

[TO-4035] Set up Jira for Marketing Request Ticketing System

Created: 02/Jun/25 Updated: 09/Jul/25

Status:	Waiting for Business
Project:	Technology Operations Board
Components:	None
Fix versions:	None

Type:	Epic	Priority:	Low
Reporter:	Amanda Klein	Assignee:	Solounge Bowen
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	6 hours		
Original estimate:	Not Specified		

Attachments:	Screenshot 2025-06-24 at 3.08.52 PM.png Screenshot 2025-06-25 at 12.43.57 PM.png Screenshot 2025-07-09 at 12.33.49 PM.png Screenshot 2025-07-09 at 12.34.08 PM.png
[Tech Ops] Vendor/ Issue Type:	Software & SaaS Tools - Jira/Atlassian
Item URL:	https://drive.google.com/a/kindbody.com/open?id=1-kvVFAY6_p5bMmMYOUiqM1Aab6O1BT9E6gwKZuOILnA
Request participants:	
Link URL:	https://kindbody.atlassian.net/jira/servicedesk/projects/MKT/queues/custom/739

Description

Marketing needs to transition from using Google Forms and Sheets to a Jira-based ticketing system for handling design and marketing execution requests. The current process involves receiving requests through email and Slack, which makes tracking and prioritizing challenging. This task involves setting up Jira access and configuring it to meet the marketing team's needs for a streamlined request management system.

Issue created in Slack from a [message](#).

Comments

Comment by [Solounge Bowen](#) [02/Jun/25]

Created a new MKT project and discovered an existing Marketing that was used by previous teams and I could not get past the settings. I proceeded to archive the project to avoid confusion. Pending update from Marketing team in the meantime

<https://kindbody.atlassian.net/jira/servicedesk/projects/MKT/queues/custom/739>

Provided team with [Marketing Jira Build](#) template in hopes to get a grasp of their needs

Comment by [Solounge Bowen](#) [16/Jun/25]

Per meeting with Amanda and Shannon

- Shown the marketing test environment and users confirmed that they will look into this further to make sure that want any specific updates
- They mentioned they'll need an approval workflow so that Shannon or Amanda can approve
- Requested to have this built based on if the reporter selecting if the ticket is Consumer vs Client Based field
- They've provided the existing form to use as a template → [Link to Design Form](#)

Comment by [Solounge Bowen](#) [24/Jun/25]

Received an update from Amanda and team . They've provided an updated sheet with the future state structure

https://docs.google.com/document/d/1x8V6ote_l3y5iP0SJGz50HT5Vidtn9dTZ3kEfVUaU8c/edit?tab=t.0

Comment by [Solounge Bowen](#) [24/Jun/25]

As I begin developing the request types, I noticed a "Website Update" option in the Design form. However, I also see a "Website Update" option for Issue types. I'll need to confirm with Amanda whether the option in the Design form should be present.

Type of request

- ☒ Flyer for digital or print
- ☐ Postcard
- ☐ Ad
- ☐ Email
- ☐ Presentation slide(s)
- ☐ Website update
- ☐ Something else

Clear selection

Comment by [Solounge Bowen](#) [24/Jun/25]

So far I've completed the following:

- Issue Types
- Request Types and their forms
- Custom fields
 - **Requestor Name (text field)**
 - **Design Asset Type**
 1. Flyer
 2. Postcard
 3. Ad
 4. Email
 5. Presentation Slide(s)
 - **Dimensions (Text field)**
 - **Does your design require an email send (Y/N)**

- **Does your design require a data file?** (Y/N)
- **Select the marketing channel(s) this request relates to**
 - 1. Email
 - 2. Social Media
 - 3. Event
- **Audience**
 - 1. Consumer
 - 2. Employer
 - 3. Internal
- **Type of Website Change**
 - 1. Bio
 - 2. Promo Page
 - 3. Other
- Built the following automations/workflow
 - Auto assign users based on request type and add ShannonVAmanda as watchers
 - Added approval workflow: Whenever a ticket in the the Pending Review Status, it request the user to submit to enter the approver in order to go to the next status
 - Notifies requestor that ticket is in Pending Review Status and would require approval. Email should also have the link to the ticket for the reporter
- Building out the SLA reminders
 - Reminder at 3 business days in Scheduled
 - Reminder at 5 business days in In Progress

