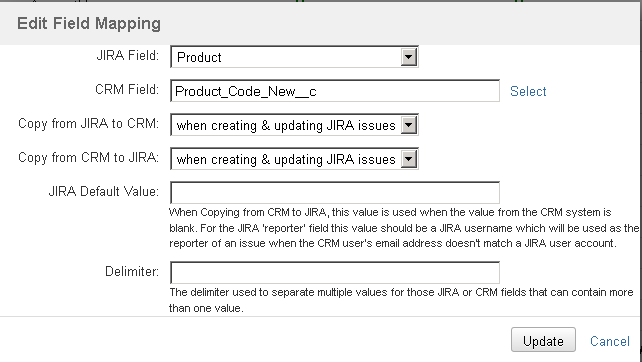
#### Field: Key



##### Value Transitions

-None-

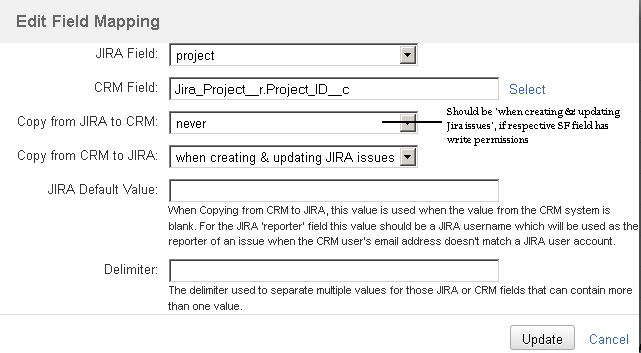
#### Field: Product



##### Value Transitions

-None-

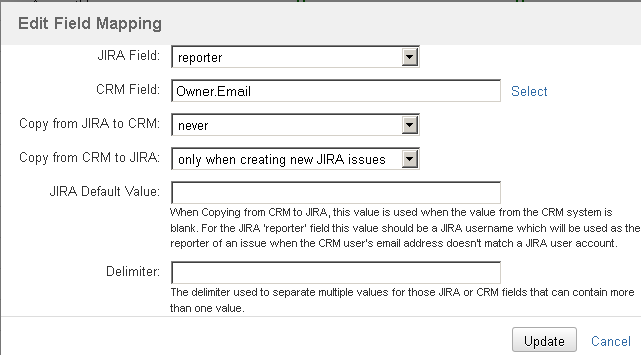
#### Field: Project



##### Value Transitions

-None-

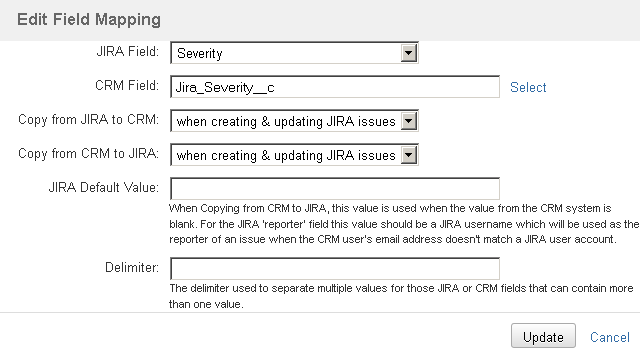
#### Field: Reporter



##### Value Transitions

-None-

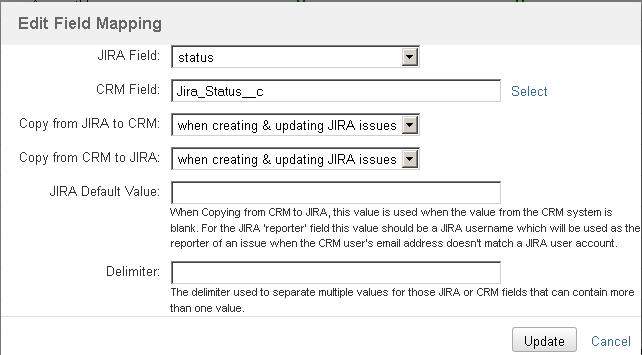
#### Field: Severity



##### Value Transitions

-None-

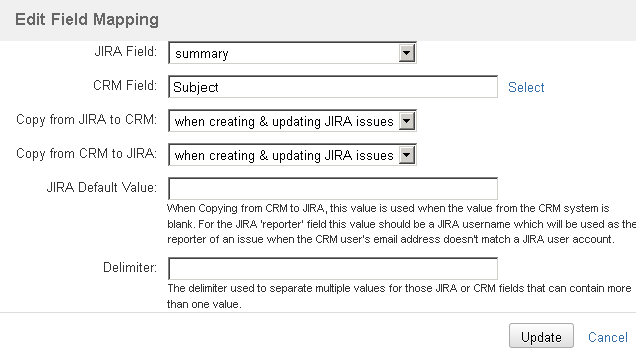
#### Field: Status



##### Value Transitions

-None-

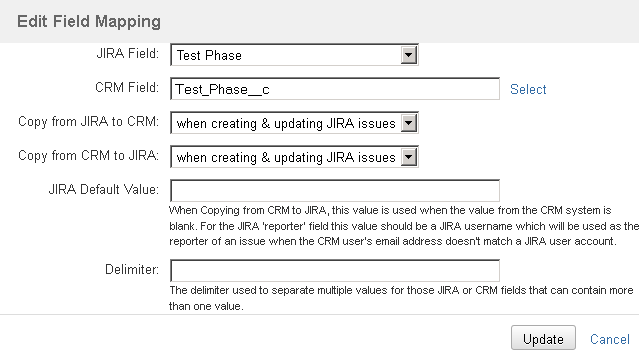
#### Field: Summary



##### Value Transitions

-None-

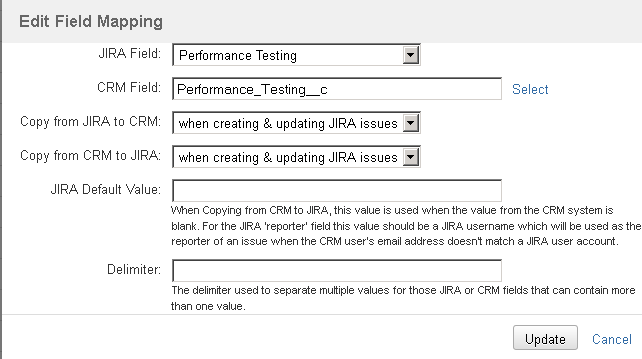
#### Field: Test Phase



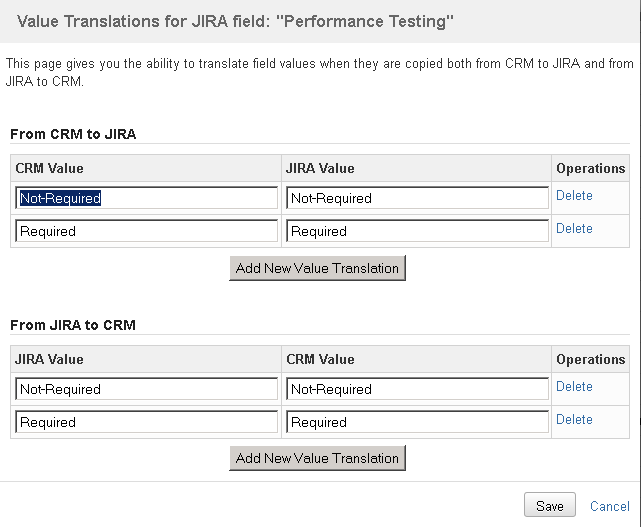
