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.

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 integrated back to the relevant project.
- Automatically update a FinancialForce PSA project field when the related Jira issue is moved to a specific status.

**Prerequisites**

- Jira Server or Jira Cloud licensing
- Salesforce org with FinancialForce PSA installed and configured
- Integration Hub Connector: FinancialForce PSA to Jira

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Worklog time in Jira integrated to PSA project time

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