COW JACKET: PYTHON AUTOMATION

At Cowjacket, users raise support requests from our web form, and each request needs to be assigned promptly to internal staff. We've got workflows managed through Jira, but here's our big headache: the Jira instance and our web form database don't talk to each other directly.

In the old days, one poor support staffer had to receive a daily CSV dump and manually create Jira tickets for every single request, a solution that's now officially creaking under pressure. Not only is this painfully slow (with a 24-hour delay!), but it's also impossible to scale.

That's where you come in.

We need a superstar like you to automate this process and rescue the support team from hours of tedious manual work. Automating this will drastically reduce turnaround time for request resolutions and keep us in line with our team SLA.

Here's the breakdown from the Head of Support:

- Every form submission from our website needs to automatically become a Jira ticket in our Customer Service Desk.
- Our Jira project has a form embedded, and you'll have to map our website form fields to Jira fields.
- Tickets must be created within 15 minutes (SLA stuff).
- You can pick either functional or OOP, but whatever you do, keep it clean, modular, and professional.

DB CREDENTIALS:

Username: postgres.tykuknkebjhzenngzujf:
Hostname: aws-1-eu-west-2.pooler.supabase.com:
Port: 6543
Db: postgres
TableName: phonerequest

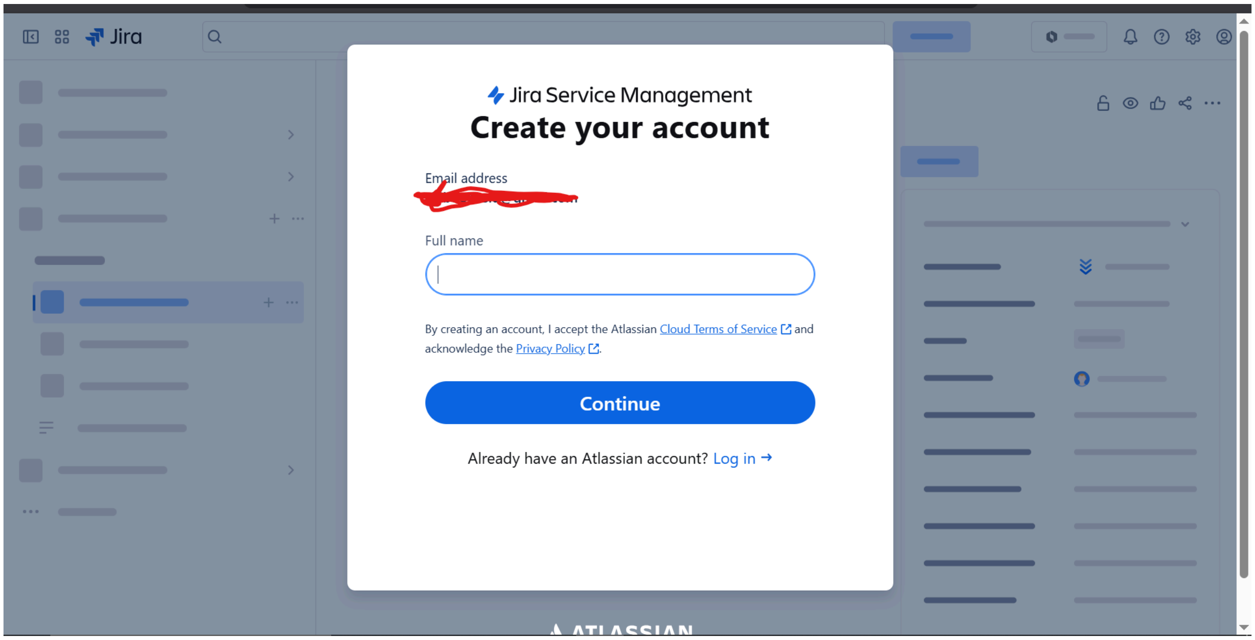
Note: The flow will probably look like this

1) Create an issue
2) Attach a form to the issue created in !)
3) Update the form attached in 2)

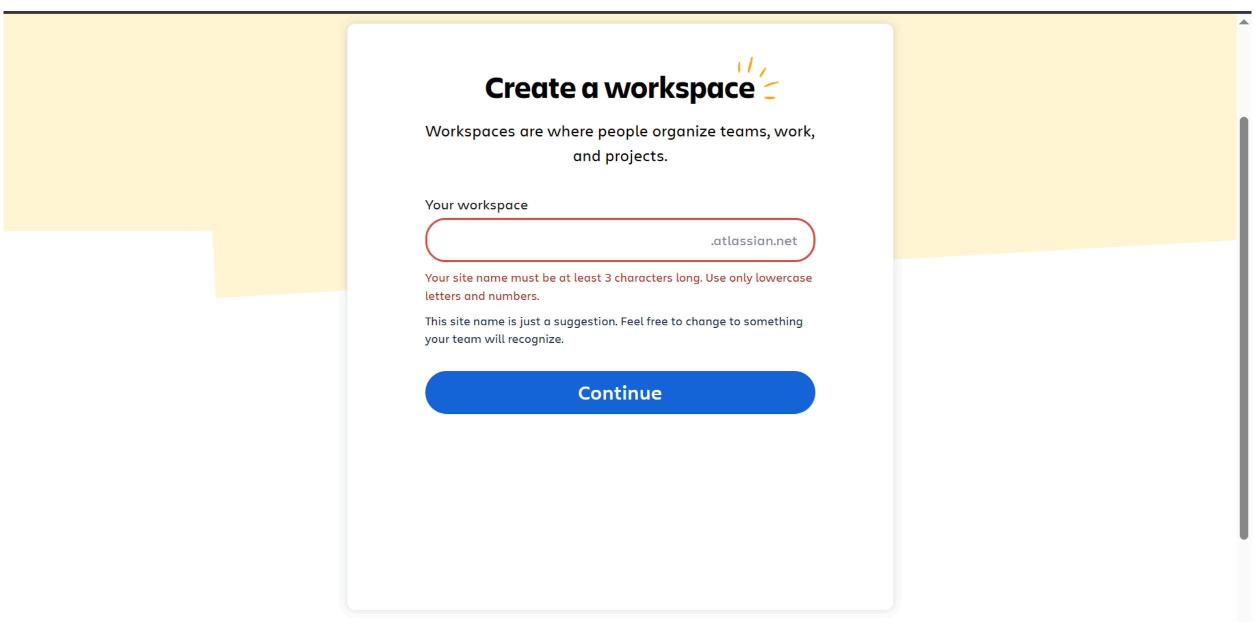
JIRA SETUP

New account -

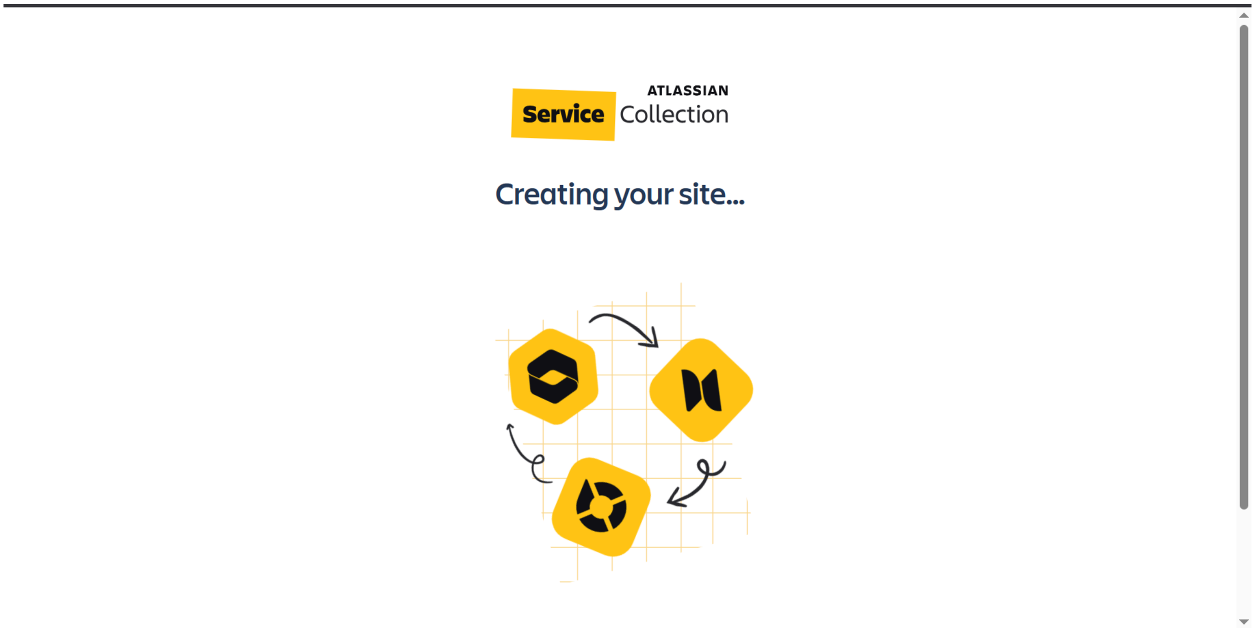
1. Visit this URL: https://www.atlassian.com/software/jira/service-management
2. Sign up with Google Account
3. You will land on a page that will prompt you to create an account.



