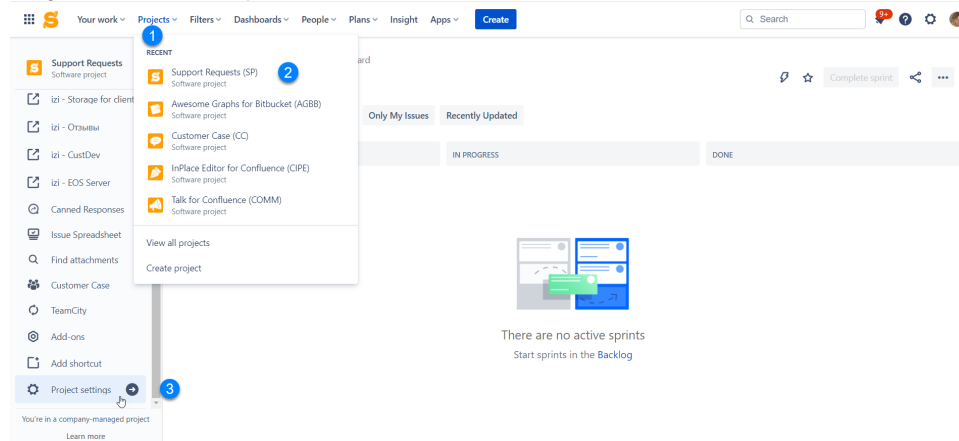


Jira Automation Tips

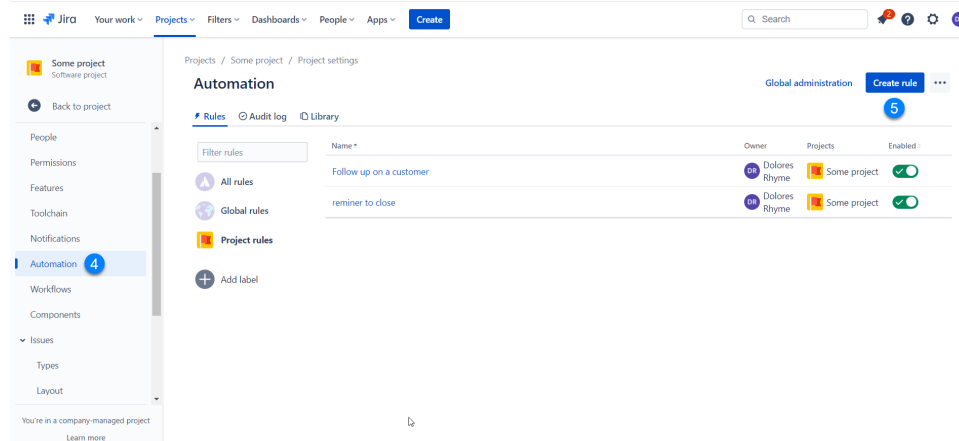
[Change a ticket's status](#)
[Follow up on a customer for the first time](#)
[Close a Ticket](#)
[Follow up on Yourself \(1\)](#)
[Follow up on Yourself \(2\)](#)
[Extract information from the Jira Issue Fields](#)
[Link Duplicated Tickets/Ideas](#)

Change a ticket's status

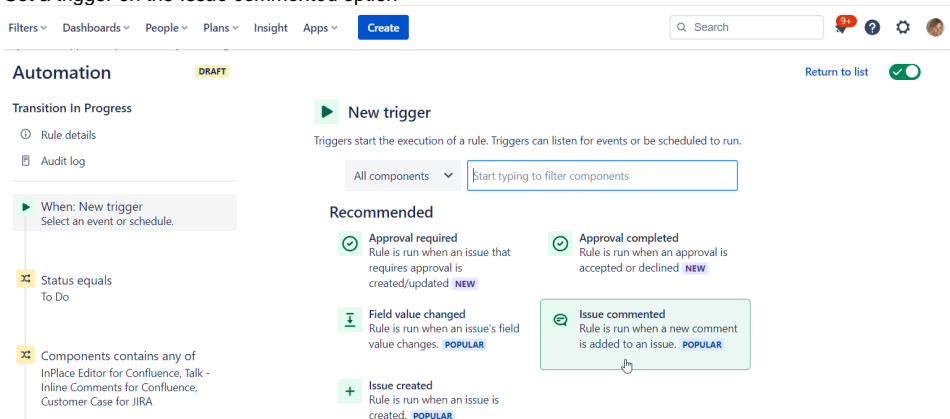
1. Go to the Project settings as it's shown in the picture



