

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.

Edit Forum: Healthy forum

Restrictions
Authentication
Automation
Widget

Name*
Healthy forum

Description*
Start your healthy lifestyle with us

Forum type*
☐ Support
☒ Feedback

Default issue type*
Story

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

Fields on the request submission form

Summary, Component/s, Description

Custom JQL query
project = 10001 AND
issuetype = Story

41 requests found.

Save Cancel



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

Forum	JIRA Project	Forum Type	Actions
ABC Company-only Portal	ABC Company	FEEDBACK	Edit Delete
Dev Team Portal	Dev Team Requests	SUPPORT	Edit Delete
Feature requests	Product Ideas	FEEDBACK	Edit Delete

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.

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Apps

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CUSTOMER CASE

General Settings

Mailboxes

Customer Portal

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
Healthy	FEEDBACK	Healthy forum	stay healthy with us	https://testcustomer.case.customer.case.com/forums/healthy-forum	Edit · Delete
Craft	SUPPORT	Craft	your elegant furnishings	https://testcustomer.case.customer.case.com/forums/craft	Edit · Delete

Customer Portal

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:

Jira Software Your work Projects Filters Dashboards Teams Apps **Create** Q Search

Forums

Support

Private

Public

View all forums

Customer Case Forums

FORUM TYPES

All forum types

Support

Private

Public

All Forums

Forum	JIRA Project	Forum Type	Actions
ABC-Company-only Portal	ABC Company	FEEDBACK	Edit · Delete
Dev Team Portal	Dev Team Requests	SUPPORT	Edit · Delete
Feature requests	Product Ideas	FEEDBACK	Edit · Delete

Create new forum

- **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.

i 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

Customer Portal

Here you can create new forums that will become the platform where you create the forum of the appropriate type:

- feedback forum displays the list of ideas visible to all users and visitors
- support forum uses the private approach so only the person who created the forum can view it

Start creation of a forum with selection of the JIRA project that will be used for the forum. You need to place this link on your website to quickly submit their feedback in the form of feature requests or issues.

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

Project	Type	Name	Description	Public URL	Actions
Healthy	FEEDBACK	Healthy forum	some description	https://testcustomercase.customercase.com/forums/healthy-forum	Edit · Delete
Craft	SUPPORT	Craft	any	https://testcustomercase.customercase.com/forums/craft	Edit · Delete

JIRA SETTINGS

- System**
Manage your general configuration, global permissions, look and feel and more.
- Products**
Manage your Jira products' settings and integrations.
- Projects**
Manage your project settings, categories, and more.
- Issues**
Configure your issue types, workflows, screens, custom fields and more.
- Apps**
Add and manage Jira Marketplace apps.

Actions

Edit · Delete

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.

Customer Case Forums

Create new forum

FORUM TYPES

- All forum types
- Support
- Private
- Public

All Forums

Forum	JIRA Project	Forum Type	Actions
Healthy forum	Healthy	FEEDBACK	Edit · Delete
Craft	Craft	SUPPORT	



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.

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Create new forum

General settings

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Authentication methods

Here you can manage the available authentication methods.

Authentication method	Enabled
JIRA Sign In	<input checked="" type="checkbox"/>
Google Sign In	<input checked="" type="checkbox"/>
Personal User Accounts	<input checked="" type="checkbox"/>

The available authentication methods

SaveCancel

Actions

Edit · Delete

Edit · Delete

Edit · Delete

Contact vendor