

Configuring the "Create Jira Issue" button with the Create Endpoint

This guide walks you through the process of configuring a "Create Jira Issue" button which enables users in Salesforce to directly create Jira issues from Salesforce Object pages.

This is simple if a button is configured for the object page layout to do so.



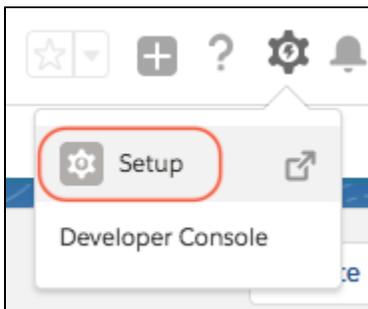
The button can only be used for the Jira project that is associated with the same Mapping because different Mappings will have different parameters appended to the Endpoint URL.

Guide

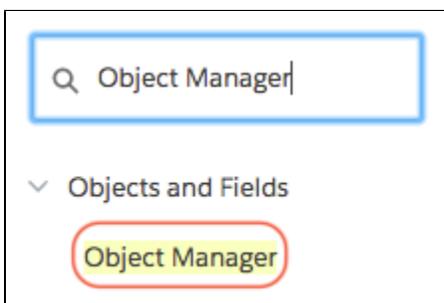
Lightning Experience

1. You will need to get the correct Jira URL first by copying the URL for the "Create" Endpoint from the Configure Mappings screen.

2. Go to  > Setup.



3. Search for "*Object Manager*" then click on the **Object Manager** menu item.



4. Choose the object that you want to create a button in. In our example, we will use **Case**.

 SETUP Object Manager 32 Items, Sorted by Label	
LABEL	API NAME
Account	Account
Activity	Activity
Asset	Asset
Asset Relationship	AssetRelationship
Campaign	Campaign
Campaign Member	CampaignMember
Case	Case
Contact	Contact
Content Version	ContentVersion

5. Choose **Buttons, Actions, and Links**.

Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types

6. You will be taken to a listing of the standard buttons and links associated with the object. Underneath this is a list of custom buttons and links. Click **New**.

Buttons, Links, and Actions					
14 Items, Sorted by Label					
LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	▼
Cases Tab	Tab			Standard page	▼

7. A form will appear for you to enter the details of the new button.

Label	Create Jira Issue
Name	Create_Jira_Issue (this is auto-populated when you add a new label)
Display Type	Detail Page Button
Behaviour	Display in new window
Content Source	URL

You are free to enter your own text for the the Label, but for this example we will call it "Create Jira Issue".

Custom Button or Link Edit

Save Quick Save Preview Cancel

Label

Name i

Description

Display Type

Detail Page Link [View example](#)

Detail Page Button [View example](#)

List Button [View example](#)

Behavior View Behavior Options

Content Source

8. Under the fields, you will see a large text input field.

In this text input field, insert the URL from step 1.

e.g., `http://localhost:6250/plugins/servlet/customware/connector/issue/3/Case/create.action?id={!Case.Id}`

Select Field Type Insert Field

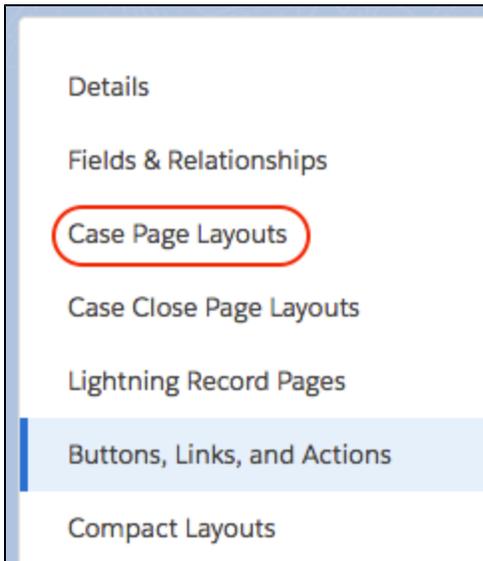
Insert Operator

`http://localhost:7800/plugins/servlet/customware/connector/issue/1/Case/create.action?id={!Case.Id}`

9. Click **Save**.

A pop-up will warn you that this button "will not be displayed to users until you add it to the page layout", which is what we will do next.

