Installation and licensing

If you're evaluating this Connector, we'd like to let you know that we also offer an Early Access to our brand new Server Connector which features a revamped user experience.

If you'd like to evaluate this new Server Connector, visit the Atlassian Marketplace.

This page will guide you through the process of installing Classic Connector for Salesforce & Jira.

Requirements

- Classic Connector for Salesforce & Jira is only available for Jira Server. (If you are interested in a Salesforce and Jira Cloud solution, check out the Connector for Salesforce & Jira instead.
- You must have admin privileges for both Jira and Salesforce.

Installation

There are two methods of installation:

1. Installation using an Atlassian License (a license bought through the Atlassian Marketplace).
2. Installation using a ServiceRocket License (a license bought directly from ServiceRocket).

Atlassian Licensing

1. Log into your Jira instance as an admin.

2. Go to the **Cog Icon** **> Atlassian Marketplace**.
   The **Manage add-ons** screen loads.

3. Click **Find new add-ons** from the left-hand side of the page.

4. Locate "Classic Connector for Salesforce & Jira" via search.
   The appropriate app version appears in the search results.

5. Click **Try free** to begin a new trial or **Buy now** to purchase a license for Classic Connector for Salesforce & Jira.
   You're prompted to log into *MyAtlassian*. Salesforce & Jira Server Connector begins to download.

6. Enter your information and click **Generate license** when redirected to MyAtlassian.

7. Click **Apply license**.
   If you're using an older version of UPM, you can copy and paste the license into your Jira instance.

ServiceRocket Licensing

>> Step 1: Install the Connector

1. Go to the **Cog Icon** **> Add-ons**

2. In the **Search the Marketplace** field, search for "Classic Connector for Salesforce & Jira".

3. Click on **Install**.

4. Ensure the add-on is installed successfully.

>> Step 2: Install the ServiceRocket License

1. Purchase a ServiceRocket license from the ServiceRocket Marketplace and you will be give a link to download the license key.

2. Go to **Cog Icon** > **General configuration**.

3. In the sidebar, under **Cloud Connectors**, click **Licensing**.

4. Upload the ServiceRocket License `.key` file by clicking **Choose File**.

5. Click **Install**.

6. If your license is valid, it will be displayed under **Current License**.

Switching between Atlassian licenses and ServiceRocket licenses

>> Switching from a ServiceRocket license to an Atlassian license

1. Go to the **Cog Icon** > **Add-ons.**

2. In the sidebar, under **Cloud Connectors**, click **Licensing**.

3. Under **Actions**, click **Manage**.

4. Click **Uninstall**. The ServiceRocket License should now be uninstalled.

5. Now, in the sidebar, under **Atlassian Marketplace**, click **Manage Add-ons**.
   (This only applies if Jira can connect to the Atlassian Marketplace. If your Jira instance is not able to connect to the Atlassian Marketplace, see the FAQ section below on how to proceed.)

6. Go to **ServiceRocket Salesforce.com Connector Plugin - Plugin** and click either **Free Trial** or **Buy Now**.

>> Switching from an Atlassian license to a ServiceRocket license

1. Go to the **Cog Icon** > **Add-ons.**

2. Go to **ServiceRocket Salesforce.com Connector Plugin - Plugin** and click on the **Pencil Icon** next to **License key**.

3. Remove the license and click **Update**.

4. In the sidebar, under **Cloud Connectors**, click **Licensing**.

5. Upload your ServiceRocket License `.key` file by clicking **Choose File**.

6. Click **Install**.

Frequently asked questions

>> Why is the Connector installation taking a long time?

This may happen if you have a large instance and may also happen if you are upgrading from a previous version. We advise you to wait it out especially if your instance contains large amounts of data.

>> What does Dual Licensing mean?

This add-on supports Dual Licensing. This means you may choose to use this add-on by purchasing either a ServiceRocket license or an Atlassian Marketplace license.

If you have an existing valid ServiceRocket license and want to switch to an Atlassian Marketplace license, you need to uninstall the ServiceRocket license first.

Likewise, if you have an Atlassian Marketplace license and want to switch to a ServiceRocket license, you will need to uninstall the Atlassian Marketplace license as well.

>> I have questions about purchasing licenses.

If you have questions about our add-on licenses, consult our Purchasing FAQ page .

>> What if the Jira instance can not access the Atlassian marketplace?

MyAtlassian is a site to manage your Atlassian-related licensing and orders. If you have a valid license for the designated add-on, the license key would be stored on MyAtlassian.

Copy the license key and manually paste the key in the Universal Plugin Manager:

1. Go to the **Cog Icon** **> Add-ons**.
2. Then, expand the add-on details and paste the license key in the text box.

Before proceeding with the Connector configuration

There are several things you should consider when configuring the Connector. We offer 3 different types of functionality for linking Jira with Salesforce and you should consider which one best suits your needs before proceeding.

The 3 different options are:

- Option 1: Remote System Reference (synchronizing)
- Option 2: Remote Object Link(s) (linking)
- Option 3: Remote Issue Link(s) (linking, only available in Jira 5 and above)

For more information, read The 3 options of linking Jira to Salesforce.

What's next?

The next step would be:

- Adding an Application Link