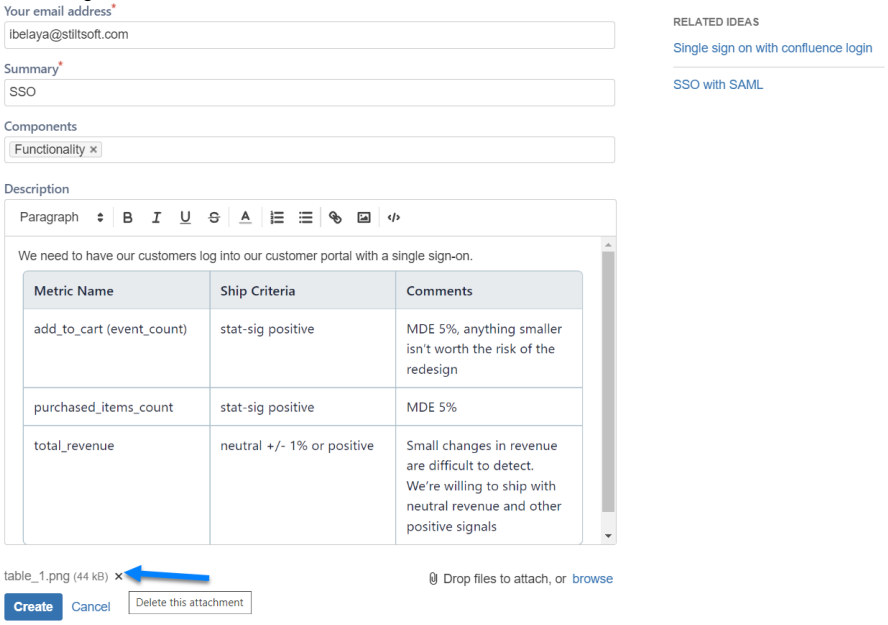
Managing Ideas and Tickets

Customer Case provides a convenient way of managing ideas and tickets on the forums.

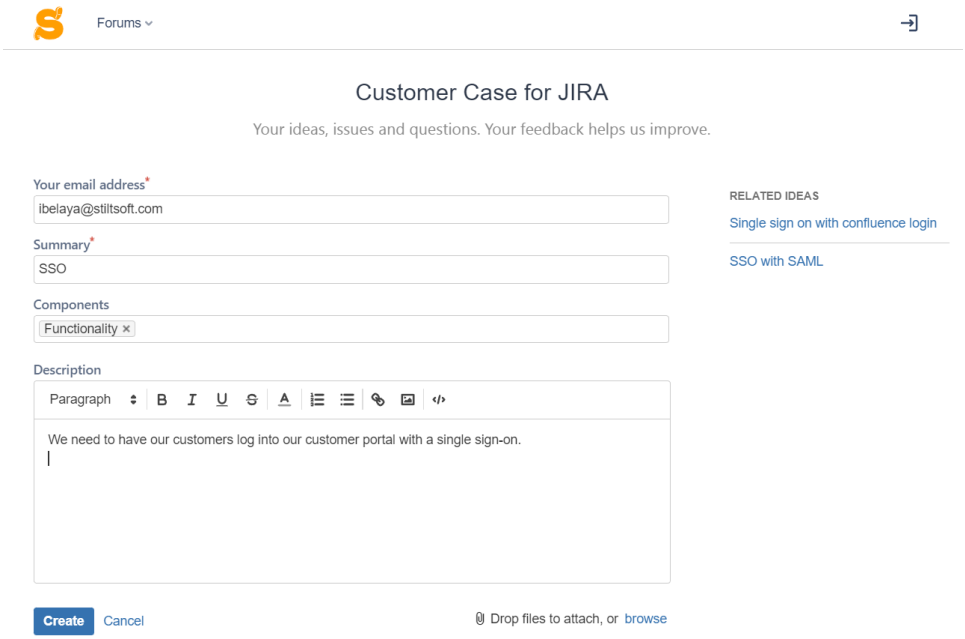
- Posting Ideas
- Submitting Tickets
- Viewing, Commenting, and Watching Ideas
    - Commenting a request
    - Copy a link to a comment
    - Watching Ideas
    - Adding Participants
- Viewing and Commenting Tickets
    - Commenting a request
- Editing Ideas / Tickets and Comments
- Creating Requests by Email
- Commenting Requests by Email

Posting Ideas

1. Locate the **Create and idea** button and click it.
2. On the opened page, enter the short summary of your idea and its description.
3. Select the appropriate category.
4. To attach one or multiple files to the idea, click **Add attachment** or just drag the files. You can also remove the attached files by hovering over them and clicking  icon.



5. Click **Create** when complete.



- Selection of the category may be unavailable if components are not defined for the project.
- The maximal size of attachment cannot exceed 10 MB.
- The Related Ideas block appears once Customer Case finds similar ideas within the same feedback forum. All ideas displayed in this block are sorted by the number of votes. The block updates the set of similar ideas continuously.