10. Now look for **Case Page Layouts** and click it.



11. A list of page layouts for the object will be listed.
In this example, we want to modify the default Case page layout, which is called **Case Layout**.
Go to the pull down menu and choose **Edit**.

Case Page Layouts			Quick Find	New	Page Layout Assignment
4 Items, Sorted by Page Layout Name					
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY			
Case (Marketing) Layout	Ted Mahsun, 3/15/2018, 12:28 AM	Ted Mahsun, 3/15/2018, 12:28 AM			▼
Case (Sales) Layout	Ted Mahsun, 3/15/2018, 12:28 AM	Ted Mahsun, 3/15/2018, 12:28 AM			▼
Case (Support) Layout	Ted Mahsun, 3/15/2018, 12:28 AM	Ted Mahsun, 3/15/2018, 12:28 AM			▼
Case Layout	Ted Mahsun, 3/15/2018, 12:28 AM	Ted Mahsun, 3/19/2018, 12:09 AM			▼

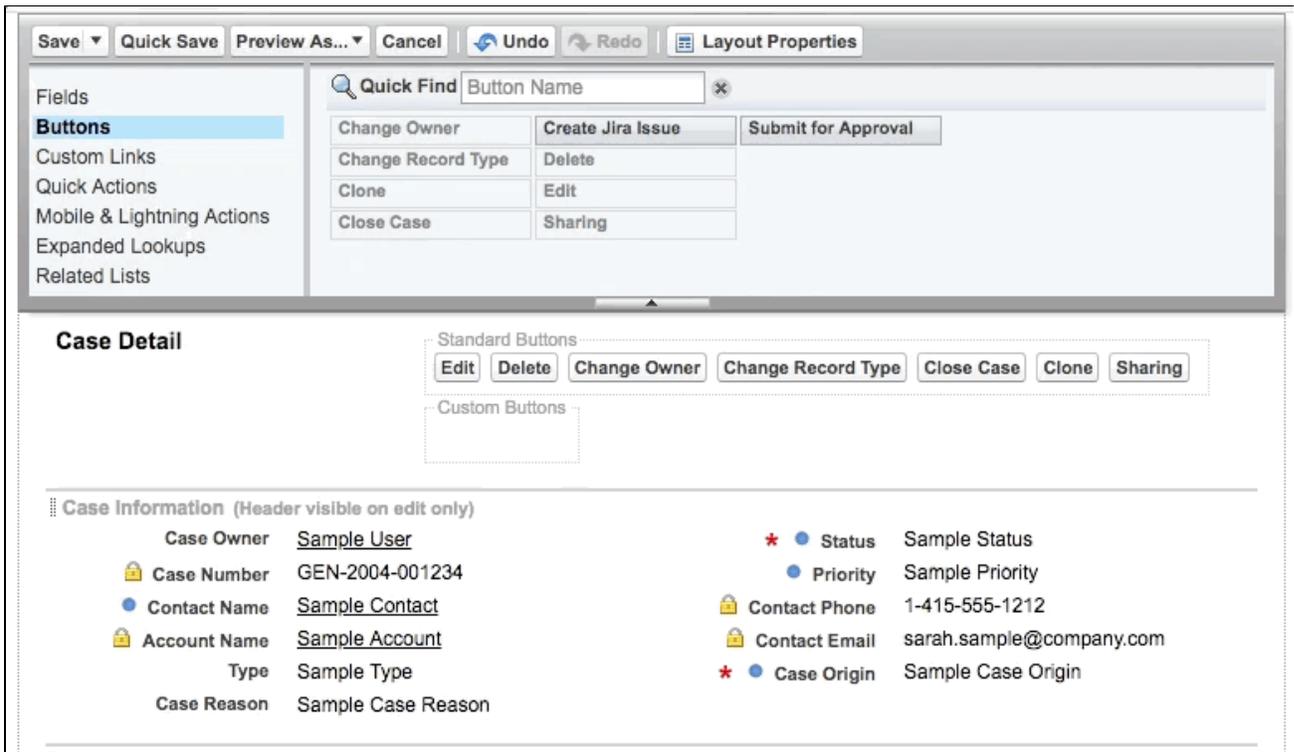
Edit

Delete

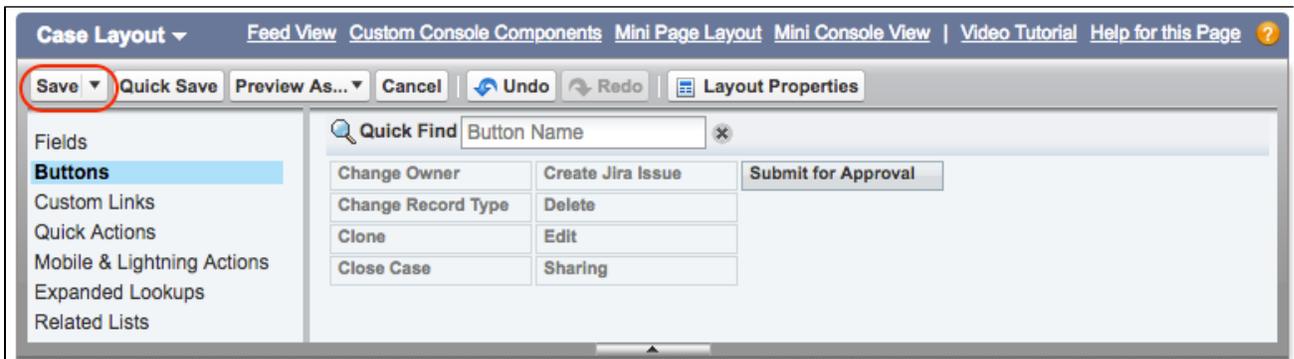
12. An interactive editor will appear for the object page layout.
