Feedback and Support Forums

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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** forum type allows you to collect feedback, ideas, and feature requests
- **Support** forum type allows your customers to submit their support requests or issues encountered with your product

Feedback Forum

The 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 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 troubleshoot these issues.

Adding New Forums



The best practice is to create a project from scratch and further use it for collecting ideas and feature requests from your customers.

You can create a forum in two ways.

The first way is available for the Jira administrators (anyone with the Administer Jira global permission):

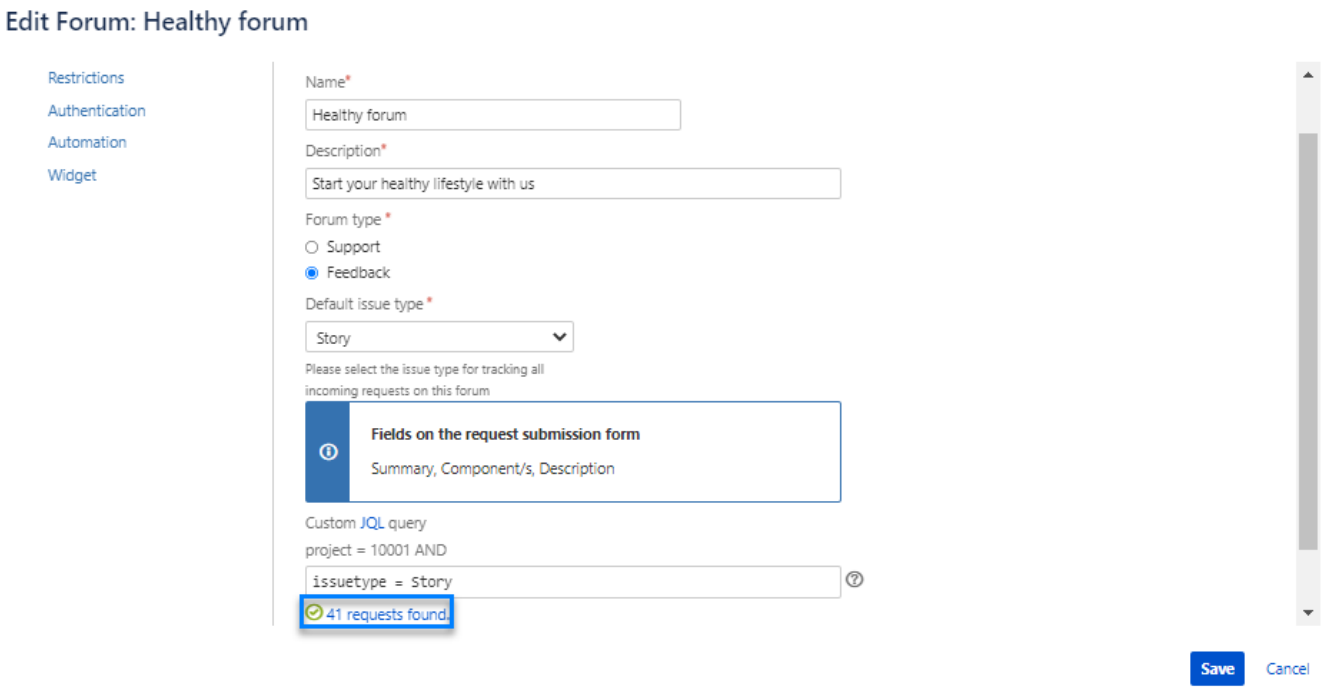
1. Navigate to **Jira Administration > Apps**.
2. Locate the **Customer Case** section and select **Customer Portal**.
3. Locate the **Create Forum** button and click it.
4. In the **Create Forum** form, specify the following information:
   - **Jira Project** - select the appropriate Jira project, which will be used for storing customers' ideas or issue reports.
   - **Name** - a name of the forum.
   - **Description** - a description of the forum.
   - **Forum type** - a 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 filters issues of your Jira project and exposes only the ones that match specified criteria.

     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.

     Applying JQL filters to hide certain issues makes them inaccessible only visually.
5. Click **Save**.

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**.