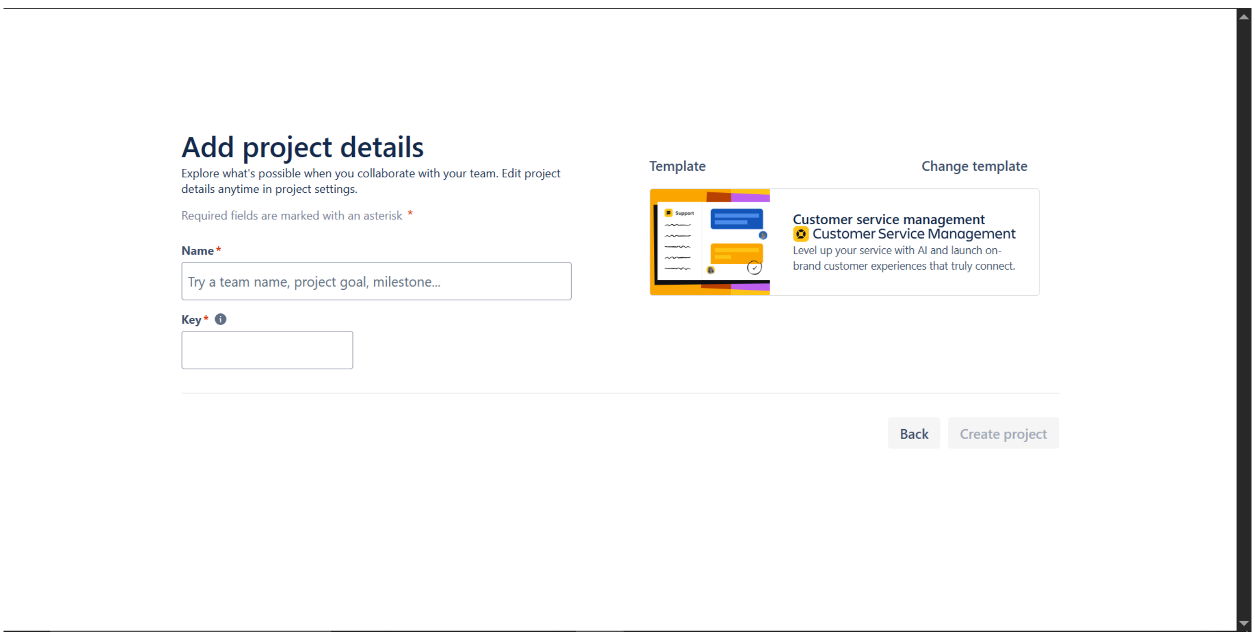
4. Create a workspace with any name



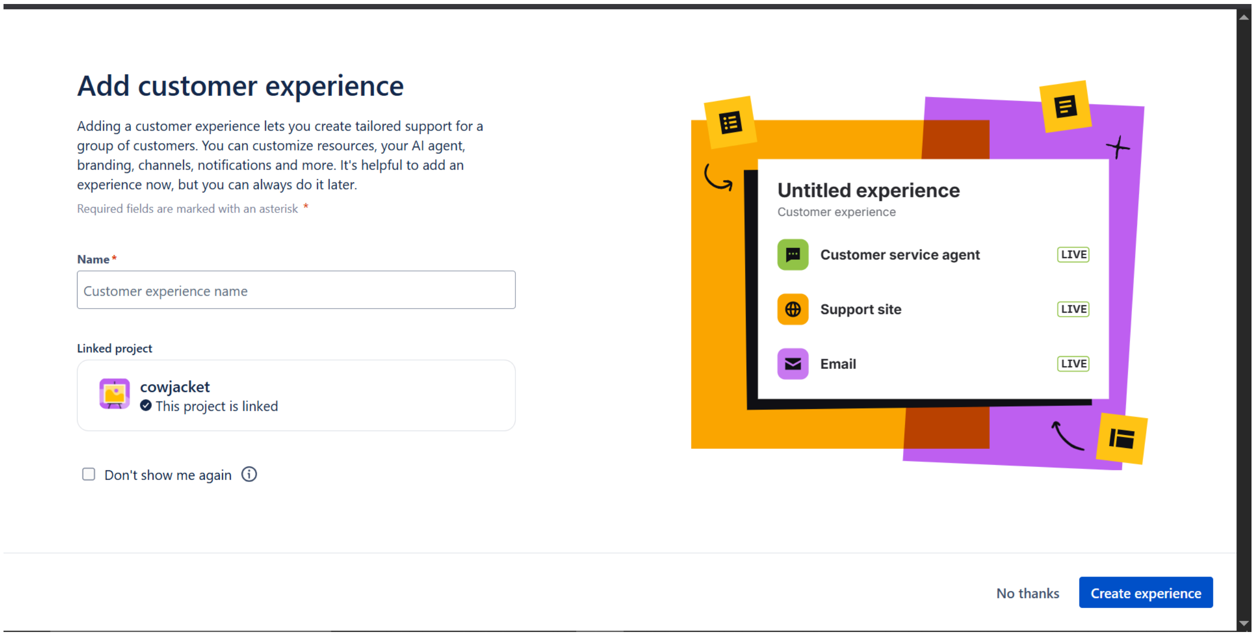
5. The next stage should show “Creating your site”.



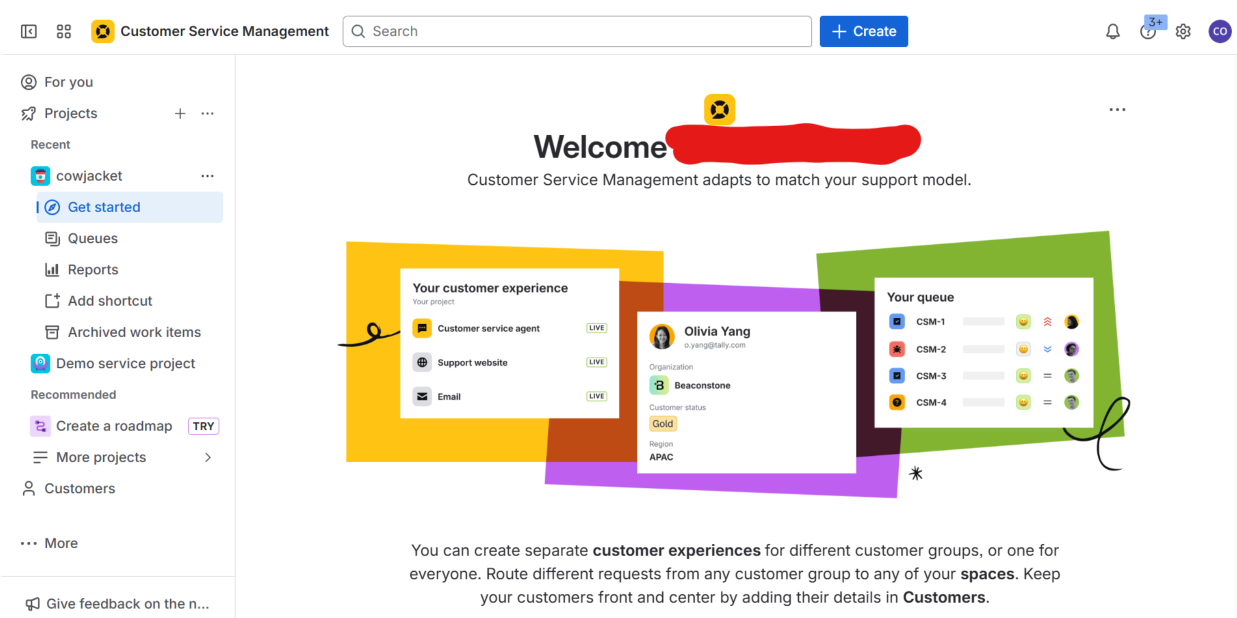
6. After this, you will be asked to add project details to the created project.



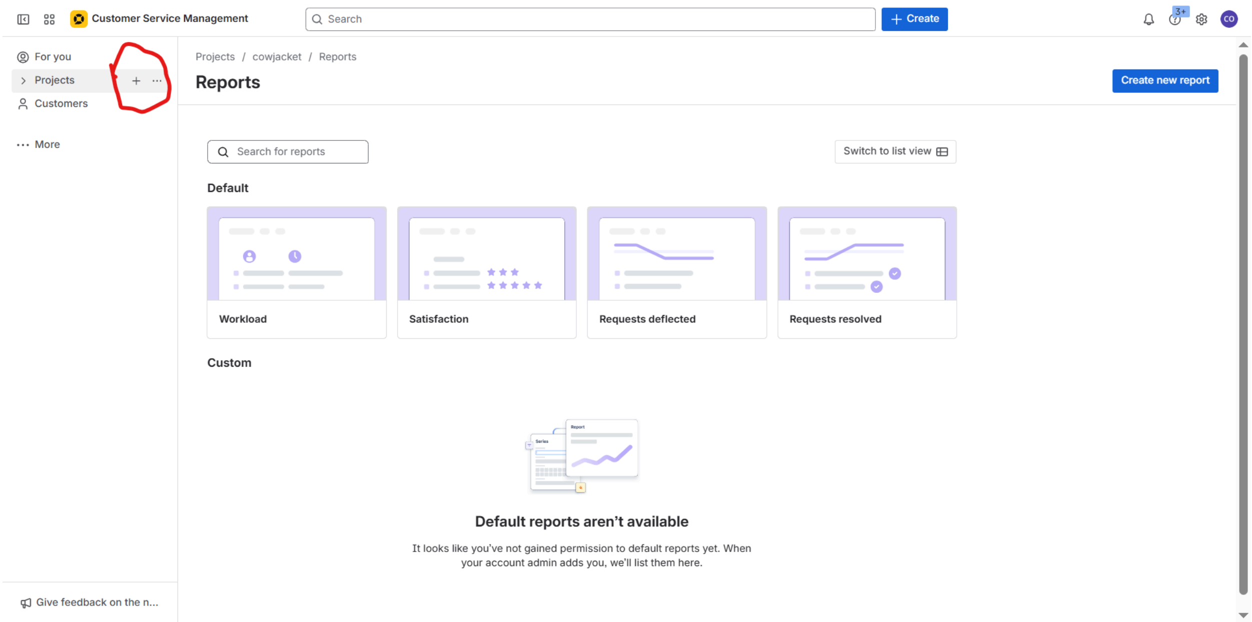
7. When you are done adding the project details to your new project, you will be asked to **Add Customer Experience**



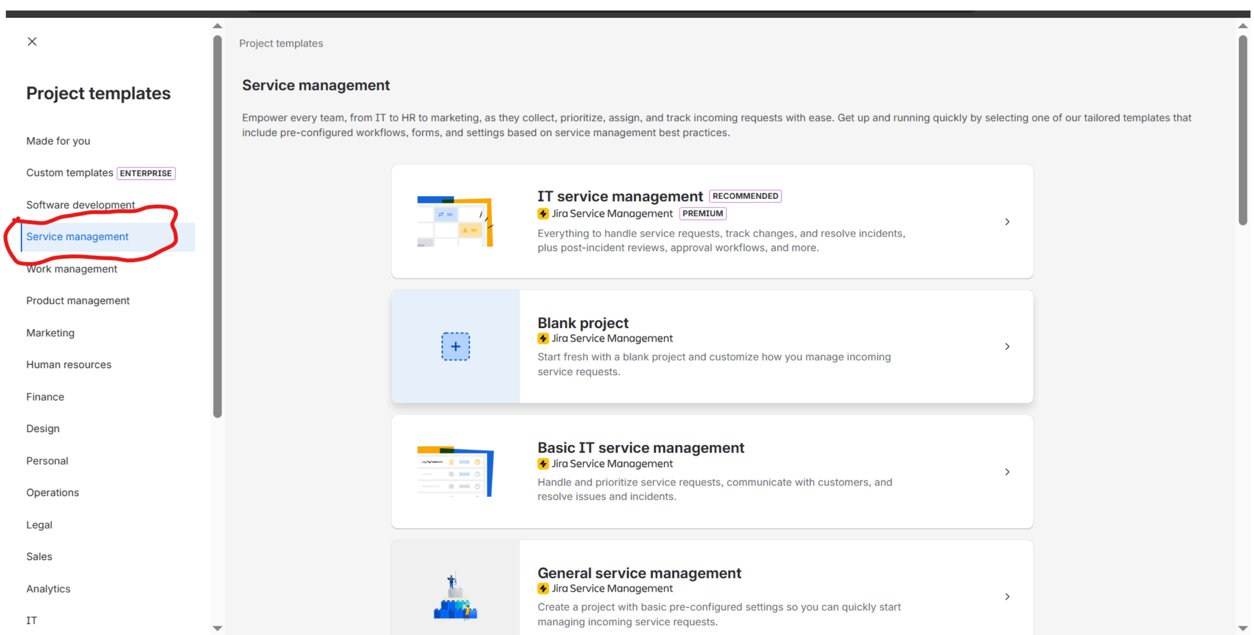
9. When you are done filling this in, it will take you to the project homepage just like the image below