At the top will be a section of the items you can add to your layout, at the bottom is the page layout where you can drag and drop the item to.
You should see also that at the top of the layout where it says **Case Detail** are sections for Standard and Custom Buttons.
We want to add our new button into the **Custom Buttons** section.
First, click on the **Buttons** area of the top section.



- Find your new **Create Jira Issue** button (or whatever you labelled it as) in the list and drag and drop it into the **Custom Buttons** section of the page layout.

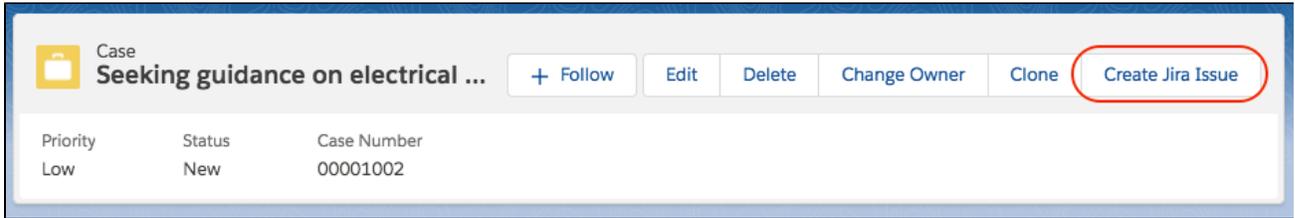


- Click **Save** at the top left of the upper section.



- You will be taken back to the object page layout listing. To verify your changes, go to an object in the instance and check that the page now has your new button.

If it does not, please check you modified the correct page layout.

