

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

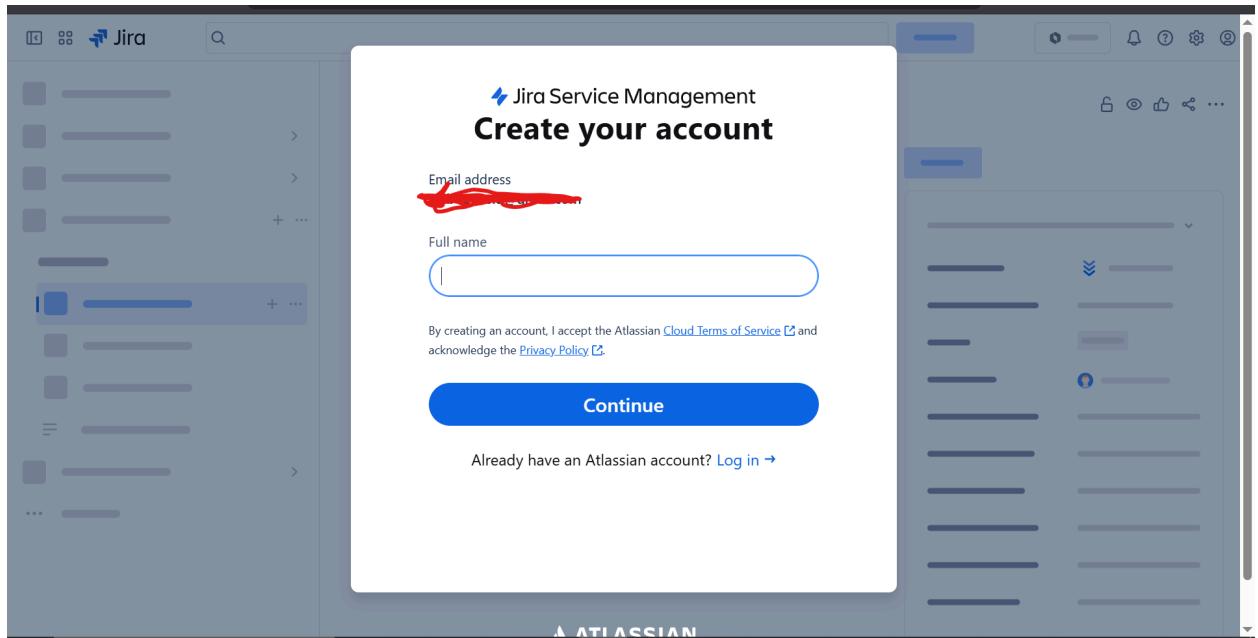
Note: The flow will probably look like this