Will need to pick up on creating the dashboards and the remaining of the automation

Comment by [Solounge Bowen](#) [25/Jun/25]

Updates/Findings

- Integrate project with slack and created a Agent-Mkt channel that alerts the agents that a ticket was created, updated, closed
- Discovered the global setting to allow external customers to be able to submit ticket within the Kindbody portal .
 - <https://kindbody.atlassian.net/jira/settings/products/servicedesk/customer-access>

Customer access

Q Search Jira admin

Configure how new accounts are created for customers to send requests and access portals on kindbody.atlassian.net. These settings impact all service projects on this site. [Learn how customer access settings impact project customer permissions.](#)

Account types ⓘ

Internal

Use this setting for internal customers such as employees at your company. [Learn more about internal customers.](#)

☒ Use [approved domains](#) to grant internal customers access to the help center with Atlassian accounts

External

Use this setting for external customers that are outside your company. [Learn more about external customers.](#)

☒ Allow portal-only accounts to be created for new customers accessing the help center

☐ Only allow account creation for customers with specific email domains

Enter a domain

Domain entry is disabled. To enable, allow account creation for specific email domains

ⓘ If a customer's email domain is already on approved domains, Atlassian account (internal) will take precedence.

Portal access

Choose how internal and/or external accounts are created for customers to access portals.

☐ Don't allow customers to create their own accounts

Only agents or admins can create accounts for customers. Sign-ups will be disabled and email requests from unidentified customers won't be processed.

☒ Allow customers to create accounts

Customers can create their own accounts by signing up or sending an email request. [Learn more about email requests.](#)

☐ Customers can access and send requests from the portal without logging in

Save Discard changes

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Filters Created

- [Open MKT Tickets](#)
- [Open Critical MKT Tickets](#)

Dashboard Widgets: <https://kindbody.atlassian.net/jira/dashboards/10357>

- Open Requests by Category
- Requests by Status
- Average Time to Completion (by issue type)
- Workload by Assignee

- Overdue Requests
- KPI Tracker (Account Creations, New Patient Visits)

Automations Created

- [Email alert for overdue issues \(Scheduled/In Progress > 3 business days\)](#)
- [Auto-prioritize as "Critical" if due date is within 3 business days](#)

Questions to MKT team

- Should the KPI Tracker be a checkbox or a radio button field?
- At what point should the assignee enter the KPI tracker?
- Confirm if there are specific domains (e.g. [kindbody.com](#), [gmail.com](#)) what should be allowed to submit tickets? Or is it only Kindbody users that have needed to submit the form?

Comment by [Solounge Bowen](#) [25/Jun/25]

Confirmed that this project is built, I've set time with Mkt team to review the current state of the board and to review the following

- Issue Types
- Request Types
- Workflow & Statuses
- Automation Rules
- Dashboard & Filters
- Team Roles/ Permissions
- Slack Integration

Jira : MKT Project Board Review

Monday, June 30 · 12:30 – 1:00pm

Time zone: America/Chicago

Google Meet joining info

Video call link: <https://meet.google.com/sjj-ivqe-sor>

Or dial: (US) +1 919-709-7134 PIN: 963 232 759#

More phone numbers: <https://tel.meet/sjj-ivqe-sor?pin=3344174110138>

Comment by [Solounge Bowen](#) [30/Jun/25]

After meeting with Amanda we've reviewed the project and confirmed that she does like the set up and will work well for her team. She's requested that we review this over with the team so that I can capture and other needed updates within the project before go live.

Will update the following:

- Edit the Audience field to all ticket types and also remove the **Internal** option as the team does not handle anything internally, only consumer/employer
- Create a Escalated to MKT status within TSD project.

