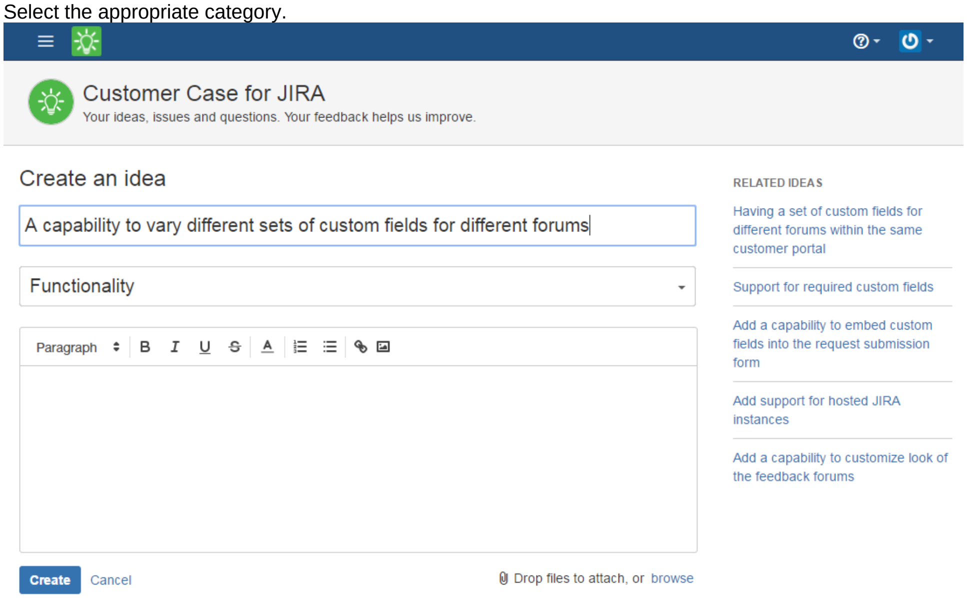
Managing Ideas and Tickets

Customer Case provides a convenient way of managing ideas and tickets on the forums.

Posting Ideas

1. Locate the **Post a new idea** button and click it.
2. On the opened page, enter the short summary of your idea and its description.
3. Select the appropriate category.



4. To attach one or multiple files to the idea, click **Add attachment** or just drag the files. You can also remove the attached files by hovering over them and clicking ✖ icon.
5. Click **Save** when complete.

- Selection of the category may be unavailable if components are not defined for the project.
- The maximal size of attachment cannot exceed 10 MB.
- The Related Ideas block appears once Customer Case finds similar ideas within the same feedback forum. All ideas displayed in this block are sorted by the number of votes. The block updates the set of similar ideas continuously.

Submitting Tickets

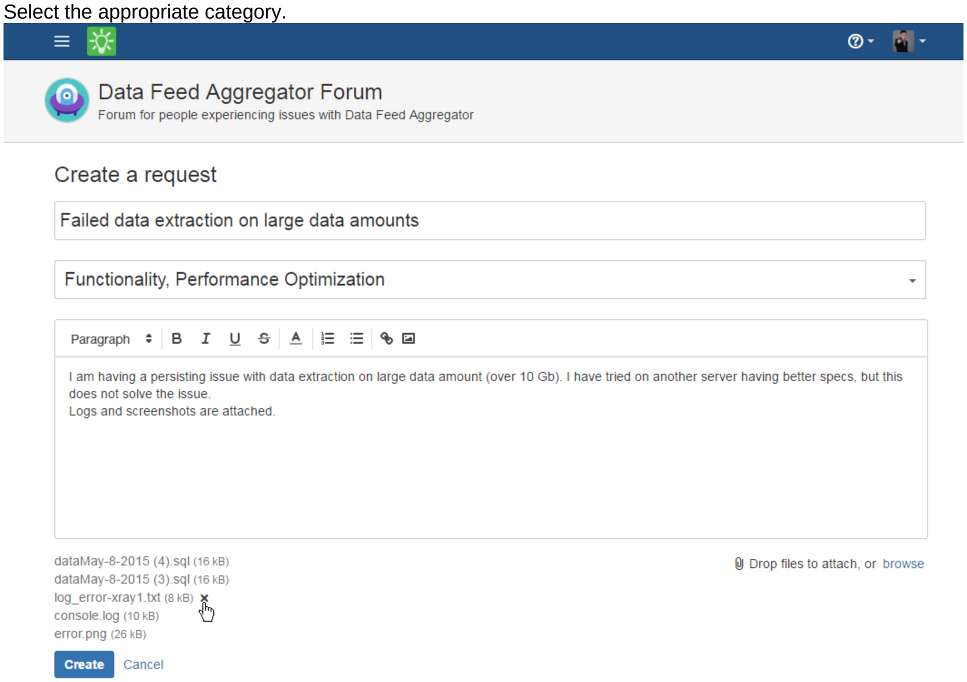
You can submit tickets in two ways:

