

WHMCS JIRA Tickets Integration: Userguide

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Introduction

Combining functionalities of your support box and JIRA, we provide you with full-fledged tracking of time, billing, and activities aimed at your customers. The extracted information will be forwarded to WHMCS so the invoicing of both billable and non-billable items with detailed description from the support box is simple to run. Focus on your work and surprise your customers saving your time and effort due to *WHMCS JIRA integration*.

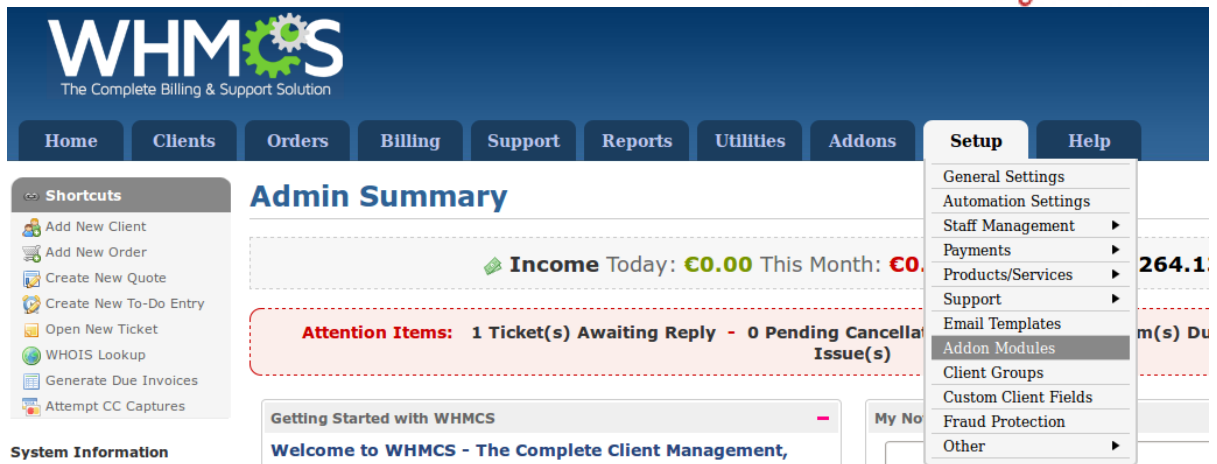
Functionality

1. Simplified support process – from planning to billing
2. Clearness between billable and non-billable items (with both being convertible into the Invoice)
3. Status of billing
4. Exact time spent on each customer
5. More clarity concerning the invoice for your customer
6. Clear overview of the accomplished scope of work

Userguide

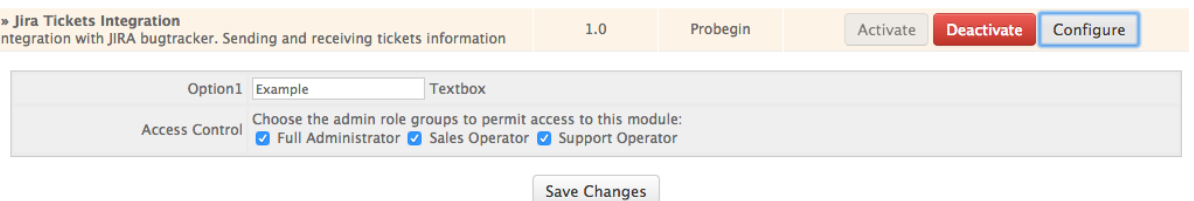
Activating the Jira Integration Module

1. Login at WHMCS
2. Unzip the Jira Integration Module and upload it to your root directory <whmcs root directory>/modules/addons/jira_tickets
3. Activate the uploaded Module within WHMCS
 - Go through path **Setup -> Addons**