##### Value Transitions

-None-

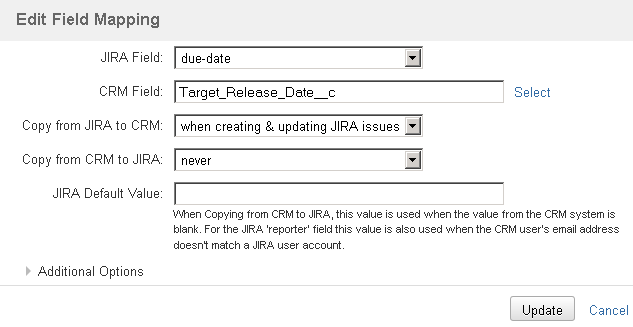
#### Field: Performance Testing



##### Value Transitions



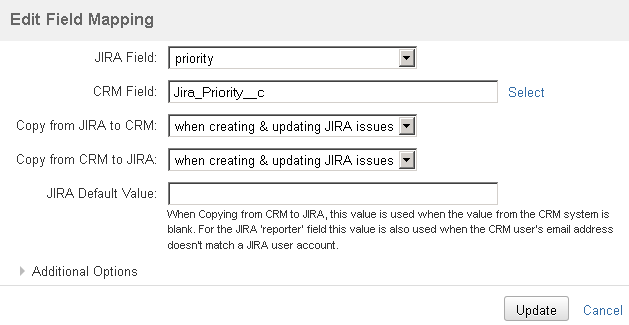
#### Field: Due Date



##### Value Transitions

-None-

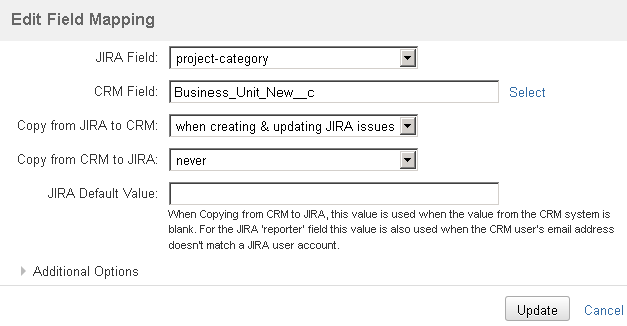
#### Field: Priority



##### Value Transitions

-None-

#### Field: Project-Category



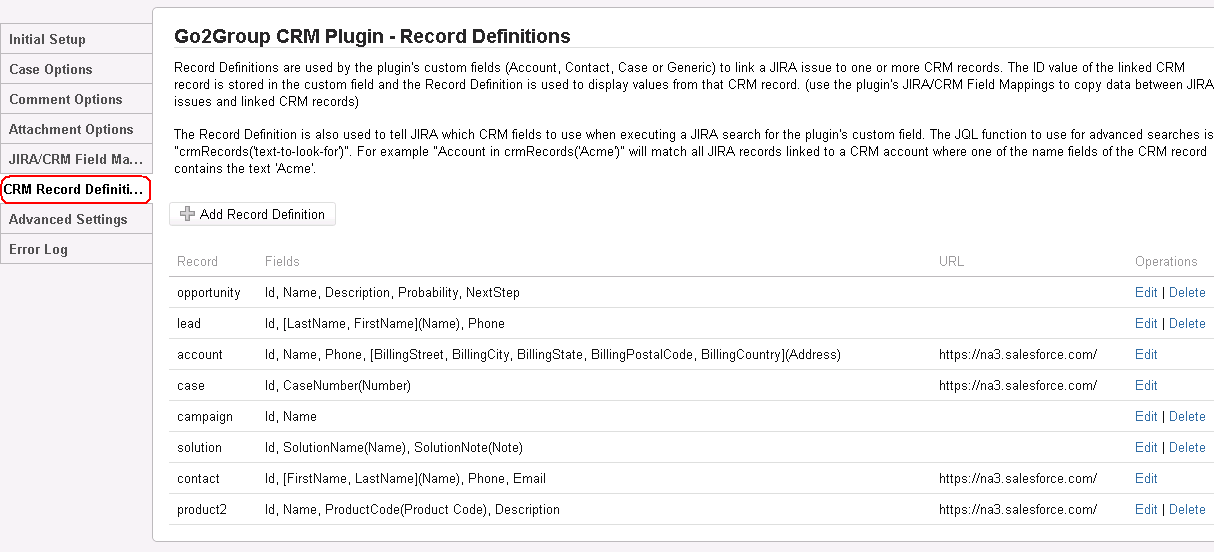
##### Value Transitions

-None-

### CRM Record Definitions

The Go2Group CRM Plugin allows users to define the CRM system records that can be queried by the Go2Group CRM Plugin and displayed on the JIRA issue screen.

Refer to the Sales force developer docs for a complete list of fields. The image below describes the required and optional fields needed to complete this section.