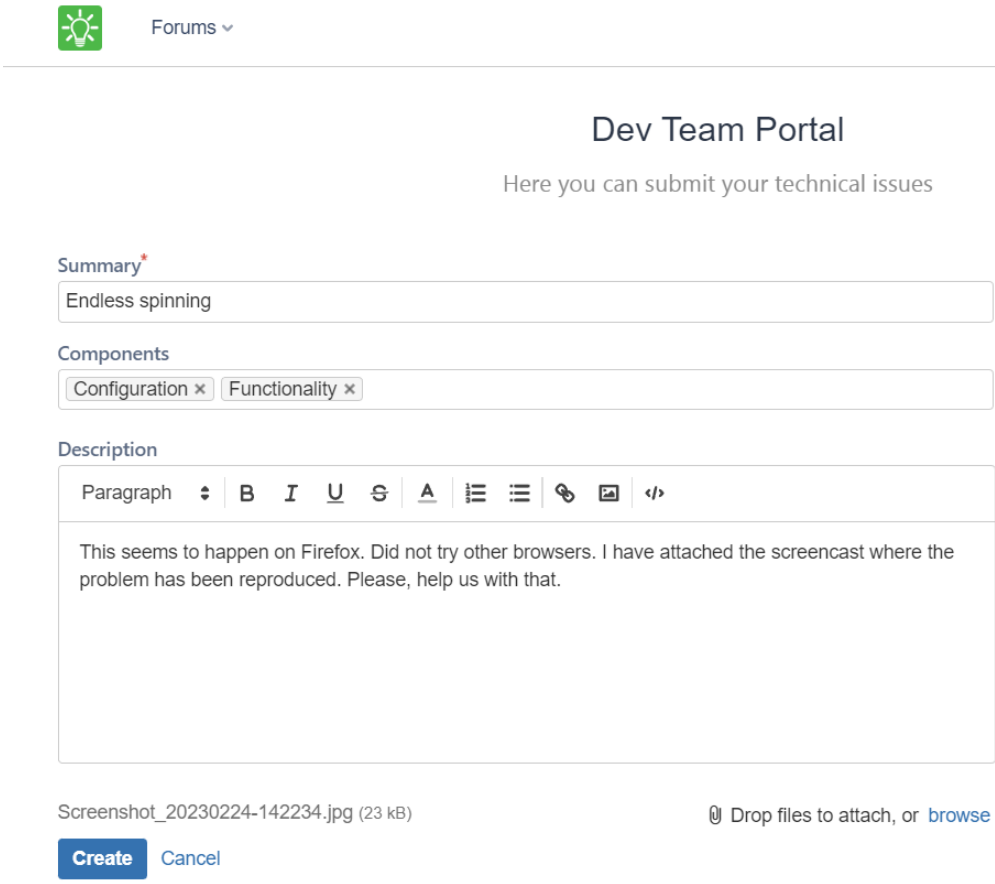
Submitting Tickets

You can submit tickets in two ways:

- using the interface of Customer Case
- sending an email to the specified address

Usage of the second way is possible on the support and feedback forums where a vendor enabled mailboxes. In this case, you can submit requests and comments including attachments by sending an email to the specific address. Customer Case will automatically fetch the required data from the email body and create either a new request or post a comment to the corresponding request. For mapping comments to specific Jira issues, you need to **keep the request key number in the email subject** when replying to the request from Customer Case.

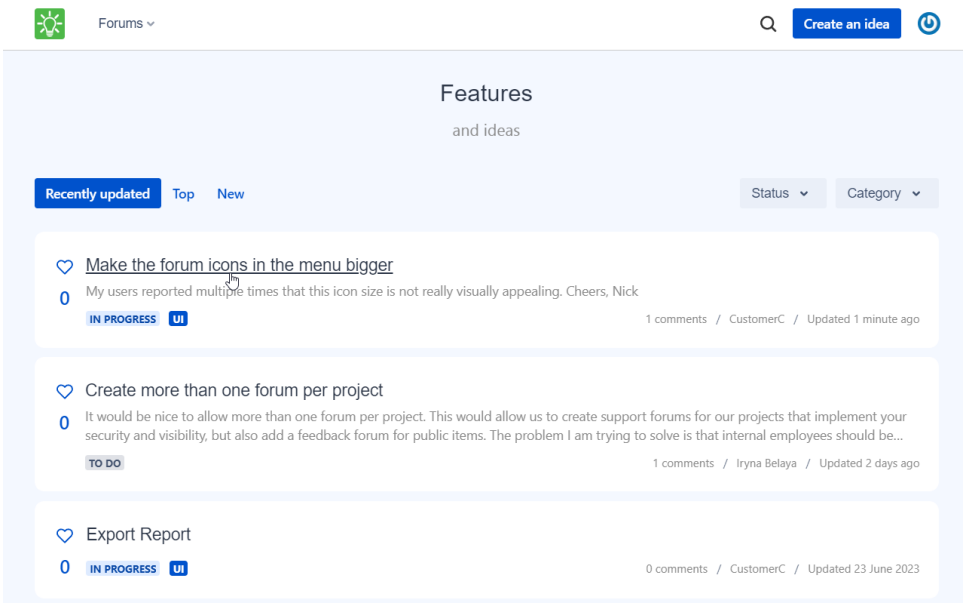
1. Locate the **Create a request** button and click it.
2. On the opened page, enter the short summary of your ticket and its description.
3. Select the appropriate category.
4. To attach one or multiple files to the ticket, click **Add attachment** or just drag the files. You can also remove the attached files by hovering over them and clicking ✕ icon.
5. Click **Save** when complete.



