Faye Business Systems Group

Sugar JIRA
Integration Application
Spec Sheet

Taking Productivity And Project Visibility To Another Level.

SugarCRM delivers an intgrated solution that empowers every user who interacts with customers to better understand and engage their customer, so every connection drives value. SugarCRM's market-leading open Customer Relationship Management (CRM) platform delivers the agility, flexibility, and security required to equip each customer facing professional with the information and tools they need to know their customers better, do their job better, and deliver a consistent, superior customer experience across the organization, every time.

JIRA is the project tracker for teams planning, building and launching great products. Thousands of teams choose JIRA to capture and organize issues, work through action items, and stay up-to-date with team activity. Jira is used by 19,000 companies, in 115 countries. Clients include: Facebook, Hulu, Ebay, Netflix, Cisco, NASA, Adobe and Twitter.

The FayeBSG SugarCRM JIRA Integration Application gives users the ability to monitor and track Jira issues from within the SugarCRM Ecosystem. CRM users can use dashboards and other standard Sugar tools to stay abreast of critical project developments from within Sugar, being able to look at issues by account, by type, and by priority. A Critical Issues Dashboard has been created for the Sugar home screen to allow users to be alerted when any issue becomes in danger of going over budget or past due.

SUGARCRM

JIRA

Jira Issue Visibility in Sugar

FUNCTIONALITY INCLUDES:

- The Jira Module displays all Jira issues with project and assignee reporting available.
- The Jira Module enables users to create Jira issues from within Sugar and assign to the relevant user.
- Users can see all issues or only open issues for that specific client from within a client account view in Sugar.
- The Sugar Home Screen shows a Jira Open Issues dashlet with all open issues ordered by priority
- The Sugar Home Screen shows a "High Priority!" dashlet listing all issues past their due dates.
- The Sugar Home Screen shows a "Due Today!" dashlet listing all issues due today or for the current week.

Search Jira Issues

Name		Issue Key		JIRA Type		Priority	
Status		Project Key					

Search   Clear   Advanced Search

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Name	Issue Key	Project Key	JIRA Type	Priority	JIRA Date Created	Due Date	Assignee
Purchase Order Module Implementation	STEPAC-5	STEPAC		Medium	06/04/2013	08/16/2013	lisastewart
Sage 100 Implementation	HOUGLA-2	HOUGLA		Medium	04/02/2013	08/01/2013	susang
New MAS Implementation	LIGHTF-1	LIGHTF		Medium	05/16/2013	07/26/2013	lisastewart
SugarCRM Implementation	CROSSR-1	CROSSR		Medium	05/02/2013	07/15/2013	susang
Implement EDI for AutoZOne	LLOMAT-20	LLOMAT		Medium	06/04/2013	06/28/2013	davidr
C.22 - Create Confirmation Letter Template (Mail Merge) in SugarCRM	THEBLA-24	THEBLA		Medium	05/08/2013	06/17/2013	chino
Sugar Jump Start	DIGNIR-1	DIGNIR		Trivial	05/29/2013	06/14/2013	matthewbradbury
C.23 - Commission Edit Maintenance	THEBLA-26	THEBLA		Medium	05/13/2013	06/14/2013	markp
C.24: Custom Salesperson Commission Report	THEBLA-27	THEBLA		Medium	05/13/2013	06/14/2013	wescurtis
Set Up CDS	COMCON-17	COMCON		Major	04/22/2013	06/14/2013	kylelowry

Assigned to: Administrator		Date Modified: 06/04/2013 07:05pm by Administrator	
Teams: Global		Date Created: 06/04/2013 07:05pm by Administrator	

▼ InsideView

▲ Jira Issues

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Name	Due Date	Issue Key	Project Key	Assignee	JIRA Type	Priority	JIRA Date Created
Software Purchases and Renewals Enhancement	06/07/2013	FAYBUS-134	FAYBUS	stricklandm		Medium	05/30/2013
Inactive Opportunities Email Summary	05/31/2013	FAYBUS-132	FAYBUS	andrewstyles		Medium	05/29/2013
Convert Leads function in Sugar	05/31/2013	FAYBUS-118	FAYBUS	wescurtis		Medium	05/01/2013
Integrate Confluence to the Jira Menu	05/31/2013	FAYBUS-99	FAYBUS	kylelowry		Trivial	04/04/2013
Changes to Quotes Module in FAYBUS Sugar	05/28/2013	FAYBUS-112	FAYBUS	andrewstyles		Medium	04/25/2013
Upgrade Demo Instances to Sugar 6.7	05/28/2013	FAYBUS-128	FAYBUS	kylelowry		Medium	05/21/2013
Archiving Emails to Sugar - add to Account & Lead							
Sugar vs Salesforce Webinar Campaign							
Client Activity - Custom Report							
Last Call Date Field							

Changes to Quotes Module in FAYBUS Sugar

Edit ▼

Name	Changes to Quotes Module in FAYBUS Sugar	Assignee	andrewstyles
Issue Key	FAYBUS-112	Project Key	FAYBUS
JIRA Date Created	04/25/2013	JIRA Date Modified	05/17/2013
JIRA Type		Priority	Medium
Status	Resolved	Reporter	matthewbradbury
Resolution	Fixed	Resolution Date	05/17/2013
Original Estimate Seconds	21,600	Remaining Estimate Seconds	1,800
Description	Discuss with Kyle before beginning development.		

In the Quotes Module, create individual Products (Quote Line Items), so the end user selects the appropriate FayeBSG product(s) they are inputting to the Quote (rather than typing out manually).

Once the Quote is 'Closed – Accepted', the Product(s) will be visible in the Product subpanel on the Account.

"Product Trial" should be listed as an individual entry. If a product is then purchased following a trial, we'd want to see both of these entries in the account panel.

A list of products (with product codes) has been attached to this issue.

Faye Business Systems Group

Welcome to the software you've always wanted....

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Faye Business Systems Group is a technology consulting and software company that helps growing companies become more profitable by working with them to implement creative, innovative, and effective financial and business systems. Products currently include Sugar-CRM, Sage 100 ERP, Intacct, Acumatica, and a variety of award winning custom software solutions. Services include project management, software implementations, consulting, software development, training, and support. FayeBSG helps companies of all sizes run more efficiently, effectively, and profitably.

ALSO AVAILABLE FROM FayeBSG:

SugarCRM Constant Contact Integration
SugarCRM Sage 100 ERP Integration
SugarCRM Authorize.net Integration
SugarCRM Intacct Integration
SugarCRM QuickBooks Integration
SagarCRM ShoreTel Integration