- using the interface of Customer Case
- sending an email to the specified address

Usage of the second way is possible on the support and feedback forums where a vendor enabled mailboxes. In this case, you can submit requests and comments including attachments by sending an email to the specific address. Customer Case will automatically fetch the required data from the email body and create either a new request or post a comment to the corresponding request. For mapping comments to specific Jira issues, you need to **keep the request key number in the email subject** when replying to the request from Customer Case.

1. Locate the **Submit a new request** button and click it.
2. On the opened page, enter the short summary of your ticket and its description.

3. Select the appropriate category.



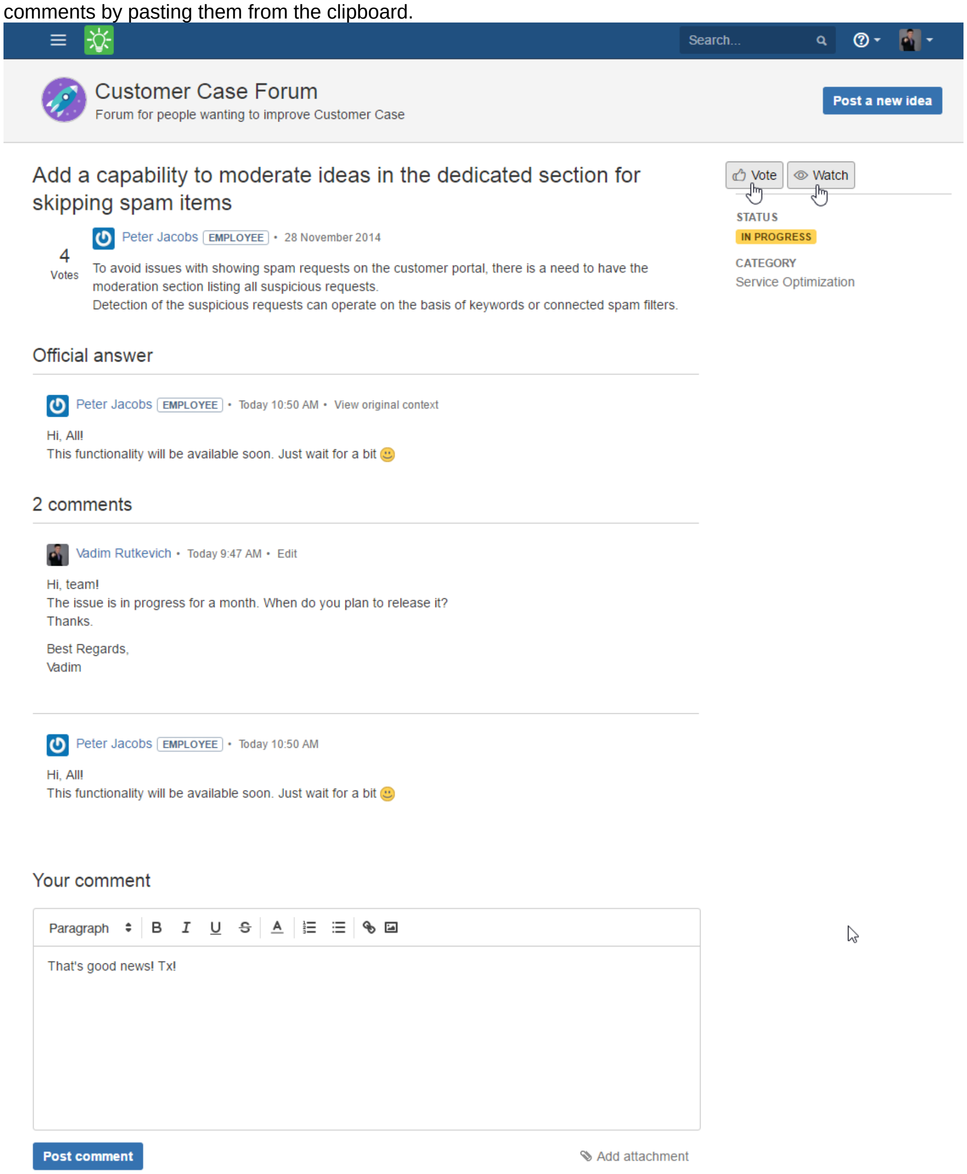
4. To attach one or multiple files to the ticket, click **Add attachment** or just drag the files. You can also remove the attached files by hovering over them and clicking ✕ icon.
5. Click **Save** when complete.