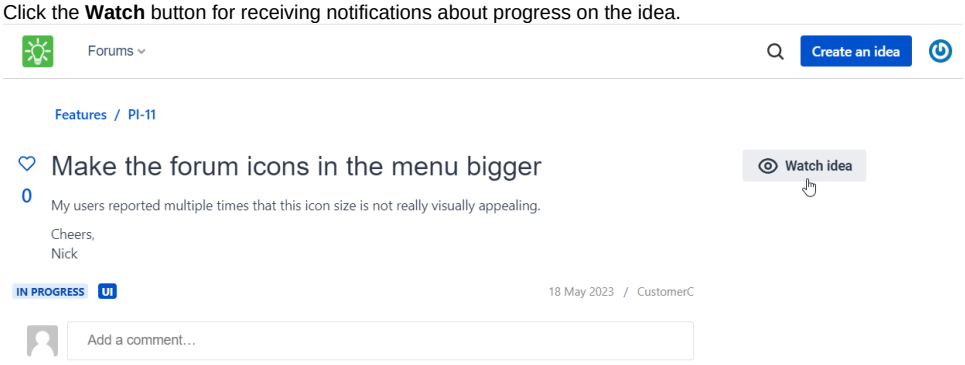
- Selection of the category may be unavailable if components are not defined for the project.
- If you want to add additional fields to the form you need to set the Required status to the proper fields in Jira.
- The maximal size of attachment cannot exceed 10 MB.

Viewing, Commenting, and Watching Ideas

1. On the list with ideas, locate the one you want to comment.
2. Click the idea summary to open the page with its detailed description.

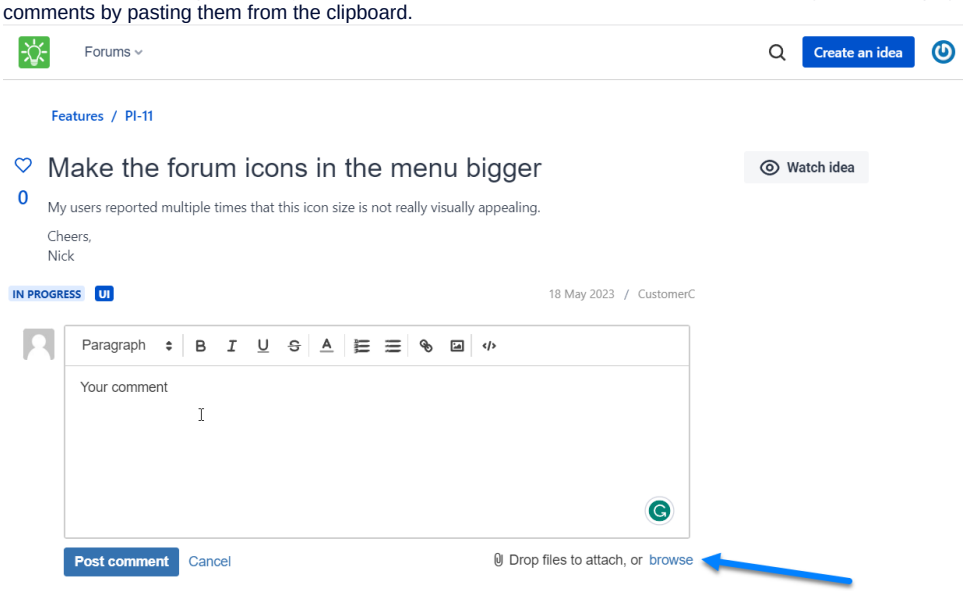


3. Click the **Watch** button for receiving notifications about progress on the idea.



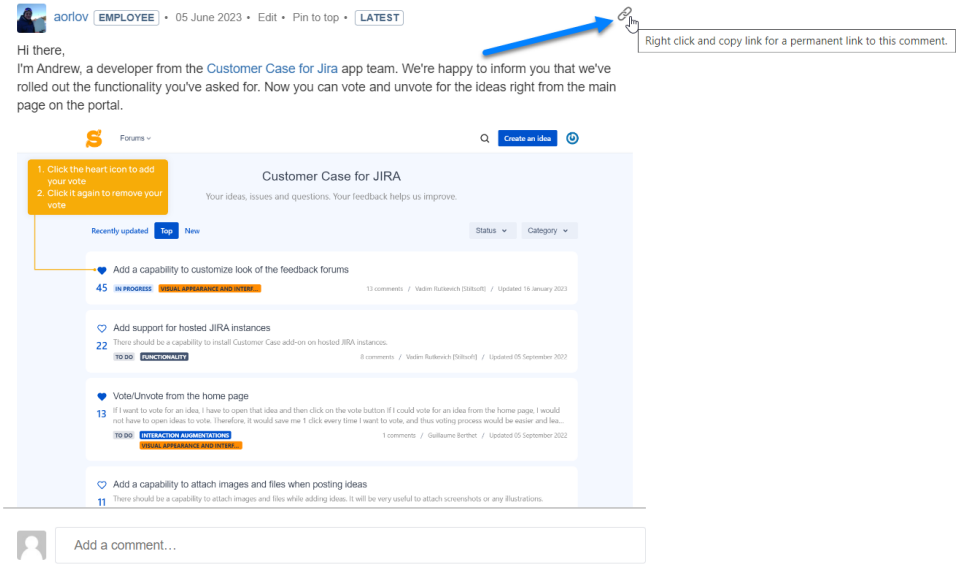
Commenting a request

1. Locate the comment field under a request description
2. In the visual editor, enter your comment and click the **Post Comment** button.
3. To attach one or multiple files to your comment, click the **browse** link and select files or drag files to the page. You can also insert images into comments by pasting them from the clipboard.