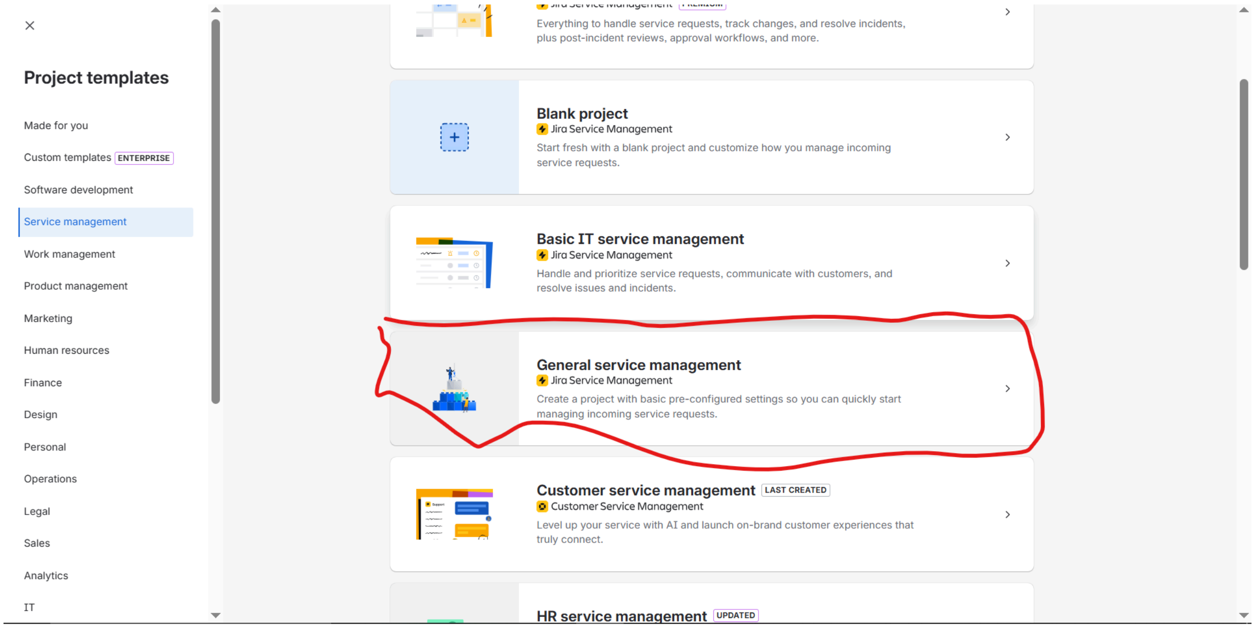
10. On your project homepage, click on the plus sign on your **Project** button



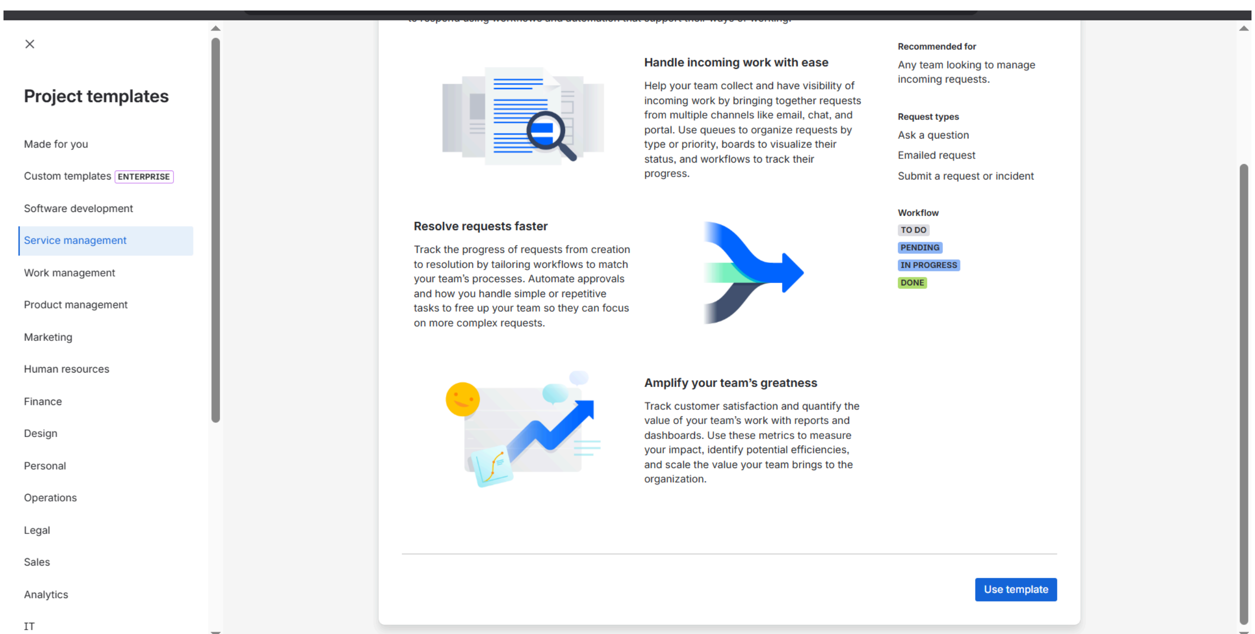
11. This will take you to a new page, here, you will click on **Service Management**



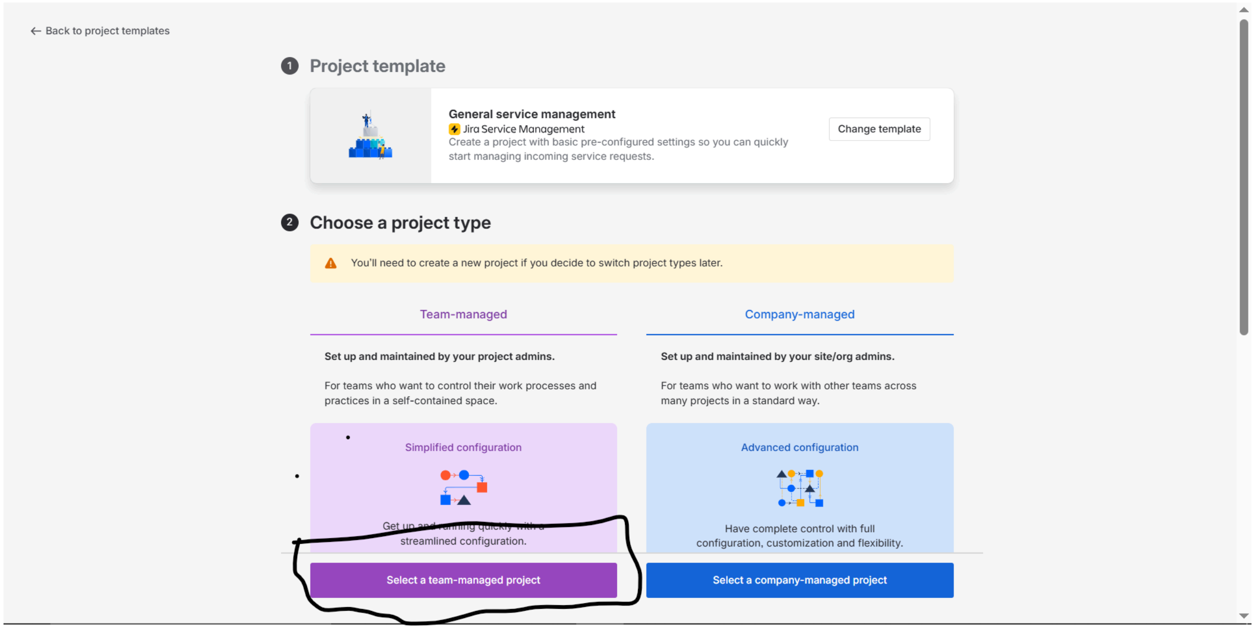
12. On this page, click on **General service management** which will take you to a new page



13. On the new page, click on **Use template** and this will take you to a template page

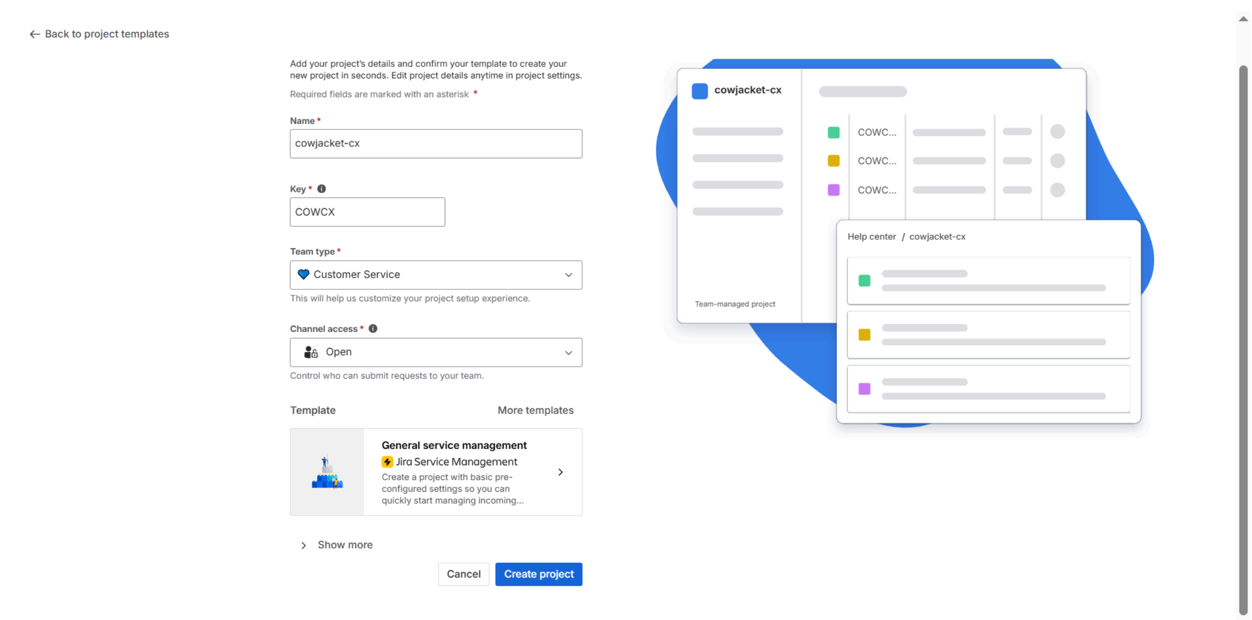


14. On the new templates page, click on **Select a team-managed project**

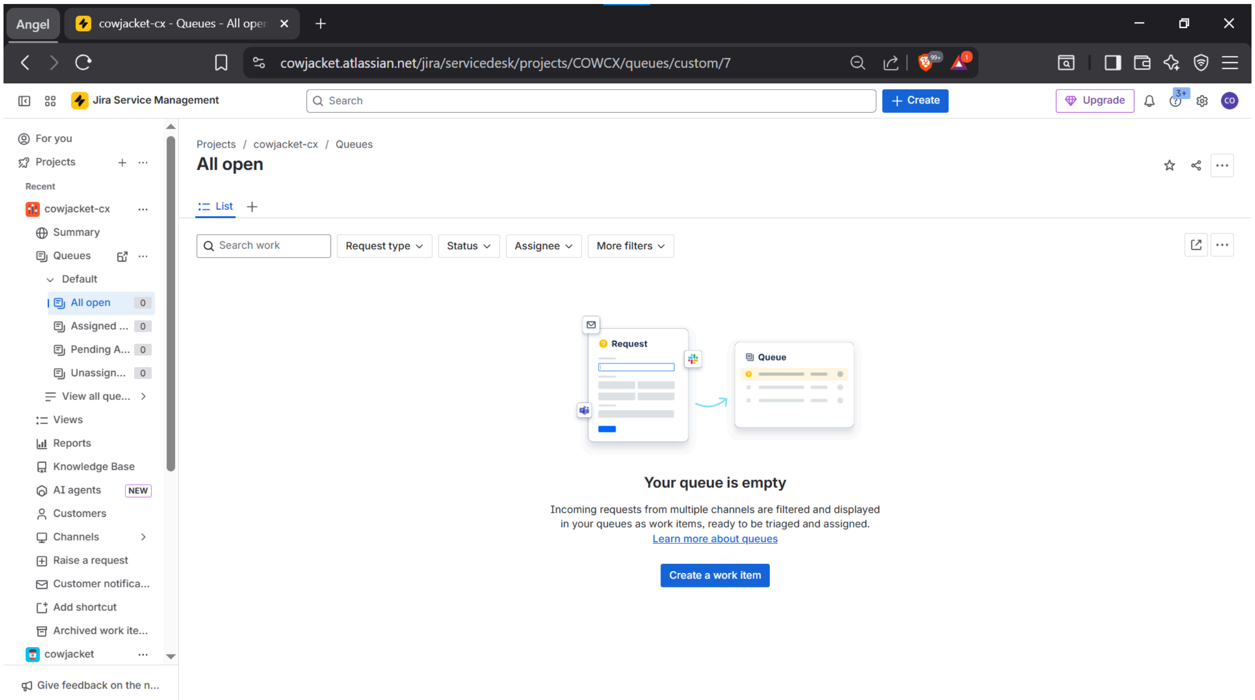


15. In this page, you will be asked to create project just like I have done in the image below (you don't have to use my details).

