

Managing Ideas and Tickets in Jira

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


See the next sections for details:

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- [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:

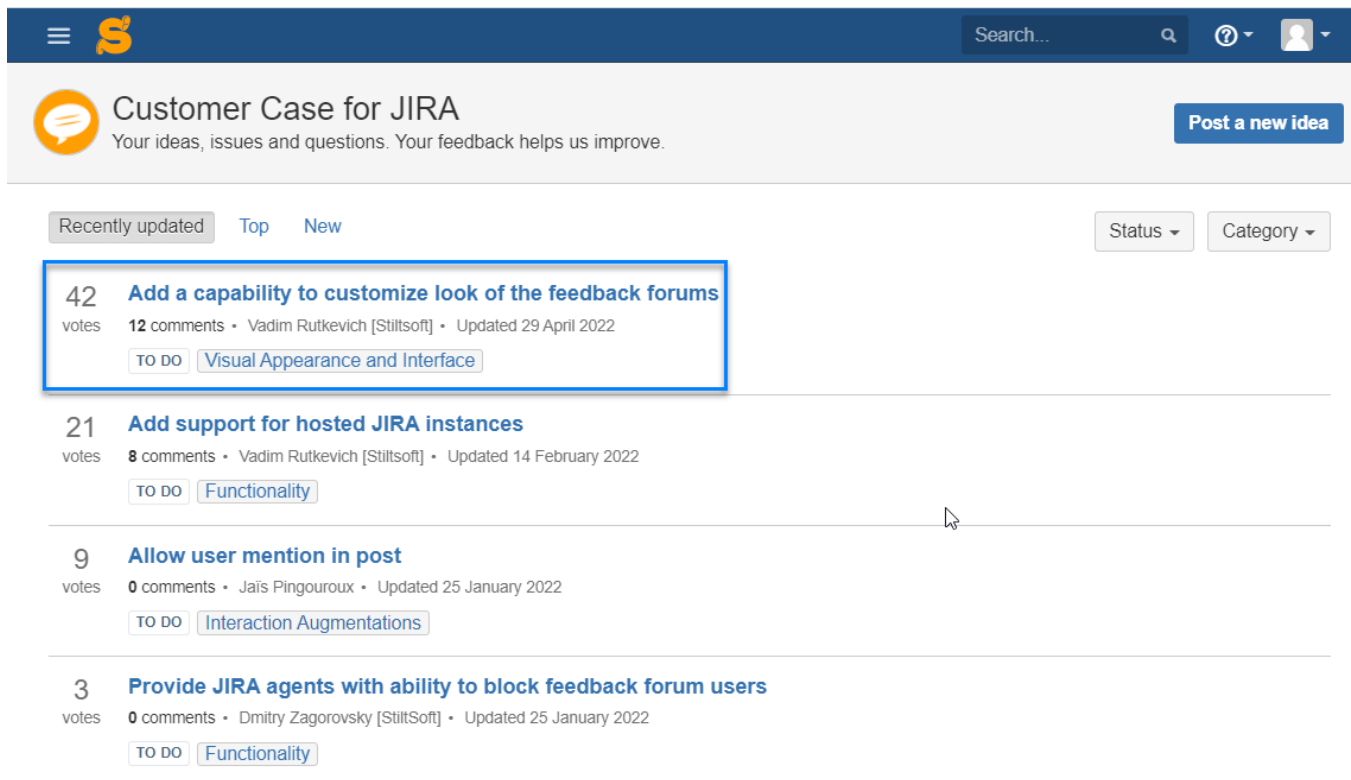
1. Open the appropriate project.
2. On the left sidebar, select **Customer Case**.
3. The list of ideas or tickets (depending on the forum type) will be displayed to you.