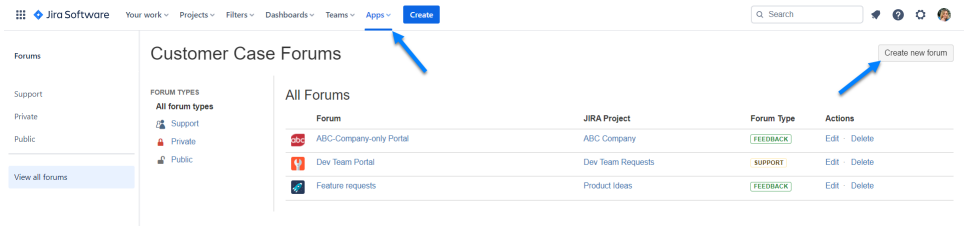
If the tickets exposed have attachments and/or comments, they won't be publically visible to avoid private data leaking. **The attachments and comments are only visible if added via the Customer Case app**, which includes a forum itself, a forum email, or the Customer Portal tab in Jira.



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

The second way is available for both Jira administrators (anyone with the Administer Jira global permission) and users with the Administer Projects permissions:

1. Find and locate the **Apps tab** on the Jira menu.
2. Select **Forums**
3. Click the **Create new forum** button



4. Further, specify the information described in the first way of creating a forum.

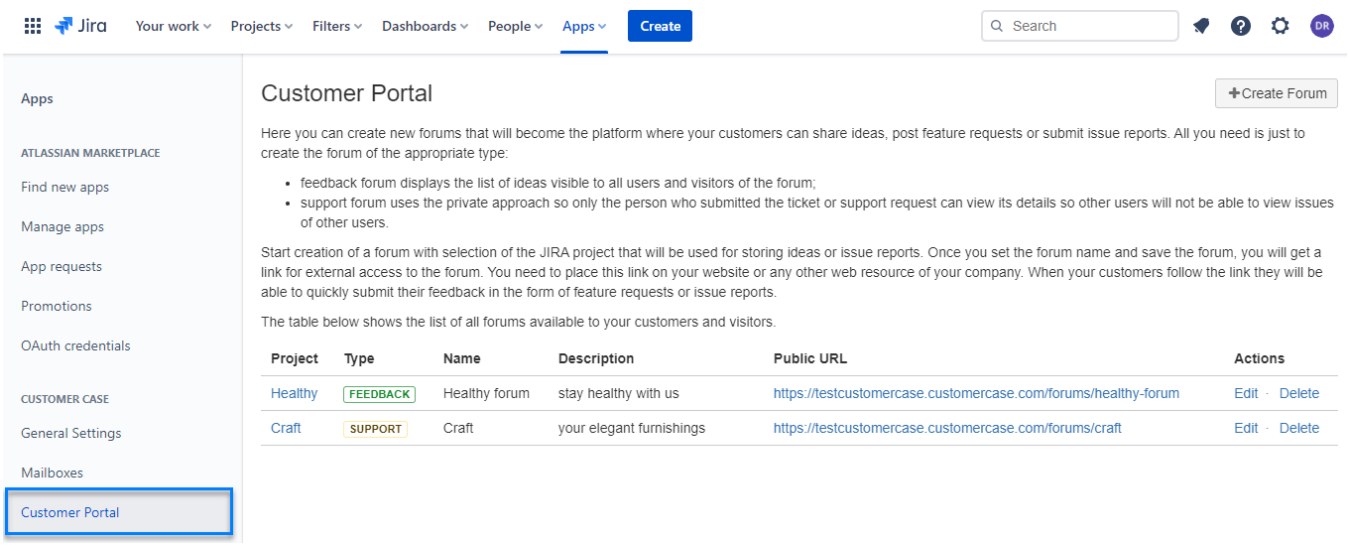
Viewing Forums

Likewise adding forums, you can observe the forums in two ways.

The first way is available for the Jira administrators (anyone with the Administer Jira global permission):

1. Navigate to **Jira Administration > Apps**.
2. Locate the **Customer Case** section and select **Customer Portal**.
3. For each forum, you can find the following information:

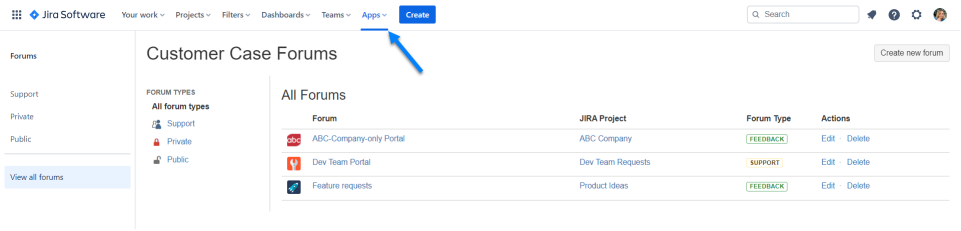
- **Project** - name of the Jira project that will be used for storing ideas, feature requests or issues reports from customers.
- **Type** - a type of the forum (*Feedback* or *Support*).
- **Name** - a name of the forum.
- **Description** - a description of the forum.
- **Public URL** - the URL address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



After creating a 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.

