Agenda:

* NS – NetSuite
* SF – SalesForce
* Jira

Overview:

1. AJ’s integration will create the NS Sales Order from SF Service Order. The following fields will be populated on the NS Sales Order:
   1. Customer
   2. SF Opportunity ID
   3. Item lines
2. Upon creation of NS Sales Order, a script on the backend will create the NS Project record:
   1. Project Name = Opportunity ID
   2. Customer = Customer from Sales Order
3. Upon creation of NS Project, a script will create the Jira Epic with the following fields:
   1. Summary = Opportunity ID
   2. Description = Memo
   3. Project ID = project id found in NS Customer record

Questions:

1. On the SOW, the text from the 2nd page onwards seem to be customized according to the type of contract/service order.
   1. Will this text also be carried over from Salesforce? TBA
   2. How will these be stored in NetSuite and populated on the PDF? TBA
2. When the NS Sales Order is created, is it assumed that the Customer is already available as a Project in Jira?

* ie When Service Orders are created in SalesForce, are these already tied up to a Project in Jira?
* We’re asking this because we need a Project ID when creating the Jira Epic. Jira Project = NS Customer.
* Will the Jira Project Id be available in the SalesForce side?

- Assumed that NS Customer will be manually created when SalesForce customer is created in preparation for SO creation.

1. Will we attach SO PDF in Jira Epic? *Yes*

Technical Requirement:

1. CTC – Create Project/Jira Epic UE
   1. AfterSubmit:
      1. If the context = CREATE and created via Web Services, call the suitelet script *CTC – Create Project/Jira Epic SL*
2. CTC – Create Project/Jira Epic SL
   1. Will create the NS Project and Jira Epic
   2. Parameters:
      1. soId
      2. opportunityId
      3. customerId
      4. jiraProjectId
   3. Logic:
      1. Generate SOW by printing SO, save it to File Cabinet
      2. Create NS Project:
         1. Project name = opportunityId
         2. Customer = customerId
      3. Once the NS Project is created, update Sales Order with Project ID
      4. Create the Jira Epic:
         1. Check if the Jira Project Id has a value and exists in Jira
            1. If the Jira Project exists, create the Jira Epic
            2. Otherwise, create the Customer first and then the Jira Epic