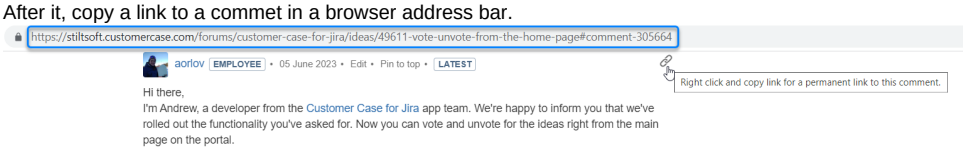


Copy a link to a comment

1. Click  icon appearing when you point to the comment.

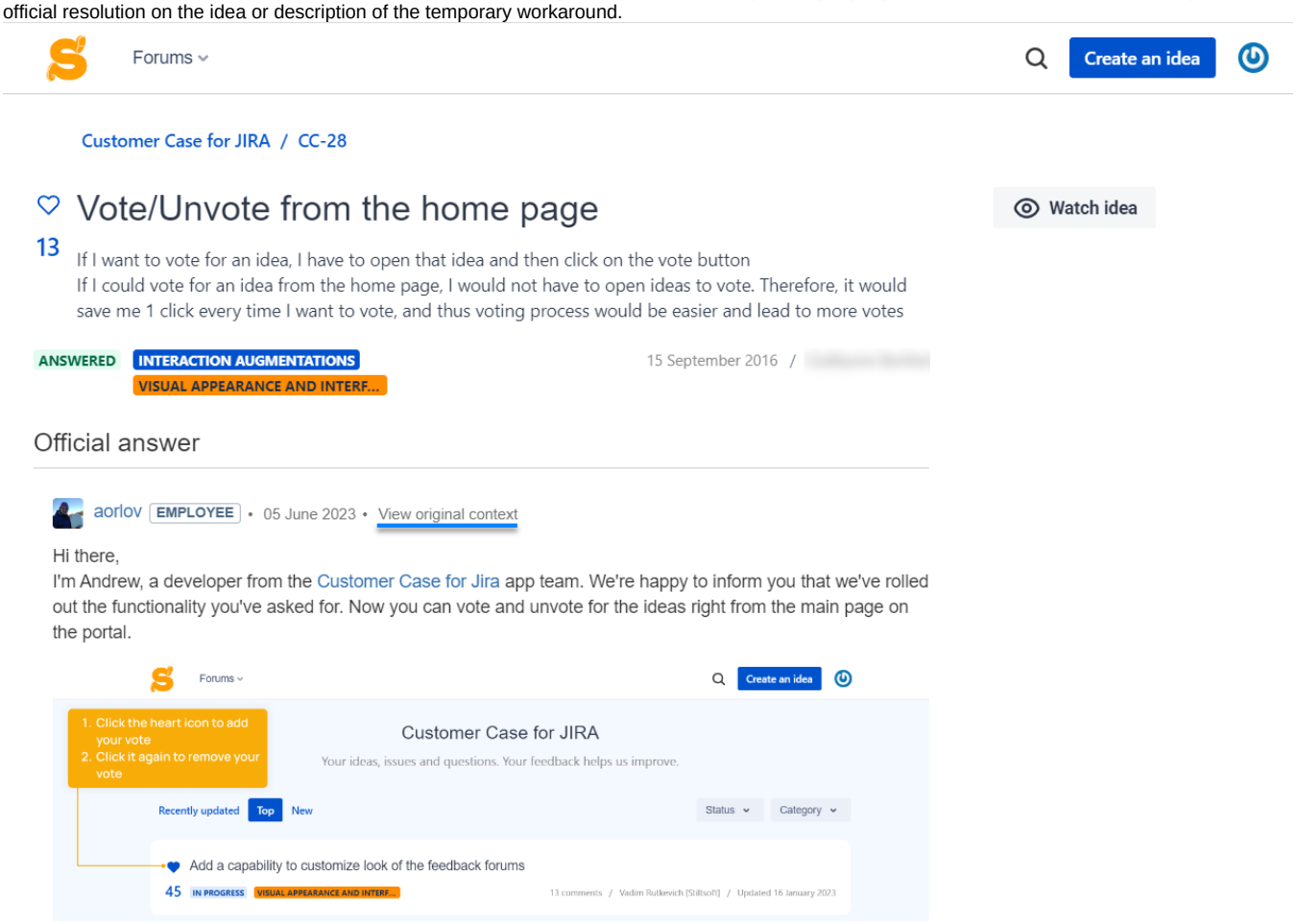


2. After it, copy a link to a commet in a browser address bar.



Accounts of company representatives commenting ideas or replying to your comments are highlighted with the EMPLOYEE marker.

