

FinancialForce & Jira Integration

One team serving the customer

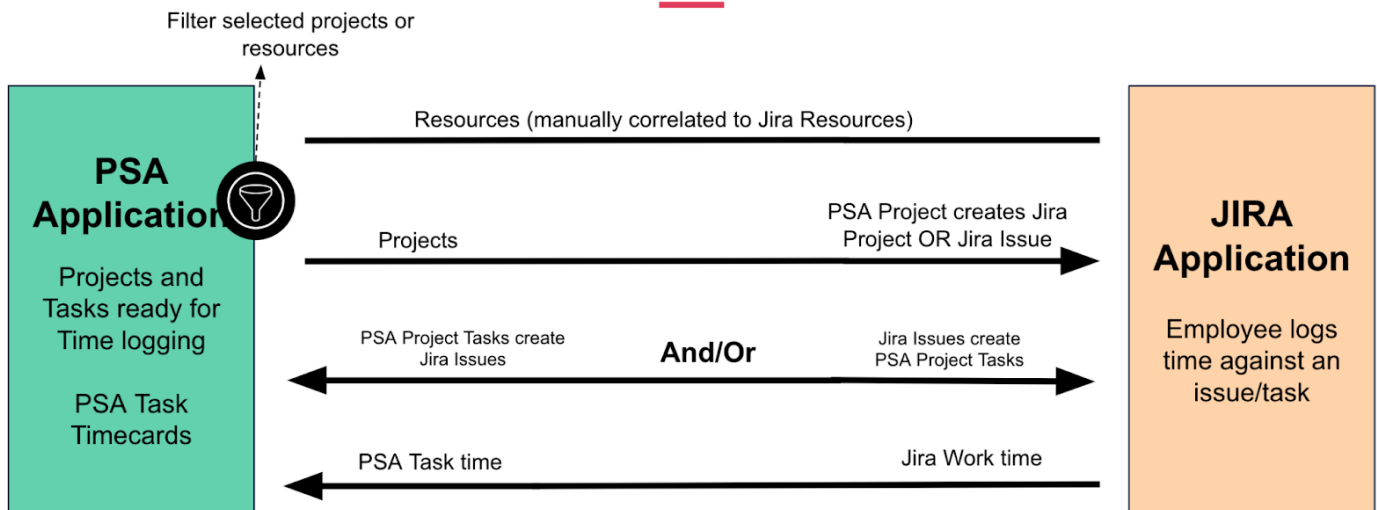
Whether used by a technical team doing development as part of a project or by a project team working in an agile fashion, Atlassian Jira is often key to the success of services organizations. While FinancialForce PSA is the system of record to manage the sales to delivery process holistically—including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

PSA Direct for Jira 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.

The solution offers the ability to synchronize PSA Tasks and Jira Issues, which brings the added benefit of synchronizing task time. Each organization can choose to sync one way or bi-directional for PSA Tasks and Jira Issues.

