## FAQ

- Is it possible to change the fields in the form request on a forum?
- What user roles are available in Customer Case?
- Are there any requirements for Jira projects used for storing submitted ideas and feature requests?
- Where can I place the public URL of my feedback forum?
- What information about me is available to other users of feedback forums?
- Is it possible to hide surnames when the forum is public?
- Can I create a personal account in Customer Case instead of using a social profile?
- How can I track progress on ideas?
- Can I vote multiple times for the same idea?
- Are there any limits for idea votes per forum?
- Is it possible to create a private forum with access restricted to certain people?
- What will happen if I delete the forum?
- How do I pre-define the request summary through the URL query?
- Where can I submit a feature request for Customer Case?
- I cannot enable categories for the forum. What can I do?
- I cannot find my project in the Create Forum form. What can I do?
- How to get the URL of request in Customer Case by JIRA issue key or ID?
- How to use the Marketplace token in Jira UPM
- Is possible to enable a custom domain name for the portal?
- Is it possible to make a custom domain name secure?

#### Is it possible to change the fields in the form request on a forum?

By default, all the standard fields (such as Summary, Description, and Components) and all the required fields from the Create Issue screen of the project will be shown during request creation in a Customer Case forum.

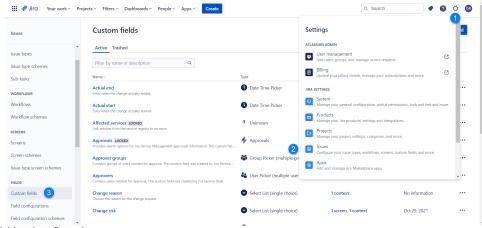
The ability to set up the required field is only available for team-managed projects. You can propel this feature for team-managed projects by adding your vote here.

#### To add additional fields to the form, follow these steps:

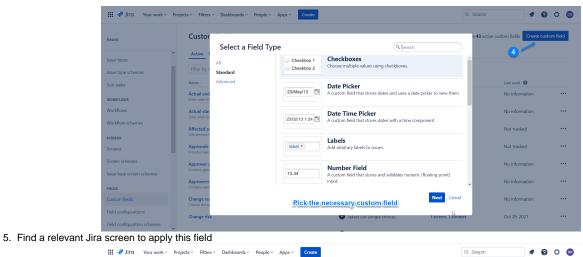
- 1. Go to the Jira Settings
- 2. Select the Issues tab

(i)

3. Navigate to the Custom fields



4. Create a custom field and configure it



🏭 👎 Jira 🛛 Your work 🗸 🖓 Pro	jects 🗸 Filters 🗸 Dashboards 🗸 People 🗸 Apps 🗸 🤇 Create				Q. Search	• 0	0	DR
Issues	Issues					Q Search	i Jira ad	dmin
New issue view transition	Associate field Pick the date to screens							
ISSUE TYPES	Associate the field Pick the date to the appropriate screens. You must associate a fie displayed. New fields will be added to the end of a tab.	ld to a screen before it	will be					
Issue types	Filter by name Q							
Issue type schemes	Screen	Tab		1				
Sub-tasks	CQ: Scrum Bug Screen	Field Tab	0	-				
WORKFLOWS	CQ: Scrum Default Issue Screen	Field Tab	0					
Workflows	CRAF: Scrum Bug Screen	Field Tab						
Workflow schemes	CRAF: Scrum Default Issue Screen	Field Tab	0		eck the Screen that	to the project you		
SCREENS	CS: Scrum Bug Screen	Field Tab	0		rresponds to the pr int set a custom fiel			
Screens	CS: Scrum Default Issue Screen	Field Tab	0					
Screen schemes	CSM: Jira Service Management Screen	Default						
	DEMO: Jira Service Management Screen	Default	0					
Issue type screen schemes	Default Screen	Field Tab						
FIELDS	GF: Scrum Bug Screen	Field Tab						
Custom fields 🔹	GF: Scrum Default Issue Screen	Field Tab						