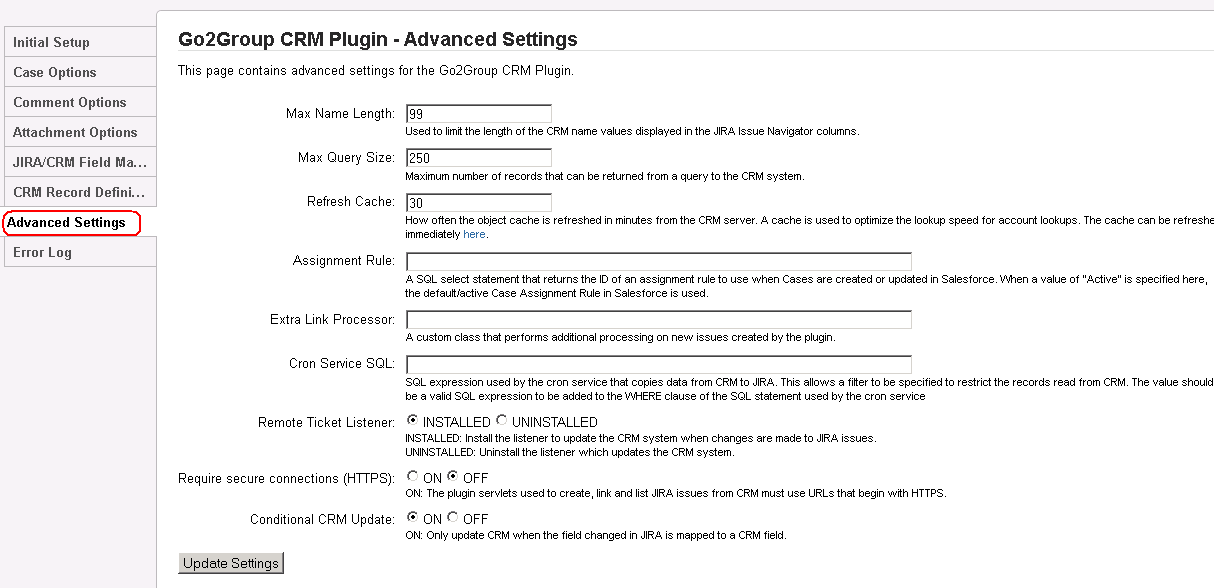


Note: If an additional record needs to be defined, click the Add Record Definition button. However, no changes are applicable here.

### Advanced Settings

The Go2Group CRM Plugin contains advanced settings for specific user needs.

The image below describes the required and optional fields needed to complete this section.



# Customizations

## Jira

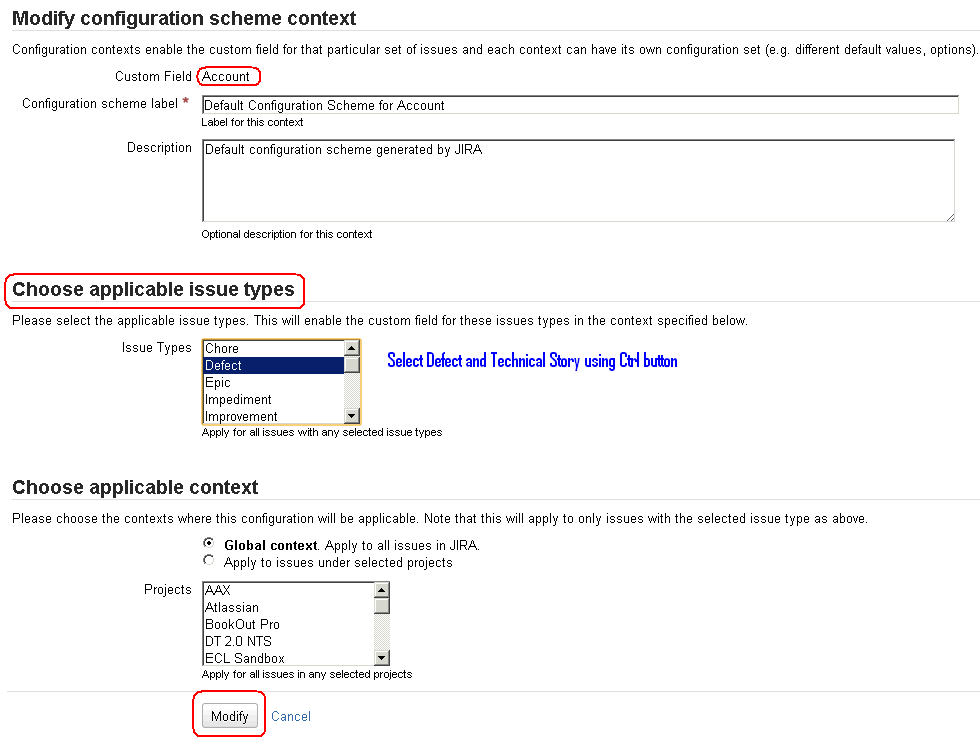
### Field Mapping

The below fields should be applicable only for the issue types “Defect” and” Technical Story” in Jira

* Account
* Case
* Contact

Steps:

* + Go to the respective custom field in Jira (Administration -> Custom Fields) **Example**: Account
  + From the cog icon dropdown at the right hand side, click on Configure
  + From the configuration page, click on Edit Configuration
  + From “Choose applicable issue types section”, select “Defect” and “Technical Story”
  + Click Modify to save the changes



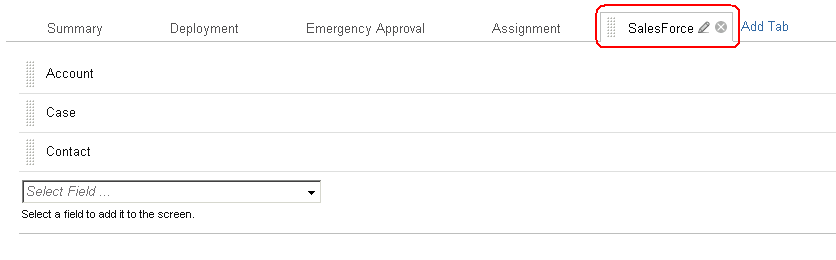
**Note**: Repeat the above steps for **Case** and **Contact**

### Screen Mapping

The above 3 fields should be placed/mapped on to the appropriate screens i.e., for the Defect and Technical Story issue type screens (*DT Ref Model Defect Screen* AND *DT Ref Model Story Screen*)

Steps:

* + Go to the respective screen in Jira (Administration -> Screens)
  + Click on Configure under the Operations section
  + By clicking “Add Tab”, add the new tab by name “SalesForce”
  + Add the 3 fields from the drop down as shown below



