Managing Forums

Forum Types

Customer Case allows you to use JIRA projects as a storage for keeping incoming feature requests or issue reports from your customers and users. Any JIRA project can be transformed into a forum. Two types of forums is supported:

- **Feedback -** this forum type allows you to collect feedback in the form of ideas.
- **Support -** this forum type allows your customers to submit their support requests and encountered issues.

Feedback Forum

Feedback forum displays the list of ideas submitted by users and customers on your customer feedback portal powered by Customer Case. Visitors on the portal can open the required feedback forum and vote for the interesting ideas, share their thoughts about options or start watching specific ideas.

Support Forum

Support forum allows your visitors to privately submit their tickets with issues and problems they encounter while using your products or services. Each user can see only tickets submitted by himself or herself and can not get access to tickets of other users. Support agents will get a listing of all tickets submitted by all users on the support forum so they can instantly proceed to troubleshooting these issues.

Viewing Forums

> ⓘ The best practice is to create a project from scratch and further use it for collecting ideas and feature requests from your customers.
>
> By default, all the standard fields (such as Summary, Description, and Component) and all the required fields from the Create Issue screen of the project will be shown during request creation in Customer Case.

If you do not have access to JIRA administration console, you can open the list of registered forum through JIRA menu. See the Viewing Forums section.

1. Once you have installed the add-on, you can proceed to its configuration.
2. Navigate to **JIRA Administration > Add-ons**.
3. Locate the **Customer Case** section and select **Customer Portal**. An empty list or the list with available forums opens.
4. For each forum, you can find the following information:

- **Project** - name of the JIRA project that will be used for storing ideas, feature requests or issues reports from customers.
- **Type** - type of the forum (*Feedback* or *Support*).
- **Name** - name of the forum.
- **Description** - description of the forum.
- **Public URL** - URL address for accessing the forum. It is comprised of the following elements:
    - **sub-domain name** is automatically assigned to each JIRA instance, which Customer Case add-on is installed on. By default, the company name from JIRA Cloud is used as sub-domain.
    - **domain name** - domain name of the Customer Case platform. Then you can change it to your your custom domain name.
    - **forum alias** - unique alias of the forum.

> ⓘ You need to place the public URL on your website to make it available to your customers. Then they can proceed to Customer Case and post their ideas, vote for the most demanding features or submit their issue reports.

Customer Portal

+Create Forum

Here you can create new forums that will become the platform where your customers can share ideas, post feature requests or submit issue reports. All you need is just to create the forum of the appropriate type:

- feedback forum displays the list of ideas visible to all users and visitors of the forum;
- support forum uses the private approach so only the person who submitted the ticket or support request can view its details so other users will not be able to view issues of other users.

Start creation of a forum with selection of the JIRA project that will be used for storing ideas or issue reports. Once you set the forum name and save the forum, you will get a link for external access to the forum. You need to place this link on your website or any other web resource of your company. When your customers follow the link they will be able to quickly submit their feedback in the form of feature requests or issue reports.

The table below shows the list of all forums available to your customers and visitors.

Project	Type	Name	Description	Public URL	Actions
Customer Case	FEEDBACK	Customer Case Forum	Forum for people wanting to improve Customer Case	http://customer-case-demo.stiltsoft.com/forums/customer-case-forum	Edit · Delete
Agile Kanban	FEEDBACK	Agile Kanban	You are creating a project for a Kanban team. You may want to name this project after the team that will use it (e.g. Bug Fix, Devops, HR, IT, Purchasing, or any workflow-driven team).	http://customer-case-demo.stiltsoft.com/forums/agile-kanban	Edit · Delete
Software Development	FEEDBACK	Software Development	Specify a descriptive name and key for your software development project. For example, the name of the application that you are developing. You also need to choose a project lead, if you have more than one user.	http://customer-case-demo.stiltsoft.com/forums/software-development	Edit · Delete
Feedback Aggregator	SUPPORT	Data Feed Aggregator Forum	Forum for people experiencing issues with Data Feed Aggregator	http://customer-case-demo.stiltsoft.com/forums/data-feed-aggregator-forum	Edit · Delete
DZ Support Branded	SUPPORT	DZ Support Branded	DZ Support	http://customer-case-demo.stiltsoft.com/forums/dz-support-branded	Edit · Delete
Support Forum	SUPPORT	Support Forum	Support Forum	http://customer-case-demo.stiltsoft.com/forums/support-forum	Edit · Delete
Customer Case Demo	FEEDBACK	Customer Case Demo Forum	Customer Case Demo Forum	http://customer-case-demo.stiltsoft.com/forums/customer-case-demo-forum	Edit · Delete
Private forum	FEEDBACK	Private forum	Simple, fast, easy to use, and fun.	http://customer-case-demo.stiltsoft.com/forums/private-forum	Edit · Delete

Adding New Forums

1. Locate the **Add Forum** button and click it.
2. In the **Create Forum** form, specify the following information:
   - **JIRA Project** - select the appropriate JIRA project, which will be used for storing customers' ideas or issue reports.
   - **Name** - name of the forum.
   - **Description** - description of the forum.
   - **Forum type** - type of the forum (*Feedback* or *Support*).
   - **Default issue type** - select the default issue type in JIRA which requests submitted in Customer Case are converted to.
   - **Custom JQL query** - enter the JQL query that will show only requests that match specific criteria on the forum.
3. Click **Save**.