2. Select the Automation tab
3. Press the Create Rule button



4. Set a trigger on the *Issue commented* option



5. Set the condition for the rule to the *Issue fields* condition as follows:

Filters ▾ Dashboards ▾ People ▾ Plans ▾ Insight Apps ▾ **Create** 91 ? ⚙️ 👤

Projects / Support Requests / Project settings / Automation

Automation ENABLED Return to list 🟢

Transition In Progress

- Rule details
- Audit log

When: Rule is triggered on

- Comment is the main action

Status equals To Do

Issue fields condition

Checks whether an issue's field meets a certain criteria. [Learn more.](#)

Field *

Status ▾

Condition *

equals ▾

Value Field

TO DO ▾

6. Set another *Advanced compare condition* that defines the comment's name to avoid transitions in case the first comment will be made by a customer. Use the following Smart Value: `{{comment.author.displayName}}`

Filters ▾ Dashboards ▾ People ▾ Plans ▾ Insight Apps ▾ **Create** 91 ? ⚙️ 👤

Projects / Support Requests / Project settings / Automation

Automation DRAFT Publish rule Return to list 🟢

Transition In Progress

- Rule details
- Audit log

When: Rule is triggered on

- Comment is the main action

Status equals To Do

Components contains any of InPlace Editor for Confluence, Talk - Inline Comments for Confluence, Customer Case for JIRA

And: Compare two values

Checks if:

`{{comment.author.displayName}}` equals Irina Belaya[Stilsoft]

Advanced compare condition

Compares two values using smart values and regular expressions. [Learn more about issue properties for Advanced compare condition.](#)

First value *

`{{comment.author.displayName}}`

Condition

equals ▾

Second value

Irina Belaya[Stilsoft]

Cancel Save

> What values can I compare?

The second value should be an agent's name

7. Add the *Transition issue* action

Filters ▾ Dashboards ▾ People ▾ Plans ▾ Insight Apps ▾ **Create** 91 ? ⚙️ 👤

Projects / Support Requests / Project settings / Automation

Automation DRAFT Publish rule Return to list 🟢

Transition In Progress

- Rule details
- Audit log

When: Rule is triggered on

- Comment is the main action

Status equals To Do

And: New action

Select an action to perform.

Add component

Delete comment

Remove a comment from an issue.

Delete issue

Permanently remove the issue.

Delete issue links

Unlink all or a subset of linked issues.

Edit comment

Edit a comment on an issue.

Edit issue

Update certain issue fields.

Link issues

Creates an issue link between two issues.

Log work

Log time against an issue.

Manage watchers

Add or remove a watcher on an issue.

Re-fetch issue data

Re-fetch any issues that have been updated.

Transition issue

Transition an issue to a specific status.

8. Define the Destination status as *In Progress* or the one that corresponds to your workflow

Filters ▾ Dashboards ▾ People ▾ Plans ▾ Insight Apps ▾ **Create** 91 ? ⚙️ 👤

Projects / Support Requests / Project settings / Automation

Automation DRAFT Publish rule Return to list 🟢

Transition In Progress

- Rule details
- Audit log

When: Rule is triggered on

- Comment is the main action

Status equals To Do

Transition issue

Transitions an issue from one status to another, through a workflow. [Learn more.](#)

Choose the status to transition the issue to:

Destination status

IN PROGRESS ▾

Ensure a transition from the issue's source status to your selected destination status exists; more info.

+ add regex to distinguish between multiple transitions to the same status

Choose fields to set... ▾



Note that this rule will be triggered even if your answer was added in the Comments section.

Activity

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



Add a comment...

Pro tip: press **M** to comment

Jira internal comments

The Customer Case app comments

Follow up on a customer for the first time

You can set up an automation rule that follows up on your customers if they forgot to answer you.

1. Perform the first three steps in the [Change a ticket's status](#) automation rule
2. Set a trigger to *Scheduled*
3. Configure it to run every day
4. Set the exact time
5. Check the *Run a JQL search and execute actions for each issue in the query* checkbox
6. Specify (read as find) those issues that need to be answered with JQL. In the example, the following JQL searches for issues that are in the In Progress status and were updated more than 1 day ago:
status = "In Progress" AND updated > -1d
You can specify a time period that meets your company's SLA for following up on a customer.