PSA Direct for Jira



Key benefits

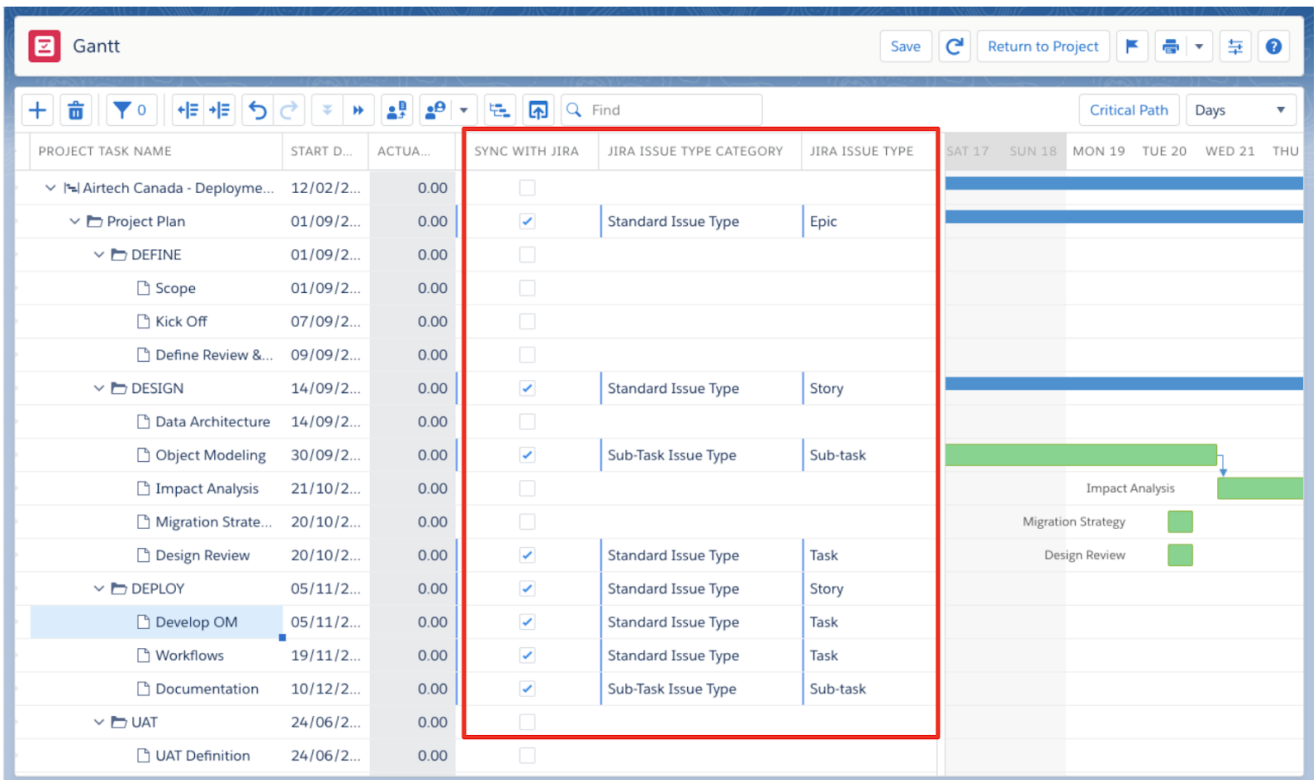
- Comprehensive view of project health
- Shorter time to invoice
- Full synchronization between FinancialForce PSA and Jira, no re-entry
- Resources enter critical data once

Capabilities

- Sync eligible FinancialForce PSA 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 FinancialForce PSA project fields when the based on Jira project status changes.
- Sync Project Tasks to create Jira Issues, Jira issues to create Project Tasks, or bi-directional synch

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 2021 version or later for Task sync
- PSA Direct for Jira



PROJECT TASK NAME	START D...	ACTUA...	SYNC WITH JIRA	JIRA ISSUE TYPE CATEGORY	JIRA ISSUE TYPE
▼ Airtech Canada - Deployme...	12/02/2...	0.00	<input type="checkbox"/>		
▼ Project Plan	01/09/2...	0.00	<input checked="" type="checkbox"/>	Standard Issue Type	Epic
▼ DEFINE	01/09/2...	0.00	<input type="checkbox"/>		
Scope	01/09/2...	0.00	<input type="checkbox"/>		
Kick Off	07/09/2...	0.00	<input type="checkbox"/>		
Define Review &...	09/09/2...	0.00	<input type="checkbox"/>		
▼ DESIGN	14/09/2...	0.00	<input checked="" type="checkbox"/>	Standard Issue Type	Story
Data Architecture	14/09/2...	0.00	<input type="checkbox"/>		
Object Modeling	30/09/2...	0.00	<input checked="" type="checkbox"/>	Sub-Task Issue Type	Sub-task
Impact Analysis	21/10/2...	0.00	<input type="checkbox"/>		
Migration Strate...	20/10/2...	0.00	<input type="checkbox"/>		
Design Review	20/10/2...	0.00	<input checked="" type="checkbox"/>	Standard Issue Type	Task
▼ DEPLOY	05/11/2...	0.00	<input checked="" type="checkbox"/>	Standard Issue Type	Story
Develop OM	05/11/2...	0.00	<input checked="" type="checkbox"/>	Standard Issue Type	Task
Workflows	19/11/2...	0.00	<input checked="" type="checkbox"/>	Standard Issue Type	Task
Documentation	10/12/2...	0.00	<input checked="" type="checkbox"/>	Sub-Task Issue Type	Sub-task
▼ UAT	24/06/2...	0.00	<input type="checkbox"/>		
UAT Definition	24/06/2...	0.00	<input type="checkbox"/>		

Easily set how you sync data with Jira and assign issue types.

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