- Selection of the category may be unavailable if components are not defined for the project.
- If you want to add additional fields to the form you need to set the Required status to the proper fields in Jira.
- The maximal size of attachment cannot exceed 10 MB.

Viewing, Commenting, Voting, and Watching Ideas

1. On the list with ideas, locate the one you want to comment or vote for.
2. Click the idea summary to open the page with its detailed description.
3. Click the **Vote** button.
4. Click the **Watch** button for receiving notifications about progress on the idea.
5. Click **View original context** for official answers for their quick location in long comment threads.

6. To attach one or multiple files to your comment, click **Add attachment** and select files or drag files to the page. You can also insert images into comments by pasting them from the clipboard.



7. In the visual editor, enter your comment and click the **Post Comment** button.
8. To copy the permanent link to the comment, click icon appearing when you point to the comment.

Accounts of company representatives commenting ideas or replying to your comments are highlighted with the EMPLOYEE marker.

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

> The Watch function allows users of your feedback forums to receive notifications about progress on the issue such as adding new comments, attaching new files, and the status change. The user who submitted an idea or left comments becomes a watcher automatically. Users can also subscribe manually by clicking the Watch button.
>
> Users who were added as participants of support requests can stop watching these tickets by clicking the **Unwatch** button. After this, they will no longer be able to view this support request until the author or agent adds him or her as a watcher again.