 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



The screenshot shows the Jira Customer Case interface. At the top, there is a navigation bar with the Jira logo, a search bar, and user profile icons. Below the navigation bar, the page title is "Customer Case for JIRA" with the subtitle "Your ideas, issues and questions. Your feedback helps us improve." and a "Post a new idea" button. The main content area displays a list of ideas, sorted by "Recently updated". The first idea is highlighted with a blue border:

- 42** **Add a capability to customize look of the feedback forums**
votes **12** comments • Vadim Rutkevich [Stiltsoft] • Updated 29 April 2022
TO DO [Visual Appearance and Interface](#)
- 21** **Add support for hosted JIRA instances**
votes **8** comments • Vadim Rutkevich [Stiltsoft] • Updated 14 February 2022
TO DO [Functionality](#)
- 9** **Allow user mention in post**
votes **0** comments • Jai's Pingouroux • Updated 25 January 2022
TO DO [Interaction Augmentations](#)
- 3** **Provide JIRA agents with ability to block feedback forum users**
votes **0** comments • Dmitry Zagorovsky [StiltSoft] • Updated 25 January 2022
TO DO [Functionality](#)

For each listed ticket, the following information is displayed:

- Ticket Summary
- Number of comments
- Author of the ticket
- Time of ticket submission
- Status
- Category

The screenshot shows the top navigation bar with a search field and user profile icons. Below is the 'Support Requests' header with a 'Submit a new request' button. A filter bar contains 'Recently updated', 'New', 'Assigned to me', 'Unanswered', 'Status', and 'Category'. The main content area lists four tickets, each with a title, comment count, author, and time, and a status label with a category link.

Support Requests
If you have a problem with one of our add-ons or you have a question to us, feel free to submit here. [Submit a new request](#)

Recently updated New Assigned to me Unanswered Status Category

Cannot add handy status to a confluence template
12 comments • Alex • Updated a moment ago
DONE Handy Macros for Confluence

Unable to add handy status macro into confluence template (in cloud version)
7 comments • Nimesh Patel • Updated 3 minutes ago
IN PROGRESS Handy Macros for Confluence

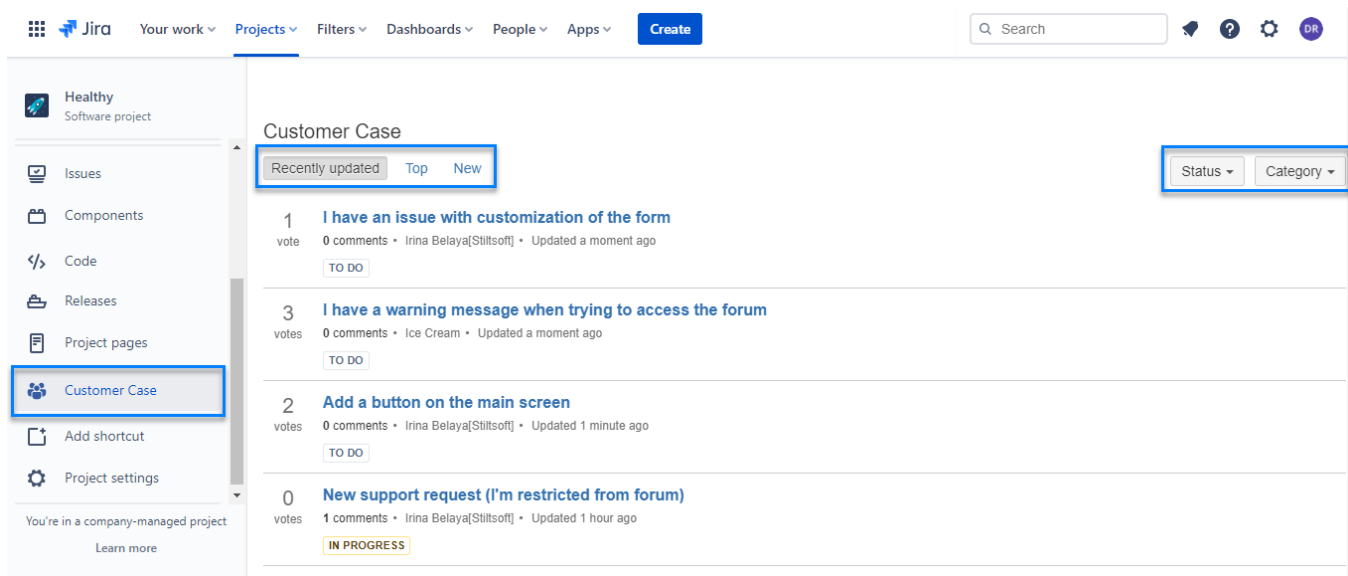
Need Information for Security Assessment of plugin for Confluence Cloud: Table Filter and Charts for Confluence
1 comments • Shrey Rusia • Updated 37 minutes ago
IN PROGRESS Table Filter and Charts for Conflue...