## SalesForce

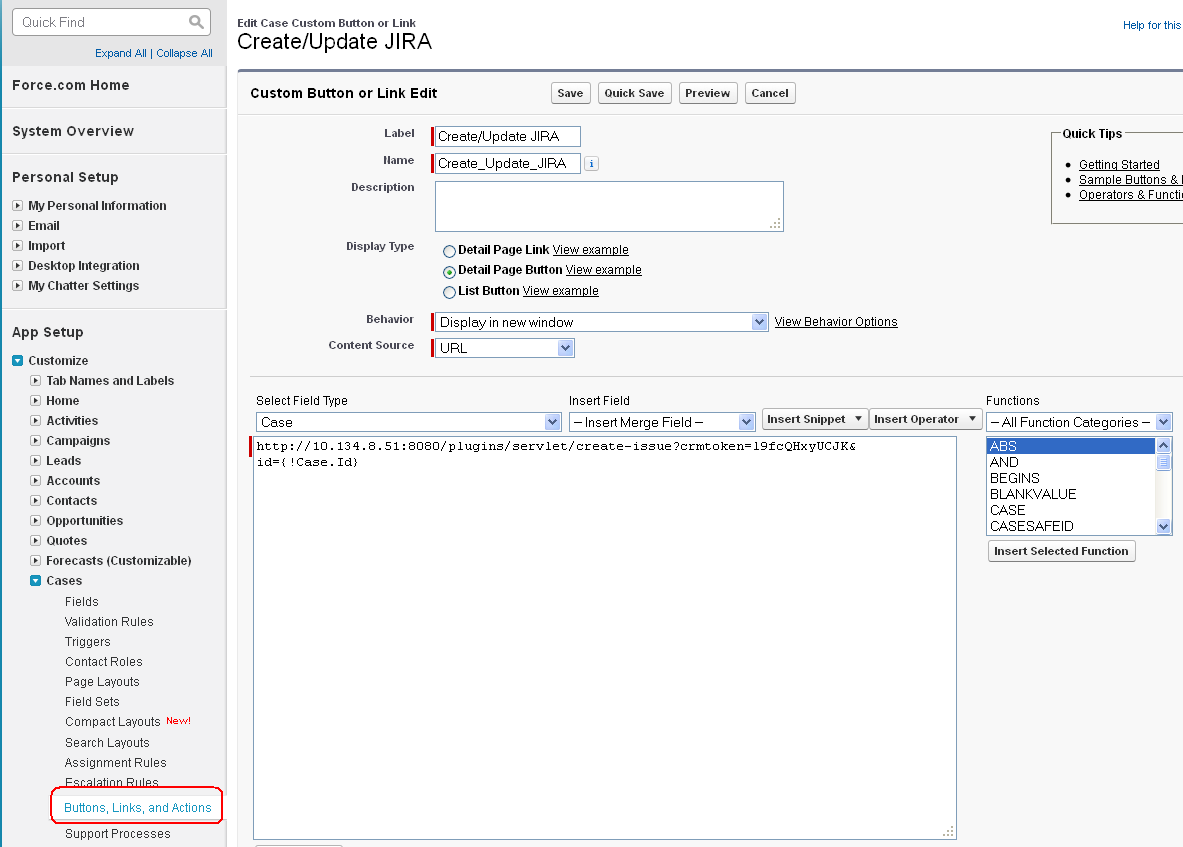
### Creating Custom Button

* Login to Sales Force with administrator credentials
* Go to "Setup" -> “App Setup”->"Customize" -> "Cases" -> "Buttons, Links and Actions”
* Click “New Button or Link” and fill in the details as shown below
* Use the URL

http://**<production jira IP address>**:8080/plugins/servlet/create-issue?crmtoken=**<Security Token>**&id={!Case.Id}

Example: - [http://10.134.8.51:8080/plugins/servlet/create-issue?crmtoken=l9fcQHxyUCJK&id={!Case.Id}](http://10.134.8.51:8080/plugins/servlet/create-issue?crmtoken=l9fcQHxyUCJK&id=%7b!Case.Id%7d)

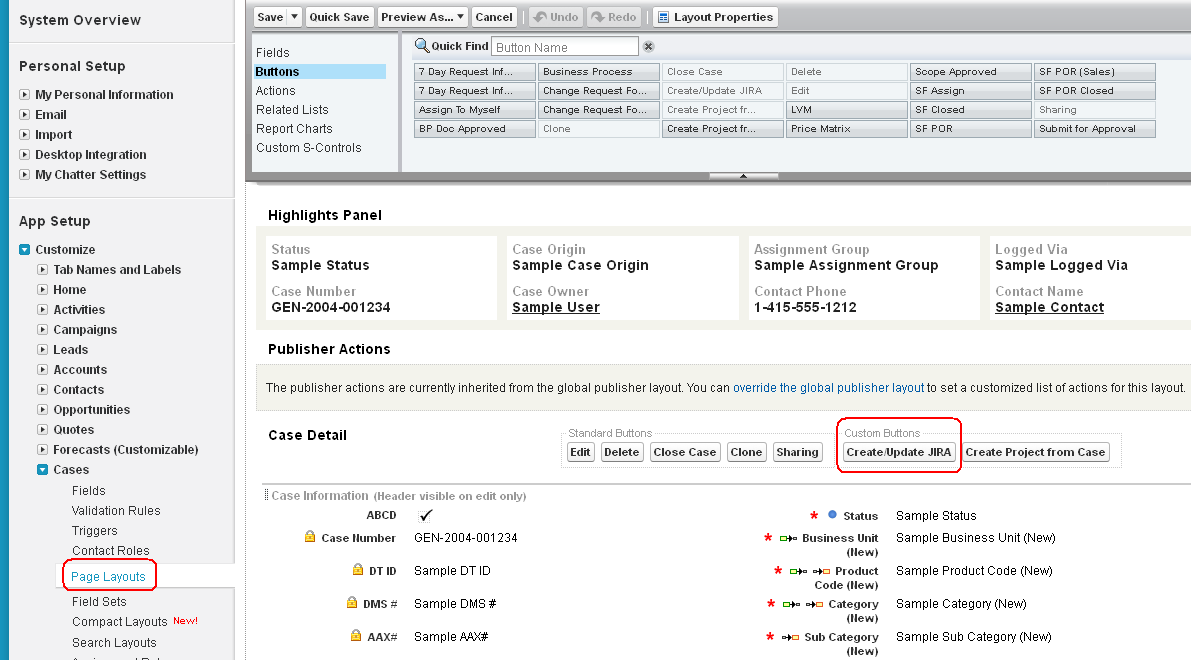
**Note: -** Where <Security Token> is the value from the Jira under Initial Setup (Refer ‘URL Security Token’ field in section ‘Initial Setup under CRM Setup)



* Click Save and the custom button is listed as shown below



* Next place the created custom button on the page layout of your choice.
* Go to Page Layouts, click Edit link next to DT Case
* Place the custom button “Create/Update JIRA” under the Custom Buttons section by dragging and dropping