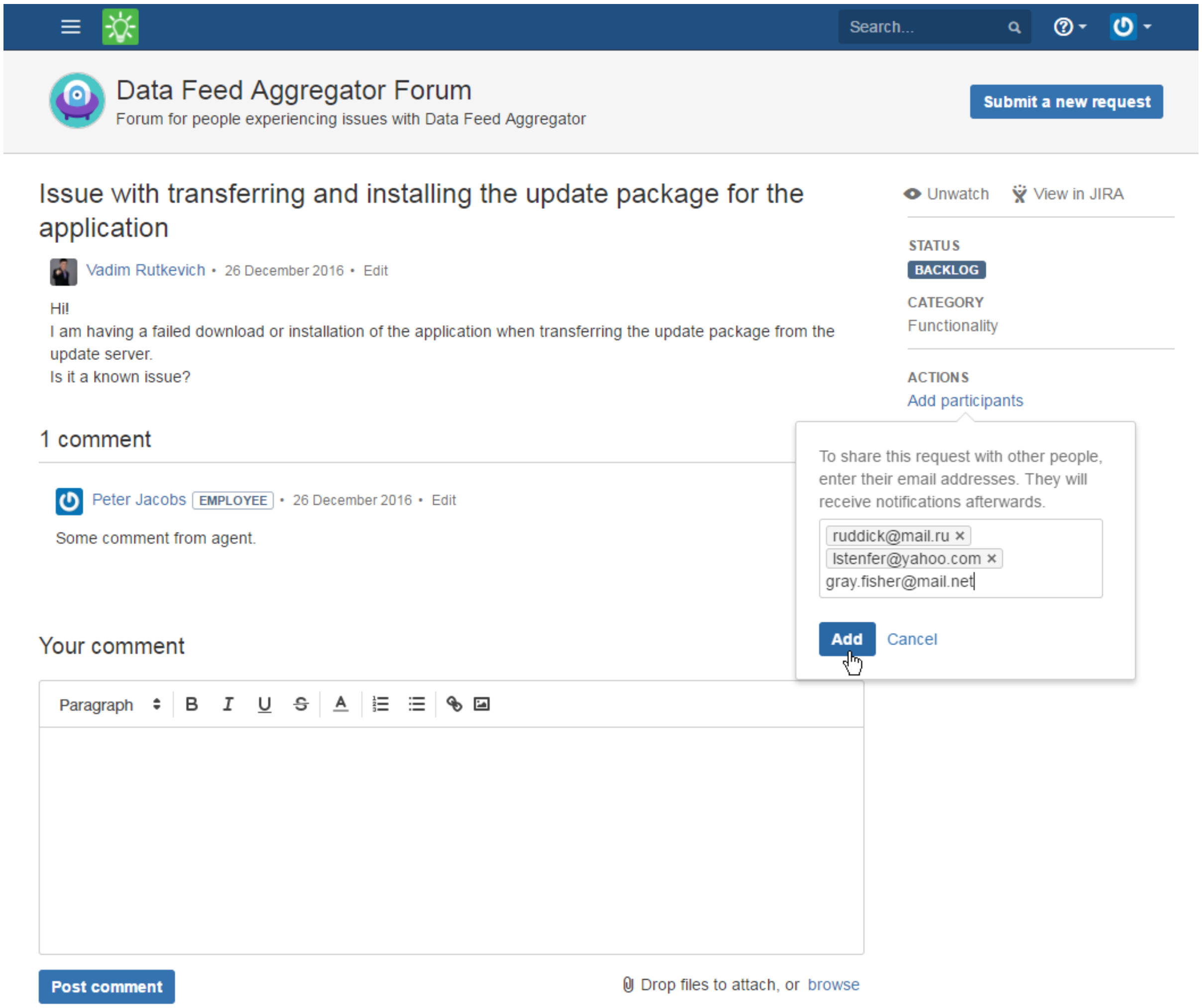
Adding Participants

Customer Case allows you to add participants for the submitted feature and support requests. On support forums, both **the author of the request and support agents** can add participants to the existing requests, on feedback forums **only support agents** can do this.

All the added participants receive a notification with the information about the person who added them as participants and the request information. If the person does not have an account in Customer Case, he or she will be prompted to sign up for the service. When adding participants on forums with access restrictions, Customer Case validates whether the email of the participant satisfies the defined access restrictions of the forum or not. If not, the notification is sent to the specified email address but the corresponded warning is displayed to the person who adds participants.

Now the users can view all the ideas and support requests that they submitted and the requests which they were added as participants into.