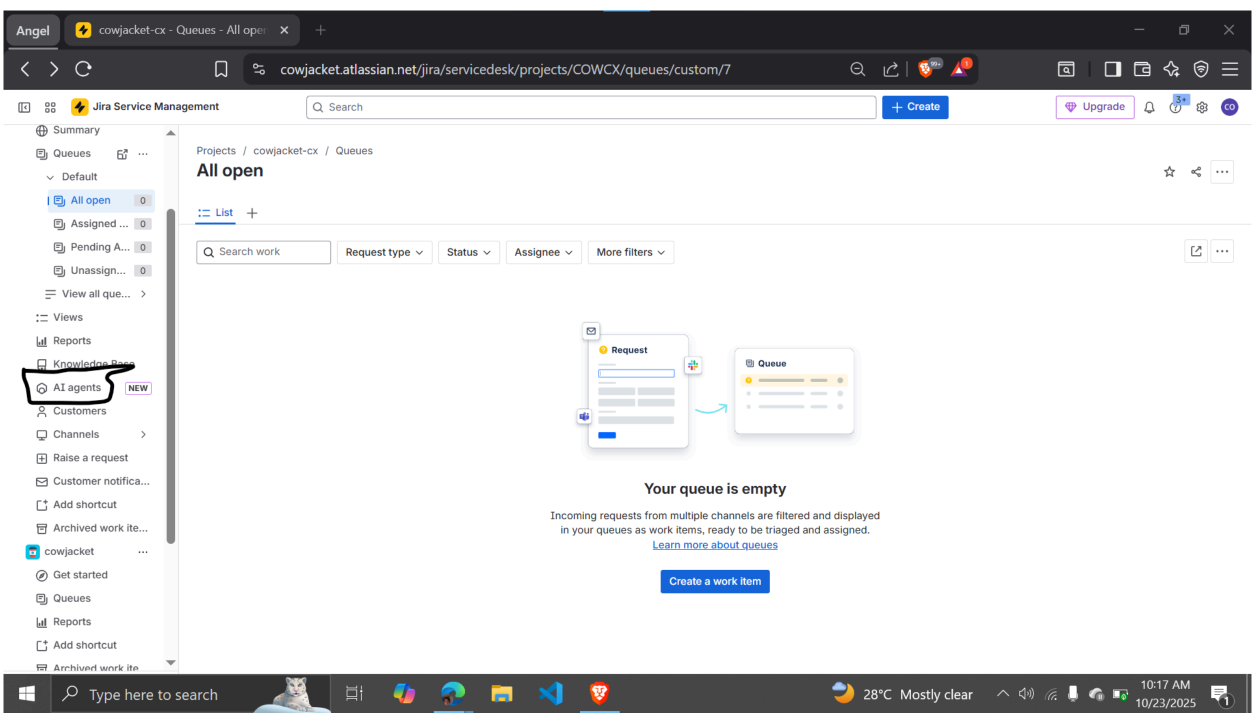
Take note of the **Team type** and the **Channel access.** You will have to use the same information that I have used for uniformity.



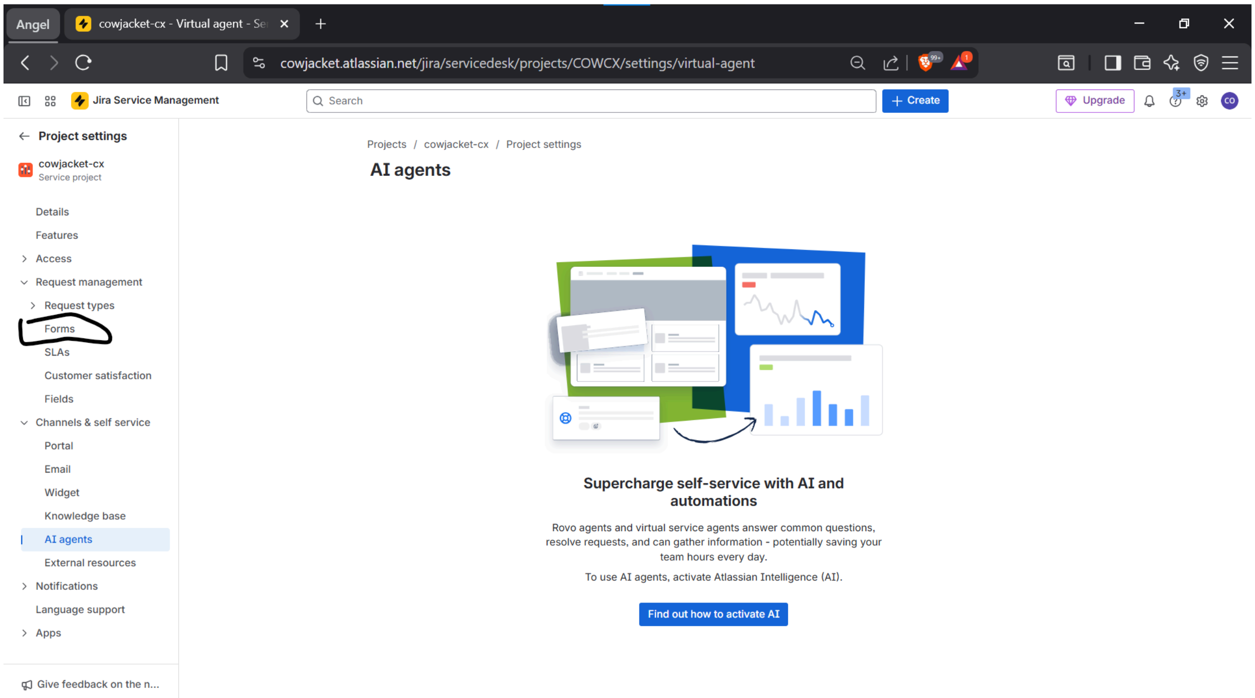
16. After doing that perfectly, you will be taken to a landing page similar to what I have below



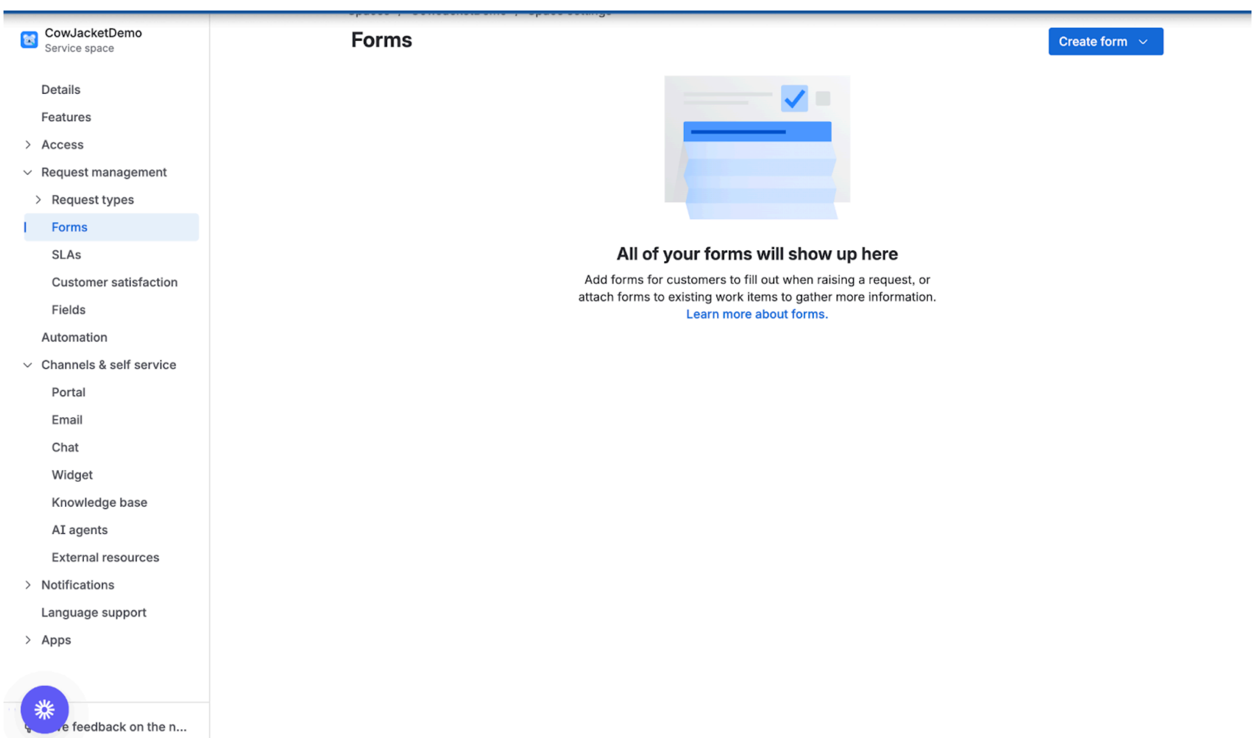
17. Click on the **AI Agents** button on the page



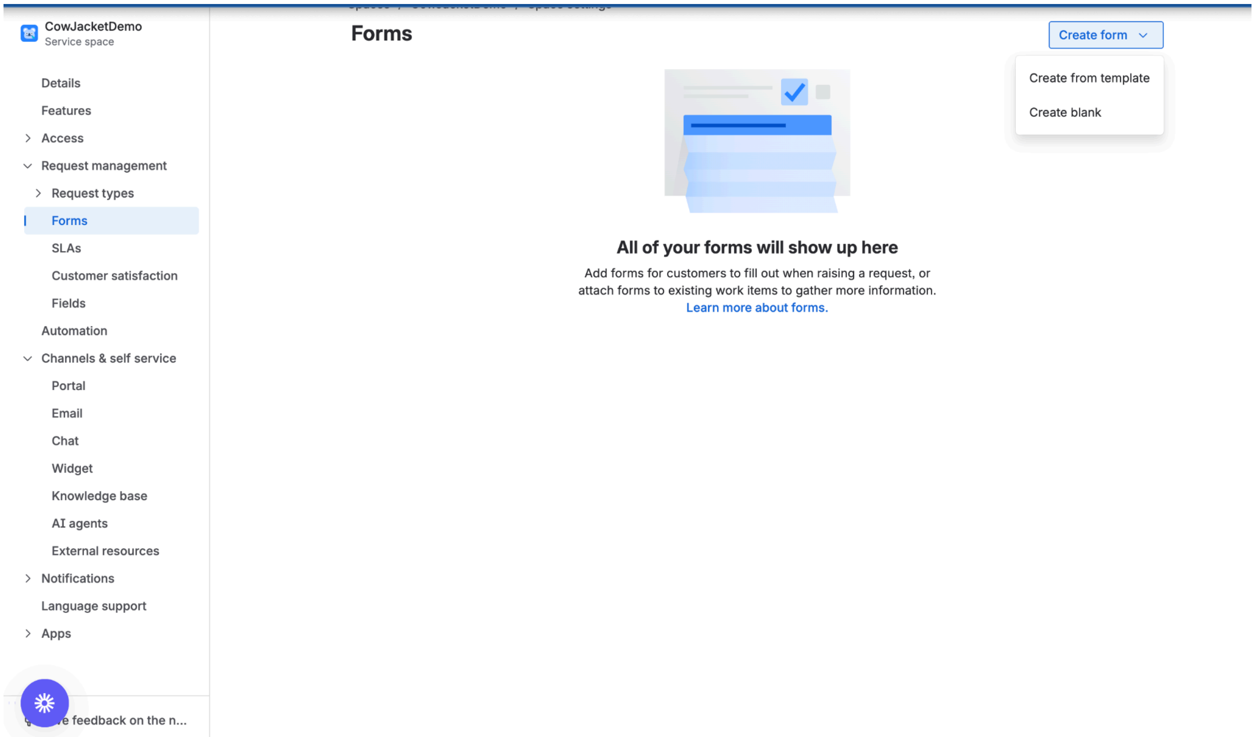
18. Click on the **Request management** dropdown, and then click on **Forms**