If the screen you apply a new field for is shared between multiple Jira projects, remember that a new field will also be used in these projects. ⚠ How to check what projects use the same screen? Jira project Project settings Summary Screens section Jira Software Your work 🗸 Projects 🗸 Filters 🗸 Dashboards 🗸 Teams 🗸 Apps 🗸 Create issue will follow, e.g. "In Progress", "Resolved". Scheme: Product Ideas PI: Software Simplified Workflow Scheme Software project 😪 Software Simplified Workflow for Project PI 🖉 Back to project Project settings Screens Screens allow you to arrange the fields to be displayed for an issue. Different screens can be used when an issue Details is created, viewed, edited, or transitioned through a workflow. Summary Scheme: PI: Scrum Issue Type Screen Scheme People PI: Scrum Default Screen Scheme DEFAULT Permissions 📳 PI: Scrum Bug Screen Scheme Notifications Automation **Fields** Different issues can have different information fields. A field configuration defines how fields behave for the Features project, e.g. required/optional; hidden/visible. Toolchain Scheme: System Default Field Configuration Workflows Default Field Configuration DEFAULT > Issues Components Settings You're in a company-managed project Some general project configuration options. Learn more JIRA Mobile Connect: Disabled (Enable) More Info Go to the Admin Settings Issues Screen Schemes and check what project share the same screens.

P When screens are shared between projects, it's better not to add fields that don't apply to all projects. When a field has a narrow use case, create a custom screen to apply to the appropriate project.

#### 6. Go to the Fields section

<ol><li>Find the relevant field name and select in</li></ol>
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🗰 👎 Jira 🛛 Your work 🗸	Projects v Filters v Dashboards v People v Apps v Create	🦸 😧 🔅 💷
Issues	lssues	Q Search Jira admin
FIELDS	View Field Configurations	Add field configuration
Custom fields		
Field configurations 6	O The table below shows Field Configurations and the Field Configuration Schemes they are used in. A Field Configuration provides the ability to change field	behavior, it essentially
Field configuration schemes	tells Jira how to handle a particular field. For example, a Field Configuration can be used to hide a field from all input screens and views, or to make a field re it is edited.	equire a value every time
FORMS	Field Configurations are activated by placing them into Field Configuration Schemes, and then associating a scheme with one or more projects.	
Data connections		
ISSUE FEATURES	٩	
Time tracking	Name Field Configuration Schemes	Actions
Issue linking	Default Field Configuration The default field configuration	Configure Copy
ISSUE ATTRIBUTES	Jira Service Management Field Configuration for Project CSM This Jira Service Management Field Configuration was generated for Project CSM	Configure Copy Edit
Statuses	7 Jira Service Management Field Configuration for Project DEMO • Jira Service Management Field Configuration Scheme for Project DEMO	Configure Copy Edit
Resolutions	Edit field properties	
Priorities		
Issue security schemes		

#### 8. Find the custom field you've just created and set it as required

🇰 <table-of-contents> Jira Your work 🗸 Proj</table-of-contents>	iects ~ Filters ~ Dashboards ~ People ~ App	s ∽ Create Q Search	🕈 🕜 🗘 🙉
lssues	Parent Link LOCKED Pick the date		Screens Edit Hide Required Screens
New issue view transition  ISSUE TYPES Issue type schemes Sub-tasks WORKFLOWS Workflows Workflows Korkflow schemes SCREENS Screens	Priority	<ul> <li>CQ: Scrum Bug Screen</li> <li>CQ: Scrum Default Issue Screen</li> <li>CRAF: Scrum Bug Screen</li> <li>CRAF: Scrum Bug Screen</li> <li>CS: Scrum Default Issue Screen</li> <li>CS: Scrum Default Issue Screen</li> <li>CSM: Jira Service Management Screen</li> <li>DEMO: Jira Service Management Screen</li> <li>DEMO: Jira Service Management Screen</li> <li>GF: Scrum Bug Screen</li> <li>GF: Scrum Bug Screen</li> <li>HEAL: Scrum Default Issue Screen</li> <li>NP: Scrum Bug Screen</li> <li>NP: Scrum Bug Screen</li> <li>SP: Scrum Bug Screen</li> </ul>	Edit Hide Required Screens Make field 'Priority' required
Screen schemes		TEST: Scrum Bug Screen     TEST: Scrum Default Issue Screen	
Issue type screen schemes	Rank LOCKED		Screens
FIELDS	Global rank field for Jira Software use only.		