Automation

DRAFT

[Return to list](#)



Follow up on a customer

Rule details

Actor: Dolores Rhyme

Audit log

1 When: Scheduled
Every day at 9:00 AM

2 If: Compare two values
Checks if:
`{{issue.comments.last.author.displayName}} equals Dolores Rhyme`

3 Then: Send email
forum+29500@testcustomercase.mail.com
{{issue.key}}

Add component



Scheduled

Executes this rule on the provided schedule. You can choose if you'd like to perform actions on a set of issues gathered with a JQL search or simply execute the rule.

Basic Advanced (CRON expression)

Run rule every

4 1 Days

At

5 9:00 AM Europe/Tallinn

Next run: Saturday, 10/10/2020 9:00 AM

Show next 10 runs

6 ☒ Run a JQL search and execute actions for each issue in the query.

JQL *

7 status = "In Progress" AND updated > -1d

[Insert account id](#)

[Resolve users](#)

[Validate query](#)

☐ Only include issues that have changed since the last time this rule executed



Your automation rule will perform actions on all issues returned in the above query, which can't be undone. Before saving this rule, look through it carefully to make sure this is okay.



Updated in the JQL covers any change to the issue. So if a comment was added or a field was edited, the issue will be considered updated, even though the status did not change.

6. Add the *Advanced condition* to check the last commenter. It must be your agent. Use the following Smart Value: `{{issue.comments.last.author.displayName}}`

Automation

ENABLED

Run rule

Return to list



Follow up on a customer

Rule details

Actor: Dolores Rhyme

Audit log

When: Scheduled
Every 5 minutes

If: Compare two values

Checks if:
{{issue.comments.last.author.displayName}} equals Dolores Rhyme

Then: Send email

forum+29500@testcustomercase.mail.c
ustomercase.com
{{issue.key}}

Advanced compare condition

Compares two values using smart values and regular expressions. [Learn more about issue properties for Advanced compare condition.](#)

First value *

{{issue.comments.last.author.displayName}}

Condition

equals

Second value

Dolores Rhyme

Cancel

Save

> What values can I compare?

7. Add the *Send email* Action. Add your [portal email address](#) to the *To* field. Use the following smart value to keep the issue key in the Subject: `{{issue.key}}`.

Automation

ENABLED

Run rule

Return to list



Follow up on a customer

Rule details

Actor: Dolores Rhyme

Audit log

When: Scheduled
Every 5 minutes

If: Compare two values

Checks if:
{{issue.comments.last.author.displayName}} equals Dolores Rhyme

Then: Send email

forum+29500@testcustomercase.mail.c
ustomercase.com
{{issue.key}}

Send email

To *

forum+29500@testcustomercase.mail.customercase.com

Cc Bcc

Subject *

{{issue.key}}

Content *

Hi there,

I decided to reach out to you and ask about any updates since my last message.

Our team is looking forward to helping you. Please, connect with us.

Kind regards,
Irina



Since the automatic message will be sent directly to the portal, the message will be created by the CustomerC user.



CustomerC 7 minutes ago

Hi there,

I decided to reach out to you and ask about any updates since my last message.

Our team is looking forward to helping you. Please, connect with us.

Kind regards,

Irina

Edit · Delete · 🗨️

8. Click Save and don't forget to Run the rule

Follow up on a customer for the second time

This scheme works when a previous message was created with the help of the previous automation rule. It is a certain text in a comment's body that triggers this rule.

1. Perform the first five steps in the *Follow up on a customer for the first time* automation rule

2. Specify (read as find) those issues that need to be answered with JQL. In the example, the following JQL searches for issues that are in the In Progress status and were updated more than 10 days ago:
status = "In Progress" AND updated > -10d

Automation DRAFT Return to list

Follow up on a customer the 2nd time

- Rule details
- Audit log

When: Scheduled
Every 5 minutes

If: Compare two values
Checks if:
{issue.comments.last.author.displayName} equals CustomerC

And: Compare two values
Checks if:
{issue.comments.body} contains I decided to reach out to you and ask about any updates since my last message.

