

# Enable integration with JIRA

## INTRODUCTION

HappyFox- JIRA integration helps you in creating tasks in JIRA from within HappyFox, having a two-way sync of tickets updates and JIRA comments and also to view the issue specific fields and other custom fields from JIRA within HappyFox.

### ***Supported versions:***

- *JIRA Software Ondemand.*
- *JIRA Self Hosted - version 5.2 or higher.*

**Note:** If you are using the "New HappyFox" experience, please refer to [this article](#) to setup your JIRA app.

## CONFIGURATION SETUP

To enable JIRA integration, login to the HappyFox staff panel and go to Manage >> Integrations. Click on the configure link against JIRA listed under External Integrations.

## External

Below is the list of all the available modules

Active	Name	Description	
✓	Facebook Integration	Enables you to manage and reply to Facebook Posts and Messages via HappyFox.	<a href="#">configure</a>
✓	Twitter Integration	Automatically convert your Mentions and Direct Messages into Tickets	<a href="#">configure</a>
✗	SAML Integration	Allows for authentication using SAML	<a href="#">configure</a>
✓	CRM Integration	Allows for integration with different CRMs	<a href="#">configure</a>
✗	Freshbooks Integration	Allows for integration with Freshbooks	<a href="#">configure</a>
✗	Olark Integration	Allows for adding Olark conversations as tickets in HappyFox	<a href="#">configure</a>
✗	Twilio	Allows your staff receive calls in their browser from a twilio number.	<a href="#">configure</a>
✗	JIRA	Allows for converting tickets into JIRA issues, and more.	<a href="#">configure</a>
✗	Screencast	Allows staff/contacts to record and attach screencasts to tickets/KB/Forum posts.	<a href="#">configure</a>

## JIRA account set up

Now, enter your JIRA account URL(Base URL) in the first text box.

Example JIRA Account URL:

<https://johnhappyfox.atlassian.net>

We recommend adding a new user in your JIRA set up, for this integration purposes. You can do this under Settings->User Management. This user should have the following permissions in JIRA - create, edit issues and to add comments. This can be accessed at Projects-> Select Project-> Project Settings->Permissions.

This user should not have Admin permission (the admin user has certain special permissions. Since username and password is required for authentication, we enforce that the user integrating with HappyFox does not have ADMIN permissions for security purposes).

Enter this user's credentials in the username and password field. Enable the integration by checking the Active box and save the settings. While saving the settings the account details will be verified. If there are any errors, the errors will be reported and you are requested to check the details.

## JIRA Integration

Back to Integrations

### JIRA Account Details

Enter the details of the JIRA account you want to integrate

**JIRA Server URL**

**Username**

**Password**

☒ Active

**JIRA Notifications**

☐ Enable email notifications for JIRA Sync Notes

Save Settings

Reset

## JIRA Notifications

To receive email notifications when a new JIRA sync note is added, click on 'Enable email notifications for JIRA Sync notes' and customize Email Subject and Email Content, based on your requirement and click 'Save Settings'. This email will be sent to all the subscribers of the ticket.

## JIRA Notifications

☒ Enable email notifications for JIRA Sync Notes

### Email Subject

[Insert Tag](#)

JIRA comment added: {{ticket\_id}} {{subject}}

### Email Content

[Reset to Default](#) [Insert Tag](#)

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#### JIRA comment added to ticket {{ticket\_id}}

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Dear {{staff\_name}},

A JIRA comment has been added to the ticket {{ticket\_id}}.

[{{update\\_url}}](#)

View in JIRA: [{{jira\\_issue\\_url}}](#)

[{{jira\\_issue\\_comment}}](#)

Actual Ticket: {{subject}}

{{message}}

*Client: {{client\_name}}*

*Category: {{category\_name}}*

*Priority: {{priority}}*

*Status: {{status}}*

Helpdesk,

[{{http\\_url}}](#)

