

# 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.

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## 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
- Idea description
- Number of votes
- Number of comments
- Author of the idea
- Time of idea submission
- Status of idea / ticket
- Category



## Customer Case for JIRA

Your ideas, issues and questions. Your feedback helps us improve.

Recently updated

Top

New

Status ▾

Category ▾

### ♥ Vote/Unvote from the home page

13

If I want to vote for an idea, I have to open that idea and then click on the vote button. If I could vote for an idea from the home page, I would not have to open ideas to vote. Therefore, it would save me 1 click every time I want to vote, and thus voting process would be easier and lea...

ANSWERED

INTERACTION AUGMENTATIONS

VISUAL APPEARANCE AND INTERF...

2 comments / Guillaume Berthet / Updated 05 June 2023

### ♥ Let customer vote from the portal

1

Hello, Is it possible for the Customer to vote on a request from the JSM portal? JSM version : 4.13.5 Jira Data Center Thanks,

TO DO

FUNCTIONALITY

0 comments / hana20attia / Updated 08 March 2023

### ♥ Custom Fields when Clicking Into Idea

1

Is it possible to add custom fields to the right side of the screen under status when you click into a idea? !image-526389006.png!

TO DO

3 comments / jj\_ss\_hh / Updated 18 January 2023

For each listed ticket, the following information is displayed:

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



Forums ▾



Create a request



## Dev Team Portal

Here you can submit your technical issues

Recently updated

New

Assigned to me

Unanswered

Status ▾

Category ▾

### LucidChart is displayed incorrectly

Hello, I'm having an issue with courses. I have several pages where I use the PowerPoint macro in confluence to include a PowerPoint with the ability to flip through the slides. However, when the page is viewed in a course, the size is reduced and you can only view the first slide. Why is this macro...

IN PROGRESS UX

0 comments / Dolores Rhyme / Updated 18 May 2023

### Cannot configure the app

IN PROGRESS CONFIGURATION

0 comments / Iryna Belaya / Updated 18 May 2023

### Link doesn't work

When I go to forum and check this issue from there link starts working after. Can you please check it?

DONE LOG IN

0 comments / Dolores Rhyme / Updated 18 May 2023

## Sorting and Filtering Ideas/Tickets



This functionality is currently unavailable due to the app UI redesign. You can use this functionality directly [on the portal](#).

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 project named 'Customer Case'. The left sidebar contains a navigation menu with options like 'Issues', 'Components', 'Code', 'Releases', 'Project pages', 'Customer Case' (highlighted), 'Add shortcut', and 'Project settings'. The main content area displays a list of issues under the 'Customer Case' project. The issues are sorted by 'Recently updated', as indicated by the selected filter. The issues listed are:

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

The top of the interface shows the Jira logo, navigation tabs (Your work, Projects, Filters, Dashboards, People, Apps), a 'Create' button, and a search bar. The 'Customer Case' project is selected, and the 'Recently updated' filter is active. The 'Status' and 'Category' filters are also visible on the right side of the issue list.

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.

You can **filter tickets** in the following way:

- **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.



Customer Case remembers the state of the **Assigned to me** filtering option for the whole customer portal.

You can **filter both 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:

Projects / Rocket science / Add epic / GF-37

## Add Info/description button next to enroll button

Attach Add a child issue Link issue

**Description**

I have received feedback that users would like to get the description of the course **before** they enroll to the course - as the description will let them know if they want or need that course.

Today they have to enroll to even know what the course is about, and might not feel that they need the course after reading the information - but at this point they are already set up for reminders and an unfinished course in the statistics.

**The idea:**

Add an info-button on the course tiles next to the enroll button? This would ideally share the information written in the description box in the course.

**Activity**

Show: **All** **Comments** History Customer Portal Newest first ↕

Add a comment...

Pro tip: press **M** to comment

**To Do**

**Details**

Assignee Dolores Rhyme

Labels [vote](#)

Sprint [GF Sprint 1](#)

Story point estimate None

Reporter CustomerC

Automation Rule executions

**Customer Portal** [Open Customer Portal](#)

Created 3 minutes ago Updated 3 minutes ago Configure

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: [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 ↓



Add a comment...

Pro tip: press **M** 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.



## ♥ Add a capability to customize look of the feedback 46 forums

ANSWERED ▾

VISUAL APPEARANCE AND INTERF...