Scheduled

Executes this rule on the provided schedule. You can choose if you'd like to perform actions on a set of issues gathered with a JQL search or simply execute the rule.

Basic **Advanced (CRON expression)**

Run rule every
5 Minutes

Next run: Tuesday, May 10, 2022 8:30 PM +03 Show next 10 runs

☒ Run a JQL search and execute actions for each issue in the query.

JQL *
status = "In Progress" AND updated > -10d
[Insert account id](#) [Resolve users](#) [Validate query](#)

☐ Only include issues that have changed since the last time this rule executed

Your automation rule will perform actions on all issues returned in the above query, which can't be undone. Before saving this rule, look through it carefully to make sure this is okay.

You can specify a time period that meets your company's SLA for following up on a customer for the second time.

3. Add the *Advanced condition* to check the last commenter. This time, it must be CustomerC. Use the following Smart Value: {issue.comments.last.author.displayName}

Automation ENABLED Run rule Return to list

Follow up on a customer the 2nd time

- Rule details
- Audit log

When: Scheduled
Every 5 minutes

If: Compare two values
Checks if:
{issue.comments.last.author.displayName} equals CustomerC

And: Compare two values
Checks if:
{issue.comments.body} contains I decided to reach out to you and ask about any updates since my last message.

Advanced compare condition

Compares two values using smart values and regular expressions. [Learn more about issue properties for Advanced compare condition.](#)

First value *
{issue.comments.last.author.displayName}

Condition
equals

Second value
CustomerC

Cancel Save

> What values can I compare?

4. Add another *Advanced condition* to check the last comment's body. It must contain the line from your last automatic message. Use the following Smart Value: {issue.comments.body}

Automation ENABLED Run rule Return to list

Follow up on a customer the 2nd time

- Rule details
- Audit log

When: Scheduled
Every 5 minutes

If: Compare two values
Checks if:
{issue.comments.last.author.displayName} equals CustomerC

And: Compare two values
Checks if:
{issue.comments.body} contains I decided to reach out to you and ask about any updates since my last message.

Advanced compare condition

Compares two values using smart values and regular expressions. [Learn more about issue properties for Advanced compare condition.](#)

First value *
{issue.comments.body}

Condition
contains

Second value
I decided to reach out to you and ask about any updates since my last message

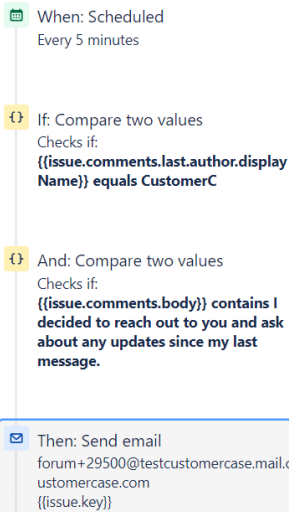
Cancel Save

> What values can I compare?

5. Add the *Send email* Action. Add your [portal email address](#) to the *To* field. Use the following smart value to keep the issue key in the Subject: {issue.key}. This time, you should modify a little bit content of a new message. It will help to automate the next rule. For example, you can add to the previous automation message the word 'again'.

Follow up on a customer the 2nd time

- Rule details
- Audit log



Send email

To *

forum+29500@testcustomercase.mail.customercase.com x

Cc Bcc

Subject *

{{issue.key}}

Content *

Hi there,

I decided to reach out to you **again** and ask about any updates since my last message.

Our team is looking forward to helping you. Please, connect with us.

Kind regards,
Irina

> More options

> What values can I use in my email body and subject?

6. Click Save and don't forget to Run the rule

Close a Ticket

- Perform the first three steps from the [Follow up on a customer for the second time](#) automation rule
- Add another *Advanced condition* to check the last comment's body. It must contain the line from your last automatic message. Use the following Smart Value: `{{issue.comments.body}}`

Automation

ENABLED

Close a ticket

- Rule details
- Audit log

When: Scheduled
Every 5 minutes

If: Compare two values
Checks if:
{{issue.comments.last.author.display
Name}} equals CustomerC

And: Compare two values
Checks if:
{{issue.comments.body}} contains I
decided to reach out to you again
and ask about any updates since my
last message.

Advanced compare condition

Compares two values using smart values and regular expressions. [Learn more about issue properties for Advanced compare condition.](#)

First value *

{{issue.comments.body}}

Condition

contains

Second value

I decided to reach out to you **again** and ask about any updates since my last message.

