Managing Ideas and Tickets in JIRA

Agents deal with ideas and issue reports while working in JIRA Cloud. Customer Case add-on adds the dedicated tab for viewing all the added ideas or support tickets depending on the forum type.

See the next sections for details:

- Viewing the Listing of Ideas or Tickets
- Sorting and Filtering Ideas/Tickets
- Working with Ideas and Tickets
  - Pinning the Comment to the Top
- Searching for Ideas using JQL
- Outputting the Gadget with Ideas to the Dashboard

Viewing the Listing of Ideas or Tickets

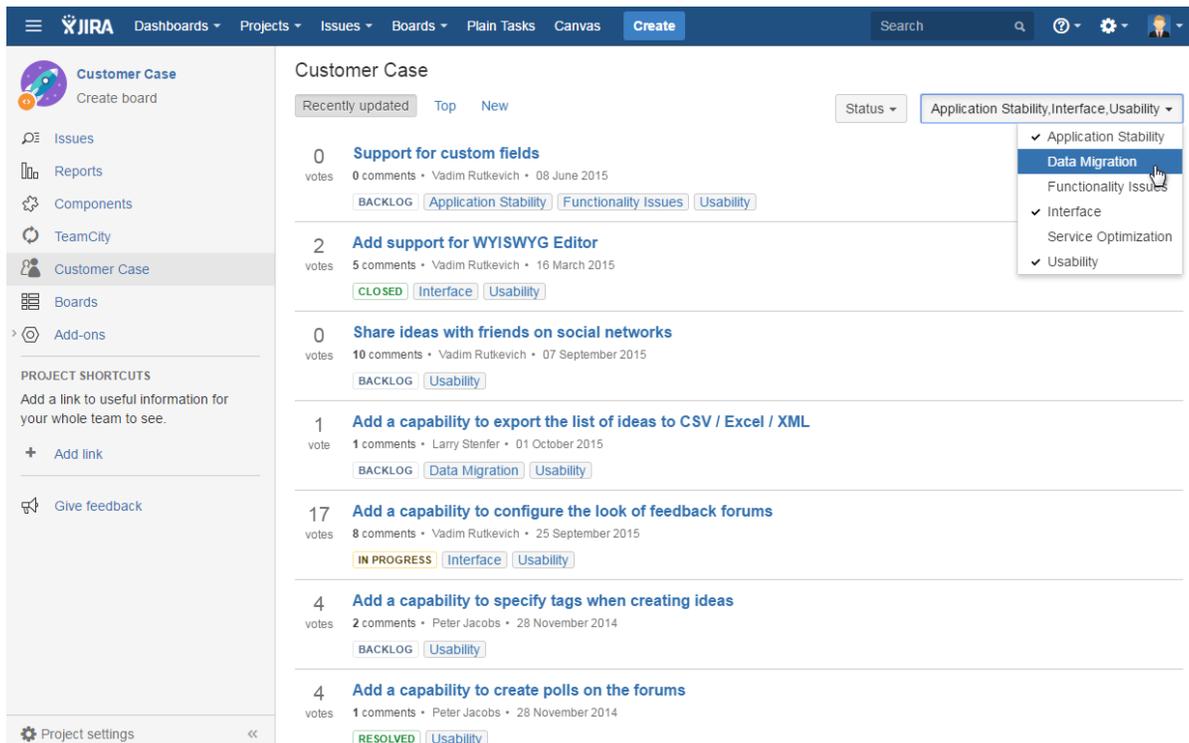To view the list of submitted ideas or tickets, follow these steps:

1. Open the appropriate project.
2. On the right sidebar, select **Add-ons**.
3. From the prompted list, select **Customer Case**.
4. The list of ideas or tickets (depending on the forum type) will be displayed to you.

> ℹ️ The **Customer Case** list item is shown only for the projects that are being used as feedback or support forums. For the details on how to create a forum, refer to the Adding New Forums section.

The view of the lists with ideas and tickets differs a bit.