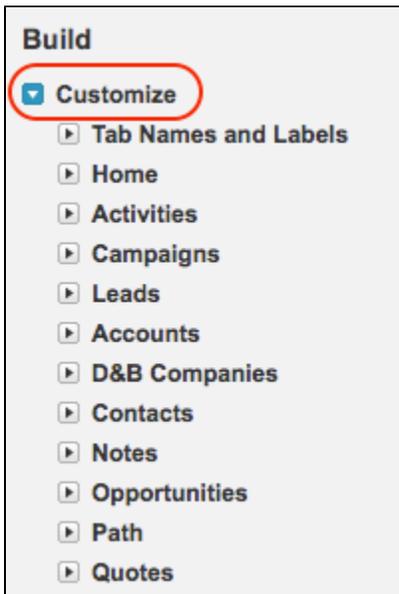


Salesforce Classic

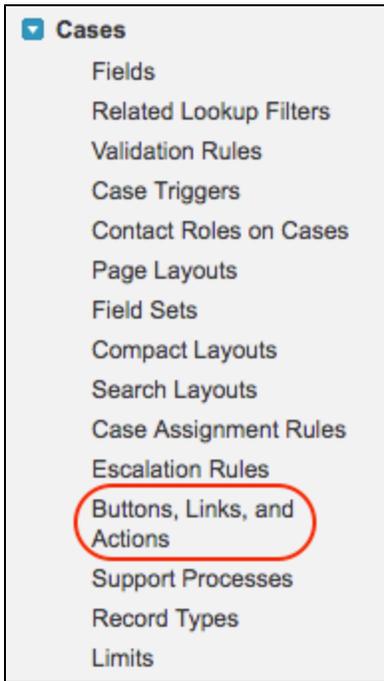
1. You will need to get the correct Jira URL first by copying the URL for the "Create" Endpoint from the Configure Mappings screen.
2. Go to Salesforce and log in as an administrator.
3. Click on **Setup**.



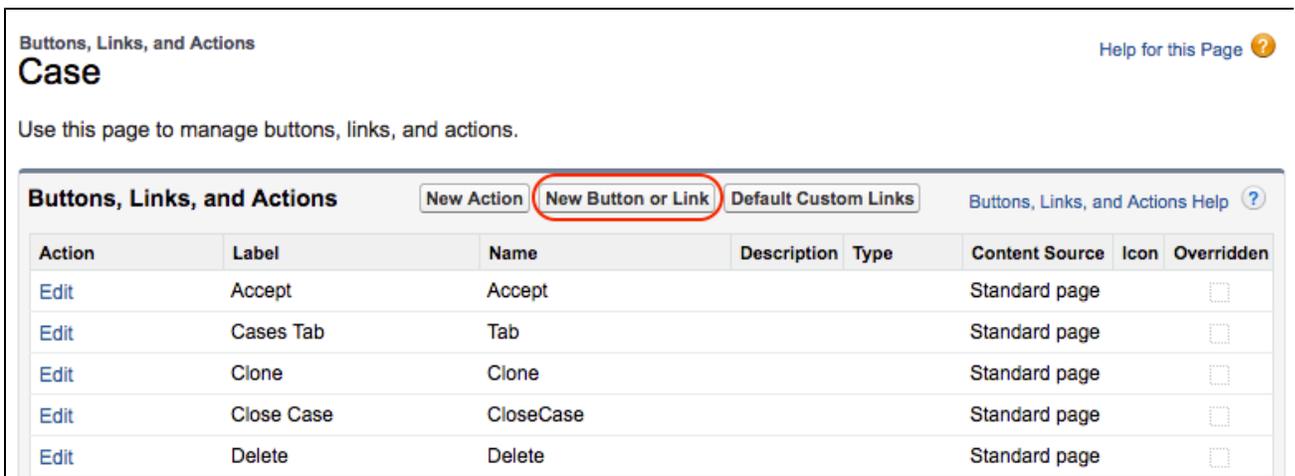
4. Expand the **Customize** menu under **Build** on the left hand menu. This should open up all the objects in your Salesforce instance.



5. Expand the object that you want to create a button in. In our example, we will use **Cases**.
6. Under the object menu, click on **Buttons, Links, and Actions**.



7. You will be taken to a listing of the standard buttons and links associated with the object. Underneath this is a list of custom buttons and links. Click **New Button or Link**.



8. A form will appear for you to enter the details of the new button.

Label	Create Jira Issue
Name	Create_Jira_Issue (this is auto-populated when you add a new label)
Display Type	Detail Page Button
Behaviour	Display in new window
Content Source	URL

You are free to enter your own text for the the Label, but for this example we will call it "*Create Jira Issue*".