Now check the result. Your custom form on a portal may have the following look:

## Create an idea

Components*			
Date <sup>*</sup>			
yy-mm-dd			
Choose an option <sup>*</sup>			
⊖ one			
⊖ two			
Description			
Paragraph 🛊 B	I <u>U</u> <del>S</del> <u>A</u> ⊨ ≔	<b>𝒫 ⊡ </b>	
Labels*		() Dece	files to attach, or browse

⚠

At Stiltsoft, we added the Component field to our form on the Support Forum and set it as **optional** to let our customers create requests via our support email address. Each component corresponds to one of our apps.



Forums 🗸

## Support Requests

If you a have a problem with one of our add-ons or you have a question to us, feel free to submit here.

Summary <sup>*</sup>	
Components	
Awesome Graphs for Bitbucket	-
Courses and Quizzes for Confluence	
Customer Case for JIRA	
General Inquiries	
Handy Macros for Confluence	
InPlace Editor for Confluence	
Listenly	
Other Add-ons	· · · · · · · · · · · · · · · · · · ·
Create Cancel	O Drop files to attach, or browse

Also, each component has a particular Assignee in Jira. In our case, it's a Product Manager responsible for an app.

S Your work ~ P	Projects 🗸	Filters ~ Dashboards ~ People ~	Plans v Insight Apps v Create		Q Search	<b>?</b>	) 0 (
S Support Requests Software project	۲	Projects / Support Requests / Project	ct settings			Create co	omponent
Back to project		Q					
Permissions	-	Component 🗧	Description =	Component lead :	Default assignee	Issues 0	
Features		TeamCity Integration for JIRA	The category for tickets about TeamCity Integration for JIRA add-on.	4 hay here	Component lead	205 issues	•••
Notifications	ι.	TeamCity Integration for Bitbucket	The category for tickets about TeamCity Integration for Bitbucket add-on.	4 may 1 may	Component lead	9 issues	•••
Automation Workflows		Talk - Inline Comments for Confluence	The category for tickets about Talk - Inline Comments for Confluence add-on.	•	Component lead	240 issues	•••
Components		Table Filter and Charts for Confluence	The category for tickets about Table Filter and Charts for Confluence add-on.	•	Component lead	3343 issues	•••
ssues Apps		Smart Attachments for Jira	The category for tickets about Smart Attachments for Jira add-on.	0	Component lead	854 issues	•••
Development tools	-	Smart Attachments for Confluence	The category for tickets about Smart Attachments for Confluence add-on.	C and the second	Component lead	113 issues	
u're in a company-managed proje Learn more	ect	Reactions for Confluence	The category for tickets about Reactions for Confluence add-on.		Component lead	7 issues	•••

Thus, when a user defines a component in a request, a ticket is automatically assigned to the relevant Component lead (Assignee).

#### What user roles are available in Customer Case?

Customer Case supports three types of user roles:

• Administrator - the person who configures feedback forums and exposes them to customers and users.

- Agent the person who reviews the customers' ideas and feature requests, indicates progress on features, and replies to customers' comments.
- User the person who submits ideas and feature requests on feedback forums.

# Are there any requirements for Jira projects used for storing submitted ideas and feature requests?

Customer Case uses Jira projects as a basis for storing the submitted requests. This includes the usage of the project's field configuration scheme. Presence of any required fields different from Summary, Description, and Component fields in the Create Issue screen of Jira will lead to the failure with request submission in Customer Case.

To avoid any issues with this, you need to make these fields as optional. For the details, please see Atlassian documentation.

Please revise your field configuration and leave only the Issue Summary, Description and Component fields as required for all your projects associated with forums.

### Where can I place the public URL of my feedback forum?

You can place the public URL of your feedback forum on your websites, in your wiki system or embed into your application or product.

#### What information about me is available to other users of feedback forums?

Other users of feedback forums can only see your first and last names, added comments and ideas, and ideas that you voted for.

#### Is it possible to hide surnames when the forum is public?

The app doesn't provide the capability to hide the surnames of the forum participants. The reporters' names are fetched from their Atlassian account once leaving feedback.

#### Can I create a personal account in Customer Case instead of using a social profile?

Yes, you can. Please see the Creating an Account section.

#### How can I track progress on ideas?

You can become a watcher of the idea and receive notifications about all progress on the idea (new comments, status change). You become watcher of an idea automatically if you have created or commented it.