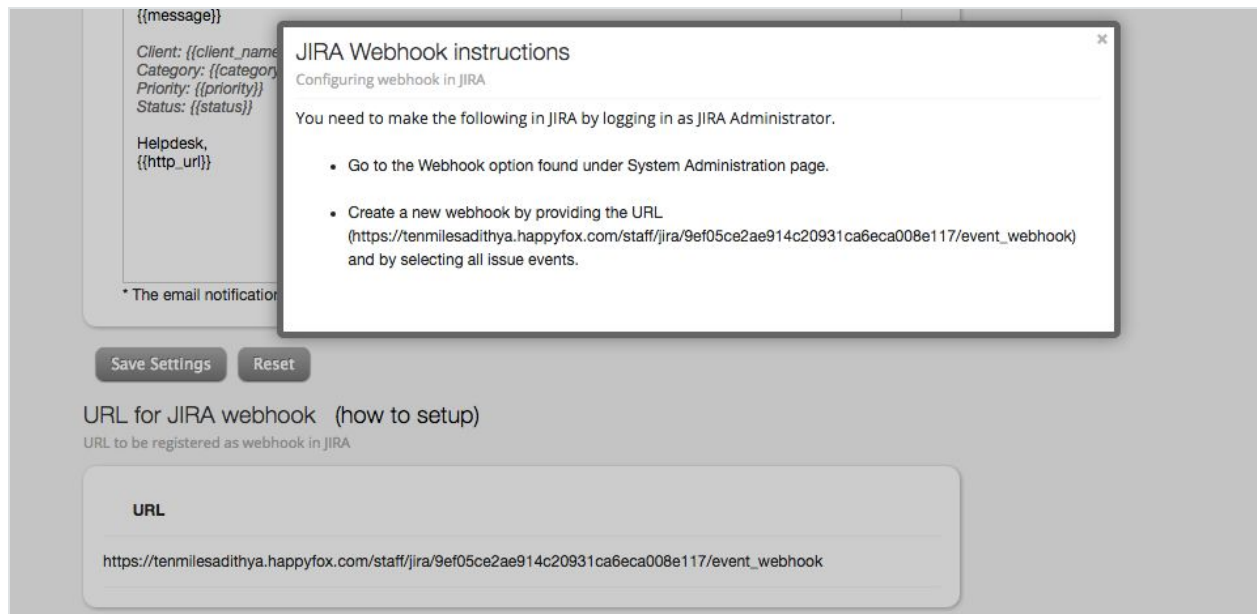
\* The email notification will be sent to all subscribers of the ticket

Save Settings

Reset

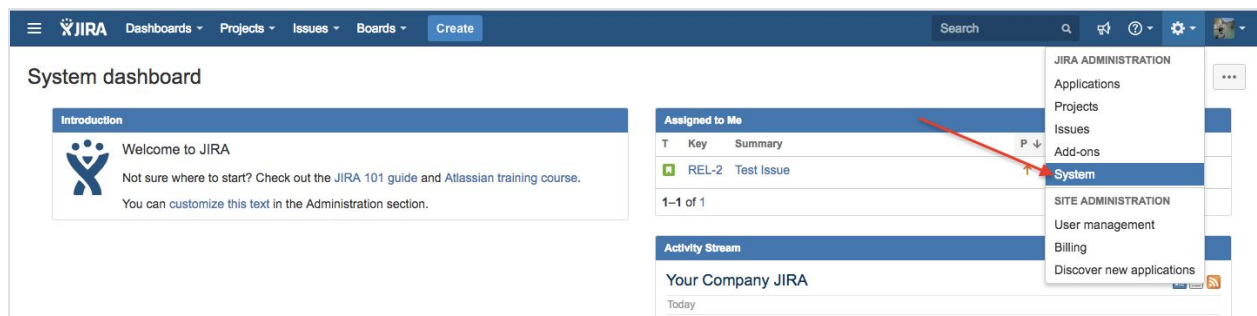
## Post setup configuration

Once the settings have been saved successfully, you will be presented with the instructions to add a WebHook in JIRA, as shown in the screenshot below. This is required for syncing the comments from JIRA to your HappyFox account.



The admin should ensure the following while setting up the WebHook.

Navigate to System settings as shown below



Navigate to WebHooks under Advanced Section as shown below.

MAIL		Russian (Russia) Spanish (Spain)
Global Mail Settings		
Outgoing Mail		English (United States)
Incoming Mail		(GMT+05:30) Kolkata
Send email		
ADMIN HELPER		
Permission helper		
Notification helper		
SHARED ITEMS		
Shared filters		
Shared dashboards		
ADVANCED		
Attachments		
Events		
WebHooks		
Services		
LexoRank management		

Default language	English (United States)
Default user time zone	(GMT+05:30) Kolkata
Options <span>?</span>	
Allow users to vote on issues	ON
Allow users to watch issues	ON
Allow users to share dashboards and filters with the public.	ON
Maximum project name size	80
Maximum project key size	10
Allow unassigned issues	ON
Logout confirmation	Never
User email visibility	Show to logged in users only
Comment visibility	Project Roles only
Exclude email header "Precedence: bulk"	OFF
Issue Picker Auto-complete	ON
JQL Auto-complete	ON

Click on "Create a WebHook".