Cancel Save

> What values can I compare?

- Add the *Send email* Action. Add your [portal email address](#) to the *To* field. Use the following smart value to keep the issue key in the Subject: `{{issue.key}}`. This time, you should add a message that clarifies your intention to close the ticket.

Automation ENABLED Run rule Return to list ✓

Close a ticket

- Rule details
- Audit log

When: Scheduled
Every 5 minutes

If: Compare two values
Checks if:
{{issue.comments.last.author.display Name}} equals CustomerC

And: Compare two values
Checks if:
{{issue.comments.body}} contains I decided to reach out to you again and ask about any updates since my last message.

Then: Send email
forum+29500@testcustomercase.mail.customercase.com
{{issue.key}}

Send email

To *

forum+29500@testcustomercase.mail.customercase.com

Cc Bcc

Subject *

{{issue.key}}

Content *

Hi there,

We're going to proceed with closing the ticket. Feel free to reach out to our team in the future.

Kind regards,
Irina

> More options

> What values can I use in my email body and subject?

Cancel Save

4. Add the *Transition issue* Action with the destination status *Done*.

Automation ENABLED Run rule Return to list ✓

Close a ticket

- Rule details
- Audit log

When: Scheduled
Every 5 minutes

If: Compare two values
Checks if:
{{issue.comments.last.author.display Name}} equals CustomerC

And: Compare two values
Checks if:
{{issue.comments.body}} contains I decided to reach out to you again and ask about any updates since my last message.

Then: Send email
forum+29500@testcustomercase.mail.customercase.com
{{issue.key}}

Transition issue

Transitions an issue from one status to another, through a workflow. [Learn more.](#)

Choose the status to transition the issue to:

Destination status

DONE

Ensure a transition from the issue's source status to your selected destination status exists; [more info.](#)

+ add regex to distinguish between multiple transitions to the same status

Choose fields to set...

> More options

Cancel Save

5. Click Save and don't forget to Run the rule

Follow up on Yourself (1)

It's another way to keep an eye on the tickets that might need to be closed.

1. Set a trigger to Scheduled
2. Configure it to run every day
3. Set the exact time
4. Check the *Run a JQL search and execute actions for each issue in the query* checkbox
5. Specify (read as find) those issues that need to be answered with JQL. In the example, the following JQL searches for issues that were created more than 80 days ago with the following JQL:
created <= "-80d"
You can specify the time period that meets your company SLA for closing a ticket.

reminer to close

Rule details

Audit log

When: Scheduled

Every day at 9:00 AM

1

If: Compare two values

Checks if:

```
{{issue.comments.last.body.replace("\n", " ")}} equals Hi there, I decided to reach out to you and ask about any updates since my last message. Our team is looking forward to helping you. Please contact with us if needed
```

Then: Send email

Assignee

Probably, you need to close this ticket

{{issue.key}}

Add component

Scheduled

Executes this rule on the provided schedule. You can choose if you'd like to perform actions on a set of issues gathered with a JQL search or simply execute the rule.

Basic Advanced (CRON expression)

Run rule every

1 Days

At

9:00 AM Europe/Tallinn

Next run: Wednesday, 2025-10-22 09:00:00

Show next 10 runs

Run a JQL search and execute actions for each issue in the query.

JQL *

created <= "-80d"

Insert account id Resolve users

10 issues found

Only include issues that have changed since the last time this rule executed

Your automation rule will perform actions on all issues returned in the above query, which can't be undone. Before saving this rule, look through it carefully to make sure this is okay.

6. Check the body of the last comment with the following Advanced condition: `{{issue.comments.last.body.replace("\n", " ")}}` and paste the comment that you usually reply for following up on a client.

Automation

DRAFT

Publish rule Return to list

reminer to close

Rule details

Audit log

When: Scheduled

Every day at 9:00 AM

If: Compare two values

Checks if:

```
{{(issue.comments.last.body.replace("\n", " "))}} equals Hi there, I decided to reach out to you and ask about any updates since my last message. Our team is looking forward to helping you. Please contact with us if needed
```

Then: Send email

Assignee

...

Advanced compare condition

Compares two values using smart values and regular expressions. Learn more about issue properties for Advanced compare condition.

