

FinancialForce & Jira Integration

One team serving the customer

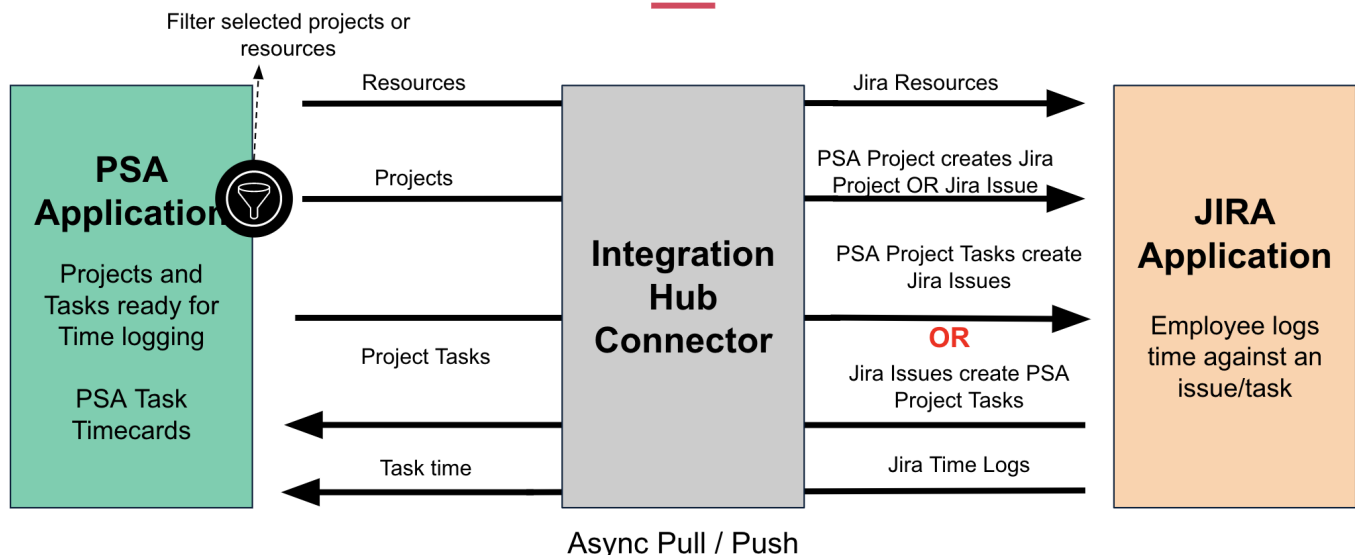
Whether used by a technical team doing development as part of a project or by a project team working in an agile fashion, Atlassian Jira is often key to the success of services organizations. While FinancialForce PSA is the system of record to manage the sales to delivery process holistically—including the financial view of a project—some resources spend all their time in Jira.

The FinancialForce-to-Jira connector allows you to seamlessly connect FinancialForce PSA and Jira to streamline your processes, ensuring that resources who use Jira can stay in sync with the Project and enter critical information such as time worked.

This integration allows resources to work in the tool best suited for their role, stay fully aligned around the work to be done, and enter critical data only once. The project manager and practice lead can see one comprehensive view of the project, allowing them to monitor health, manage change, and ensure billing and revenue forecasting remain current. As a result, your organization can more successfully deliver projects on time and increase customer satisfaction.

With our Fall 2020 release, we have added the ability to synchronize PSA Tasks and Jira Issues, which brings the added benefit of synchronizing task time. Each organization must choose which direction they want the synch to go - PSA Tasks create Jira Issues or Jira Issues create PSA Tasks - only one option is possible, it is not bidirectional.

JIRA to PSA Connector flow (Task level)