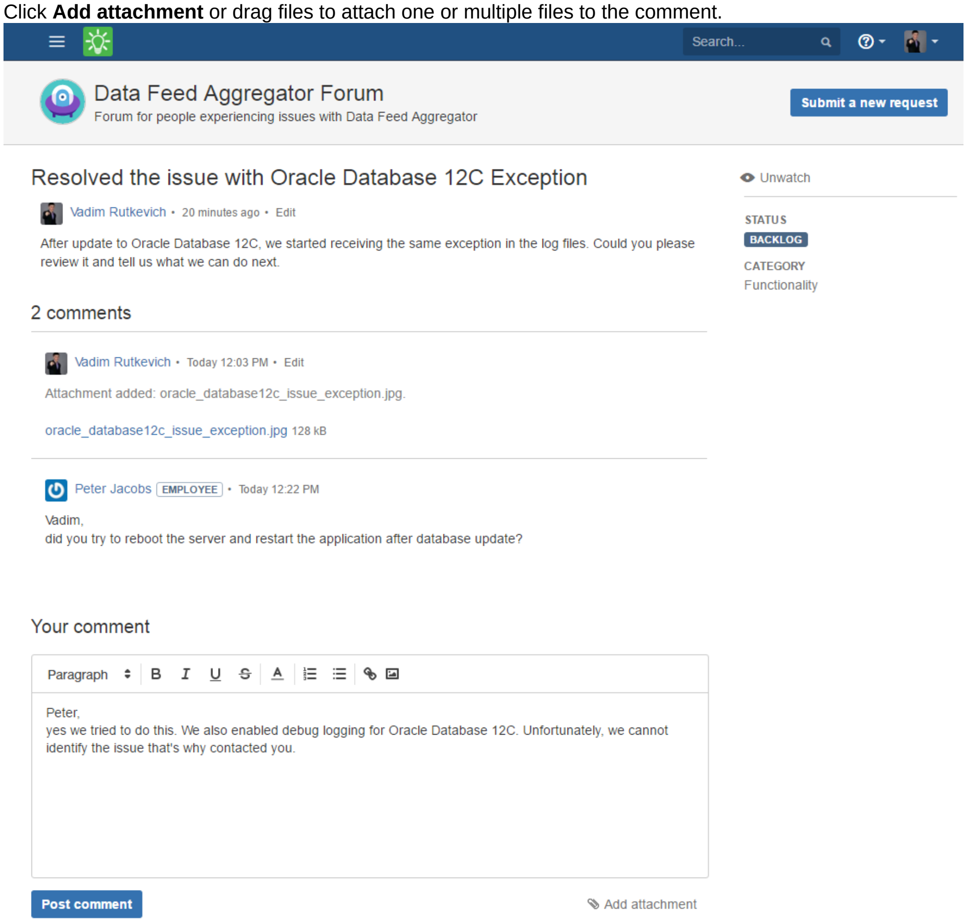
1. In the right part of the screen, locate the **Add participants** link and click it.
2. Enter the email address of a person you want to add as a participant. Customer Case will automatically convert the specified string into the email address once you press the **Space, Enter,** or**, (Comma)** button.
3. Click **Add** once complete.



Viewing and Commenting Tickets

1. On the list with issue reports, locate the one you want to comment on.
2. Click the issue report summary to open the page with its detailed description.