* The custom button appears on the Case as shown below



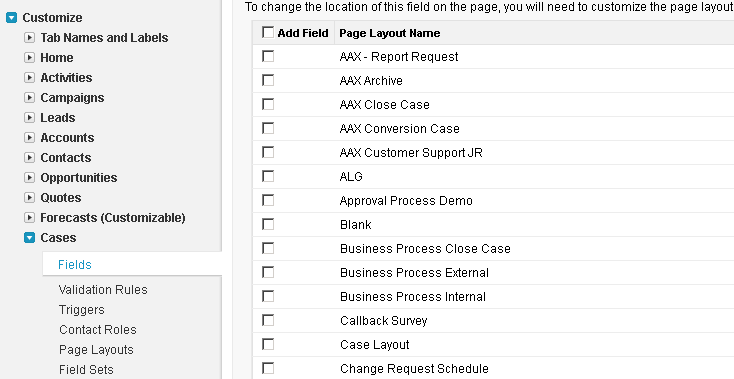
### Creating Custom Fields

* In Sales Force go to “Set Up”-> “App Setup”->”Customize”->”Cases”->”Fields”
* Click “New” button under Case Custom Fields & Relationships

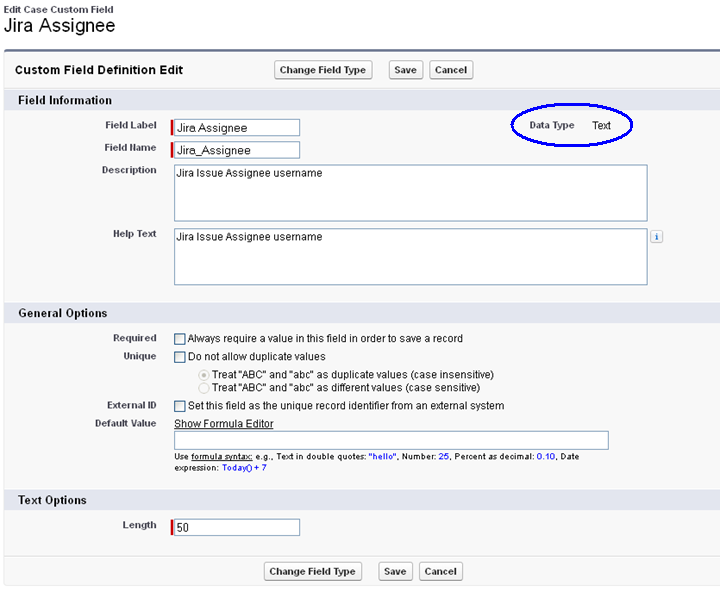


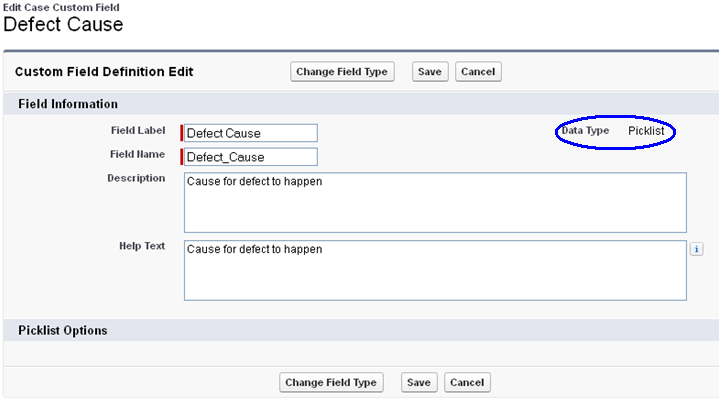
* Create the below mentioned custom fields, field
* Jira Assignee
* Defect Cause
* Environment
* Jira Release
* Jira Issue Key
* Product Code (New)
* Jira Project
* Jira Severity
* Jira Status
* Test Phase
* Performance Testing
* Jira Priority
* Jira Key

Add the field into ‘Page layout’ of your choice while creating. Select the checkbox and click ‘Save’, will add the custom field into the page layout where custom field usage expected and create the field.

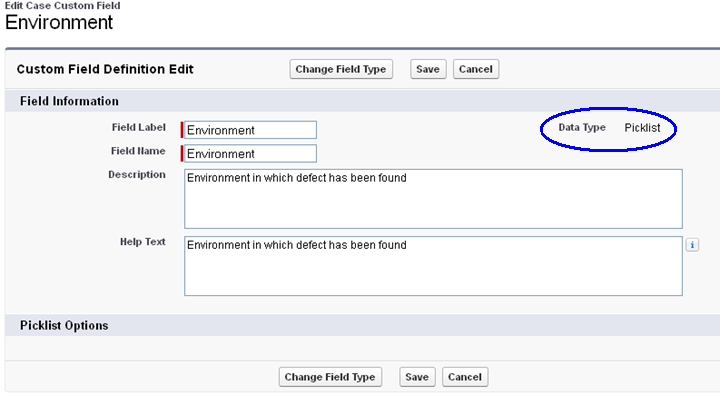


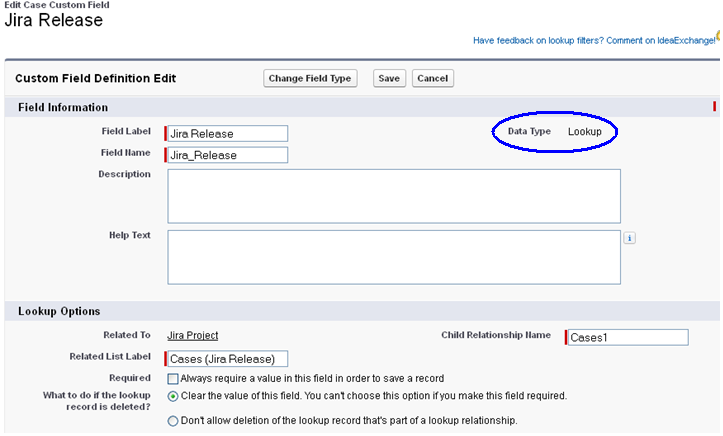
Please refer screenshots below for the creation of each custom field mentioned above