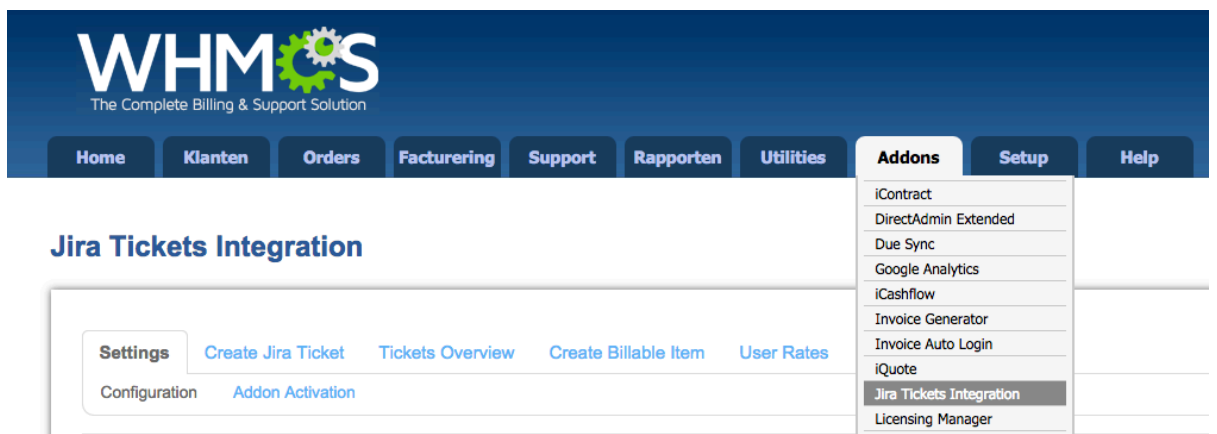
The screenshot shows the WHMCS Admin Summary page. The top navigation bar includes Home, Clients, Orders, Billing, Support, Reports, Utilities, Addons, Setup, and Help. The Setup menu is open, showing options like General Settings, Automation Settings, Staff Management, Payments, Products/Services, Support, Email Templates, Addon Modules, Client Groups, Custom Client Fields, Fraud Protection, and Other. The main content area displays 'Income Today: €0.00 This Month: €0.00' and 'Attention Items: 1 Ticket(s) Awaiting Reply - 0 Pending Cancellation Issue(s)'. A 'Getting Started with WHMCS' section is also visible.

- Press **Activate** button next to the Jira Integration Module
4. Check the Configuration
Once you have activated the module make sure that the users can access the module



The screenshot shows the configuration page for the 'Jira Tickets Integration' module. It includes a table with columns for Name, Version, and Author, and buttons for 'Activate', 'Deactivate', and 'Configure'. Below the table, there is a 'Textbox' field for 'Option1' and an 'Access Control' section with checkboxes for 'Full Administrator', 'Sales Operator', and 'Support Operator'. A 'Save Changes' button is at the bottom.

5. Go to the addon



The screenshot shows the WHMCS Addons page. The top navigation bar includes Home, Klanten, Orders, Facturering, Support, Rapporten, Utilities, Addons, Setup, and Help. The Addons menu is open, showing a list of addons including iContract, DirectAdmin Extended, Due Sync, Google Analytics, iCashflow, Invoice Generator, Invoice Auto Login, iQuote, Jira Tickets Integration, and Licensing Manager. The 'Jira Tickets Integration' addon is highlighted. Below the menu, the 'Jira Tickets Integration' page is visible, showing tabs for 'Settings', 'Create Jira Ticket', 'Tickets Overview', 'Create Billable Item', and 'User Rates'. The 'Settings' tab is active, showing 'Configuration' and 'Addon Activation' options.

6. Activate your Addon
- Go to the 'Addon Activation' tab under 'Settings'.
 - Enter your licence key and press 'Activate'

Settings [Create Jira Ticket](#) [Tickets Overview](#) [Create Billable Item](#) [User Rates](#) [About](#)

[Configuration](#) [Addon Activation](#)

Addon Activation

License Key

7. Setup your JIRA connection
 - Follow the steps at the bottom of the configuration page

JIRA Instructions: To integrate module with jira - follow this steps:

1. Go To Your JIRA system settings and select tab 'WebHooks';
2. Click 'Create a WebHook' button;
3. Add into URL field this link :
`http://whmcs.qa.probegin.com/modules/addons/jira_tickets/includes/jira.php?key=${issue.key}`
4. Change 'Status' option to 'Enabled';
5. In 'Issue' checkbox group select 'updated';
6. Press 'Save' button;

Configuration settings

Below you'll find instructions for each setting which you can set in the configuration within WHMCS.