Marketing Jira Review

Wednesday, July 9 · 11:00 – 11:30am

Time zone: America/Chicago

Google Meet joining info

Video call link: <https://meet.google.com/doa-djzt-vow>

Or dial: (US) +1 612-470-9290 PIN: 483 232 248#

More phone numbers: <https://tel.meet/doa-djzt-vow?pin=7660277475437>

Comment by [Solounge Bowen](#) [09/Jul/25]

After having a meeting with marketing team , retireved a some feedback and made some updates:

Updates

- All fields that were radio box (select one) have been changed to checkboxes (select multiple)
- Removed Website Change type field
- Added **Social Media** as a option in **Design Asset Type** field
- Added **Other** option to all questions that seemed fit
- Added the following Request types (screenshot attached)
 - [Printex Print Portal Access Request](#) (within General marketing)
 - [Social Media Request](#) (within General marketing)
 - [Marketing Data](#) (within Marketing Data Pull, and currently only seen internally by team only)

Important Links

- Team Jira email (will create ticket if sent here) ➡ mkt@kindbody.atlassian.net
- [Link to Marketing Portal Form \(submitter view\)](#)
- [Team Access Settings](#)
- [MKT Team Issue/Request Types](#)
- [Link to open tickets. \(list/queue view\)](#)
- [Link to view ticket in Kanban Board](#)

Pending them to review for any updates after this recent update



Welcome to the Marketing Request Portal

This portal is designed to help the Marketing team efficiently manage incoming requests and prioritize work across multiple departments.

Design Requests

✓ Submit design needs from any team (Marketing, Clinical, Sales, Client Management, Leadership, etc.). This ensures projects are prioritized and tracked through completion.

Website Updates

Request updates to the website, including:

- ✓ Team bios and location pages (hours, staff, etc.)
- ✓ Marketing banners, promo pages, and booking flow updates
- ✓ Pricing changes, new blog posts, and legal updates (e.g., terms & conditions)
- ✓ Menu adjustments and new page builds

What can we help you with?



Printex Print Portal Access Request

Got a Printex Print portal request? Submit it here.



Social Media Request

Got a social media update request? Submit it here.



Request data extraction

Request the extraction of specific marketing data for analysis or reporting purposes.



Design Request

Submit requests for visual design support across all departments, including marketing campaigns, clinical materials, internal documents, presentations, social media assets, client collateral, and leadership initiatives.



Request website update

Submit a request to update or change the content on the website.



Questions for marketing

Got a question for the marketing team? Submit it here.

← Project settings

KB Marketing

Service project

Details

Summary

Features

> Access

> Request management

Request types

Forms

Workflows

SLAs

Customer satisfaction

Work item types

Fields

Screens

> Automation

Playbooks NEW

> Channels & self service

Portal

Projects / KB Marketing / Project settings

Request types

Request types help you categorize incoming requests and collect the details you need to resolve them.
[Read more about request types.](#)

Find request type

Work types

Request type groups

Portal groups

View settings

Request type	Work type	Workflow	Portal group	Restrictions	Actions
Design Request	Design Request	MKT: Jira Service Management default workflow	General	🔒	...
Emailed request EMAIL CHANNEL	Emailed request	MKT: Jira Service Management default workflow	Hidden from portal	🔒	...
Printex Print Portal Access Request	General Marketing Request	MKT: Jira Service Management default workflow	General	🔒	...
Questions for marketing	General Marketing Request	MKT: Jira Service Management default workflow	General	🔒	...
Social Media Request	General Marketing Request	MKT: Jira Service Management default workflow	General	🔒	...
Request data extraction	Marketing Data Pull	MKT: Jira Service Management default workflow	General	🔒	...
Marketing Data	Marketing Data Pull	MKT: Jira Service Management default workflow	Hidden from portal	🔒	...
Request website update	Website Request	MKT: Jira Service Management default workflow	General	🔒	...

Give feedback

Create request type

This option is not shown in the form and can be handled internally

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