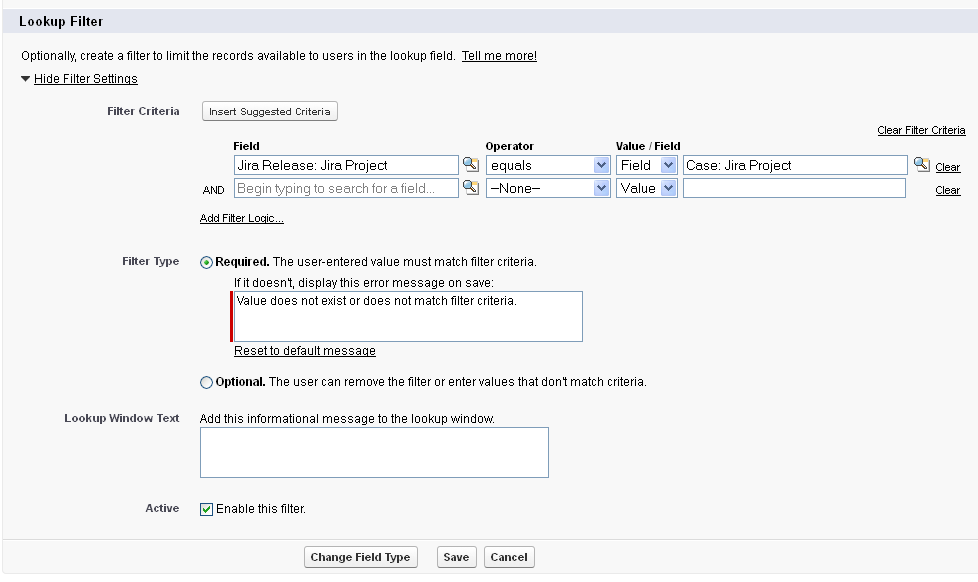


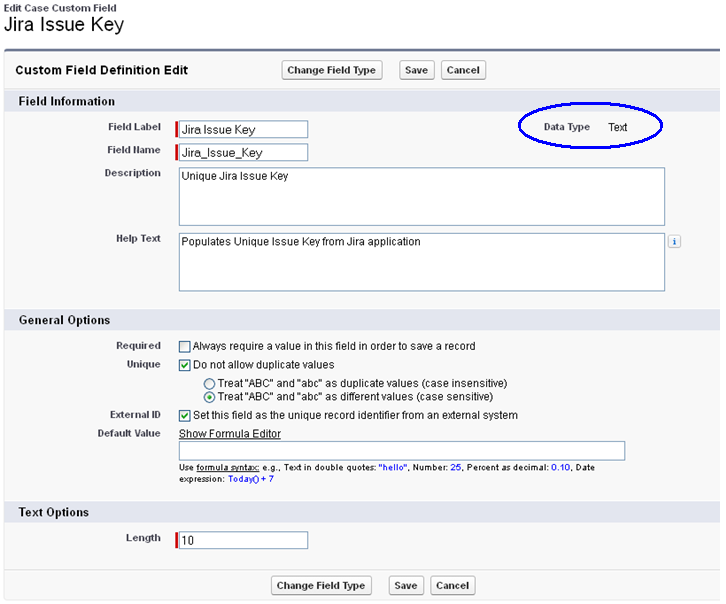


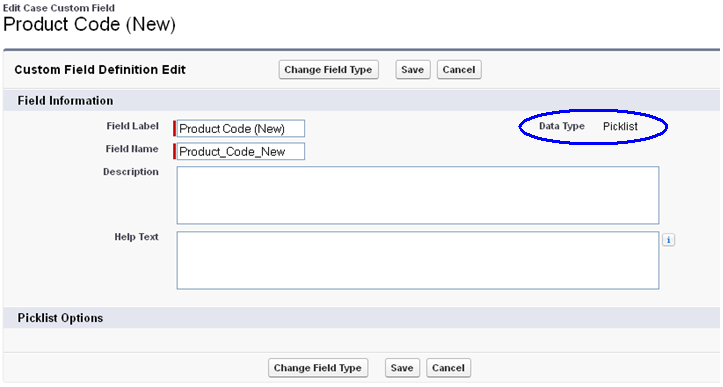
**Picklist Options:** Changed requirement, New requirement, Missed functionality, Unit test deficiency, Code Defect, Collateral damage, Existing issue, Compatibility issue, Dev integration test deficiency, Test Deficiency, Improper code move, Partner Defect, Environment issue, Performance, Rejected