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

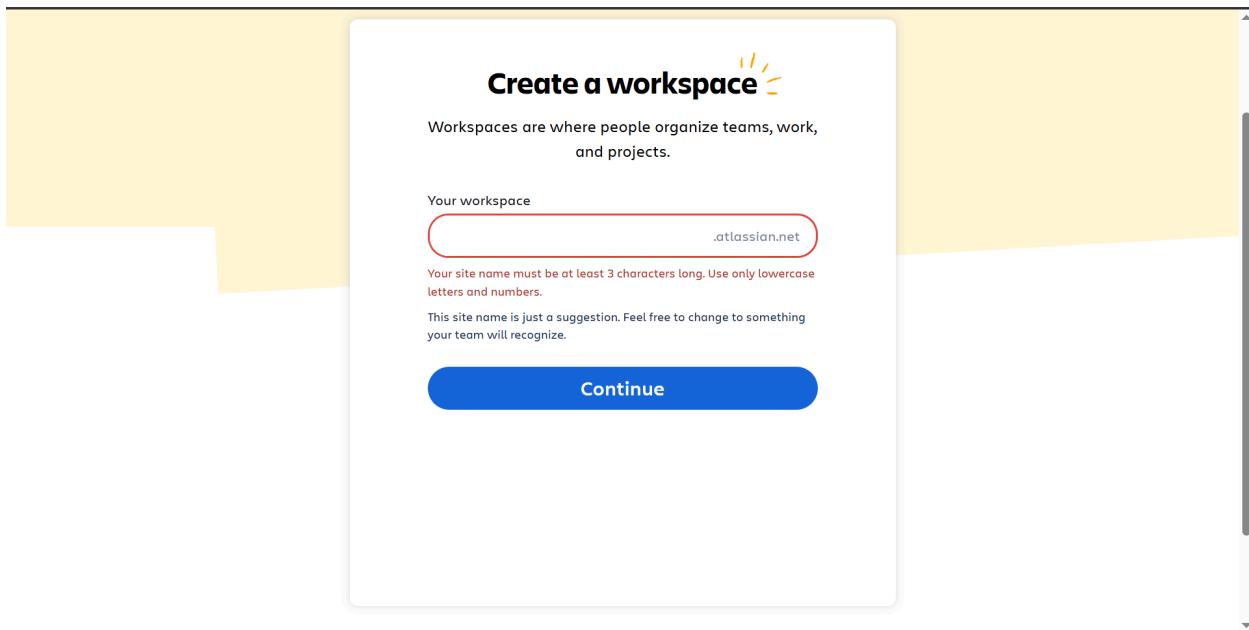
JIRA SETUP

New account -

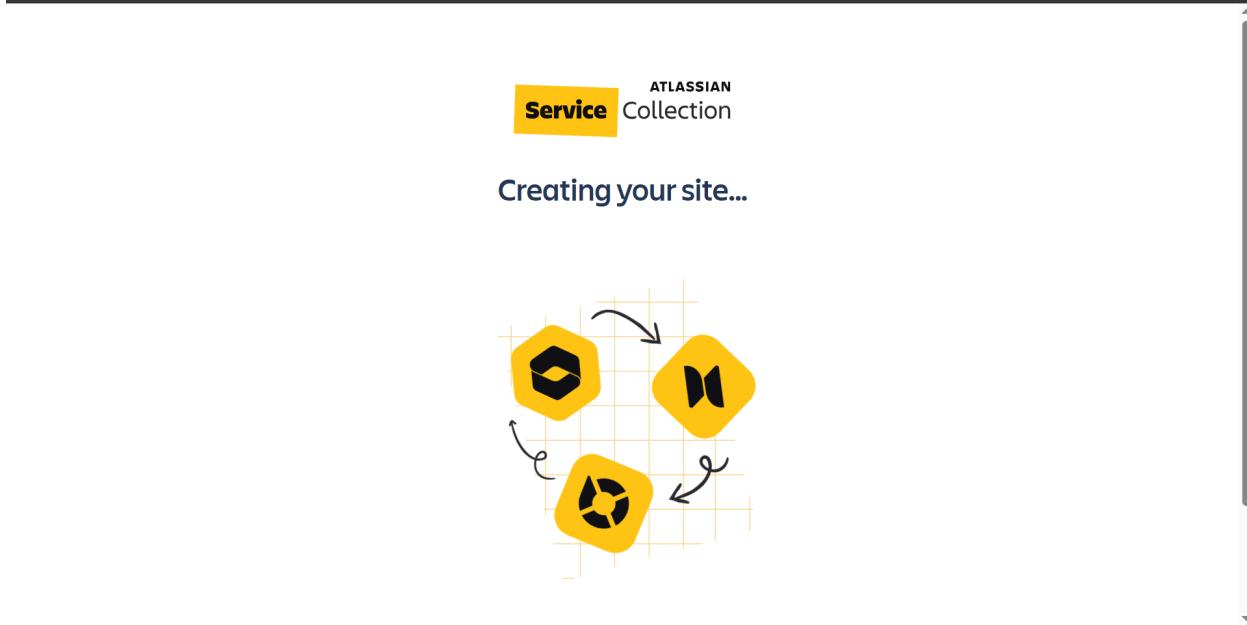
1. Visit this URL: <https://www.atlassian.com/software/jira/service-management>
2. Sign up with Google Account
3. You will land on a page that will prompt you to create an account.