Request for free license
0 comments • Nathan Chantrenne • Updated 1 hour ago
TO DO

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.

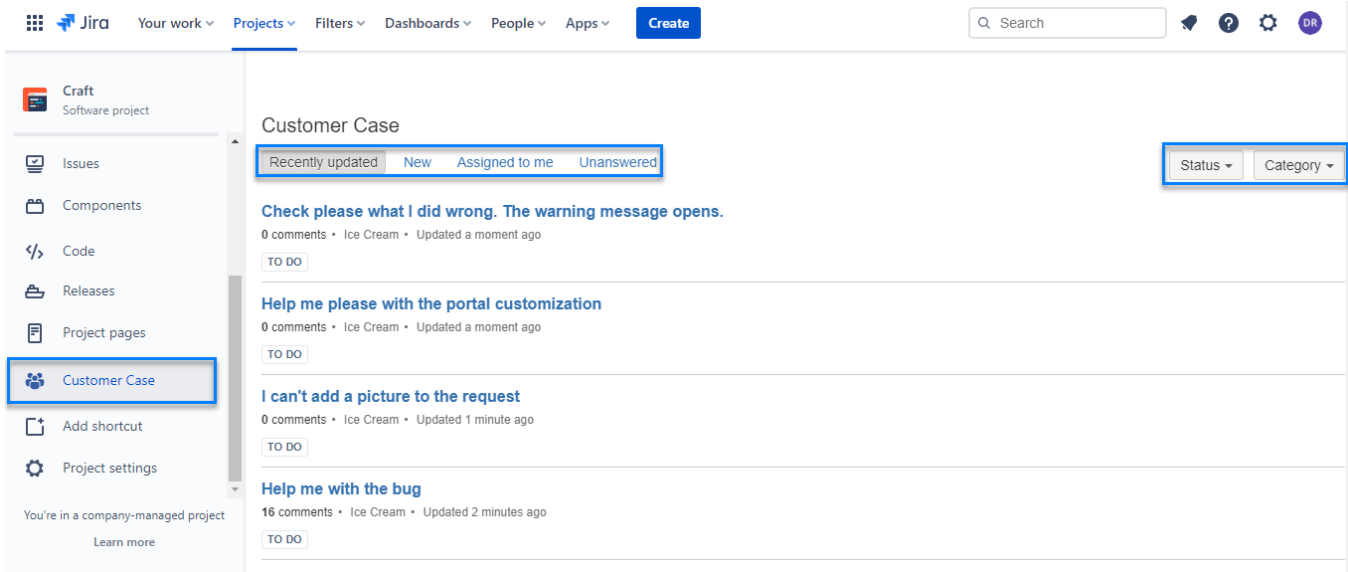


The screenshot shows the Jira interface for a 'Customer Case'. The top navigation bar includes 'Jira', 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. A search bar is on the right. The left sidebar shows a navigation menu with 'Customer Case' highlighted. The main content area displays a list of tickets under the heading 'Customer Case'. The list is sorted by 'Recently updated', as indicated by the selected sorting button. The tickets are as follows:

Rank	Title	Vote	Comments	Author	Updated	Status
1	I have an issue with customization of the form	1 vote	0 comments	Irina Belaya[Stiltsoft]	Updated a moment ago	TO DO
3	I have a warning message when trying to access the forum	3 votes	0 comments	Ice Cream	Updated a moment ago	TO DO
2	Add a button on the main screen	2 votes	0 comments	Irina Belaya[Stiltsoft]	Updated 1 minute ago	TO DO
0	New support request (I'm restricted from forum)	0 votes	1 comments	Irina Belaya[Stiltsoft]	Updated 1 hour ago	IN PROGRESS

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.
- **Unanswered** - the tickets that do not have a reply from an Agent



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



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

Jira issue panel

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

The app adds the Customer Portal tab on the Jira issue panel:

Please, implement the button on the main screen

Attach Create subtask Link issue

Description

Add a description...

Activity

Show: All **Comments** History Work log Customer Portal Newest first

DR Add a comment...

Pro tip: press M to comment

DR Dolores Rhyme November 2, 2021, 6:23 PM

To provide this capability we need to gather at least 50 votes.