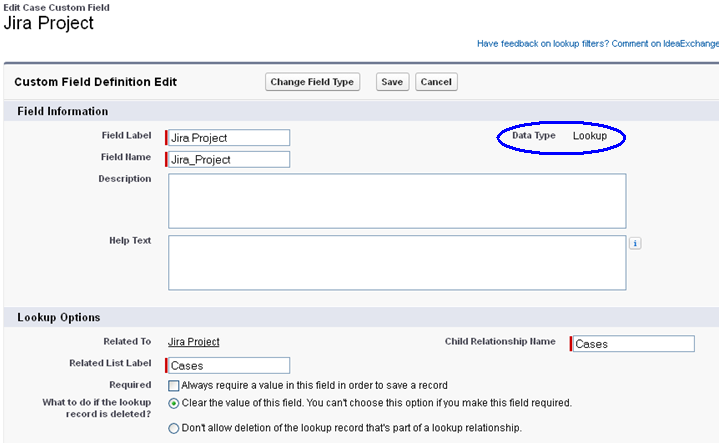


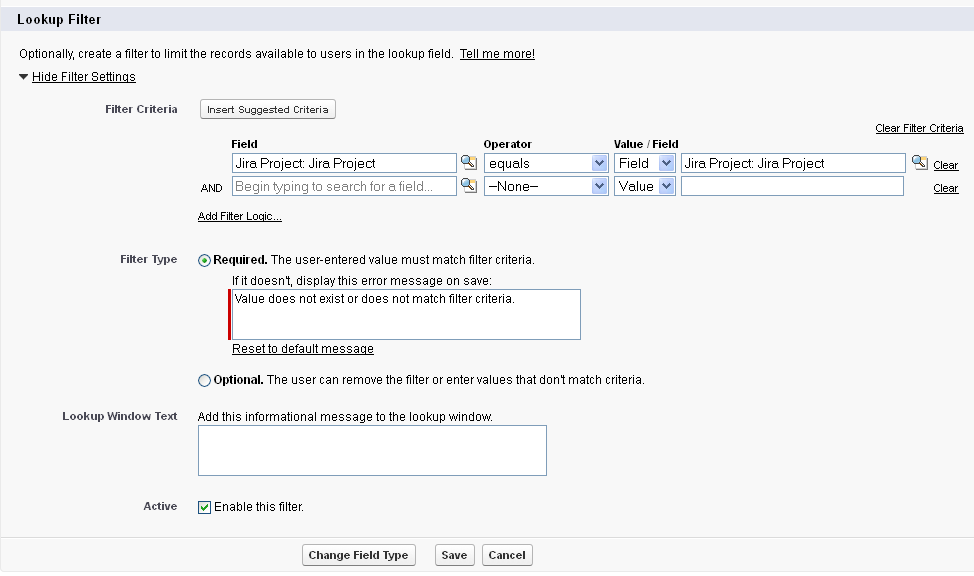


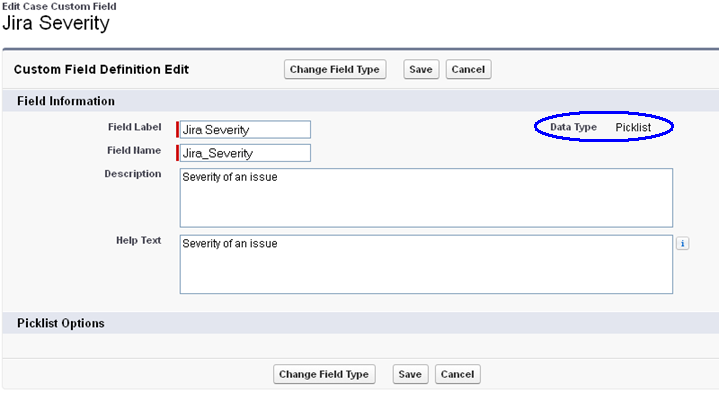




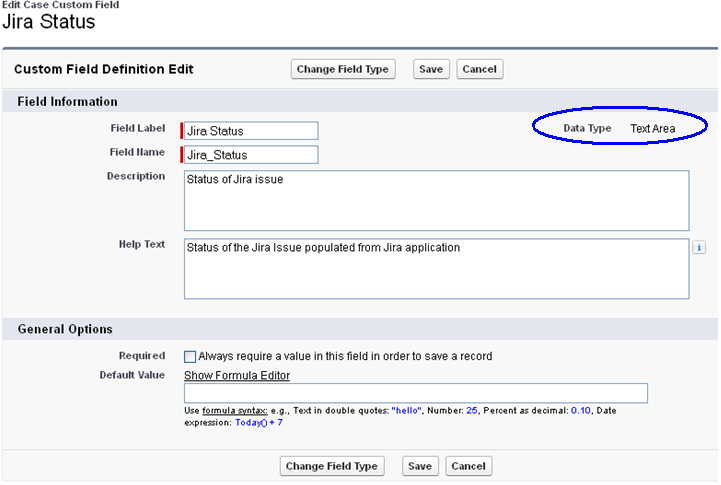
**Picklist Options**: <Pick values from Product field>