20 February 2015 / Vadim Rutkevich [Stiltsoft]

Official answer



Irina\_Bel[Stiltsoft]

EMPLOYEE

• 04 September 2023 • Unpin • View original context

Hi there 🙋,

It's Irina, a Product Manager of the Customer Case app. We're happy to inform you that our app has undergone a stunning makeover! Now, it's ready to seamlessly blend into your brand's aesthetic.

Why not take a quick tour? Explore the updated portal of the Customer Case app to get a feel of its fresh new look.

Tell me please, what do you think about it? We will be grateful for your feedback.

Irina

16 comments



Add a comment...

7. To unpin the comment, click **Unpin**.

## Searching for Ideas Using JQL

The app provides a set of issue properties searchable using JQL

Examples:

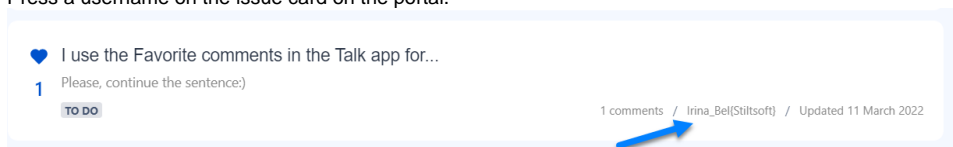
customerVotes>2	searches for all issues having more than 2 votes for a specific project
project="PROJECT_NAME" ORDER BY customerVotes ASC (or DESC)	Filters ideas from the specified project in the ascending (or descending order)
project="PROJECT_NAME" AND customerVotes>2 ORDER BY customerVotes ASC (or 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](#).

For example, let's find all the tickets of a specific user submitted via the portal in Jira.

1. Press a username on the issue card on the portal.




2. Copy a ccUserId in a user profile in the browser address bar.



https://customercase.customercase.com/users/138109

Forums

 Irina\_Bel{Stiltsoft}

EMPLOYEE

1 Ideas | 2 Votes | 1 Comments

Full Name  
Irina\_Bel{Stiltsoft}

Email  
ibelaya@stiltsoft.com

Ideas | Votes | Comments | Watches

0 votes

**Editor seems to give an endless spinning**

1 comments • Irina\_Bel{Stiltsoft} • Updated 3 days ago

to do | Configuration | Functionality

3. Transfer to the Jira Issues tab in the Jira project where you want to find the ticket of the user.
4. Paste the ccUserId in JQL.

Jira Software

Projects / Dev Team Requests

Issues

project = "DTR" AND ccUserId = 138109

Enter to search Shift+Enter to add a new line

Type	Key	Summary	Assignee	Reporter	P	Status	Resolution	Cre
Issue	DTR-12	Editor seems to give an endless spinning	Unassigned	CustomerC	High	Unresolved	Unresolved	Jun 16, 2023

Give feedback

1-1 of 1

## 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

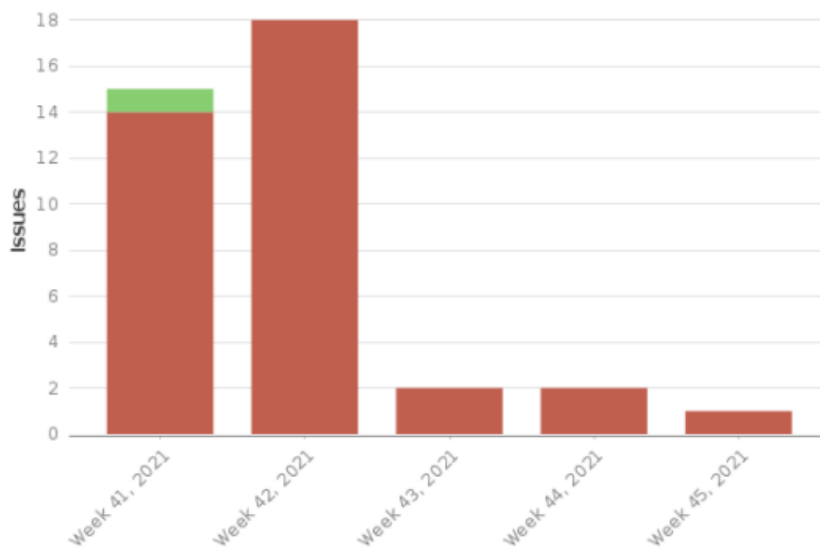
How often you would like this gadget to update

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**)