Create Forum

General settings

Restrictions

Authentication

Automation

General settings

JIRA project *

[Customer Case (CUSTCASE)   ▾]

Select the JIRA project for storing ideas.

Name*

[Customer Case Forum]

Description*

[Forum for sharing ideas and leaving feedback on Customer Case]

Forum type *

○ Support

● Feedback

Default issue type *

[New Feature   ▾]

Please select the issue type for tracking all
incoming requests on this forum

Custom JQL query

project = 10301 AND

[issueType IN ("New Feature")] ⑦

Create   Cancel

⚠ Note that JIRA projects containing some tasks will be exposed if you create a feedback forum. No tasks will be exposed if you create a support forum.

You can apply the custom JQL query to filter issues in the JIRA project that will be exposed on the forum.

By default, Customer Case pulls all issues from the selected JIRA project by using the JQL query (project = [projectId] AND). You can further append additional criteria to this query according to your needs. The specified JQL query is validated in the real time, so if the query is not valid you will see a corresponding warning.

⚠ Note that if you decide to change forum type from support to feedback forum, all the privately submitted tickets will be visible on this feedback forum.

Editing Forums

1. On the list with forums, locate the appropriate one.
2. Click the **Edit** link.
3. Make the required modifications.
4. Confirm the modifications.

Removing Forums

1. On the list with forums, locate the appropriate one.
2. Click the **Remove** link.
3. Confirm the removal of the selected forum.

⚠ Consider that all the submitted ideas and tickets will be preserved in your JIRA in the selected project, but the forum will not be available to your customers after removal.

Setting Access Restrictions for Forums

Customer Case allows you to create private forums for your internal use. Access to such forums can be restricted for particular email domains or users' emails. Additionally, you can select which authentication capabilities should be available for accessing each feedback forum.

1. On the list with feedback forums, locate the appropriate one.
2. Click the Restrictions link.
3. The **Edit forum descriptions** form opens.

Configuring Authentication Capabilities

1. In the **Edit forum restrictions** form, select the appropriate authentication methods that should be available on the feedback forum.
2. Click **Apply** when complete.

Edit forum restrictions: Customer Case Forum

Authentication

Restrictions

Authentication methods

Here you can manage the available authentication methods.

Authentication method	Enabled
JIRA Sign In	☑
Google Plus Sign In	☑
Facebook Sign In	☑
Personal User Accounts	☑

Apply   Cancel

Setup of Private Forums

1. In the **Edit forum restrictions** form, switch to the **Restrictions** section.
2. In the **General access options** block, select the *This is a private forum* option. Once enabled, the forum will be no longer visible to users that have not logged in to the feedback forum.
3. You can allow users who are not logged in to Customer Case to submit requests on your private forum. Select the *Allow request submission for users not logged in to Customer Case* option. This option will override the defined access restrictions.
4. Click **Apply**.

Edit forum restrictions: Customer Case Forum

Authentication

Restrictions

General access options

Here you can manage the general forum access options.

☑ This is a private forum

Private forum will be visible to authorized users only.

☑ Allow request submission for users not logged in to Customer Case

The request submission form is available to users who are not logged in to Customer Case. Access restrictions are skipped during request submission.

User's email domain restriction

Here you can restrict forum access for specified users email domains.

☐ Restrict access for specified email domains

Only users with specified email domains will be granted to access the private forum

User email domain	Actions
stiltsoft.com	Delete
stiltsoft.org	Delete
	Add

User's emails restriction

Here you can restrict forum access for specified users emails.

☑ Restrict access for specified users' emails

Only users with the specified emails will be able to access this private forum

User email	Actions
vrutkevich@stiltsoft.com	Delete
pjacobs@stiltsoft.com	Delete
astone@stiltsoft.org	Delete
	Add

Apply Cancel

Defining Access Restrictions for Email Domains

Customer Case allows you to restrict access to feedback forums for particular email domains. Only users with email addresses including the specified email domains will be able to log in to feedback forums.

1. Locate the **Email domain restriction**s block.
2. Select the *Restrict access for specified email domains* option.
3. Enter the appropriate email domain and click the **Add** button.
4. If you no longer need some email domain, click the **Delete** link next to this domain.
5. Click **Apply**.

Defining Access Restrictions for Users' Emails

Customer Case allows you to restrict access to feedback forums for particular users based on their email addresses. Only users with email addresses specified in the settings of the feedback forum will be able to log in.

1. Locate the **User email restrictions** block.
2. Select the *Restrict access for specified users' emails* option.
3. Enter the appropriate email address and click the **Add** button.

ⓘ

4. If you no longer need some email address, click the **Delete** link next to this email.
5. Click **Apply**.

ⓘ Customer Case will automatically send the invitation email to all the specified users' emails.