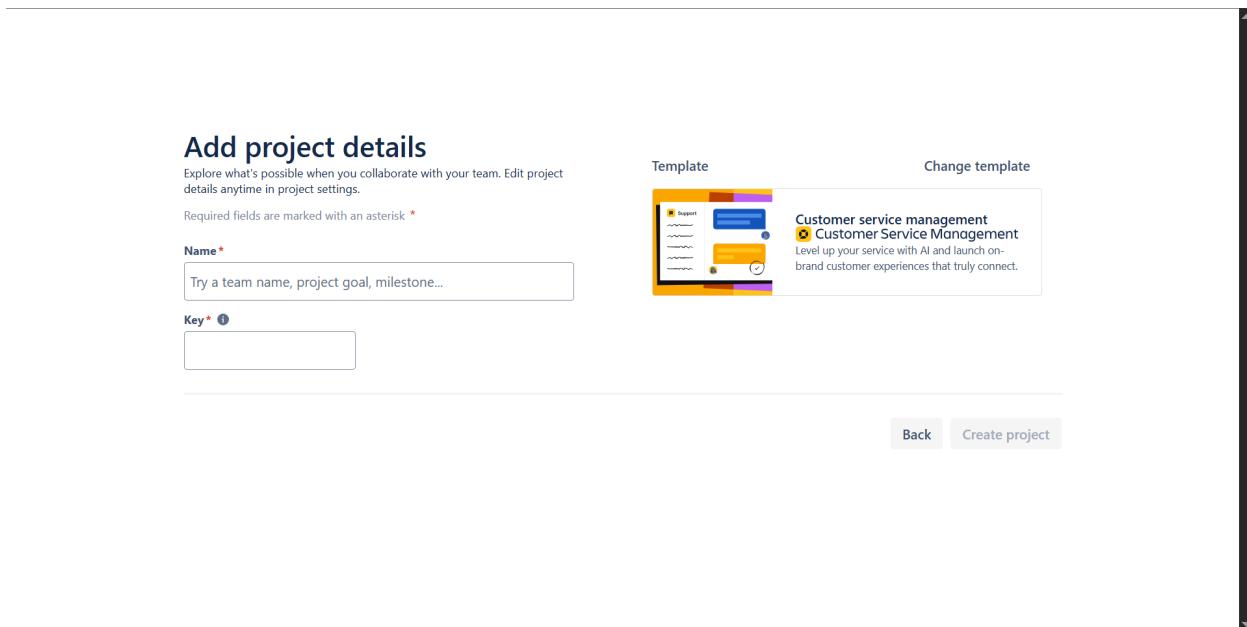
4. Create a workspace with any name



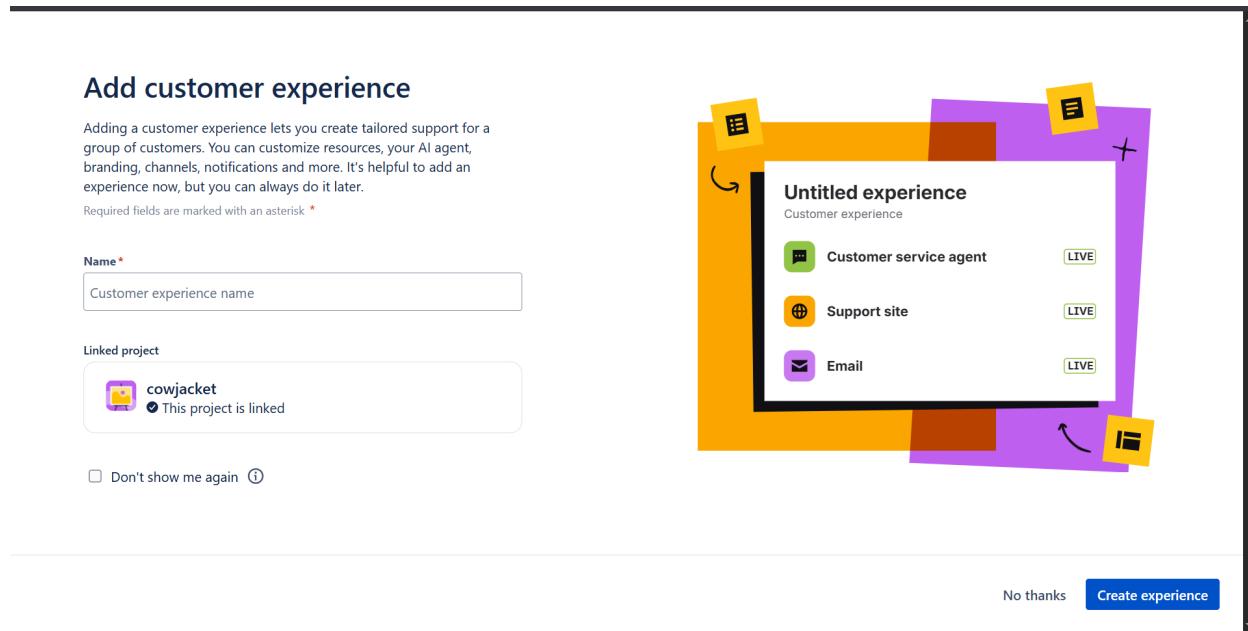
5. The next stage should show “Creating your site”.



