



CASE STUDY

Integrating Salesforce CRM Platform and Jira Service Desk with Sinergify

HIGHLIGHTS



Integrated Jira Service Desk with Salesforce CRM Platform



Developed a Custom Business Process per the Business Requirements



Maintained Data Balance with Data Syncing from Jira Service Desk to Salesforce



Improved Cross-Functional Collaboration

The Customer

Based in Paris, France, the customer is a leading European software company and a provider of the cyber risk management platform. Their cybersecurity technology enables companies and government organizations to understand how they are exposed to risks and to support them in helping to make decisions and determining the security measures to be implemented.

The Context

The customer was using Salesforce CRM Platform for managing its CRM operations and had their support portal on Jira Service Desk. Their end-customers used the support portal to raise tickets in case they faced any issues. But managing two different systems is not without its challenges. They were facing the challenge of discrepant data in both systems, leading to inconsistent data in both systems. This was causing their sales and support reps the trouble of maintaining quality data.

The Objective

Looking at the issue, the customer decided to integrate their Salesforce CRM and Jira Service Desk instance. But they didn't want a manual integration, so they were looking for a connector. But there aren't many Salesforce and Jira connectors in the market that support the integration of Salesforce CRM Platform and Jira Service Desk. And then, their search ended at Sinergify.

The Solution

Sinergify supported the integration of Jira Service Desk and Salesforce CRM Platform. The customer liked the features and use cases that Sinergify provided.

What the customer wanted to achieve from the integration was to enable a seamless syncing of data from Jira Service Desk to Salesforce CRM Platform. This would help them maintain data consistency across both platforms.

They wanted a business use case that would enable syncing of Jira tickets into their Salesforce Org. This was a business requirement, which needed to be developed manually.

Per the business requirements shared by the customer, we firstly needed to deploy and set up Sinergify within their Salesforce Org. So, we did that in the first phase.

After configuring Sinergify, we developed a customized process to sync Jira tickets in Salesforce and sync the data to respective Salesforce objects.

The mapping of data would be in the following manner:

Organization ↔ Account

Reporter ↔ Contact

The information related to the contracts, which are typically linked with Accounts, needed to be sent to all the linked Jira issues in Jira.

So, our technical team of experts configured the mapping. And after that, they developed the whole process which entailed the following:

- Whenever a Jira ticket is created and synced in Salesforce, it would check the data of the Jira ticket against the data in Salesforce. The Jira ticket would be linked with an account based on the '**Organization**' value.
- The contacts are used to add as a '**Reporter**' on the Jira issues that are linked with an account.

Once done, our QE experts performed a stringent quality analysis to ensure everything worked smoothly. Upon receiving a 'good-to-go' from the QE team, we handed over the Org to the customer.

The Outcome

Sinergify enabled a smooth integration of Jira Service Desk and Salesforce CRM platform. Our product experts also developed a customized business process per the business requirements shared by the customer. This all enabled a seamless flow of data from Jira Service Desk to Salesforce. Thus, the customer was able to maintain consistent data in both their systems.

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