#### Can I vote multiple times for the same idea?

Each user is allowed to vote only once for the same idea. This is done to prevent false voting and spamming.

#### Are there any limits for idea votes per forum?

No, there are no limits for votes within the same forum. You can vote for any idea you like or want have in the product.

#### Is it possible to create a private forum with access restricted to certain people?

Yes, it is possible. Please see the Setting Access Restrictions for Forums section.

#### What will happen if I delete the forum?

Removal of the feedback forum causes reset of votes. Ideas and comments from users will be preserved in JIRA. If you decide to restore the forum, all ideas will be restored, but comments and votes will be reset.

#### How do I pre-define the request summary through the URL query?

- 1. Open the appropriate forum and switch to the request creation form.
- 2. In the address line of your browser, you can see the address of this page. Its pattern looks like https://{portal-address}/forums/{forum-name} /ideas/create.
- 3. Append the summary parameter to the address: ?summary=request\_summary\_text. (You need to enter the text of your summary).
- 4. As the result, you will receive something like this: https://stiltsoft.customercase.com/forums/support-requests/ideas/create?summary=Request% 20a%20demo

#### Where can I submit a feature request for Customer Case?

You can submit feature requests for Customer Case on its own Feedback Forum.

#### I cannot enable categories for the forum. What can I do?

To enable categories for your feedback or support forum, you need to configure components for the JIRA project used for feedback forum.

For regulating the required or optional selection of the category during idea or request submission, you need to set the Required or Optional status for the Component field in JIRA.

- 1. Open the JIRA project.
- 2. Open the Project Administration section.
- 3. Locate the Fields section and click the project field configuration.

		Fields		
	<u> </u>	Different issues can have different information fields. e.g. required/optional; hidden/visible.	A field configuration defines how fields	behave for the project,
		Scheme: System Default Field Configuration		
4. [	Locate	the Component field and click Required or Op	tional.	
	Compo [Autoco	nent/s mplete Renderer]	<ul> <li>AGILEKAN: Kanban Bug Screen</li> <li>AGILEKAN: Kanban Default Issue Screen</li> <li>AH: Simple Issue Tracking Create Issue Screen</li> <li>AH: Simple Issue Tracking Edit/View Issue Screen</li> <li>AK: Simple Issue Tracking Create Issue Screen</li> <li>AK: Simple Issue Tracking Edit/View Issue Screen</li> <li>AK: Simple Issue Tracking Edit/View Issue Screen</li> <li>AS: Scrum Bug Screen</li> <li>AS: Scrum Default Issue Screen</li> <li>BIG: Simple Issue Tracking</li> </ul>	Edit Hide <u>Required</u> Screens Ren Prers

Edit/View Issue Screen

O V

When using a shared field configuration, your modifications in the status of the Component fields will be propagated to other projects associated with this field configuration.

### I cannot find my project in the Create Forum form. What can I do?

You may encounter such an issue with projects using the non-default permission scheme, for example, Service Desk projects. You shoud grant the following permissions to the **atlassian-addons-project-access** role or to the **Customer Case for Atlassian Cloud** user:

- Browse Projects
- Create Issues
- Add Comments
- Edit All Comments
- Edit Issues
- Create Attachments
- 1. Open the administration console.
- 2. Navigate to Issues > Permission Schemes.
- 3. Locate the permission scheme used by Service Desk projects and click the Permissions link.
- 4. On the opened page, click the Grant permission link.

5. Grant the required permissions to the project role or the user mentioned above.

Permission Scheme: JIRA Serv	ice Desk Permission Scheme for	r Project JSD	
Please select the type of permission you wish to add to this Permission Scheme			
Permissions	Add Comments Administer Projects Assign Issues Browse Projects Close Issues Create Attachments		
	(Select the permissions that you war	nt to assign).	
	User Custom Field Value	Choose a custom field <b>v</b>	
	Project Role	Choose a project role <b>v</b>	
	<ul> <li>Service Desk Customer -</li> <li>Portal Access</li> </ul>		
	Reporter		
	Current Assignee		
	<ul> <li>Single User</li> </ul>	addon_customer-case-for-] 📇 Start typing to get a list of possible matches.	
	Project Lead		
	Group	Anyone 🔻	
	Group Custom Field Value	Choose a custom field <b>•</b>	
	Add Cancel		
lick Add when complete.			