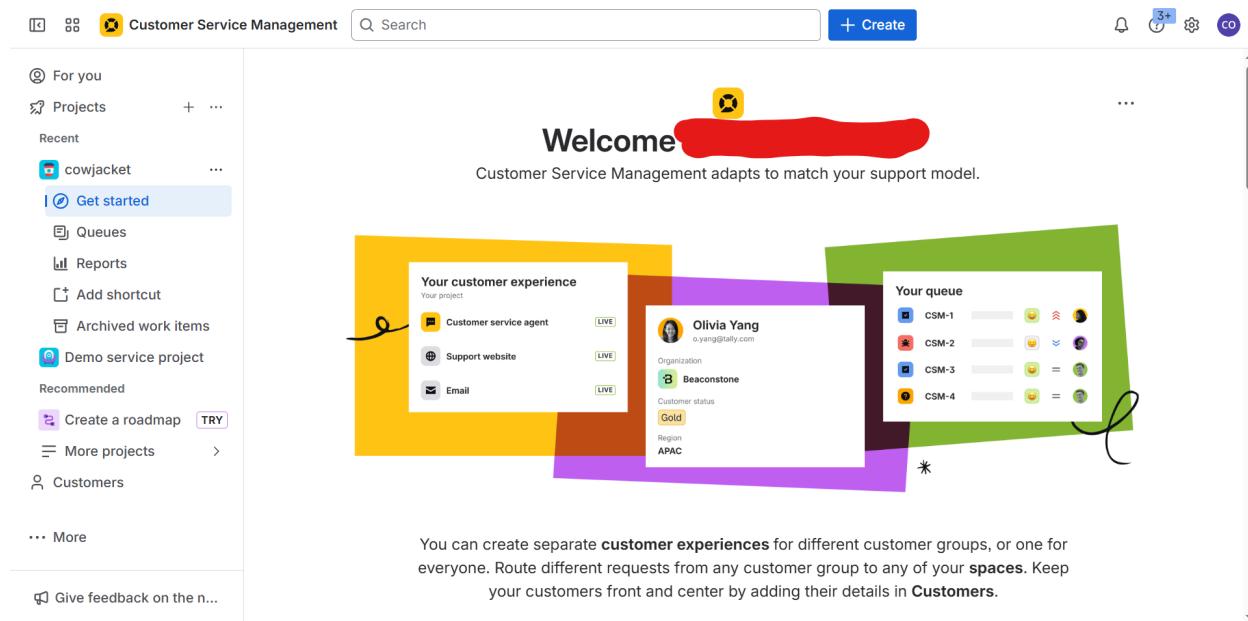
6. After this, you will be asked to add project details to the created project.



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

The screenshot shows the Jira Customer Service Management interface. On the left, there's a sidebar with navigation links: 'For you', 'Projects' (which is selected and highlighted with a red circle), 'Customers', and 'More'. Below this is a search bar and a '+ Create' button. The main content area is titled 'Reports' and shows a grid of four default reports: 'Workload', 'Satisfaction', 'Requests deflected', and 'Requests resolved'. Below these are sections for 'Custom' reports and a message stating 'Default reports aren't available' because the user hasn't gained permission yet.

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

The screenshot shows the 'Project templates' page. On the left, there's a sidebar with categories: 'Made for you', 'Custom templates (ENTERPRISE)', 'Software development', 'Service management' (which is selected and highlighted with a red circle), 'Work management', 'Product management', 'Marketing', 'Human resources', 'Finance', 'Design', 'Personal', 'Operations', 'Legal', 'Sales', 'Analytics', and 'IT'. The main content area is titled 'Service management' and contains four project template cards: 'IT service management (RECOMMENDED)', 'Blank project', 'Basic IT service management', and 'General service management'.

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

The screenshot shows the 'Project templates' section under the 'Service management' category. It lists several pre-configured project templates:

- Project management**: Everything to handle service requests, track changes, and resolve incidents, plus post-incident reviews, approval workflows, and more.
- Blank project**: Start fresh with a blank project and customize how you manage incoming service requests.
- Basic IT service management**: Handle and prioritize service requests, communicate with customers, and resolve issues and incidents.
- General service management**: Create a project with basic pre-configured settings so you can quickly start managing incoming service requests. This item is highlighted with a red rounded rectangle.
- Customer service management**: LAST CREATED. Level up your service with AI and launch on-brand customer experiences that truly connect.
- HR service management**: UPDATED.