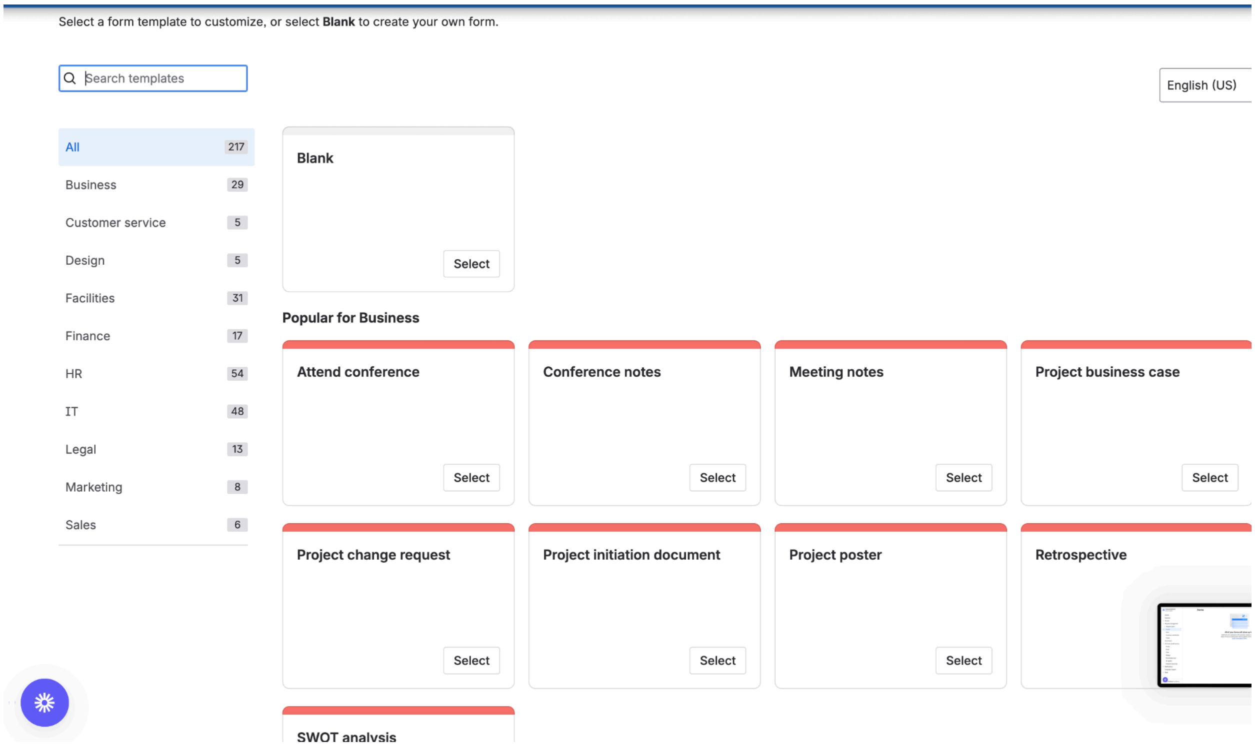
19. On the **Form** landing page, click on **Create Form** . This is on the top right part of the screen.



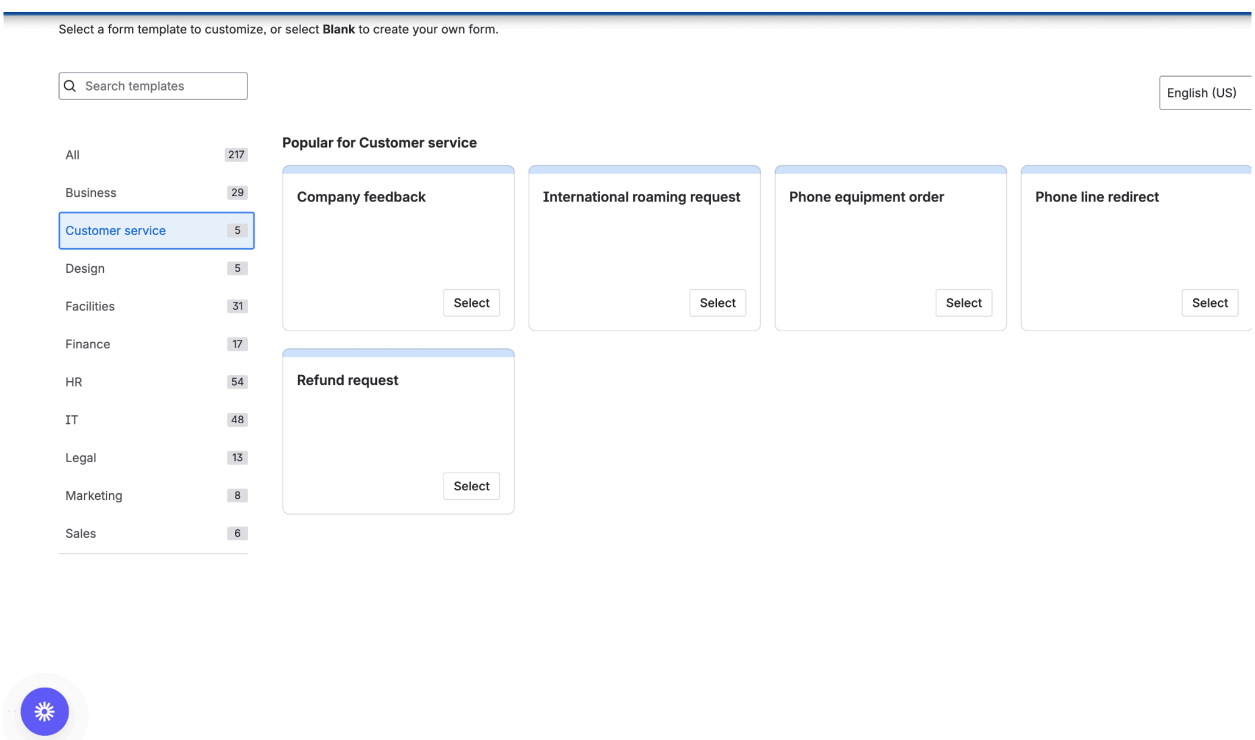
20. When the list drops down, click on **create from template.** This will bring out several templates for you to work with.



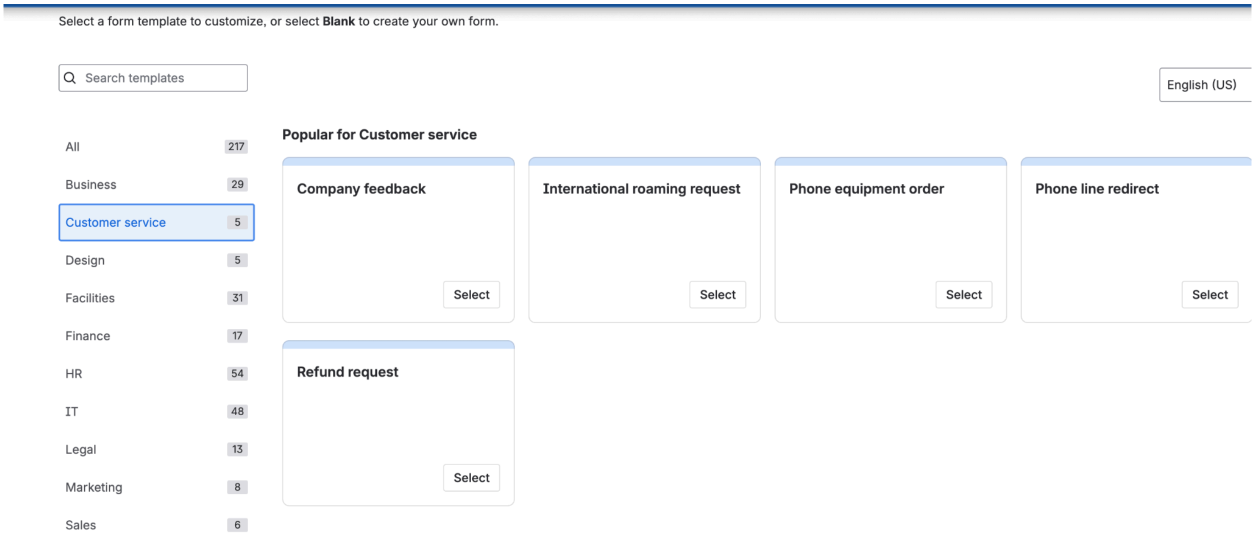
21. When this opens, you will see a screen like the one below. At the left side of the screen, click on **Customer service** button



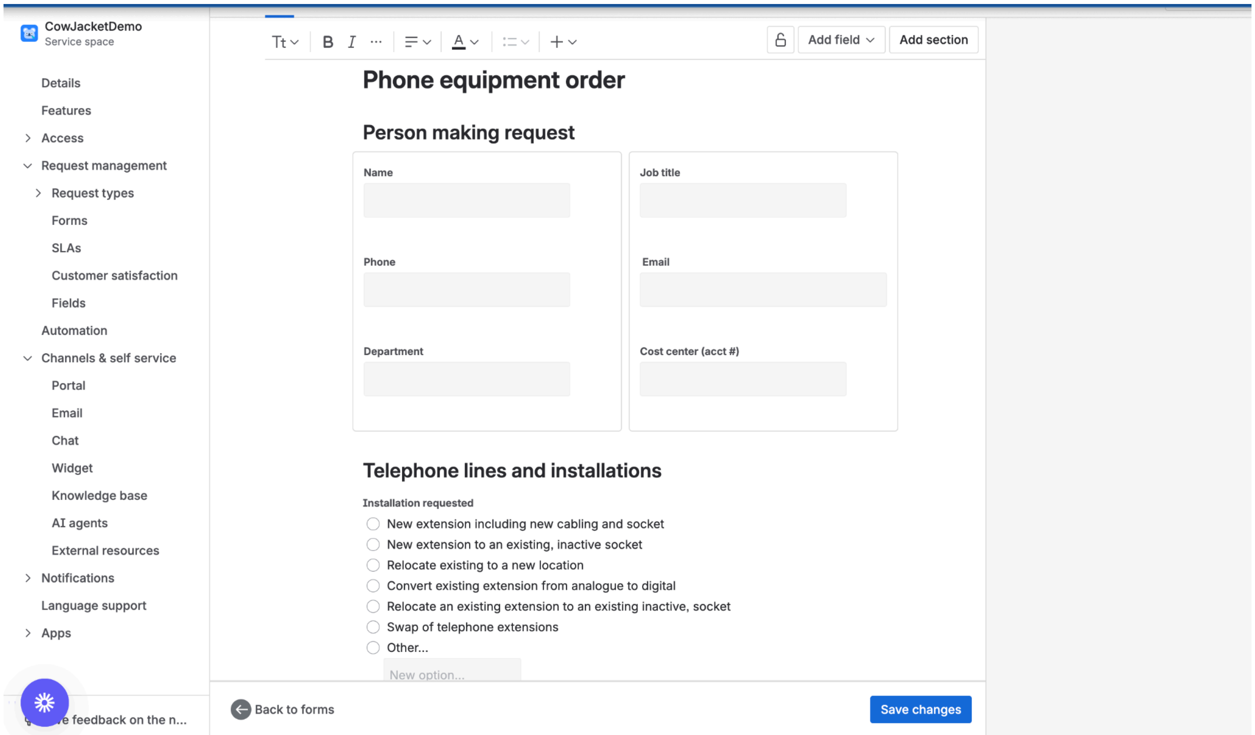
22. A new page pops up which has the templates for the service you clicked on. This should bring out a screen like the on below