Custom Button or Link Edit Save Quick Save Preview Cancel

Label

Name i

Description

Display Type

Detail Page Link [View example](#)

Detail Page Button [View example](#)

List Button [View example](#)

Behavior View Behavior Options

Content Source

9. Under the fields, you will see a large text input field.
 In this text input field, insert the URL from step 1.
 e.g., <http://localhost:6250/plugins/servlet/customware/connector/issue/3/Case/create.action?id={!Case.Id}>

Select Field Type Insert Field -- Insert Merge Field -- Insert Operator

`http://localhost:7800/plugins/servlet/customware/connector/issue/1/Case/create.action?id={!Case.Id}`

10. Click **Save**.
 A pop-up will warn you that this button "will not be displayed to users until you add it to the page layout", which is what we will do next.
11. In the sidebar, under your object menu, click on **Page Layouts**.

- ▾ Cases
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Case Triggers
 - Contact Roles on Cases
 - Page Layouts**
 - Field Sets
 - Compact Layouts
 - Search Layouts
 - Case Assignment Rules
 - Escalation Rules

12. A similar listing of page layouts for the object will be listed as for the buttons page.
 In this example, we want to modify the default Case page layout, which is called **Case Layout**.
 Click on the **Edit** link under the **Actions** column of the layout.

Action	Page Layout Name	Created By	Modified By
Edit Del	Case (Marketing) Layout	Ted Mahsun , 3/15/2018 12:28 AM	Ted Mahsun , 3/15/2018 12:28 AM
Edit Del	Case (Sales) Layout	Ted Mahsun , 3/15/2018 12:28 AM	Ted Mahsun , 3/15/2018 12:28 AM
Edit Del	Case (Support) Layout	Ted Mahsun , 3/15/2018 12:28 AM	Ted Mahsun , 3/15/2018 12:28 AM
Edit Del	Case Layout	Ted Mahsun , 3/15/2018 12:28 AM	Ted Mahsun , 3/15/2018 12:28 AM

13. An interactive editor will appear for the object page layout.

At the top will be a section of the items you can add to your layout, at the bottom is the page layout where you can drag and drop the item to.

You should see also that at the top of the layout where it says **Case Detail** are sections for Standard and Custom Buttons.

We want to add our new button into the **Custom Buttons** section.

First, click on the **Buttons** area of the top section.

Case Layout ▾ Feed View Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page ?

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields

- Buttons**
- Custom Links
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Quick Find Field Name

Section	Business Hours	Case Reason	Contact Mobile	Date/Time Clk
Blank Space	Case Number	Closed When Created	Contact Name	Date/Time Op
Account Name	Case Origin	Contact Email	Contact Phone	Description
Asset	Case Owner	Contact Fax	Created By	Engineering I

14. Find your new **Create Jira Issue** button (or whatever you labelled it as) in the list and drag and drop it into the **Custom Buttons** section of the page layout.

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields

- Buttons**
- Custom Links
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Quick Find Button Name

Change Owner	Create Jira Issue	Submit for Approval
Change Record Type	Delete	
Clone	Edit	
Close Case	Sharing	

Case Detail

Standard Buttons

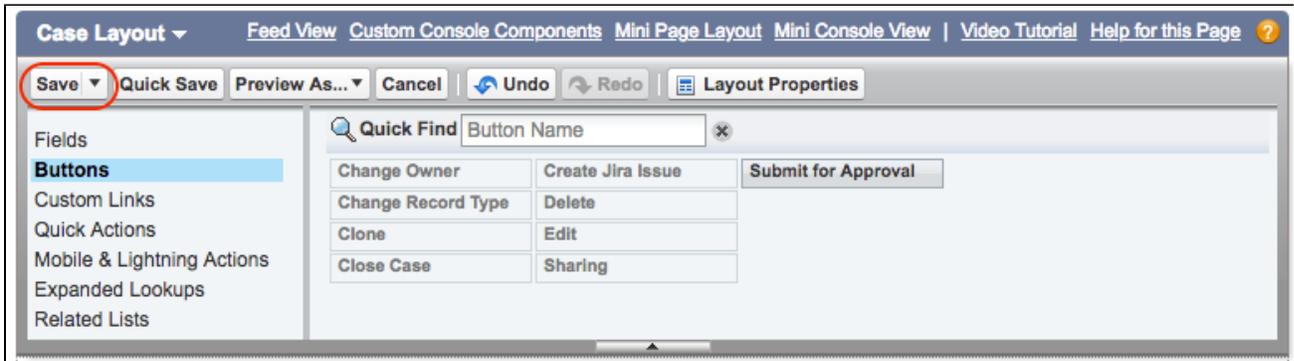
[Edit](#) [Delete](#) [Change Owner](#) [Change Record Type](#) [Close Case](#) [Clone](#) [Sharing](#)