Basic settings

1. **Default hour rate:** Set the default billing rate per hour
2. **Invoice Action:** Setup what to do with the invoice created by the billing item
3. **Date Finished:** When the issue should be closed

Global Configuration

Default Hour Rate:	<input type="text" value="50"/>
Invoice Action:	<input type="radio"/> Don't Invoice for Now <input type="radio"/> Invoice on Next Cron Run <input checked="" type="radio"/> Add to User's Next Invoice <input type="radio"/> Invoice as Normal for Due Date <input type="radio"/> Recur Every <input type="text"/> Never <input type="text"/> for <input type="text"/> Times
Date Finished:	<input type="radio"/> Date when issue was closed <input checked="" type="radio"/> Due Date (from issue)
User (JIRA access):	<input type="text" value="m.pirikh"/>
Password (JIRA access):	<input type="password" value="*****"/>
API URL (JIRA):	<input type="text" value="https://probegin-nl.atlassian.net/"/> <small>URL to Your JIRA account (example: https://your-domain.atlassian.net/)</small>
Jira Field ID For Billable Issue (yes/no option):	<input type="text" value="customfield_10105"/>
Jira Field ID For Billable Hours Field:	<input type="text" value="customfield_10600"/>
Jira Field ID For Ticket ID:	<input type="text" value="customfield_10300"/>
Jira Field ID For Billable Client:	<input type="text" value="customfield_10401"/>
Jira Field ID For Ticket URL:	<input type="text" value="customfield_11202"/>
Default Project (JIRA):	<input type="text" value="External"/>
Default Department (WHMCS):	<input type="text" value="test"/>
Admin User (WHMCS):	<input type="text" value="admin"/>
Close Ticket Status (Transition ID):	<input type="text" value="121"/>
Invoice description template	<input type="text" value="{issue-id} - {issue-title} - {due-date} - {working-hours} hours @ € {hours-rate} /hour"/> <small>Replace parameters: {due-date} {issue-title} {issue-id} {working-hours} {hours-rate}</small>
Automatic Billing When Issue Closed:	<input type="radio"/> OFF <input checked="" type="radio"/> ON

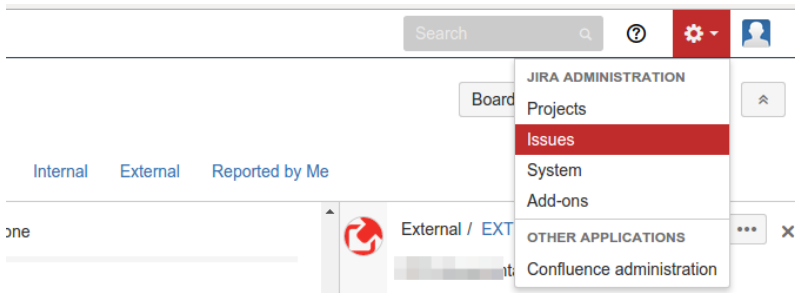
JIRA user settings

1. **User** (JIRA access): Your JIRA account username
2. **Password** (JIRA access): Your JIRA account password
3. **API URL** (JIRA): Url to your JIRA account (example: <https://your-domain.atlassian.net/>)

JIRA custom fields

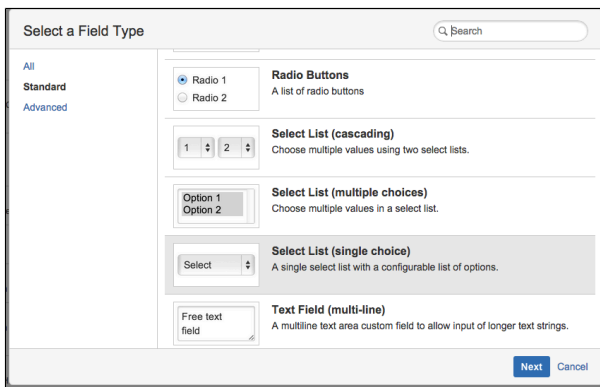
For this part you need to create 4 new custom fields in JIRA

1. Go to the **JIRA admin panel**
When logged in as a JIRA admin on your JIRA installation, go to the top right corner of your screen and enter **Issues**.

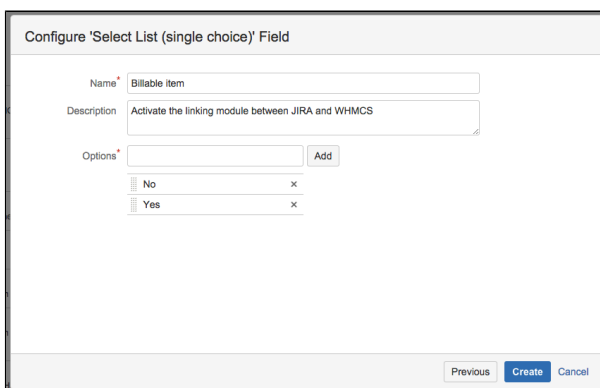


From the page that was opened user has to go to **Custom fields** in the sidebar on the left.