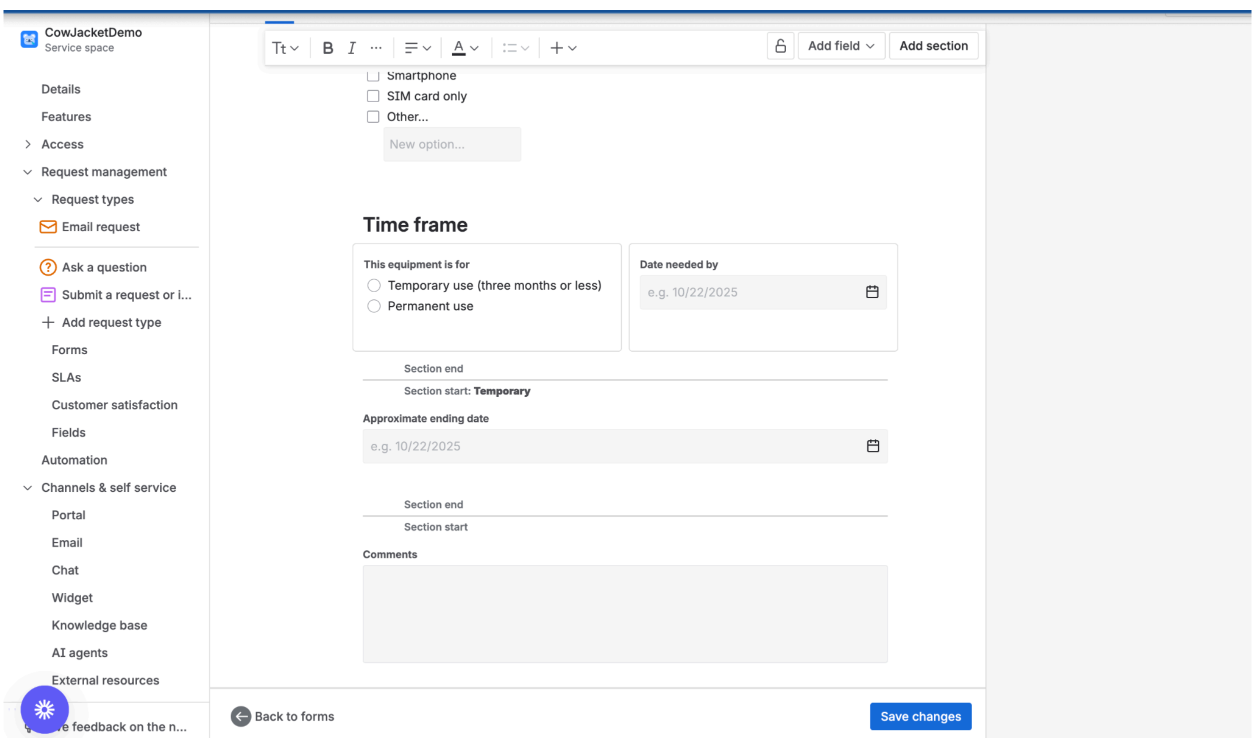
23. Click on the customer service button to see a similar image to the one below and select the phone equipment order.



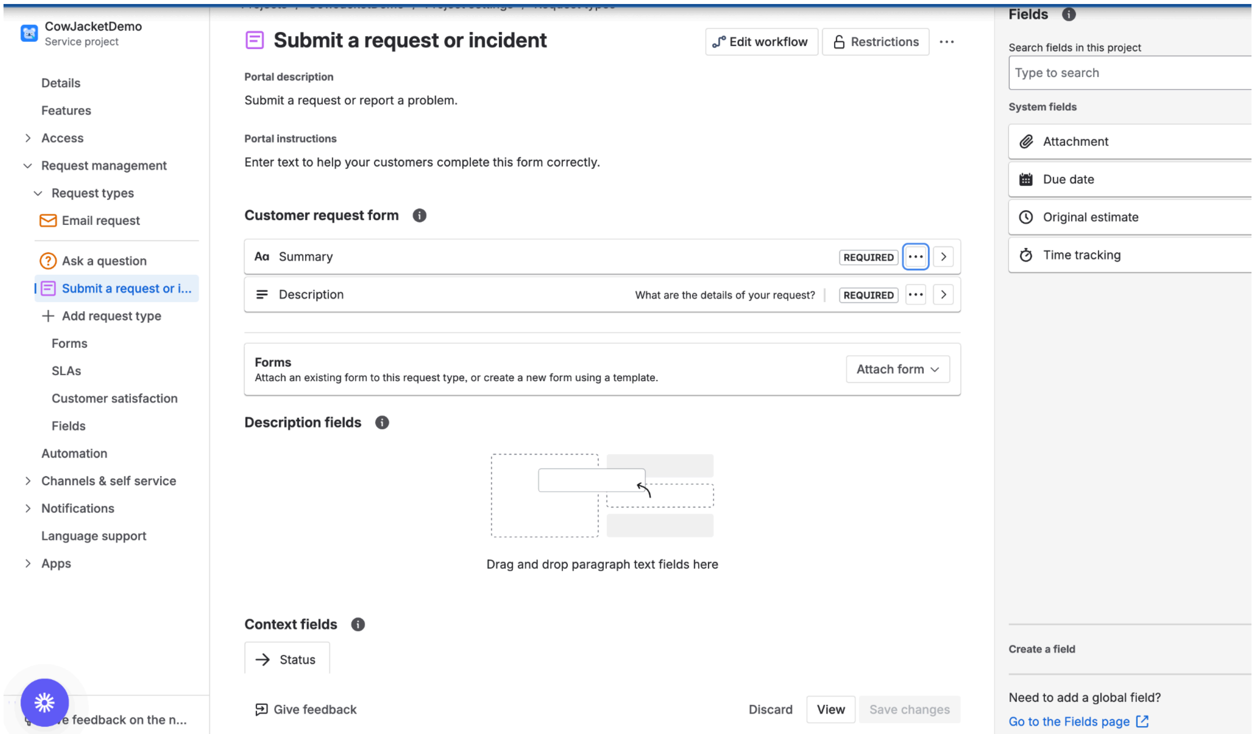
23. You will see an image similar to the below , then click on save changes.



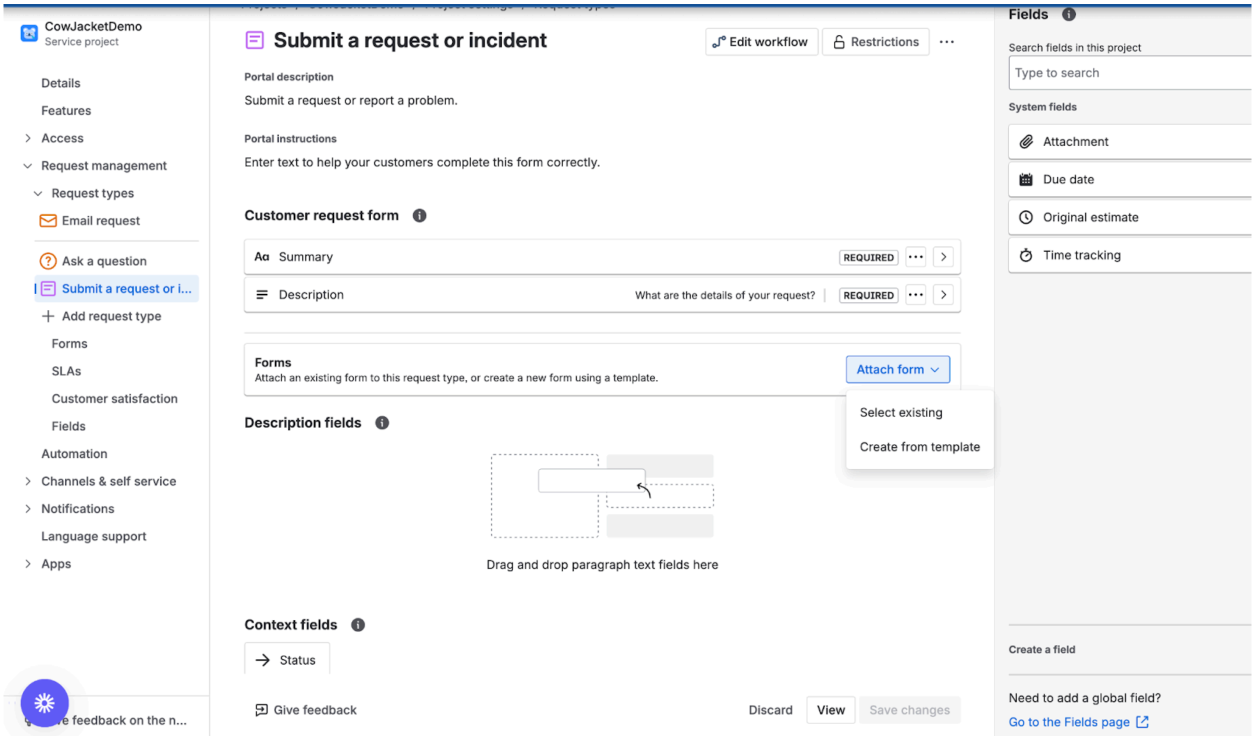
24. You will go on to expand the request types and click on submit a request or i… button