Kind regards,
Iryna

To Do

Details

Assignee DR Dolores Rhyme

Reporter DR Dolores Rhyme

Labels None

Change risk None

Request Type None

Priority Medium

Automation Rule executions

Customer Portal **Open Customer Portal**

Once you press the **Customer Portal** tab you will see the author of the idea, the number of votes, and the public URL, which the current idea is available at. For the support request, only the author and the public URL are shown. The agent can immediately proceed to Customer Case portal for viewing idea or ticket details by clicking the Public URL link.

Customer Portal

Author: Larry Stenfer






Votes: 8 Remove vote for this issue

Public URL: <http://customer-case-demo.stiltsoft.com/forums/customer-case-forum/i...>

Jira issue tab

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.

Please, implement the button on the main screen

 Attach  Create subtask  Link issue  


Description


Add a description...

Activity


Show:  All  **Comments**  History  Work log  **Customer Portal**  Newest first ↓




Pro tip: press  to comment

 **Dolores Rhyme** November 2, 2021, 6:23 PM
To provide this capability we need to gather at least 50 votes.

Kind regards,
Iryna

 The omments tab is used for internal correspondence. The comments and attachments that you add to this tab **will not be visible** on the Customer Case portal.

Pinning the Comment to the Top

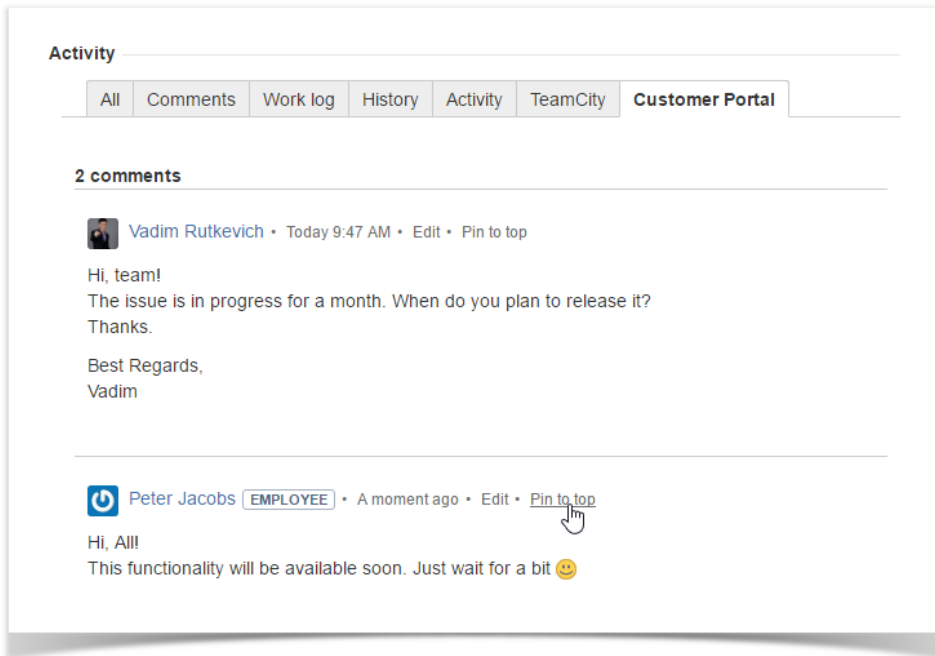
 This functionality is only available for feedback forums.

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 a description of the solution or workaround that may help.