3. Click **Add attachment** or drag files to attach one or multiple files to the comment.



4. In the visual editor, enter your comment and click the **Post Comment** button.

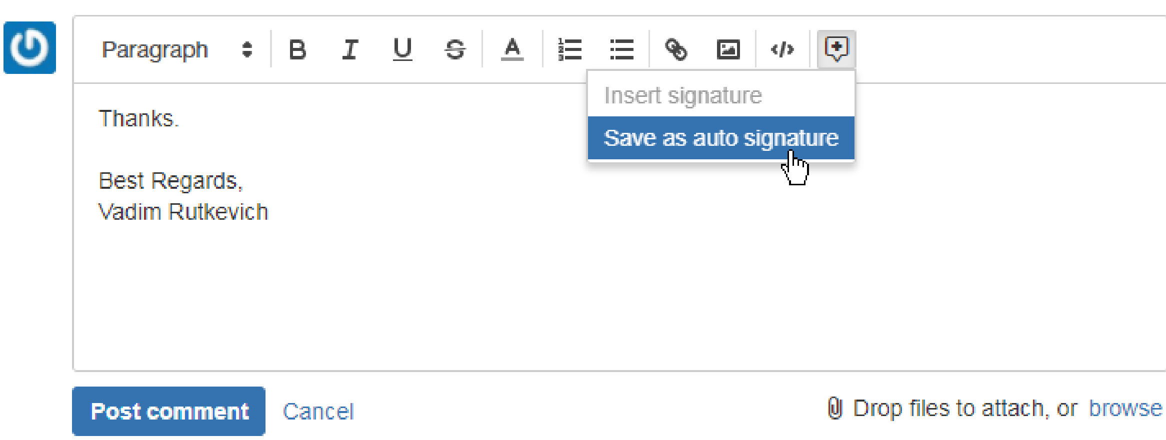
Accounts of company representatives commenting on ideas or replying to your comments are highlighted with the EMPLOYEE marker.

Inserting the Automatic Signature

You can add the automatic signature which will be inserted into your replies in Customer Case. You can use text, links, and images in your automatic signature.

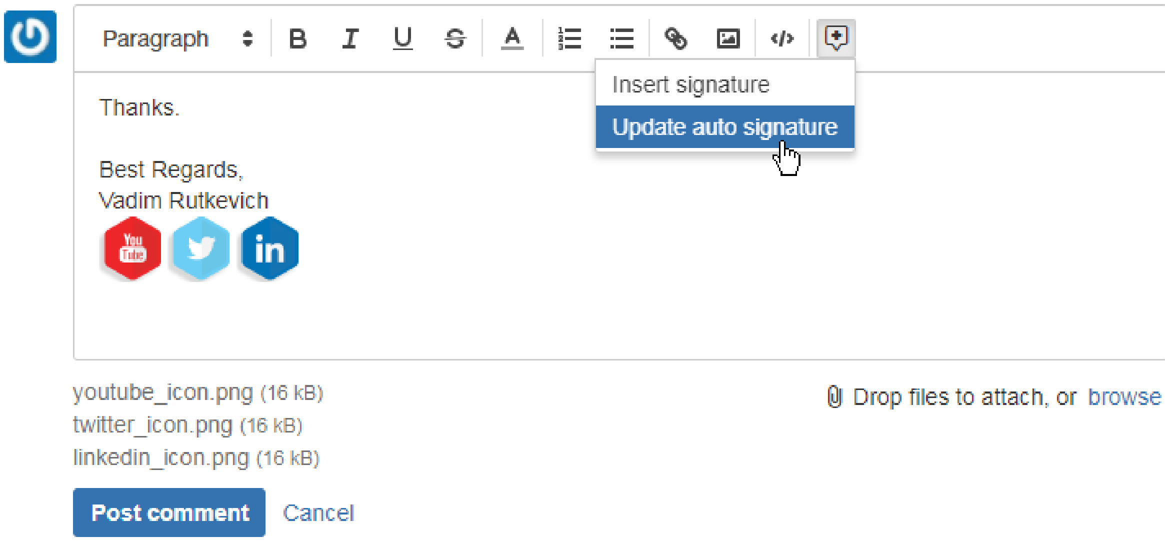
1. Expand the text area to write a reply to a customer.
2. Enter the text snippet which you want to use as an automatic signature.
3. Click the **Canned responses** icon.
4. From the contextual menu, select **Save as auto signature**.

Customer Case will automatically insert this signature into all replies you write to customers on support and feedback forums.



If you want to modify the saved signature, enter a new text snippet. Then click the **Canned responses** icon and select **Update auto signature**.