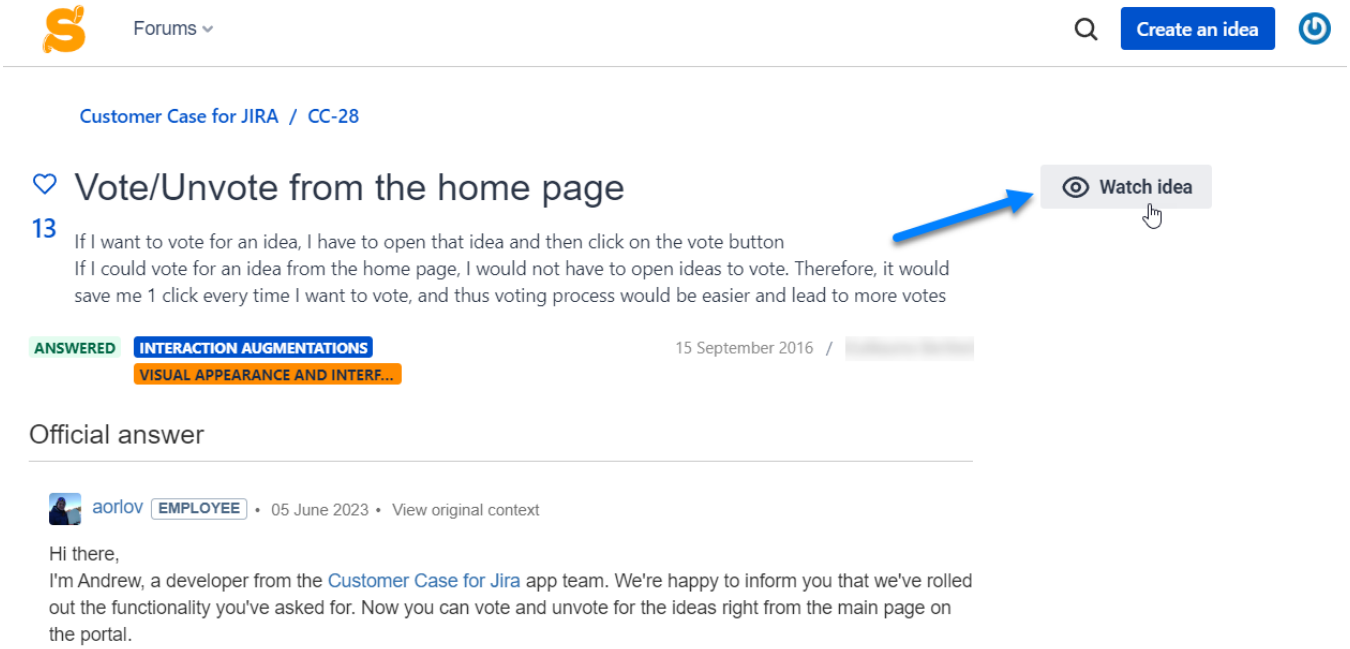
The **Official answer** section shows the comment pinned to the top of the comment list by a company representative. The official answer may contain the official resolution on the idea or description of the temporary workaround.



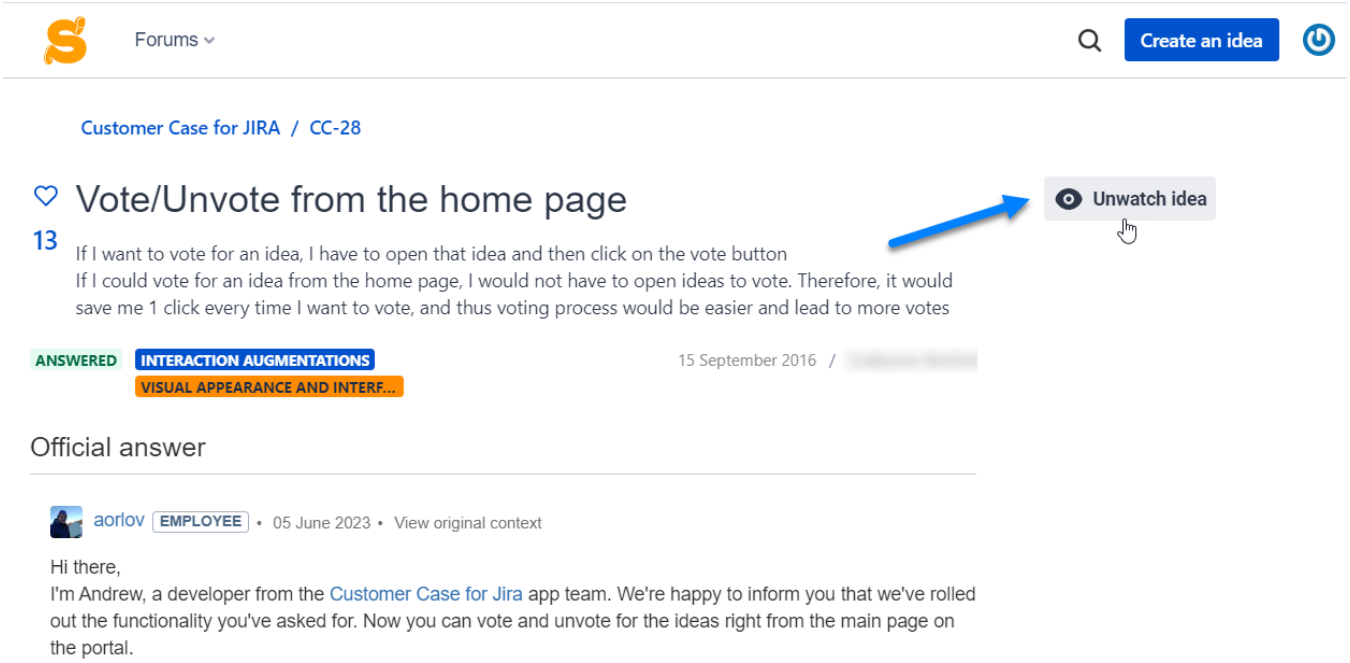
If the thread of comments is too long, but you need to locate where the pinned comment was posted you can view the comment in its original context. Click **View original context**.