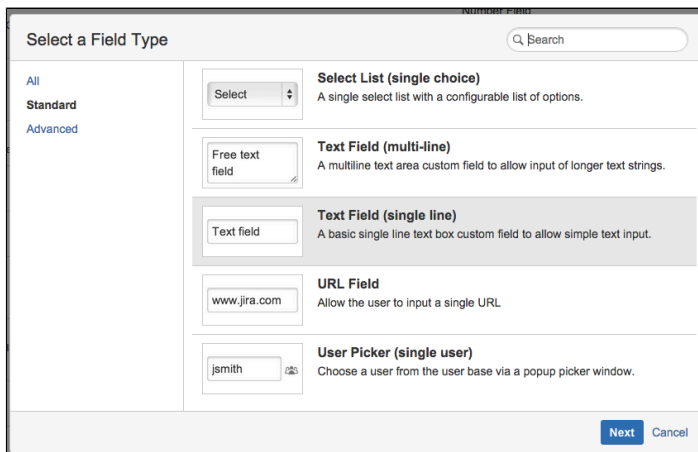
2. Add new Custom fields. Press the **Add custom field** button at the top right of the screen. You will need to create 4 new custom fields:
 - Billable Item - Select List (single choice)
 - Billable Hours - Text Field (single line)
 - Billable Ticket - Number Field
 - Billable Client - Text Field (single line)



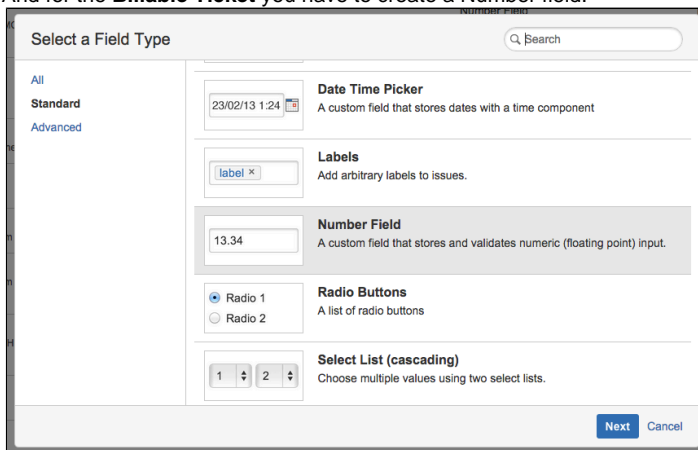
For the **Billable Item** you need to use **two options (yes and no)**:
For the description you can use whatever you like, it's not required for the addon to work.



For the **Billable Hours** and **Billable Client** you have to create 2 text fields:

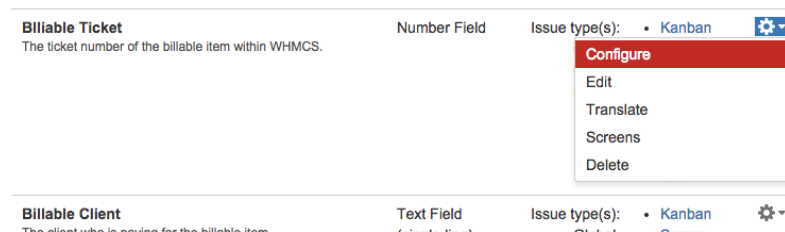


And for the **Billable Ticket** you have to create a Number field:

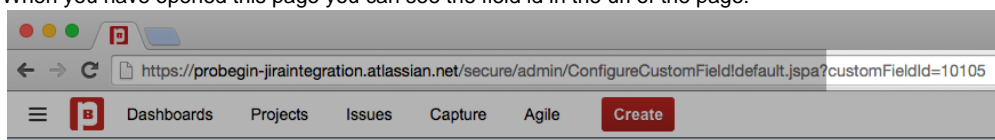


3. Add the **field id's** to your WHMCS

To get the field id's of the 4 custom fields you have just created, you will need to go to the configuration page of your custom field. You can do this by clicking the cog on the right side of the custom field, and selecting the Configure option.