(i) For the details on permission scheme management, refer to Atlassian Documentation.

#### How to get the URL of request in Customer Case by JIRA issue key or ID?

If you need to get the URL of the request in Customer Case when having JIRA issue key or ID, run the following request in your browser:

{customerCase.url}/redirect-to-request?jiraIssueIdOrKey={issueIdOrKey}

Here, you need to enter the URL of Customer Case and the key or id of the appropriate issue.

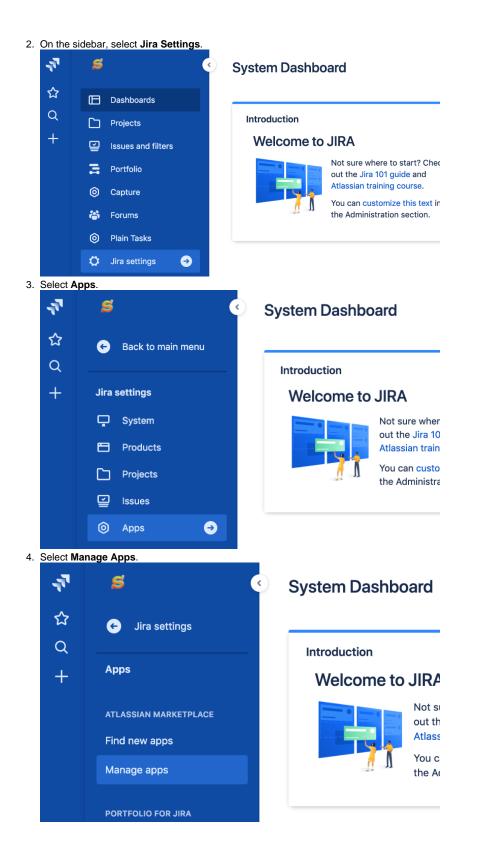
For example:

https://stiltsoft.customercase.com/redirect-to-request?jiralssueldOrKey=CC-31

You will be redirected to the related request in Customer Case. You may be prompted to enter your username and password when accessing forums requiring authentication.

#### How to use the Marketplace token in Jira UPM

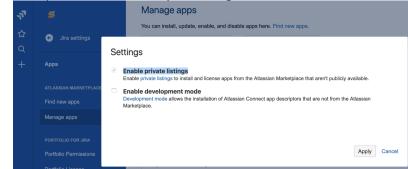
1. Log in to Jira Cloud.



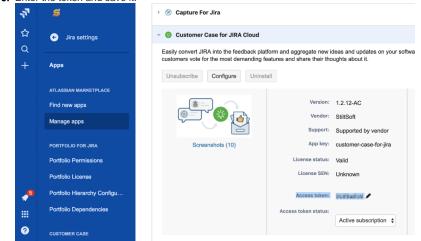
5. Under the list with apps, click Settings.

-77	S	Manage apps		
ಚ Q	← Jira settings	You can install, update, enable, and disable apps here. Find new apps.       Filter visible apps       V         User-installed		
+	Apps	User-installed apps		
	ATLASSIAN MARKETPLACE	> Analytics for Confluence Cloud		
	Find new apps	> 🎯 Capture For Jira		
	Manage apps			
		O Customer Case for JIRA Cloud		
	PORTFOLIO FOR JIRA	> men eazyBI for Jira Cloud		
	Portfolio Permissions			
	Portfolio License	> (i) JIRA Toolkit Plugin		
_6	Portfolio Hierarchy Configu	> 🦰 My Reminders		
	Portfolio Dependencies	> 🧶 Plain Tasks		
		> D TeamCity Integration for JIRA Cloud		
?	CUSTOMER CASE			
۵.	General Settings	Audit log Settings		

6. In the opened form, select Enable private listings.



- 7. On the User-installed apps list, locate Customer Case.
- 8. Click the Pencil icon.
- 9. Enter the token and save it.



The token will be applied within 120 seconds.

#### Is possible to enable a custom domain name for the portal?

Yes, it is possible. Learn about it in the following guidelines.

#### Is it possible to make a custom domain name secure?

Yes, it is possible. Read the information on this page and contact us upon reading.