Watching Ideas

The Watch function allows users of your feedback forums to receive notifications about progress on the issue such as adding new comments, attaching new files, and the status change. The user **who submitted an idea or left comments** becomes a watcher automatically. Users can also subscribe manually by clicking the Watch button.



Users who were added as participants of support requests can stop watching these tickets by clicking the **Unwatch** button. After this, they will no longer be able to view this support request until the author or agent adds him or her as a watcher again.



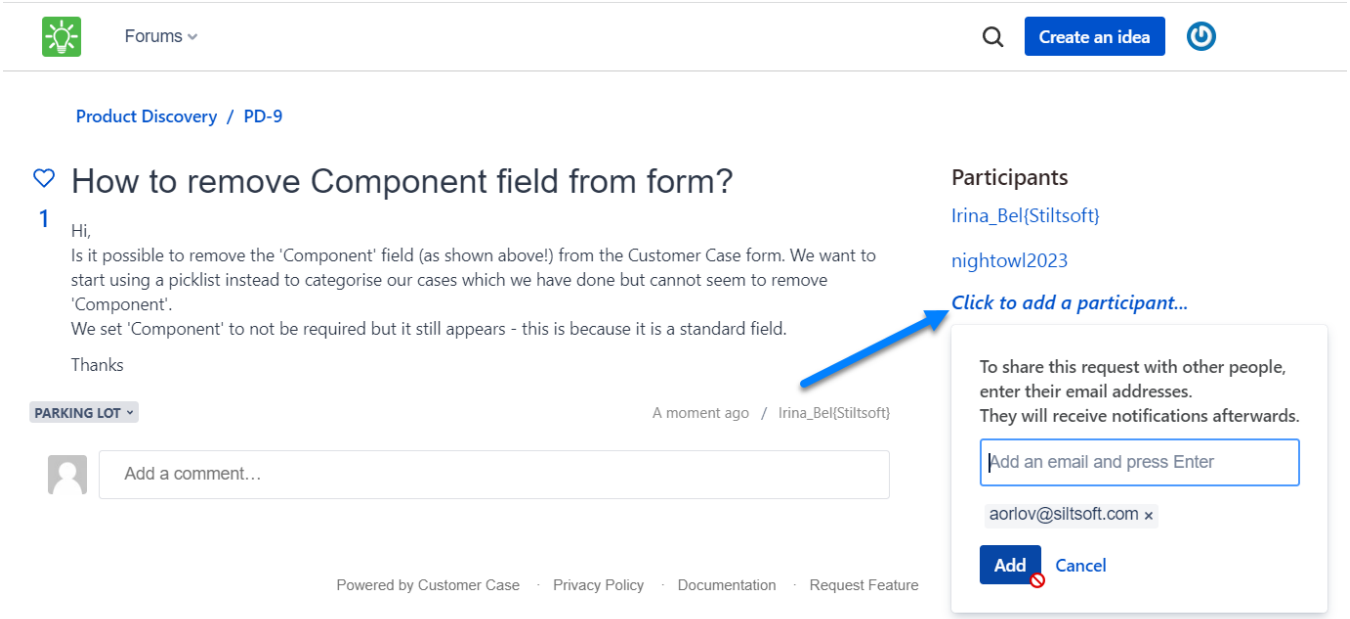
Adding Participants

Customer Case allows you to add participants for the submitted feature and support requests. On support forums, both **the author of the request and support agents** can add participants to the existing requests, on feedback forums **only support agents** can do this.

All the added participants receive a notification with the information about the person who added them as participants and the request information. If the person does not have an account in Customer Case, he or she will be prompted to sign up for the service.