Custom Buttons

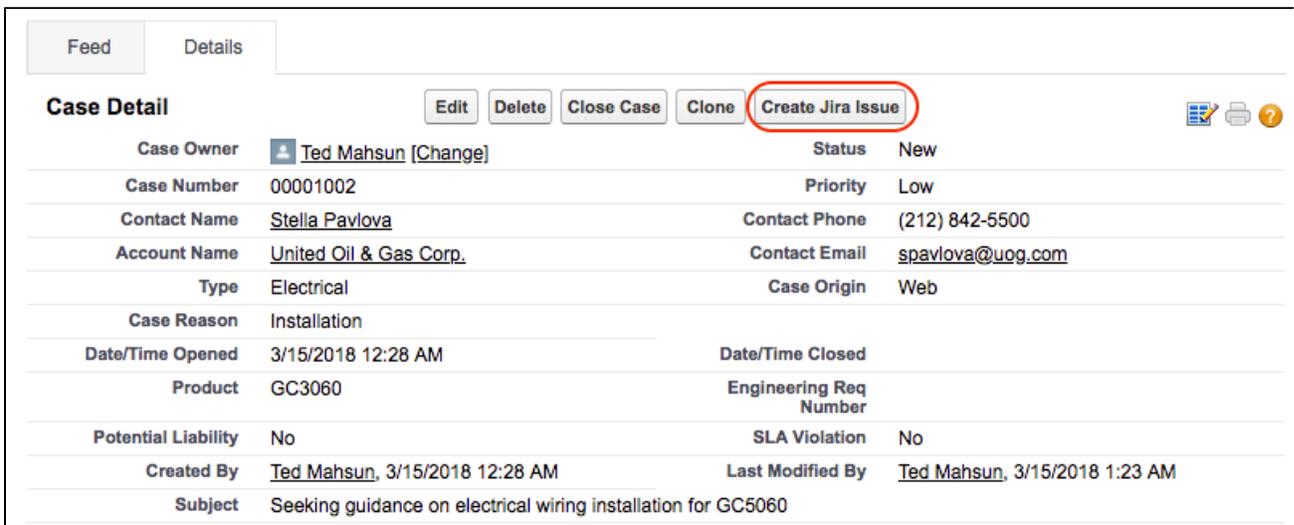
Case Information (Header visible on edit only)

Case Owner	Sample User	* ● Status	Sample Status
Case Number	GEN-2004-001234	● Priority	Sample Priority
Contact Name	Sample Contact	🔒 Contact Phone	1-415-555-1212
Account Name	Sample Account	🔒 Contact Email	sarah.sample@company.com
Type	Sample Type	* ● Case Origin	Sample Case Origin
Case Reason	Sample Case Reason		

15. Click **Save** at the top left of the upper section.



16. You will be taken back to the object page layout listing.
To verify your changes, go to an object in the instance and check that the page now has your new button.



Notes

1. You can include the extra parameters to the Create endpoint to specify a default project and default issue type
 1. **project** - Jira project key
 2. **issueType** - Jira issue type ID (See: How you can find the ID of an issue type)
2. For example, if you have the following:

```
project key = PRO
issueType = 4 for improvement
```

Then you can append the parameters to the create endpoint for the task object as below:

```
<Jira URL>/plugins/servlet/customware/connector/issue/1/Task/create.
action?id={!Task.Id}&project=PRO&issueType=4
```