First value *

{{issue.comments.last.body.replace("\n", " ")}}

Condition

equals

Second value

Hi there, I decided to reach out to you and ask about any updates since my last message. Our team is looking

Cancel Save

What values can I compare?

- i** As an option, you may use the following Smart value to check a specific phrase in the answer: `{{issue.comments.last.body}}`
- Then, instead of *Equals* condition, select *Contains* and specify a phrase from your typical answer in the *Second value* field.

Advanced compare condition

Compares two values using smart values and regular expressions. Learn more about issue properties for Advanced compare condition.

First value *

{{issue.comments.last.body}}

Condition

contains

Second value

I decided to reach out to you and ask about any updates since my last message

Cancel Save

- Set the action in the rule to *Send email*
- Specify Assignee in the *To* field
- Paste a smart value for an issue key in the Subject `{{issue.key}}`
- Paste a smart value for an issue link in the Content `{{issue.url}}`
- Click Save and don't forget to Run the rule

Automation

DRAFT

Return to list

reminer to close

Rule details

Audit log

When: Scheduled

Every day at 9:00 AM

If: Compare two values

Checks if:

```
{{(issue.comments.last.body.replace("\n"," ")) equals Hi there, I decided to reach out to you and ask about any updates since my last message. Our team is looking forward to helping you. Please contact us if you need more information. Thank you!}}
```

Then: Send email

Assignee

Probably, you need to close this ticket {{issue.key}}

Send email

To *

Assignee

Cc Bcc

Subject *

Probably, you need to close this ticket {{issue.key}}

Content *

{{issue.url}}

More options

Cancel

Save

Follow up on Yourself (2)

This way is a more universal one. You can specify the following conditions in the automation rule:

1. Repeat the 5 steps described in the *Follow up on yourself (1) rule*.
2. Apply the following advanced condition to check the name of the last commentor: `{{issue.comments.last.author.displayName}}`. In our example, it's the Agent.

Automation

ENABLED

Run rule

Return to list

Reminder to close the ticket

Rule details

Audit log

When: Scheduled

Every 5 minutes

If: Compare two values

Checks if:

```
{{(issue.comments.last.author.displayName) contains Rhyme}}
```

And: Compare two values

Checks if:

```
{{(issue.comments.last.created.diff(now).days) is greater than 10}}
```

Advanced compare condition

Compares two values using smart values and regular expressions. Learn more about issue properties for Advanced compare condition.

First value *

{{(issue.comments.last.author.displayName)}}

Condition

contains

Second value

Rhyme

Cancel

Save

What values can I compare?

3. Apply the following advanced condition to check how many days ago the ticket was made: `{{issue.comments.last.created.diff(now).days}}`. In our example, we find tickets that were made more than 10 calendar days ago.

Automation

ENABLED

Run rule

Return to list

Reminder to close the ticket

Rule details

Audit log

When: Scheduled

Every 5 minutes

If: Compare two values

Checks if:

```
{{(issue.comments.last.author.displayName) contains Rhyme}}
```

And: Compare two values

Checks if:

```
{{(issue.comments.last.created.diff(now).days) is greater than 10}}
```

Advanced compare condition

Compares two values using smart values and regular expressions. Learn more about issue properties for Advanced compare condition.

First value *

{{(issue.comments.last.created.diff(now).days)}}

Condition

greater than

Second value

10

Cancel

Save

What values can I compare?

4. Set the action in the rule to *Send email*
5. Specify Assignee in the *To* field
6. Paste a smart value for an issue key in the Subject `{{issue.key}}`
7. Paste a smart value for an issue link in the Content `{{issue.url}}`
8. Click Save and don't forget to Run the rule

Reminder to close the ticket

Rule details

Audit log

When: Scheduled

Every 5 minutes

If: Compare two values

Checks if:

`{{issue.comments.last.author.display Name}}` contains Rhyme

And: Compare two values

Checks if:

`{{issue.comments.last.created.diff(now.days)}}` is greater than 10

Then: Send email

testcustomer@case@gmail.com

Probably, the ticket number `{{issue.key}}` needs to be closed

Send email

To *

Cc Bcc

Subject *

Probably, the ticket number `{{issue.key}}` needs to be closed

Content *

Here it's: `{{issue.url}}`

More options

What values can I use in my email body and subject?