When you have opened this page you can see the field id in the url of the page:



Then you need to input those id's in the corresponding input fields on the configuration page of the addon module. (Make sure

you write it as shown below: customfield_xxxxx)

Jira Field ID For Billable Issue (yes/no option):	customfield_10105
Jira Field ID For Billable Hours Field:	customfield_10600
Jira Field ID For Ticket ID:	customfield_10300
Jira Field ID For Billable Client:	customfield_10401

Default settings

- a. **Default Project (JIRA)**
 - The project where the issues get added by default (can be individually changed for each issue upon creating).
- b. **Invoice description template**
 - This is the description that will be shown on the invoices, you can add the parameters that are shown below the input field.
- c. **Automatic billing when issue closed**
 - Choose if you want to bill your clients automatically when an issue has been closed.

Create Ticket Tab

On this page you can create a new ticket.

Issue Type	<input type="text" value="Ticket related"/> *
Ticket Num#	<input type="text"/>
Project	<input type="text" value="Support"/>
Title Problem	<input type="text"/>
Company Name	<input type="text"/>
Due Date	<input type="text"/>
Work Hours	<input type="text"/> <input type="text" value="hours"/>
Priority	<input type="text" value="Very Urgent - Block"/>
Label	<input type="text"/>
Billable	<input checked="" type="radio"/> Yes <input type="radio"/> No
Assignee	<input type="text" value="Development"/>
Attachment	<div style="border: 1px dashed gray; padding: 10px; text-align: center;"> <p>DRAG & DROP YOUR FILES</p> </div> <div style="border: 1px solid gray; height: 60px; margin-top: 10px;"></div>

[Add Jira Ticket](#)

- **Issue Type:** Select Ticket related if you want to create a sub issue.
- **Ticket Num#:** The ticket which the new issue is supposed to be a sub issue of. (only available when issue type is 'Ticket related')
- **Project:** The JIRA project where you want to place the issue under.
- **Title Problem:** The title of the issue
- **Company Name:** The company of the customer
- **Due Date:** The due date of the issue
- **Work Hours:** The estimated time for the issue
- **Priority:** The priority of the issue
- **Label:** The issue label
- **Billable:** Choose if you want to make the issue billable or not.
- **Assignee:** Select who you want to assign the issue to.
- **Attachment:** Attach files to the issue
- **Description:** A description of the issue

Ticket overview

On this page you can see all Jira tickets, ones that are created from within Jira are shown here as well.

1. **Filter** data by:
 - Status
 - Project

- Is Billable
- Billable Client
- Date

2. Add JIRA Ticket on this page by clicking **Add JIRA Ticket** button.

Settings [Create Jira Ticket](#) Tickets Overview [Create Billable Item](#) [User Rates](#) [About](#) [Need help?](#)

Status: **- All -** Project: **External** Is Billable: **- All -** Billable Client: **- All -** Date Filter: [Reset](#)

Key	Type	Title	Assignee	Priority	Status	Due	Billable	Billable Ticket#	Billable Client	Reporter	Created	Updated
EXTERNAL-627	Problem			Medium	Open	Aug 7, 2015	No				Aug 6, 2015	Aug 6, 2015
EXTERNAL-626	Problem			High	Open	Aug 6, 2015	No				Aug 6, 2015	Aug 6, 2015
EXTERNAL-625	Problem			Medium	Open	Aug 6, 2015	No				Aug 6, 2015	Aug 6, 2015

Create Billable Item Tab

On this page you can select the issue which you want to create a billable item for.

1. **Filter** data by:
 - Status
 - Project
 - Is Billable
 - Billable Client
 - Date
2. Select which **issue to bill**: you can create billable item for issue or make it not billable
3. Select multiple issues to bill by checking the checkbox on the left and pressing **Not billable** or **Bill Client** button.

Settings [Create Jira Ticket](#) Tickets Overview [Create Billable Item](#) [User Rates](#) [About](#) [Need help?](#)

Status: **- All -** Project: **External** Is Billable: **- All -** Billable Client: **- All -** Date Filter: [Reset](#) [Not Billable](#) [Bill Client](#)

<input type="checkbox"/>	Key	Type	Title	Assignee	Priority	Status	Due	Billable	Billable Ticket#	Billable Client	Reporter	Created	Updated	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	EXTERNAL-627	Problem			Medium	Open	Aug 7, 2015	No				Aug 6, 2015	Aug 6, 2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	EXTERNAL-626	Problem			High	Open	Aug 6, 2015	No				Aug 6, 2015	Aug 6, 2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	EXTERNAL-625	Problem			Medium	Open	Aug 6, 2015	No				Aug 6, 2015	Aug 6, 2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>