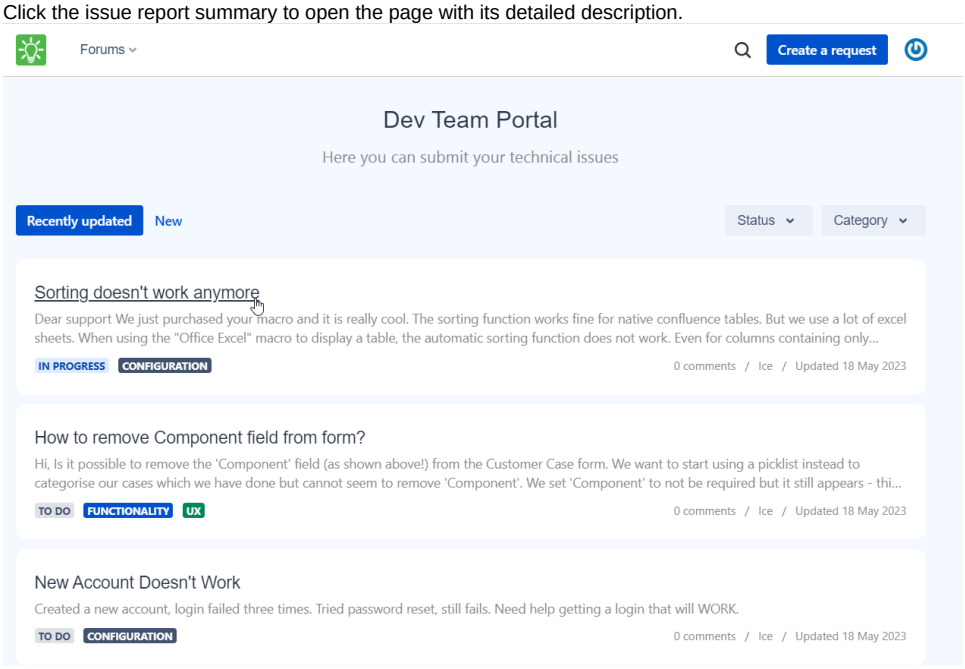
Now the users can view all the ideas and support requests that they submitted and the requests which they were added as participants into.

1. In the right part of the screen, locate the **Click to add a participant** link and click it.
2. Enter the email address of a person you want to add as a participant and press Enter.
3. Click Add once complete.



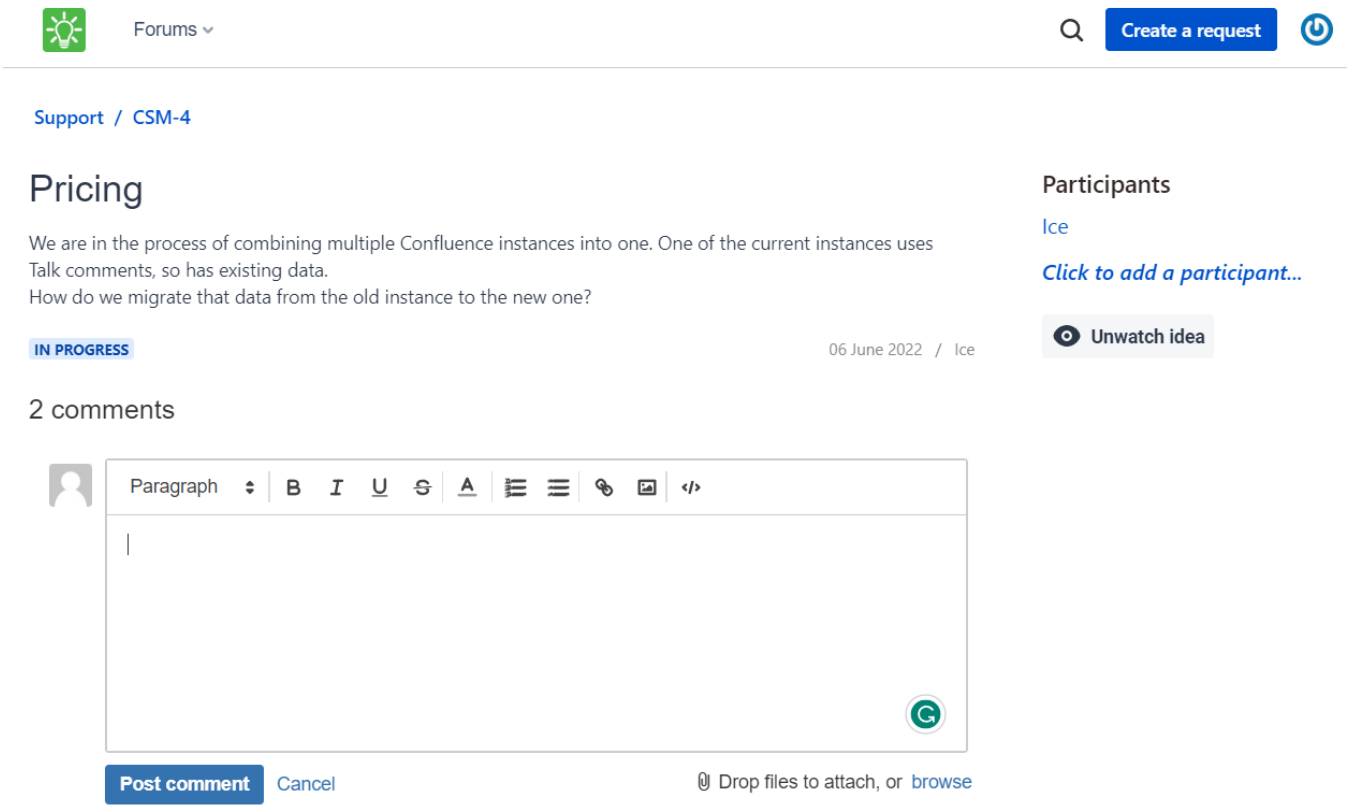
Viewing and Commenting Tickets

1. On the list with issue reports, locate the one you want to comment on.
2. Click the issue report summary to open the page with its detailed description.