The second way is available for all the users:

1. Find and locate the Apps tab on the Jira pane.
2. Open **Forums**
3. For each forum, you can find the following information:



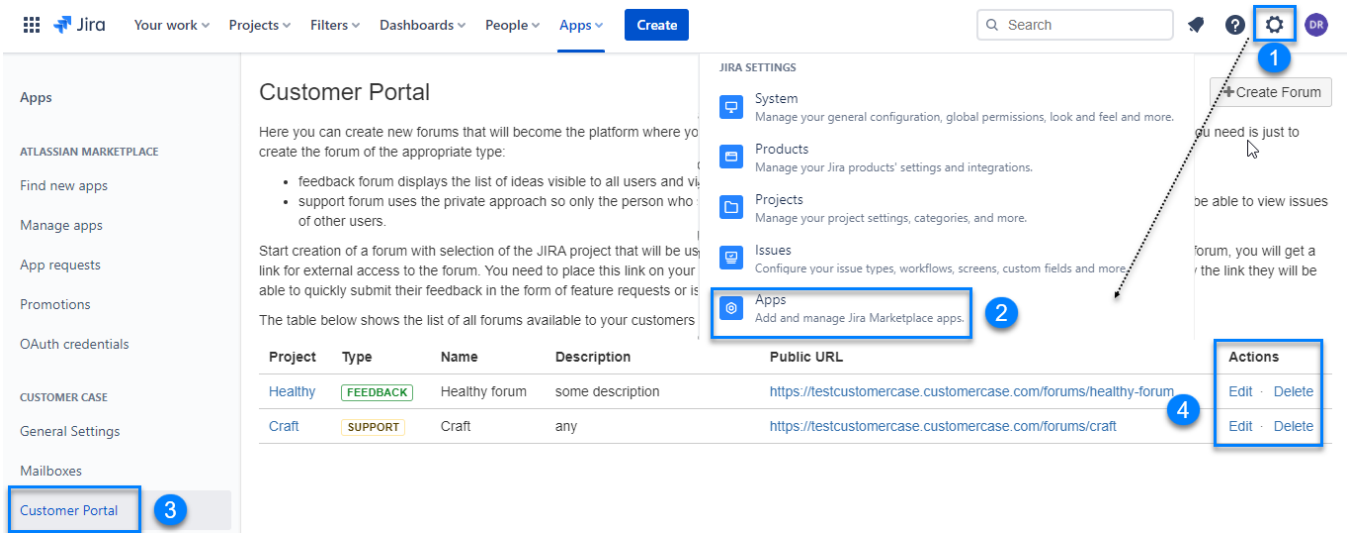
- **Forum** - a name of the forum.
- **Jira Project** - a name of the Jira project that will be used for storing ideas, feature requests, or issues reports from customers.
- **Forum Type** - a type of the forum (*Feedback* or *Support*).
- **Actions -** the capability to edit or delete a forum.

> The Action buttons may not be available for specific forums if you do not have a Global Administrator role in Jira (ADMINISTER or SYSTEM_ADMIN) or your project role for the relevant Jira project isn't equal to ADMINISTER_PROJECTS.

Editing and Removing Forums

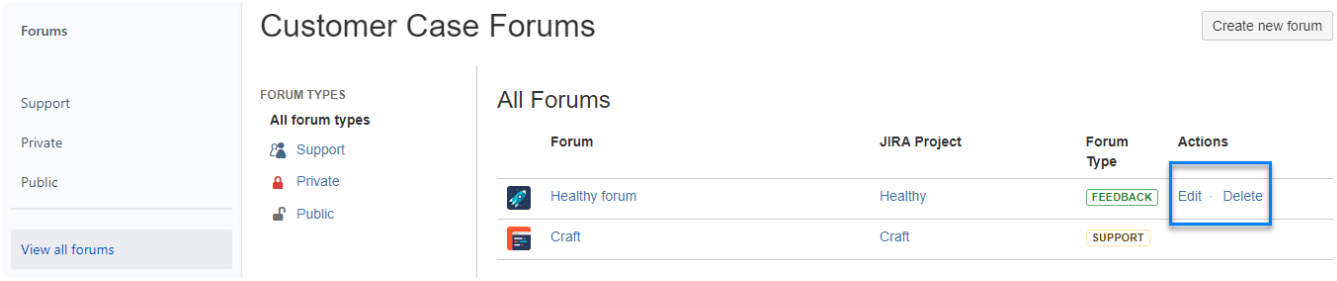
As a user with the Global Administrator role, you can edit and delete forums in the Jira settings.