User rates Tab

1. **Add** a new User rate by pressing **Add** button:
 - Choose Client
 - Set rate

Add/Edit New Exclusion ✕

Client:

Rate (per hour):

2. **Delete** User rate
 - a. Check checkbox in **Remove** column
 - b. Press **Save** button

[Settings](#) [Create Jira Ticket](#) [Tickets Overview](#) [Create Billable Item](#) **User Rates** [About](#) [Need help?](#)

ID	Client ID	Client name	Rate (per hour)	Remove
1	2600	Remco Geerdink PROBEGIN	10	<input type="checkbox"/>
2	2600	Remco Geerdink PROBEGIN	1	<input type="checkbox"/>

Synchronization Jira with WHMCS support tickets

This feature will allow you to automatically synchronize tickets created in Jira to WHMCS.

Jira Field ID For Billable Issue (yes/no option):

Jira Field ID For Billable Hours Field:

Jira Field ID For Ticket ID:

Jira Field ID For Billable Client:

2. Jira Field ID For Ticket URL:

Default Project (JIRA):

3. Default Department (WHMCS):

Please make sure that next **conditions are fulfilled** before ticket creation:

1. Jira Workflow should consist **direct transition** from **Open to Closed** status.
2. Create **customfield** in Jira with type "URL field" and set it in Jira Integration Addon Settings.
 - Please check page 2. [JTI Configuration settings](#), paragraph 3 to see how to set custom fields in Jira.
3. Set **default department** in WHMCS (Addons->Jira Tickets Integration->Settings). All tickets will be created with the selected department. You will be able to change department after ticket is created.
4. For the synchronization support tickets feature you should create **two webhooks**:
 - [http://www.somedomain.com/login/modules/addons/jira_tickets/includes/jira.php?key=\\${issue.key}&ticket=create](http://www.somedomain.com/login/modules/addons/jira_tickets/includes/jira.php?key=${issue.key}&ticket=create) In 'Issue' checkbox group select 'created';
 - [http://www.somedomain.com/login/modules/addons/jira_tickets/includes/jira.php?key=\\${issue.key}&ticket=update](http://www.somedomain.com/login/modules/addons/jira_tickets/includes/jira.php?key=${issue.key}&ticket=update) In 'Issue' checkbox group select 'updated';
5. Whmcs client(s) and JIRA user(s), who is assigned to the ticket, should have same email addresses, otherwise support tickets won't be added in WHMCS.

Steps:



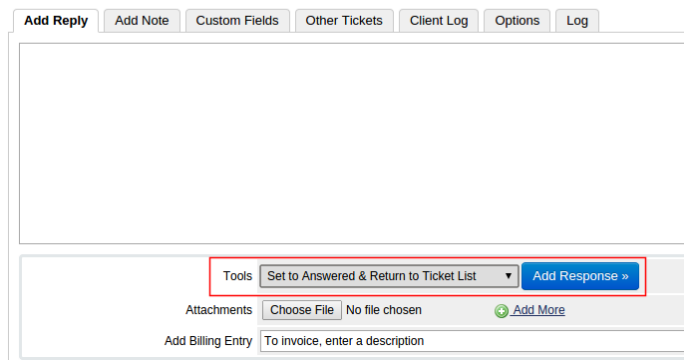
1. **Create** ticket in Jira:

- **Priority:** Set priority High, Low or Medium in order to have priority displayed similar in WHMCS.
- **Description:** Description is not obligatory field in Jira but it is obligatory in WHMCS, so user should fill in ticket description in Jira. Otherwise ticket won't be displayed in WHMCS.

Ticket will be created with comment "Open ticket in WHMCS" in Jira and with the default department in WHMCS.

Support Tickets

#434694 - test **Answered** [Close](#)



2. You can **add comment** in **WHMCS** ticket on the tab "Add reply". You should choose one of the Tool (except "Add as a Private Ticket Note" - in this case comment won't be posted to Jira). After comment was added to the ticket in WHMCS, you will be notified in Jira.
3. You can **change** status in WHMCS. This action will add comment in Jira about status change.
4. You can **add comment** in **Jira**. This action will add response to WHMCS ticket.
5. You can **close** ticket in **WHMCS**. This action will close ticket in Jira. But if you change the status in WHMCS after closing the ticket it's status won't be changed (comment will be posted about status change).