Customer Case will update your automatic signature with the new variant.



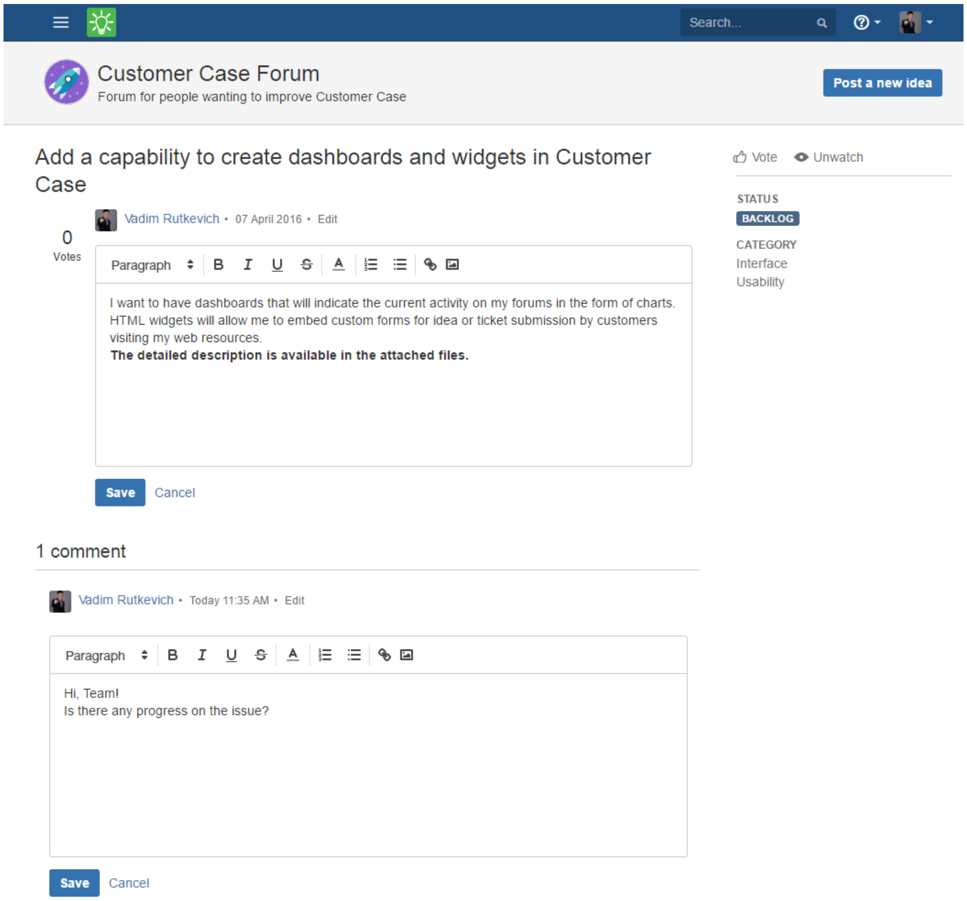
Editing Ideas / Tickets and Comments

Users of Customer Case can edit a description of their own ideas, tickets, and comments. The way of editing the description and comments is identical for feedback and support forums.

> There is no possibility to delete own comments once you leave it on a portal.

1. Open your idea / ticket or locate your comment.
2. Click the **Edit** link.
3. Update description of the idea or ticket or comment.

4. Click **Save**.



> You cannot edit ideas / issue reports and comments posted by other users.

Creating Requests by Email

Customer Case allows you to submit requests by email. This requires the configured mailbox for the forum.

The vendor or company should share this email address with you, so you can send your requests to this address.

Commenting Requests by Email

> Please preserve the request key in the email subject, so Customer Case can properly match it to the existing request and add your comment into it.

1. In your mail agent, locate the request creation confirmation request or the email with the response from the support agent.
2. Click **Reply**.
3. Enter the text of your reply.
4. Click **Send**.