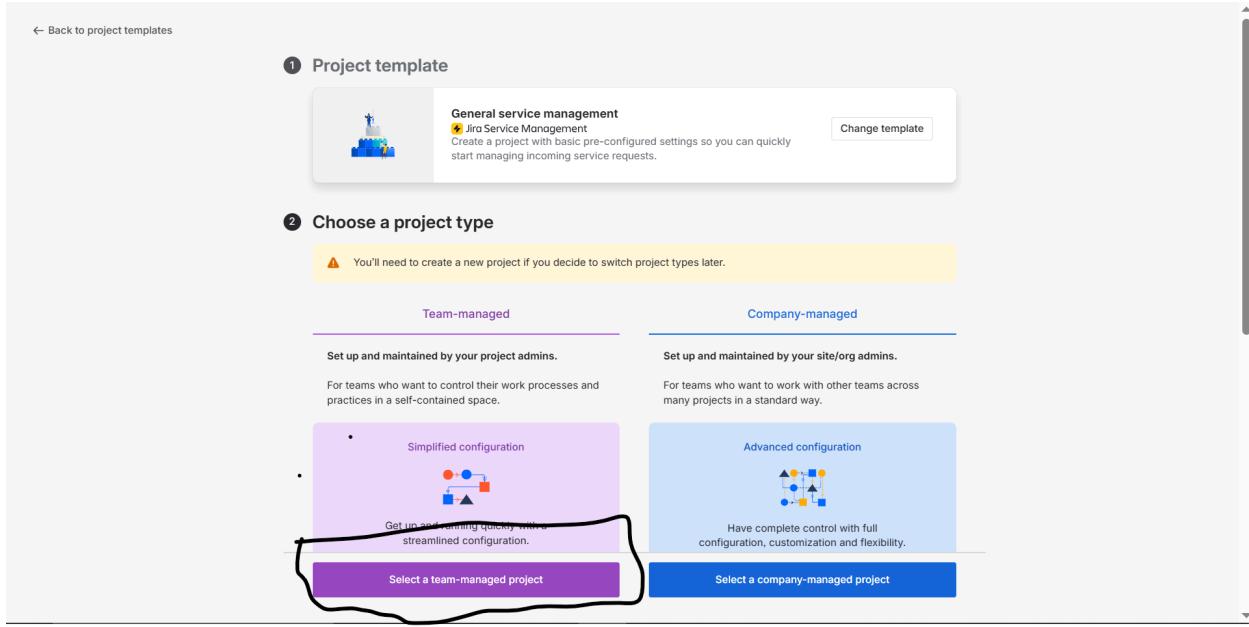
13. On the new page, click on **Use template** and this will take you to a template page

The screenshot shows a template page for 'Service management'. It highlights three main features:

- Handle incoming work with ease**: Help your team collect and have visibility of incoming work by bringing together requests from multiple channels like email, chat, and portal. Use queues to organize requests by type or priority, boards to visualize their status, and workflows to track their progress.
- Resolve requests faster**: Track the progress of requests from creation to resolution by tailoring workflows to match your team's processes. Automate approvals and how you handle simple or repetitive tasks to free up your team so they can focus on more complex requests.
- Amplify your team's greatness**: Track customer satisfaction and quantify the value of your team's work with reports and dashboards. Use these metrics to measure your impact, identify potential efficiencies, and scale the value your team brings to the organization.