Paste the WebHook URL that you had copied from HappyFox.

Ensure that all issue related events are selected as shown below.

New WebHook Listener

HF Listener

Name \*

New WebHook Listener

Status \*

Enabled

Disabled

URL \*

http://example.com/rest/webhooks/webhook1

You can use the following additional variables in the URL: \${attachment.id}, \${board.id}, \${comment.id}, \${issue.id}, \${issue.key}, \${mergedVersion.id}, \${modifiedUser.key}, \${modifiedUser.name}, \${project.id}, \${project.key}, \${sprint.id}, \${version.id}, \${worklog.id}

Read more

Description

Events

Issue related events

Events for issues and worklogs. You can specify a JQL query to send only events triggered by matching issues.

All issues

Syntax help

Attachment

☒ created

☒ deleted

Issue link

☒ created

☒ deleted

Issue

☒ created

☒ updated

☒ deleted

☒ worklog changed

Worklog

☒ created

☒ updated

☒ deleted

Comment

☒ created

☒ updated

☒ deleted

## Integration with tickets in HappyFox

Once the JIRA integration has been set up, there will be a new section shown in the Ticket detail page in HappyFox. Example of section, when no JIRA task is associated with the ticket is shown in the screenshot below.

Customer Info from Infusionsoft CRM   Add Tags to Infusionsoft CRM   [show more](#)

Email

godwin@happyfox.com

Name

Godwin

Information from JIRA   add new   link existing

No JIRA task is associated with this ticket.

Messages

Godwin

15 hours ago

% Permalink

Switch to 4G

Ticket created by Staff **Abhinayaa** , Assigned to **abhinayaa**, status set to **Open**, priority set to **Medium**, set Please specify the product colour to **dqsa**