Cancel Save

Extract information from the Jira Issue Fields

You can extract the field from the Jira issue in the answer. In our case, it is the Labels field that we will extract.

Jira

Your work

Projects

Filters

Dashboards

People

Apps

Create

Rocket science

Software project

PLANNING

Roadmap

Backlog

Board

DEVELOPMENT

Code

Project pages

Customer Case

Add shortcut

Project settings

You're in a team-managed project

Learn more

Projects

Rocket science

Add epic

GF-18

Attachments (4)

Activity

Show: All Comments History Customer Portal

Newest first

CustomerC

1 minute ago

Hi there,

We're going to proceed with closing the ticket. Feel free to reach out to our team in the future.

4.2.3

Kind regards,

Irina

Edit Delete

Done

Done

Details

Assignee

Unassigned

Assign to me

Labels

4.2.3

Story point estimate

None

Reporter

CustomerC

Automation

Rule executions

Customer Portal

Open Customer Portal

Created July 11, 2022 at 8:22 PM

Updated 1 second ago

Resolved now

Configure

In the Labels field, you need to add a fixed version

1. Perform the first three steps in the *Change a ticket's status* automation rule
2. Set a trigger to Issue transitioned
3. Specify the From and To statuses

Jira Rocket science Software project

Automation **ENABLED** [Return to list](#)

Label upon Done

- Rule details
- Audit log

When: Issue transitioned
FROM In Progress
TO Done

Then: Send email
forum+29794734-92f797054d7d@testcustomercase.mail.customercase.com
{{issue.key}}

Cancel Save

Issue transitioned

Rule is run when an issue is transitioned through its workflow.
Learn more about transitioning an issue with automation.

From status
IN PROGRESS

To status
DONE

4. Set the action in the rule to *Send email*. In the email field you need to indicate the email of your forum that you can find in the [mailbox settings](#).

Jira Software

Mailboxes [+Add Mailbox](#)

You can allow your customers to communicate with you by email. For doing this, create a mailbox for your support or feedback forum and configure the email forwarding from your company email to the inbound email of the mailbox. Once done, you will receive support requests, ideas or comments to Customer Case by email.

Forum	Inbound email	From email	From name	Actions
Dev Team Portal	forum+a18548d9-99d86ecce1c1@customercase.mail.customercase.com	clientcustomercase@gmail.com	Dev Team	<ul style="list-style-type: none">EditDelete

Jira Rocket science Software project

Automation **ENABLED** [Return to list](#)

Label upon Done

- Rule details
- Audit log

When: Issue transitioned
FROM In Progress
TO Done

Then: Send email
forum+29794734-92f797054d7d@testcustomercase.mail.customercase.com
{{issue.key}}

Send email

To
forum+29794734-8716-49de@testcustomercase.mail.custr

Cc Bcc

Subject
{{issue.key}}

Content
Hi there,

The fix was addressed in the {{issue.fields.labels}} version.

Kind regards,
Irina

More options

Cancel Save

It's the Jira smart value for labels on a ticket

This rule will perform every time you transition an issue from the states indicated. You can use it to mention a fixed version in the answer when the issue is implemented.

The screenshot shows a Jira issue page for the 'Rocket science' project, issue 'GF-18'. The issue is in the 'Customer Portal' tab. A comment from 'CustomerC' says 'Hi there, The fix was addressed in the 4.2.3 version.' A blue arrow points from the '4.2.3' text in the comment to the 'Labels' field in the issue details, which contains '4.2.3'.

⚠ Similarly, depending on your case, you can extract other fields from the Jira issue.

For example, you can mention a username in the Labels field on issues to

1. Filter tickets of a specific user (company).
2. Use the field in the Jira automations mentioned above to follow up with a client.

Even though there's a way [to find all the submitted tickets by a user on a portal in Jira via JQL](#), this way may be used as a workaround.

Link Duplicated Tickets/Ideas

Whether it's a feedback or support portal, it's handy to find duplicated tickets to:

- Assign the right individuals or teams to work on the primary ticket to eliminate redundant work.
- Summarize the activity on a feature request, enabling you to pinpoint the most in-demand ones.
- Empower your team to address client problems more swiftly by having at hand a solution-filled library of previously resolved tickets.
- Enrich your documentation by incorporating answers to the questions your customers ask most frequently, as identified by the volume of duplicated tickets.