Commenting a request

1. Locate the comment field under a request description
2. In the visual editor, enter your comment and click the **Post Comment** button.
3. To attach one or multiple files to your comment, click the **browse** link and select files or drag files to the page. You can also insert images into comments by pasting them from the clipboard.



Accounts of company representatives commenting on ideas or replying to your comments are highlighted with the EMPLOYEE marker.

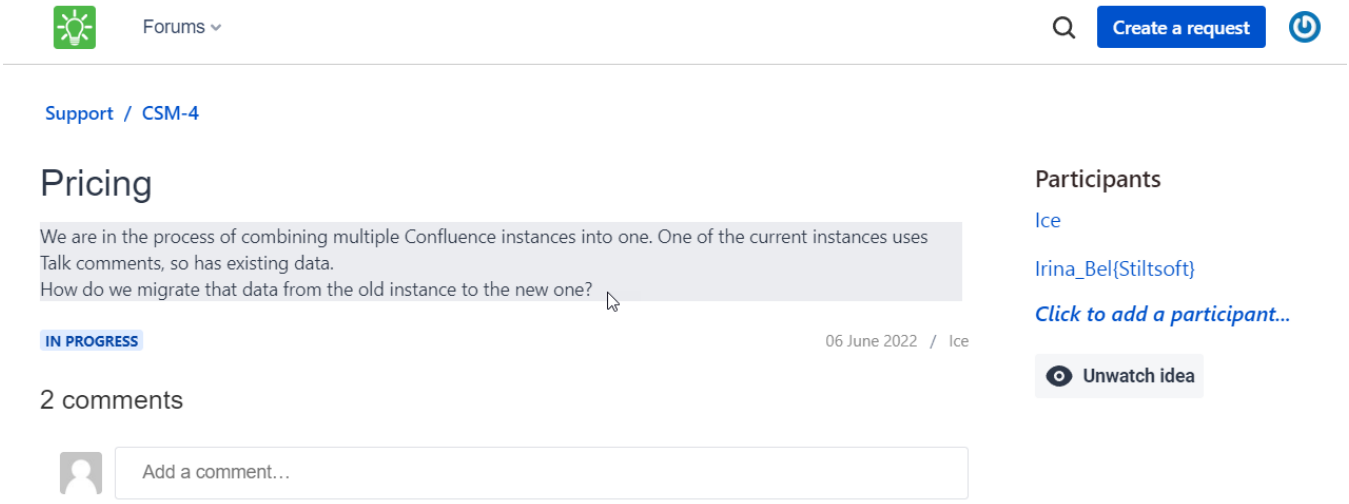
Editing Ideas / Tickets and Comments

Users of Customer Case can edit a description of their own ideas, tickets, and comments. The way of editing the description and comments is identical for feedback and support forums.

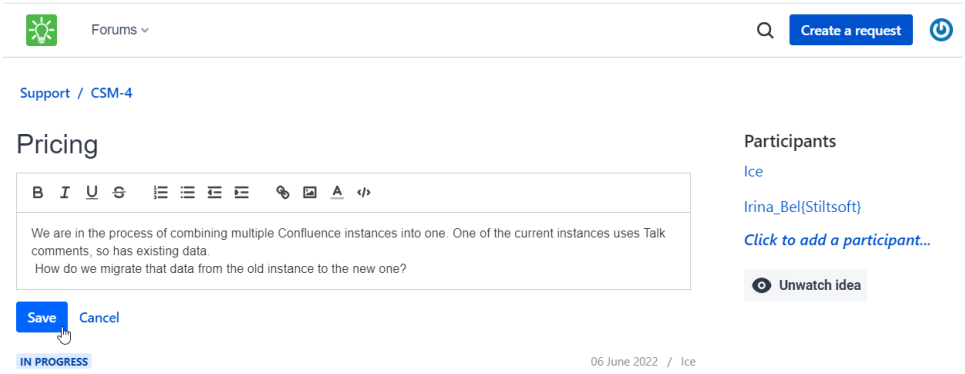
> There is no possibility to delete own comments once you leave it on a portal.

To edit a description, you need:

1. Open a request, hover over its description, and click it.



1. Update the idea or ticket description or comment.
2. Click **Save**.



To edit your comment, you need:

1. Click the Edit link on a comment you submitted.



2. Click Save once you finish editing.

> You cannot edit ideas / issue reports and comments posted by other users.

Creating Requests by Email

Customer Case allows you to submit requests by email. This requires the configured mailbox for the forum.

A company should share this email address with you, so you can send your requests to this address.

Commenting Requests by Email

> Please **preserve the request key in the email subject**, so Customer Case can properly match it to the existing request and add your comment into it.

1. In your mail agent, locate the request creation confirmation request or the email with the response from the support agent.
2. Click **Reply**.
3. Enter the text of your reply.
4. Click **Send**.