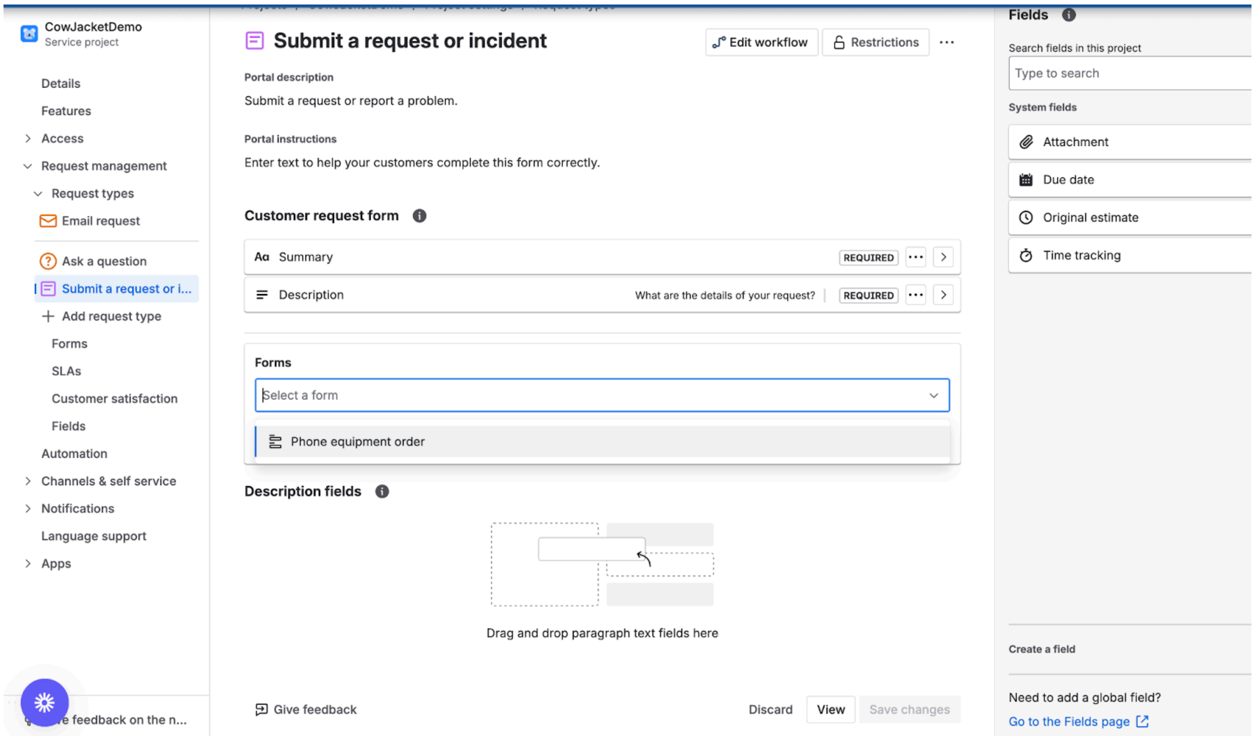
25. You will land on the page similar to the below, what you want to do here is to link the phone equipment form to this request type and save changes.

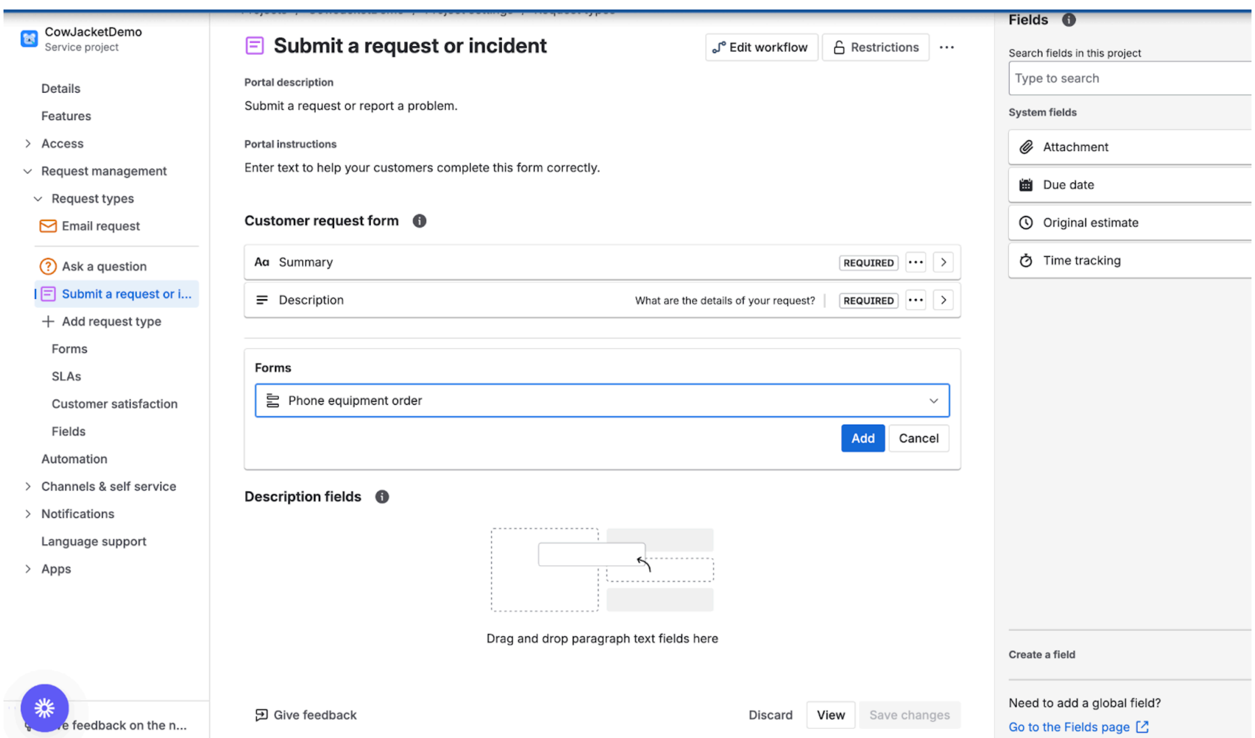


26. After that, click on **Attach form** and click on **Select existing**



27. A box will come out just like below, click on the **Phone equipment order** and click on **add** (this is on the next image). Then click on **save changes** (on the third image)


CowJacketDemo
Service project
Details
Features
Access
Request management
Request types
Email request
Ask a question
Submit a request or i...
Add request type
Forms
SLAs
Customer satisfaction
Fields
Automation
Channels & self service
Notifications
Language support
Apps
Submit a request or incident
Edit workflow
Restrictions
Portal description
Submit a request or report a problem.
Portal instructions
Enter text to help your customers complete this form correctly.
Customer request form
Summary
REQUIRED
Description
What are the details of your request?
REQUIRED
Forms
Select a form
Phone equipment order
Description fields
Drag and drop paragraph text fields here
Give feedback
Discard
View
Save changes
Fields
Search fields in this project
Type to search
System fields
Attachment
Due date
Original estimate
Time tracking
Create a field
Need to add a global field?
Go to the Fields page


CowJacketDemo
Service project
Details
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Submit a request or i...
Add request type
Forms
SLAs
Customer satisfaction
Fields
Automation
Channels & self service
Notifications
Language support
Apps
Submit a request or incident
Edit workflow
Restrictions
Portal description
Submit a request or report a problem.
Portal instructions
Enter text to help your customers complete this form correctly.
Customer request form
Summary
REQUIRED
Description
What are the details of your request?
REQUIRED
Forms
Phone equipment order
Add
Cancel
Description fields
Drag and drop paragraph text fields here
Give feedback
Discard
View
Save changes
Fields
Search fields in this project
Type to search
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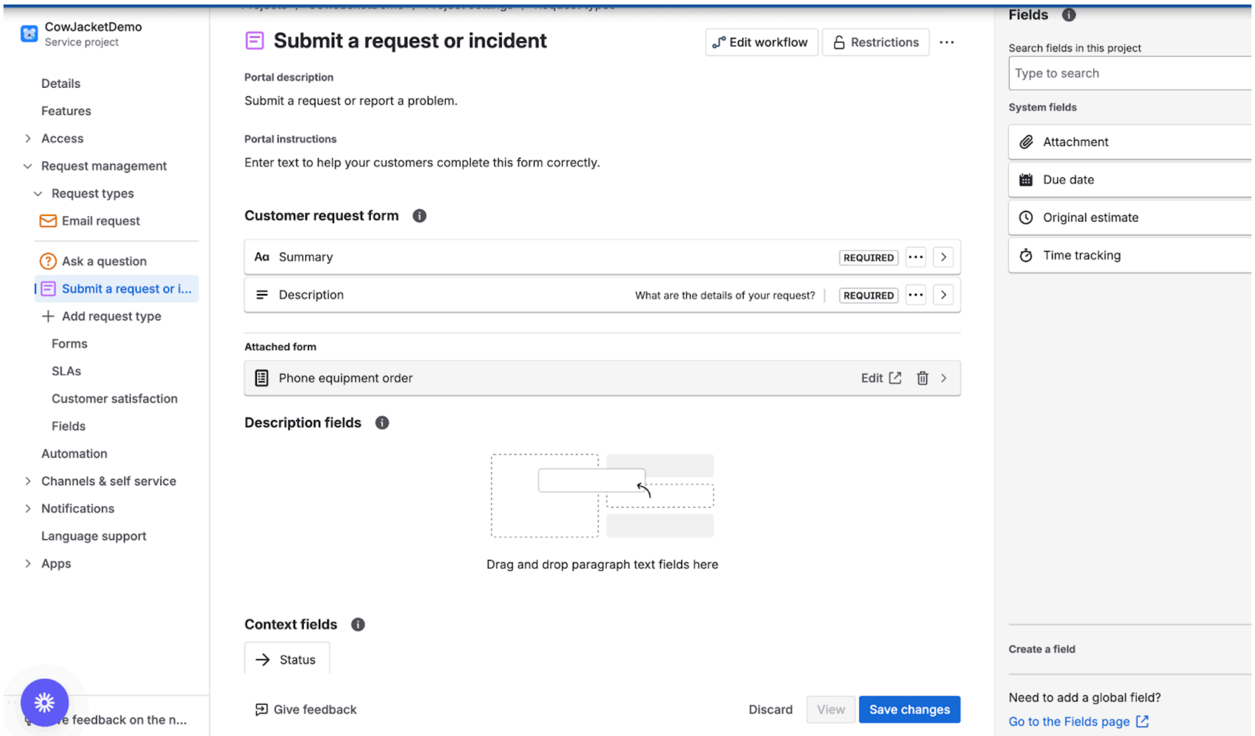


Now go back to the home page by clicking on the back arrow beside **Project Settings.**