1. Go to the Project settings of the Jira project the Customer Case forum is linked to.
2. Find the Automation tab and press Create rule button:

The screenshot shows the 'Automation' tab in the 'Feature requests' project settings. The 'Create rule' button is highlighted with a blue arrow. Below, a table lists existing automation rules.

Name	Labels	Owner	Scope	Updated	Enabled
Duplicated issues		Dolores Rhyme	Feature requests	2 hours ago	✓
Transition to dev		Irina_Bel Stiltsoft	Feature requests	a month ago	✓

3. Set up the automation rule as follows.

3.1. Pick an action when the rule will be triggered. In our case, it's Issue created:

Automation

ENABLED

Return to list 

Duplicated issues

- Rule details
- Audit log

+ When: Issue created
Rule is run when an issue is created.

1

Then: Lookup issues
Search for issues using JQL
summary ~ "{{triggerIssue.summary}}" OR
description ~ "{{triggerIssue.description}}"

If: Compare two values
Checks if:
{{lookupIssues.size}} is greater than 1

Then: Link issue to
{{lookupIssues.key}}

+ Issue created

Rule is run when an issue is created. This trigger needs no configuration.

Save

3.2. Add the Lookup tickets action to find tickets with a similar summary or description in a backlog to a newly created ticket. Use the following JQL for that: `summary ~ "{{triggerIssue.summary}}" OR description ~ "{{triggerIssue.description}}"`

Automation

ENABLED

Duplicated issues

- Rule details
- Audit log

+ When: Issue created
Rule is run when an issue is created.

Then: Lookup issues
Search for issues using JQL
summary ~ "{{triggerIssue.summary}}" OR
description ~ "{{triggerIssue.description}}"

2

If: Compare two values
Checks if:
{{lookupIssues.size}} is greater than 1

Then: Link issue to
{{lookupIssues.key}}


Lookup issues

Search for up to 100 issues using JQL and include the results list in other actions by using the **{{lookupIssues}}** smart value. [Learn more about Lookup issues action](#)

JQL *

summary ~ "{{triggerIssue.summary}}" OR description ~ "{{triggerIssue.description}}"

 Insert account id

 Resolve users

 Validate query

Cancel

Save

3.3. Add the condition (If) and use the Advanced compare condition option next. Paste this smart value `{{lookupIssues.size}}` for comparison.

Automation

ENABLED

Duplicated issues

ⓘ Rule details

📄 Audit log

+

When: Issue created

Rule is run when an issue is created.

🔍

Then: Lookup issues

Search for issues using JQL
summary ~ "{{triggerIssue.summary}}" OR
description ~ "{{triggerIssue.description}}"

⚡

If: Compare two values

Checks if:
{{lookupIssues.size}} is greater than 1

🔗

Then: Link issue to

{{lookupIssues.key}}

Advanced compare condition

Compares two values using smart values and regular expressions. [Learn more about issue properties for Advanced compare condition.](#)

First value*

{{lookupIssues.size}}

Condition

greater than

Second value

1

Cancel

Save

> What values can I compare?

3.4. The last action is to link the tickets found in the previous step. Just paste this smart value `{{lookupIssues.key}}` into the unfolding list.

Automation

ENABLED

Duplicated issues

ⓘ Rule details

📄 Audit log

+

When: Issue created

Rule is run when an issue is created.

🔍

Then: Lookup issues

Search for issues using JQL
summary ~ "{{triggerIssue.summary}}" OR
description ~ "{{triggerIssue.description}}"

⚡

If: Compare two values

Checks if:
{{lookupIssues.size}} is greater than 1

🔗

Then: Link issue to

{{lookupIssues.key}}

Link issues

[Learn more about Link issues action](#)

Please provide a link type and the issue to link to:

duplicates

{{lookupIssues.key}}

You can link to the issue that triggered this rule, previous created issue, a smart-value or simply an issue key.

Cancel


Save


4. Save the rule.


5. Test the rule by creating a ticket with a similar summary or description to a ticket in the backlog. If the rule works properly, the similar tickets will be linked like so:


 FR-66


Having search bar into

 Attach

 Create subtask

 Link issue





Description

Add a description...

Linked issues



duplicates

 **FR-4** Having search bar into Folder attachment macro





TO DO ▾