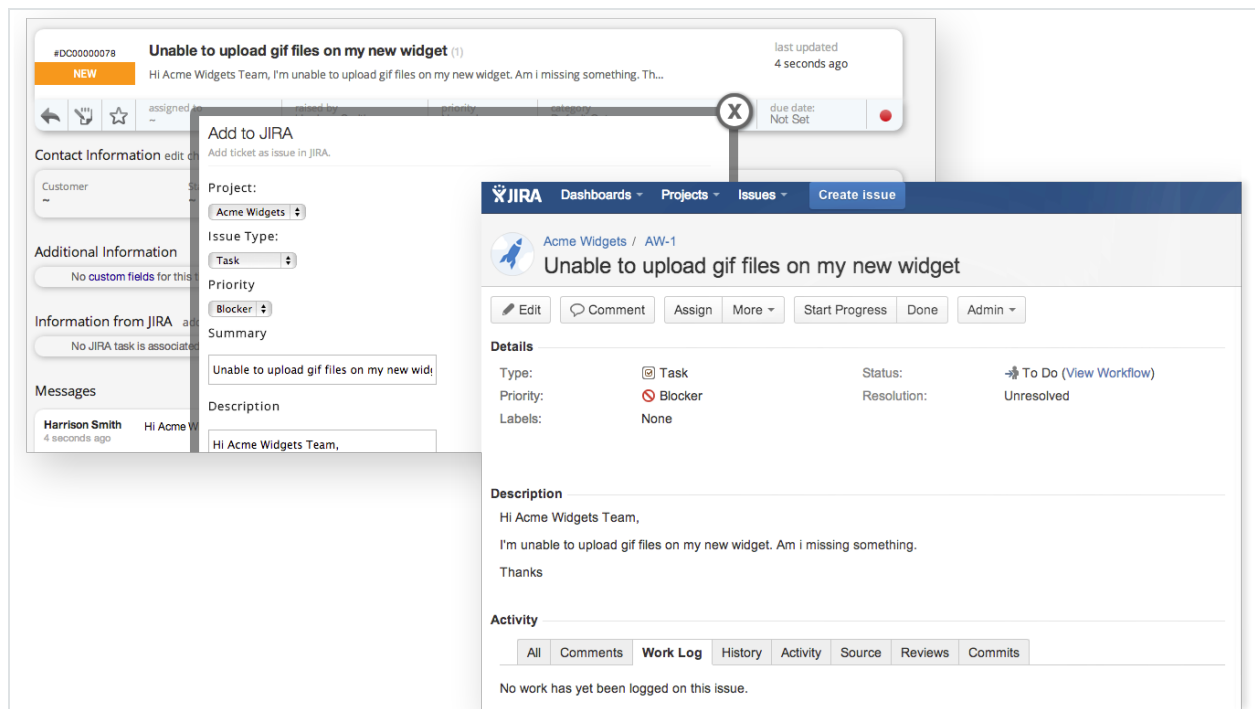


## **Creating a new JIRA task from HappyFox**

*To create a new task in JIRA from a ticket in HappyFox, the permission Create & Edit JIRA issues should be enabled in the Staff >> Roles section for the logged in staff.*

To add an issue, click on the "add new" link and this will open a facebox with details like Project name, issue type, custom fields etc from your JIRA account. HappyFox also provides the following options, which you can optionally check.

- Sync comments from JIRA
- Close the ticket when the JIRA task is closed



## Add to JIRA

Add ticket as issue in JIRA.

### Project:

jira\_integration

### Issue Type:

Task

### Priority

Blocker

### Url field CF

Also, you can link the ticket to an existing task in JIRA by entering the JIRA Issue Key.

The screenshot shows a Salesforce CRM interface with a modal dialog box titled "Link to JIRA". The dialog box has a close button (X) in the top right corner. Below the title, it says "Link ticket as issue in existing JIRA." followed by a text input field labeled "Jira Ticket Id". Below this field are two checkboxes: "Close this ticket when the JIRA task is closed." (unchecked) and "Synchronize the updates." (checked). At the bottom of the dialog are "Create" and "Cancel" buttons. The background interface shows a section titled "Case Custom Fields from Salesforce CRM" with a loading spinner, and a "Messages" section with a list of messages from "Vignesh Vaidyanathan" and "Mark" dated "25-Apr".

## Task created in JIRA

Once the task is created in JIRA, it will appear under the Issues section.

## Comments sync with JIRA

Comments which are synced from the JIRA task will be shown in HappyFox as shown below. the update is shown as a "JIRA Update" with the blue band (JIRA sync) indicating that this update in the ticket was from JIRA.

Messages

Harrison Smith  
18 minutes ago




Hi Acme Widgets Team,

JIRA Update  
7 minutes ago

JIRA SYNC

Comment added by Josh Appleseed (tmstaff1@gmail.com)

Right now we support only .png and .jpeg on the widgets. we will consider this as a feature request and we will work on it.



other recipients  
None

attachments  
None

Richard Lorentz  
2 minutes ago

Hi Josh,




Richard Lorentz  
3 seconds ago

Hi Harrison,

Right now we support only .png and .jpeg image file formats. Support of .gif on the widgets is on the road map. Will keep you posted on this.

Regards,  
Richard.

Sent update to customer



other recipients  
None

attachments  
None

*Comments sync from JIRA will be pushed to the HappyFox account only if SSL is enabled on your HappyFox account.*

## More Information from JIRA

Other information from JIRA, about the specific issue like the other custom fields data is shown in the Information from JIRA section. You can click on More info to view this data. The edit functionality will open a facebox in HappyFox to edit the basic information for the JIRA task (not all fields are supported). The options to sync updates and close the ticket, will be present, in case this setting has to be changed from before, while the task was initially created.

You can also click on "view in JIRA" to view the task fully in JIRA.

Information from JIRA			
edit		view in JIRA	
Free Text Field CF <b>you can type unlimited text here</b>	User Picker CF <b>admin</b>	Priority <b>Critical</b>	Group Picker CF <b>jira-users</b>
	Description <b>test</b>	Reporter <b>hdpuser</b>	JIRA issue key <b>PROJ-6</b>
Job Checkbox <b>true</b>	Issue Type <b>Task</b>	Summary <b>test</b>	Project <b>Project 2</b>
Resolution <b>~</b>	Workratio <b>-1</b>	Assignee <b>admin</b>	Url field CF <b>http://tenmiles.com</b>