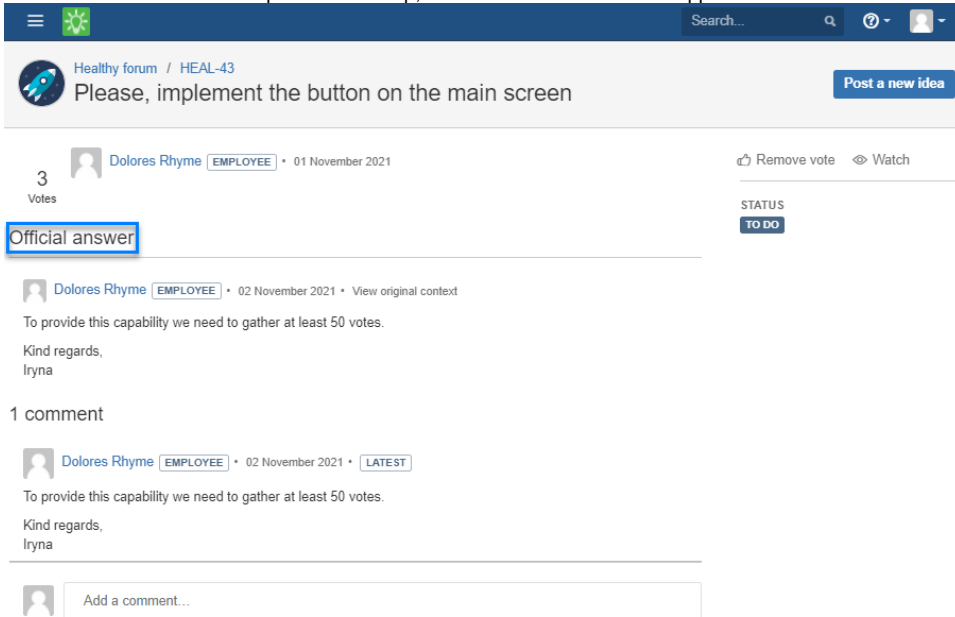
You can pin only one comment to the top of the list. If there is a comment already pinned to the top, you can either unpin it or pin another comment that will replace the current one. You can pin comments of Jira agents and customers.

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 been 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 app provides a set of issue properties searchable using JQL

Examples:

customerVotes>2	searches for all issues having more than 2 votes for a specific project
project="PROJECT_NAME" ORDER BY customerVotes ASC (or DESC)	Filters ideas from the specified project in the ascending (or descending order)
project="PROJECT_NAME" AND customerVotes>2 ORDER BY customerVotes 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 ccUserId=139366	Searches in the specified project for ideas that belongs to the certain user

project = name AND created >= "2021-10-10" AND created <= "2021-10-11"

Searches in the specified project for ideas that were created within the defined period

Once you have created the JQL query, you can [save it as a filter](#).

To learn more about JQL view this [Search Jira like a boss with JQL guide](#).

Outputting the Gadget with Ideas to the Dashboard

1. [Add a Recently Created Chart gadget](#) to your dashboard.
2. Select the filter containing the JQL query.

⋮ Recently Created Chart: Filter for HEAL board

Project or Saved Filter:

Filter for HEAL board

customerVotes > 1

Project or saved filter to use as the basis for the graph.

[Advanced Search](#)

Period

Weekly

The length of periods represented on the graph.

Days Previously

30

Days (including today) to show in the graph.

Refresh Interval:

Every 1 Hour

How often you would like this gadget to update

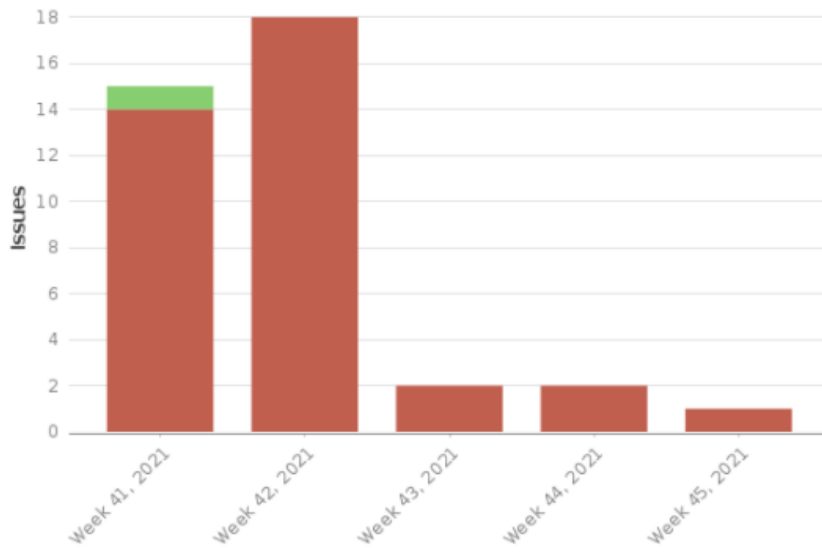
Save

Cancel

3. Select the period for showing the chart.
4. Define the refresh interval for the gadget.

5. Click **Save**.

☰ Recently Created Chart: Filter for HEAL board



Total Issues: **38**

Period: last **30** days (grouped **Weekly**)