For each listed idea, the following information is displayed:

- Idea Summary
- Number of votes
- Number of comments
- Author of the idea
- Time of idea submission
- Status of idea / ticket
- Category

For each listed ticket, the following information is displayed:

- Ticket Summary

- Number of comments
- Author of the ticket
- Time of ticket submission
- Status
- Category
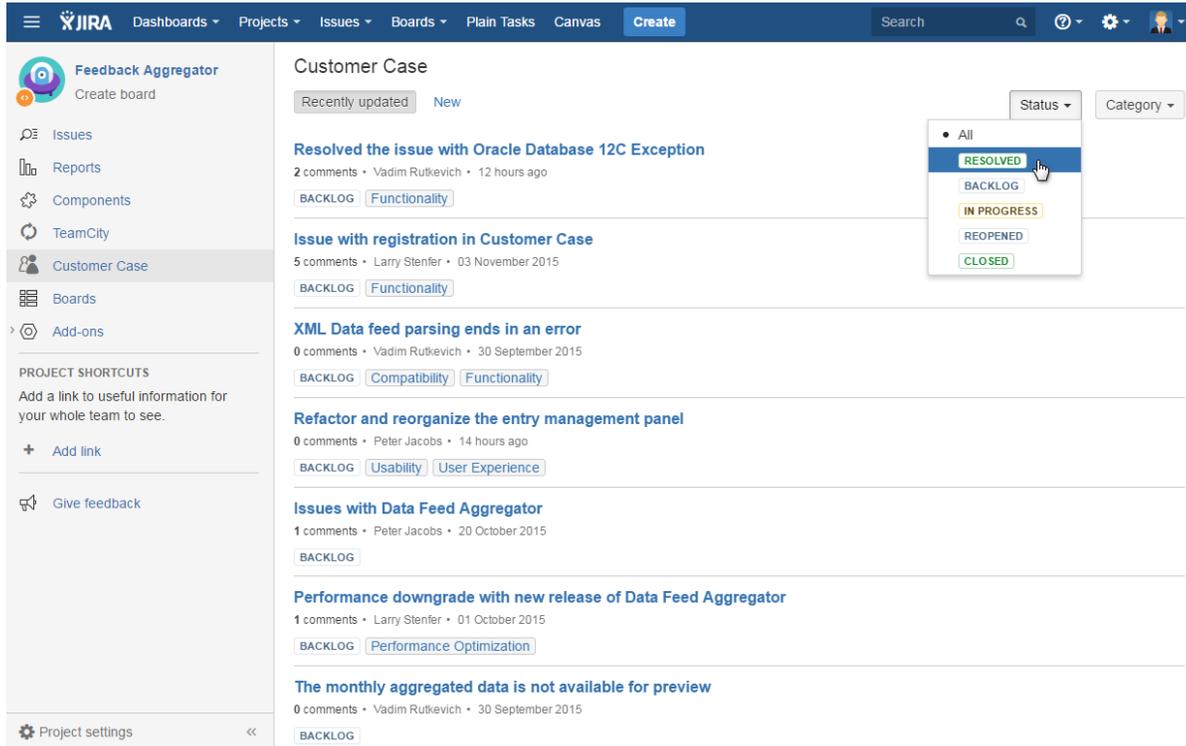
Sorting and Filtering Ideas/Tickets

You can sort ideas in the following way:

- **Recently updated** - ideas are sorted by the recent updates (idea status change or new comments).
- **Top** - ideas are sorted by the number of votes.
- **New** - ideas are sorted by the creation date.

You can sort tickets in the following way:

- **Recently updated** - tickets are sorted by the recent updates (ticket status change or new comments).
- **New** - tickets are sorted by the creation date.
- **Assigned to me** - shows the tickets that are assigned to the currently logged JIRA agent. It is available only on the listing with support tickets in Customer Case.

Select the appropriate parameter to sort out the list of ideas or tickets.

> (i) Customer Case remembers the state of the **Assigned to me** filtering option for the whole customer portal.

You can filter ideas and tickets by the following criteria:

- **Status** - ideas or tickets are filtered by the current status. You can filter requests by one or by multiple statuses at once.
- **Category** - ideas or tickets are filtered by the category. You can filter requests by one or by multiple categories at once. If a request is associated with multiple categories, it will appear in the filtration results once you select any of the categories which this request relates to.