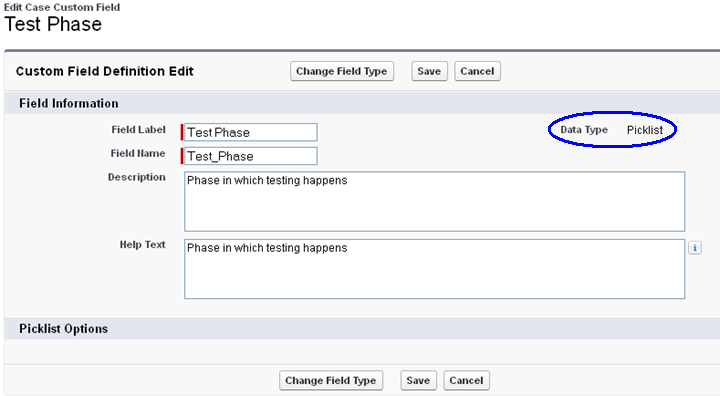




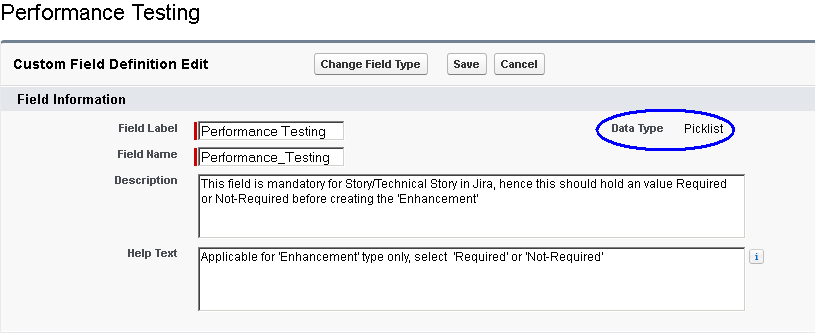


**Picklist Options**: High (show stopper), Low (work around), Medium (difficult work around)

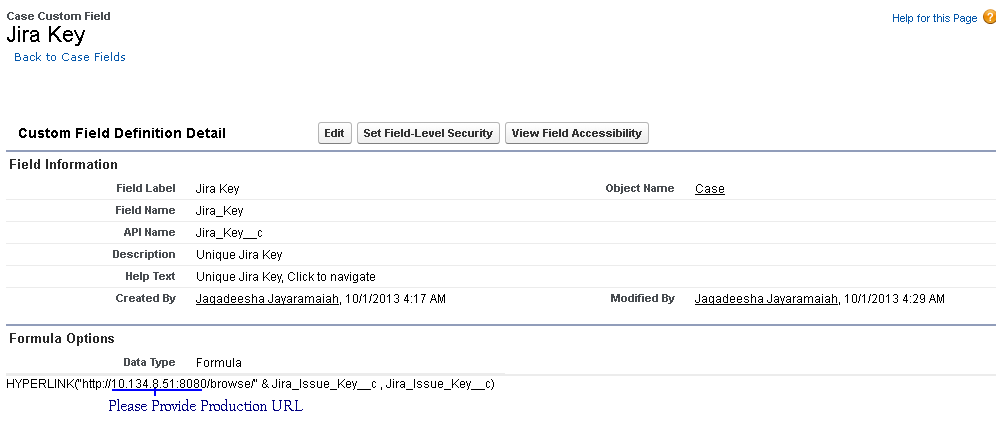


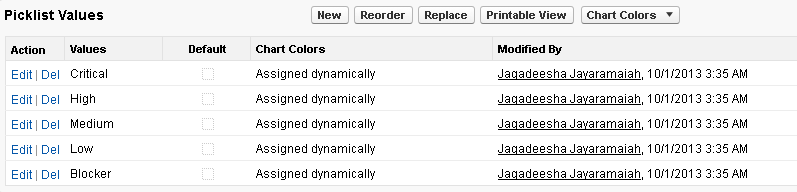


**Picklist Options**: BVT, Functional, Performance, Regression, Security

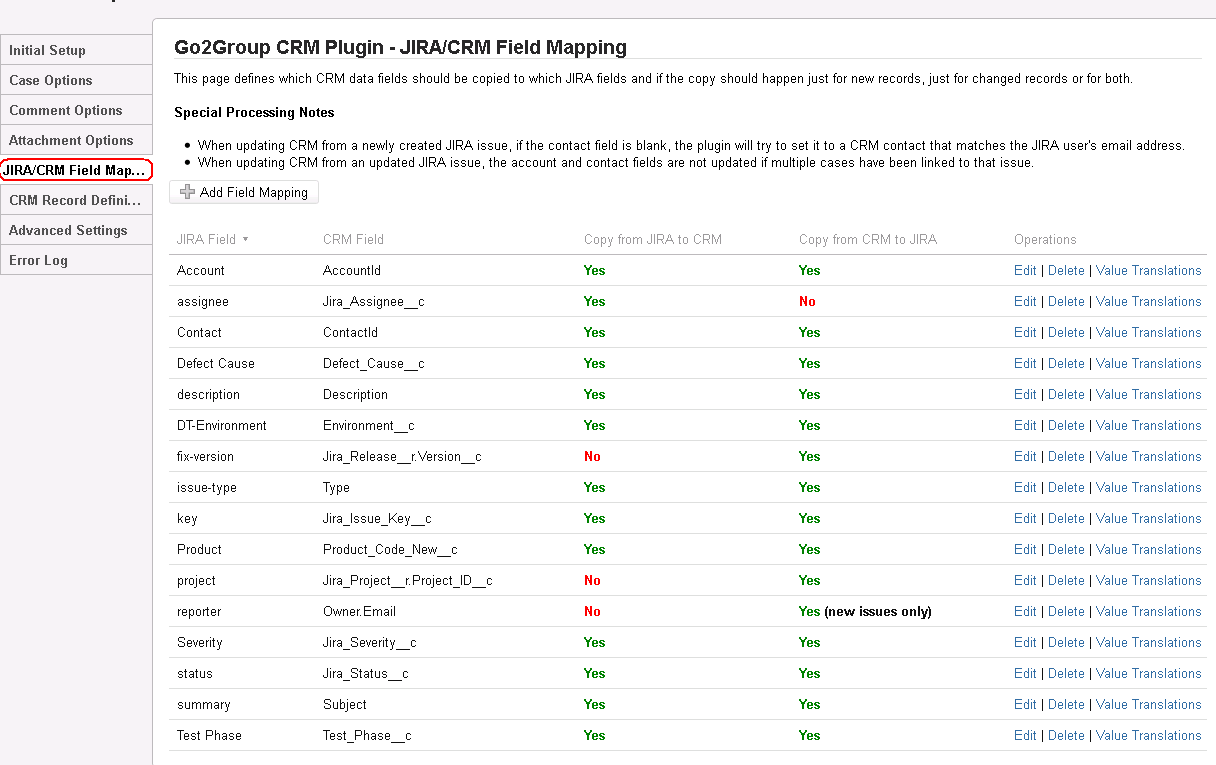


**Picklist Options**: Required, Not-Required (This field should be visible only for ‘Enhancement’ Type)

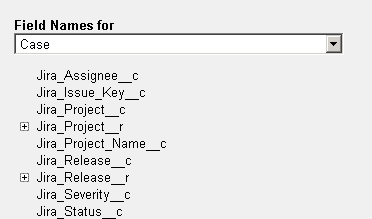




* Map the above created custom fields to Jira fields as shown bellow

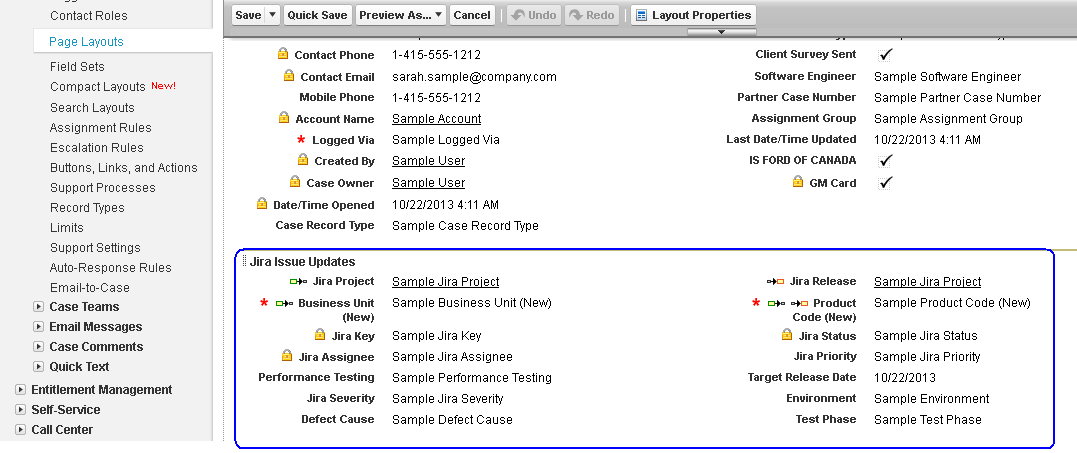


Note: SalesForce custom field name appended with ‘\_c’ and appears as shown in below



### Custom Field Alignment for Case

* Go to Setup
* Under Customize > Cases > Page Layouts
* Create a section called ‘Jira Issue Updates’
* And place/align the custom fields by dragging and dropping under ‘Jira Issue Updates’ section as shown below,



# Notes

1. Case Type ‘Enhancement’ creates ‘Technical Story’ issue type in Jira
2. Case Type ‘Problem’ creates ‘Defect’ issue type in Jira
3. Fields Defect Cause, Environment, Jira Severity and Test Phase are mandatory for Salesforce Case type ‘Problem’ replication to Jira. Hence, please ensure to fill these details while creating Case type ‘Problem’
4. Field ‘Performance Testing’ is mandatory to replicate Salesforce case type Enhancement
5. Field ‘Jira Priority’ is mandatory to replicate both Salesforce case type Enhancement and Problem to Jira
6. While creating Salesforce case, leave fields Jira Assignee, Jira Status and Target Release Date blank as these field updates are received from Jira and specific issue created.
7. Jira Project and Jira Release fields are lookup list values. These fields are not updated (when Jira issue created/mapped to Salesforce Case) as these fields are read-only and doesn’t accept dynamic values
8. Salesforce custom field ‘Jira Issue Key’ shouldn’t be displayed on Case Layout, as another custom field ‘Jira Key’ will pick the value from field Jira Issue Key and displays upon replication.
9. If both mapped fields from Jira and Salesforce carry same field values, then it’s not recommended to specify value transitions.
10. Business Unit (New), Product Code (New) and Target Release Date fields are used in field mappings. Here all three fields are existing and used them for mapping. If they do not exist, please create.
11. Field Salesforce: Business Unit (New) and Jira: project-category should hold same values , please refer attachments below
12. Field Salesforce: Product Code (New) and Jira: Product should hold same values, please refer attachments below



1. Currently replication happens on click of button ‘Create/Update Jira’, this trigger need to be moved to L-3 support Escalation point (once its finalized in sales force)