- Go to the Jira settings
- Select Apps
- Find the Customer Case section in the right sidebar and press the Customer Portal tab
- Find the Actions column and choose the relevant option



You can Edit or Delete a forum **while viewing it** if you have either the Administer Jira global permission or the Administer Projects permissions.

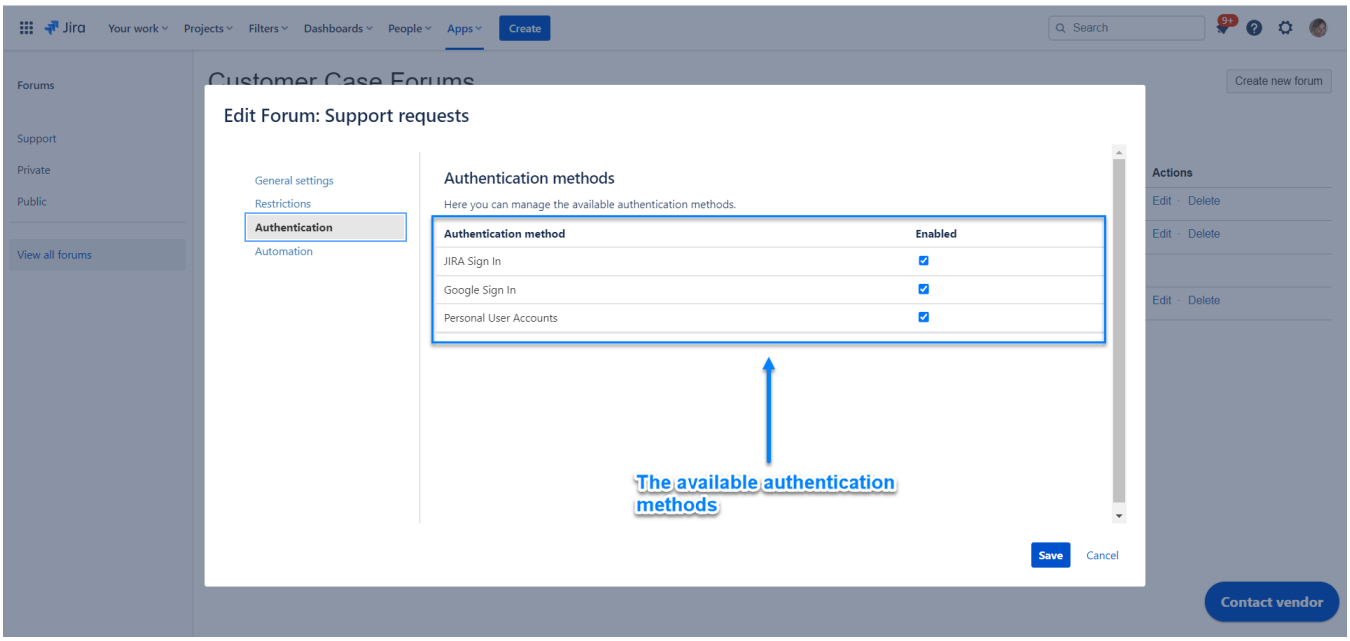
1. On the list with forums, locate the appropriate one.
2. Click the **Edit or Delete** link.
3. Confirm the modifications or a forum removal.



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.

Configuring Authentication Capabilities

1. On the list with feedback forums, locate the appropriate one.
2. In the Actions column press the Edit link
3. In the opened form click the Authentication link.
4. The Authentication methods screen opens.
5. Select the appropriate authentication methods that should be available on a forum.
6. Click Save when you complete.


Jira
Your work
Projects
Filters
Dashboards
People
Apps
Create
Search
Forums
Support
Private
Public
View all forums
Customer Case Forums
Create new forum
Edit Forum: Support requests
General settings
Restrictions
Authentication
Automation
Authentication methods
Here you can manage the available authentication methods.
Authentication method
Enabled
JIRA Sign In
Google Sign In
Personal User Accounts
The available authentication methods
Save
Cancel
Actions
Edit · Delete
Edit · Delete
Edit · Delete
Contact vendor