Above the list with ideas or tickets, select the criteria for filtration. You can combine the **Status** and **Category** filters for more precise results.

- Statuses of ideas / tickets are determined by JIRA workflow configured for the particular project. For the details, refer to What is Workflow.
- Categories of ideas / tickets are determined from JIRA components. For the details. refer to Defining a Component.

Working with Ideas and Tickets

By clicking the idea or ticket title, you will be redirected to the standard page for viewing details of the idea or ticket.

The add-on adds a separate section **Customer Portal** for viewing customers' comments for particular ideas or tickets and replying to them from JIRA.

The agent can post or edit comments (both own and users'). All the comments posted through the **Customer Portal** tab will be shown to customers when they open the corresponding idea. When the agent starts progress on the issue or resolves it, the corresponding status is shown to customers in Customer Case. Optionally, the agent can attach one or multiple attachments to the comment, these attachments will be visible in Customer Case too.

The **Official answer** section shows the comment pinned to the top of the comment list. The official answer may contain the official resolution on the idea or description of the temporary workaround.

The **Customer Portal** block shows the author of idea, the number of votes and the public URL, which the current idea is available at. For the ticket, only the author and the public URL is shown. The agent can immediately proceed to the customer's area of Customer Case portal for viewing idea or ticket details by clicking the Public URL link.

(i) All the attachments uploaded through JIRA will not be visible in Customer Case. Only the files attached to the comments on the **Customer Portal** tab are visible in Customer Case.

(i) A JIRA agent who first comments on the newly submitted ticket becomes the assignee of this ticket automatically.

Pinning the Comment to the Top

(i) This functionality is only available for feedback forums.

Sometimes you may find it necessary to pin some comment to the top of the comment list, so everyone who opens this idea can view the comment with actual information about it. It may be an official response from your team or description of the solution or workaround that may help.

You can pin only one comment to the top of the list. If there is a comment already pinned to the top, you can either unpin it or pin another comment that will replace the current one. You can pin comments of JIRA agents and customers.

1. Open the idea.
2. Switch to the **Customer Portal** tab.
3. Locate the comment you want to pin to the top of the list.

4. Click **Pin to top**.

5. Confirm the performed operation.

6. Once the comment has pinned to the top, the **Official answer** section appears above the list with comments..
7. To unpin the comment, click **Unpin**.

Searching for Ideas using JQL

The add-on has a special JQL query for searching for ideas with votes.

```
# For example, issue.property[cc.vote].total > 2 - searches for all issues having more than 2 votes.
issue.property[cc.vote].total + operator + number
```

More examples:

```
# Filters ideas by number of votes in the ascending (or descending order).
ORDER BY issue.property[cc.vote].total ASC (or DESC)

# Filters ideas  from the specified project in the ascending (or descending order).
project="PROJECT_NAME" ORDER BY issue.property[cc.vote].total ASC (or DESC)

# Searches in the specified project for ideas with the number of votes more than 2 and shows them in the
ascending order.
project="PROJECT_NAME" AND issue.property[cc.vote].total > 2 ORDER BY issue.property[cc.vote].total ASC
```

Once you have created the JQL query, you can save it as a filter

Outputting the Gadget with Ideas to the Dashboard

1. Add a gadget to your dashboard.

2. Select the filter containing the JQL query.

Recently Created Chart: Customer Case

Project or Saved Filter:	**Customer Case**
	Quick Find
	Advanced Search
Period:	Weekly ▾
	The length of periods represented on the graph.
Days Previously:	60
	Days (including today) to show in the graph.
Refresh Interval:	Every 1 Hour ▾
	How often you would like this gadget to update
	Save Cancel

3. Select the period for showing the chart.
4. Define the refresh interval for the gadget.
5. Click **Save**.

Recently Created Chart: Customer Case   ✛ ☐ ▽

Total Issues: **5**

Period: last **60** days (grouped **Weekly**)