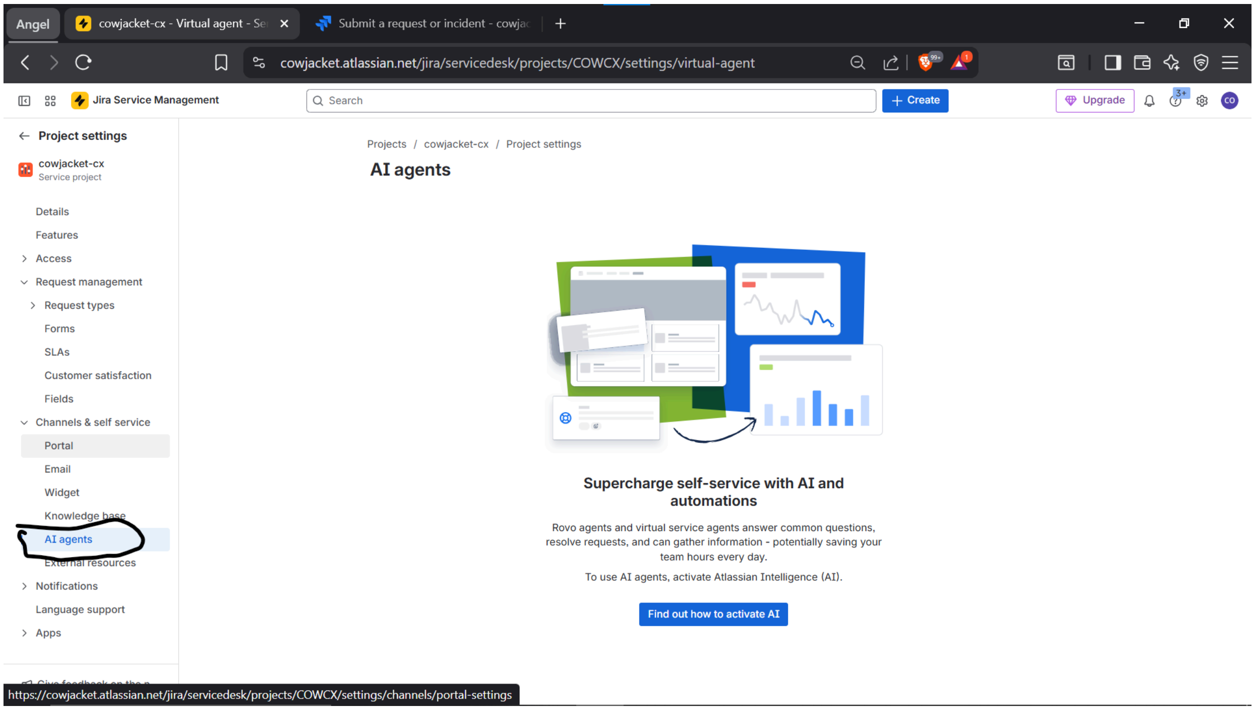
Project settings

cowjacket-cx
Service project

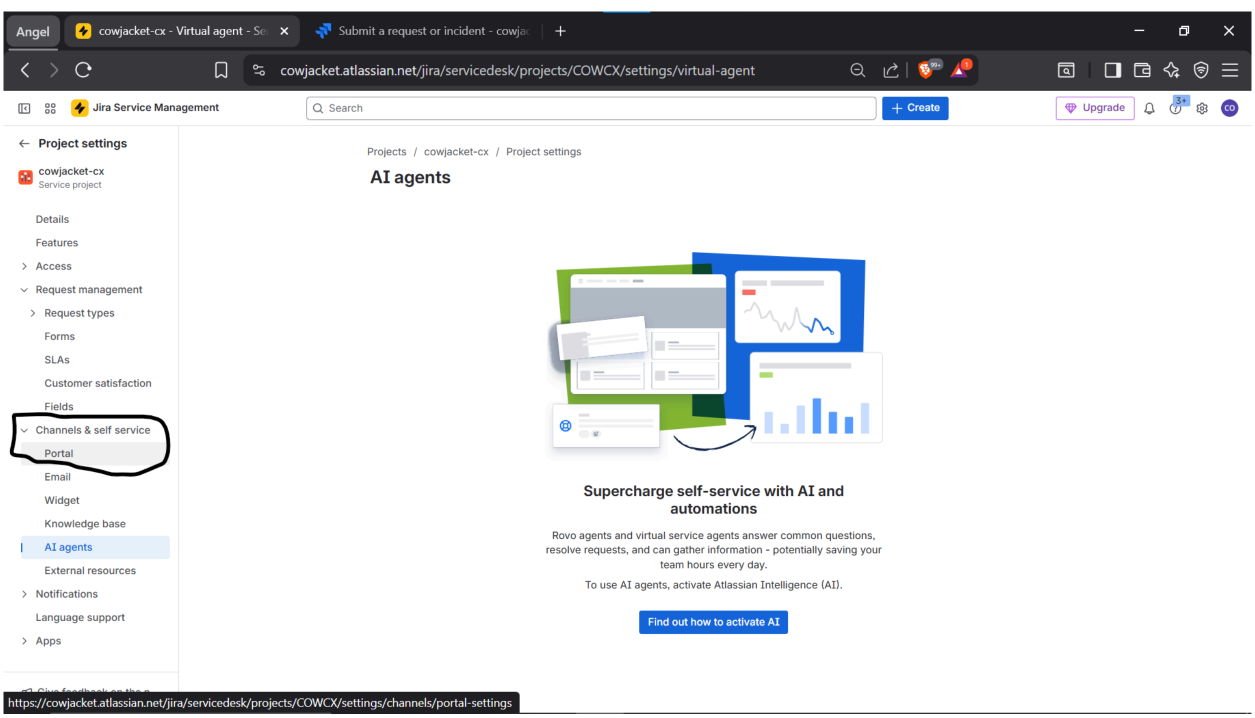
- Details
- Features
- Access
- Request management
  - Request types
  - Forms
  - SLAs
  - Customer satisfaction
  - Fields
- Channels & self service
  - Portal
  - Email
  - Widget
  - Knowledge base
  - AI agents
  - External resources
- Notifications
- Language support
- Apps

Give feedback on the n...

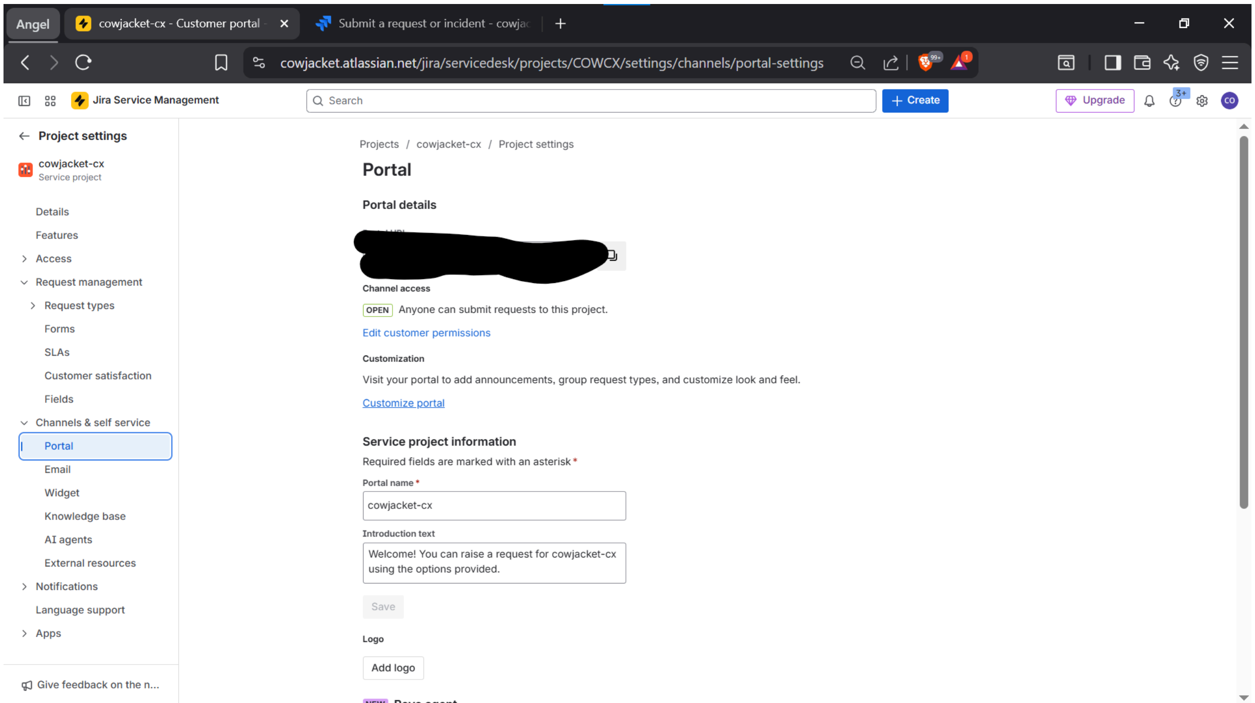
That will take you back to the initial screen and then click on **AI Agents**



When that page opens up, click on **Portal** still under **Channels & self service**

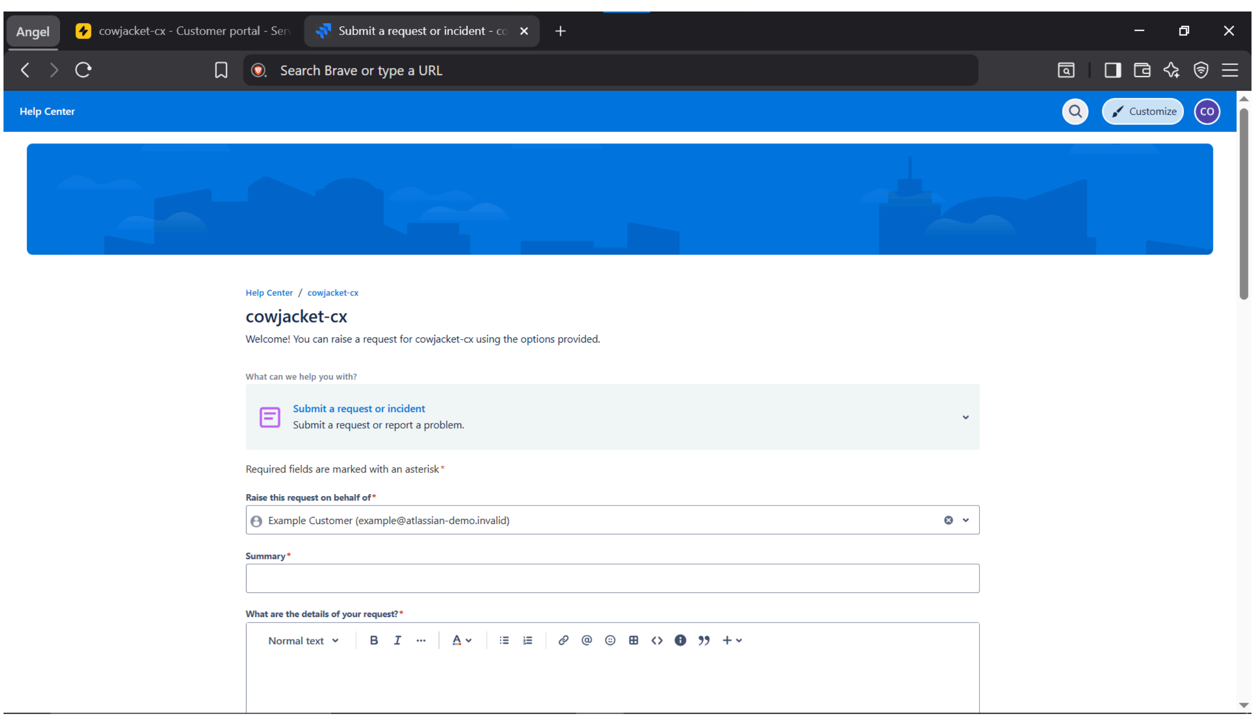


On your portal homepage, copy the url under portal details



And paste it on a new browser tab. This should open up a new page where you will be able to create your ticket.

Fill in the form and submit it.



Step 1: Setting Up Your Jira Access

- Create an API token:
  - Go to your Atlassian Account → Account Settings → Security → Create and manage API tokens.
  - Set your token expiry to 6 months.

Step 2: Gathering Your Jira Information

- Find your Jira URL:
  - For example, ours is `https://femlexx.atlassian.net`
- Get your Cloud ID:
  - Follow this guide.

Step 3: Find Your Service Desk and Request Type IDs

- Use the hints here: Finding ServiceDeskId & RequestTypeId.

Step 4: Figure Out What Fields You Need to send for the RequestType

- Fetch the fields required to create your customer request:
  This shows what fields are needed for your payload.

Step 5: Check Out the Embedded Form Questions

- Get the form fields linked to your request type:
  It'll return the form structure, including question IDs and options (useful for radio buttons, checkboxes).

Step 6: Find your form template Id

```
"id": "form-template-id",
"publish": {
  "portalRequestTypeIds": [
    YYYY
  ],
  "submitOnCreate": true,
  "validateOnCreate": true
},
"updated": "Z"
```


These will be part of the response you will receive in 5), your form template id is the id key. You can also create a test issue and make this type of request

Step 7: Actually Create the Ticket

- Now you'll POST to Jira to create the customer request (issue):