Key benefits

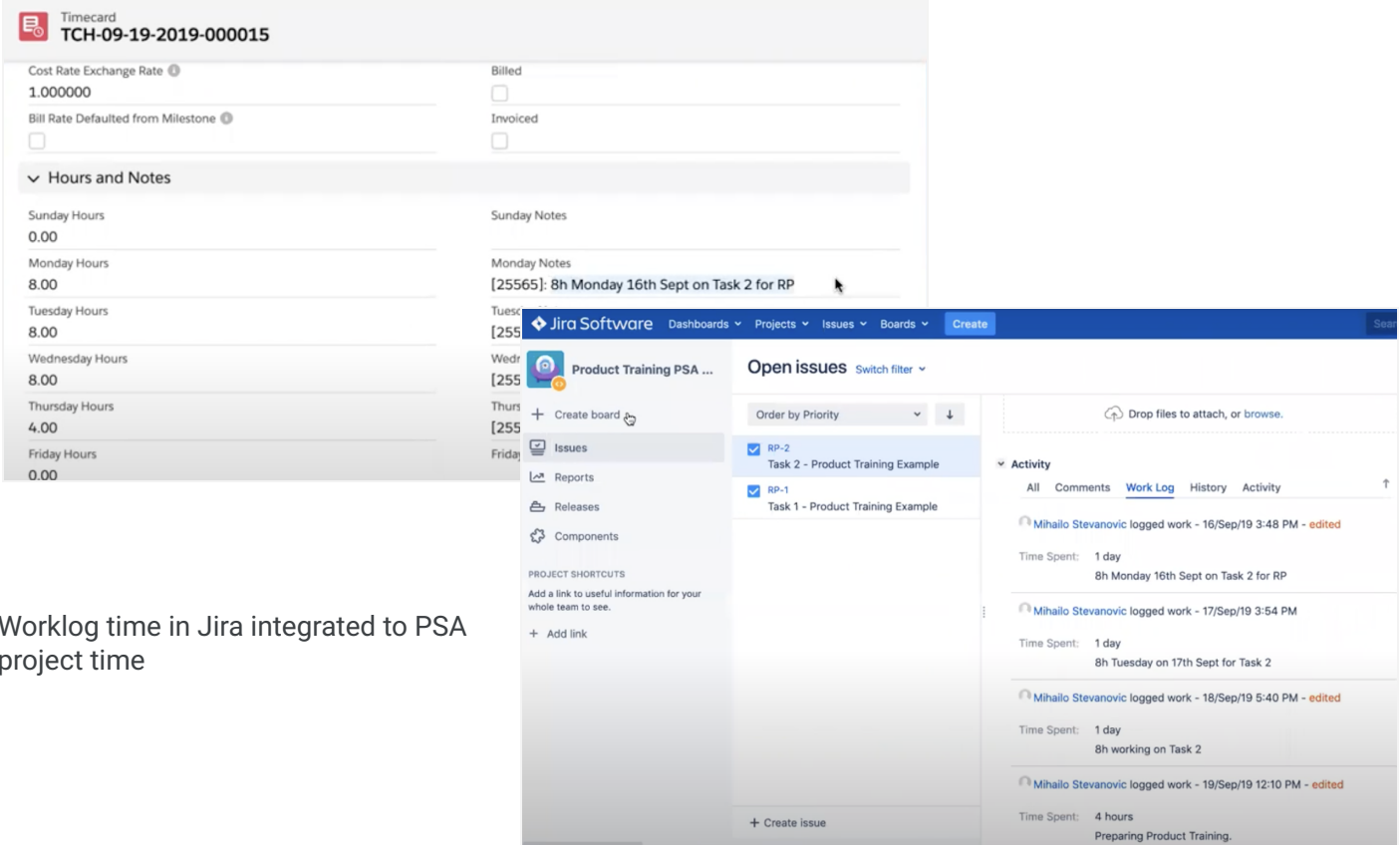
- Comprehensive view of project health
- Shorter time to invoice
- Full synchronization between FinancialForce PSA and Jira, no re-entry
- Resources enter critical data once

Capabilities

- Sync eligible FinancialForce PSA resources to Jira users.
- Sync eligible FinancialForce PSA projects to Jira projects, or issues of a predetermined type.
- Time entry in Jira is synced back to the task level or project level in PSA
- Automatically update a FinancialForce PSA project field when the related Jira issue is moved to a specific status.
- Sync Project Tasks to create Jira issues or Jira issues to create project tasks

Prerequisites

- Jira Cloud or Jira Server 8.0 or newer
- Salesforce org with FinancialForce PSA installed and configured - Jira users sending data to PSA must have the appropriate PSA licenses
- FinancialForce PSA Fall 2020 version or later for Task sync
- Integration Hub Connector: FinancialForce PSA to Jira



The screenshot illustrates the integration between Jira and FinancialForce PSA. On the left, the FinancialForce PSA interface shows a 'Timecard' for project 'TCH-09-19-2019-000015'. It includes fields for 'Cost Rate Exchange Rate' (1.000000) and 'Billed' status. Below these is a 'Hours and Notes' section with a table for daily hours (Sunday to Friday) and a 'Notes' section. On the right, the Jira Software interface shows a 'Product Training PSA' project. It displays 'Open issues' with a list of tasks (RP-2, Task 2 - Product Training Example) and a 'Work Log' section. The 'Work Log' shows time spent on tasks, such as '8h Monday 16th Sept on Task 2 for RP' and '8h Tuesday on 17th Sept for Task 2'. The Jira interface also includes a sidebar with navigation options like 'Dashboards', 'Projects', 'Issues', 'Boards', and 'Create'.

Worklog time in Jira integrated to PSA project time