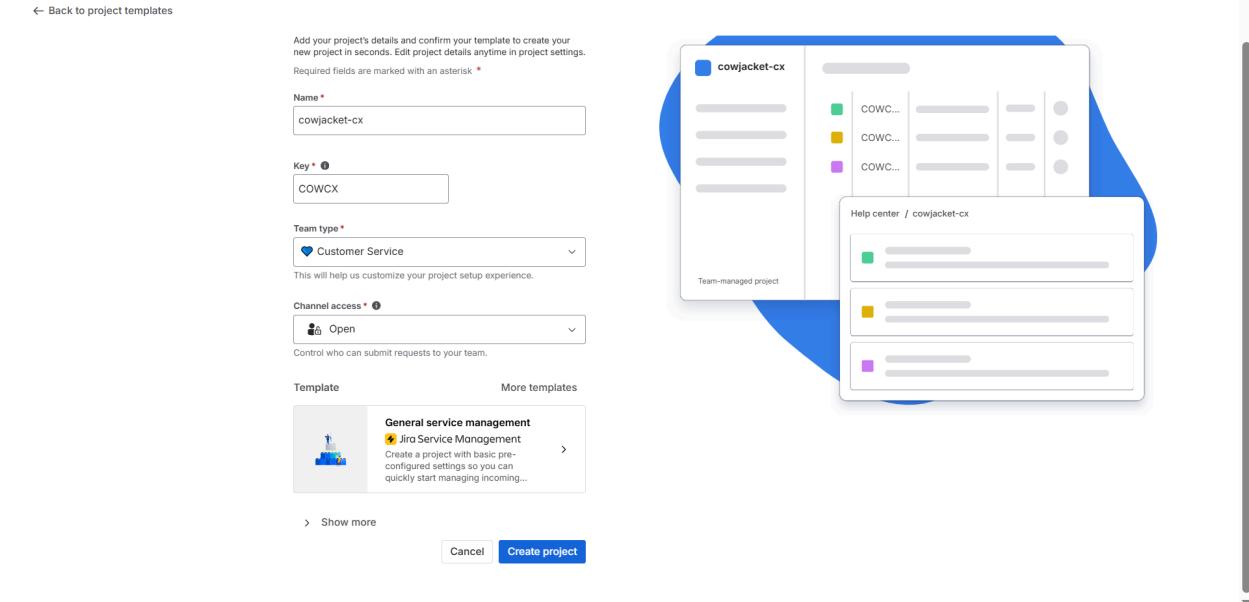
On the right side, there are sections for 'Recommended for', 'Request types', 'Workflow', and a 'Use template' button.

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

The screenshot shows the Jira Service Management interface for the project 'cowjacket-cx'. The left sidebar is open, showing navigation options like 'For you', 'Projects', 'Summary', 'Queues' (which is selected), and 'Knowledge Base'. Under 'Queues', there are sub-options for 'Default', 'All open' (selected), 'Assigned ...', 'Pending A...', 'Unassign...', and 'View all que...'. The main content area is titled 'All open' and shows a diagram of a 'Request' card being moved into a 'Queue'. Below the diagram, it says 'Your queue is empty' and provides instructions: 'Incoming requests from multiple channels are filtered and displayed in your queues as work items, ready to be triaged and assigned.' A blue button at the bottom right says 'Create a work item'.

17. Click on the AI Agents button on the page

This screenshot is identical to the one above, showing the Jira Service Management interface for the project 'cowjacket-cx'. However, the 'AI agents' option under the 'Knowledge Base' section in the sidebar is now highlighted with a purple oval and a black outline. The rest of the interface remains the same, showing the 'All open' queue page with its characteristic request-to-queue diagram.

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

The screenshot shows the Jira Service Management interface for the project 'cowjacket-cx'. The left sidebar has a tree view of settings: Project settings (selected), cowjacket-cx (Service project), Request management (selected), AI agents (selected), and other sections like Channels & self service, Notifications, and Apps. The main content area is titled 'AI agents' and features a graphic of a smartphone, laptop, and dashboard. Below it is the heading 'Supercharge self-service with AI and automations' and a note about Rovo agents and virtual service agents. A blue button at the bottom right says 'Find out how to activate AI'.

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

The screenshot shows the 'Forms' landing page for the 'CowJacketDemo' service space. The left sidebar is identical to the previous screenshot, showing the 'Forms' section selected under 'Request management'. The main content area is titled 'Forms' and features a placeholder image of a form with a checkmark. Below it is the heading 'All of your forms will show up here' and a note about adding forms for requests or attaching them to work items. A blue button at the top right says 'Create form'.

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

The screenshot shows the 'Forms' page within the 'CowJacketDemo Service space'. On the left, there is a navigation sidebar with various service management categories like Details, Features, Access, Request management, Request types, SLAs, Customer satisfaction, Fields, Automation, Channels & self service, Portal, Email, Chat, Widget, Knowledge base, AI agents, External resources, Notifications, Language support, and Apps. The 'Forms' category is currently selected, indicated by a blue highlight. At the top right, there is a 'Create form' button with a dropdown menu containing 'Create from template' and 'Create blank'. Below the sidebar, there is a placeholder image of a form with a checkmark. A text overlay says 'All of your forms will show up here' and provides instructions: 'Add forms for customers to fill out when raising a request, or attach forms to existing work items to gather more information.' It also includes a link to 'Learn more about forms.'

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

Select a form template to customize, or select **Blank** to create your own form.

Search templates English (US)

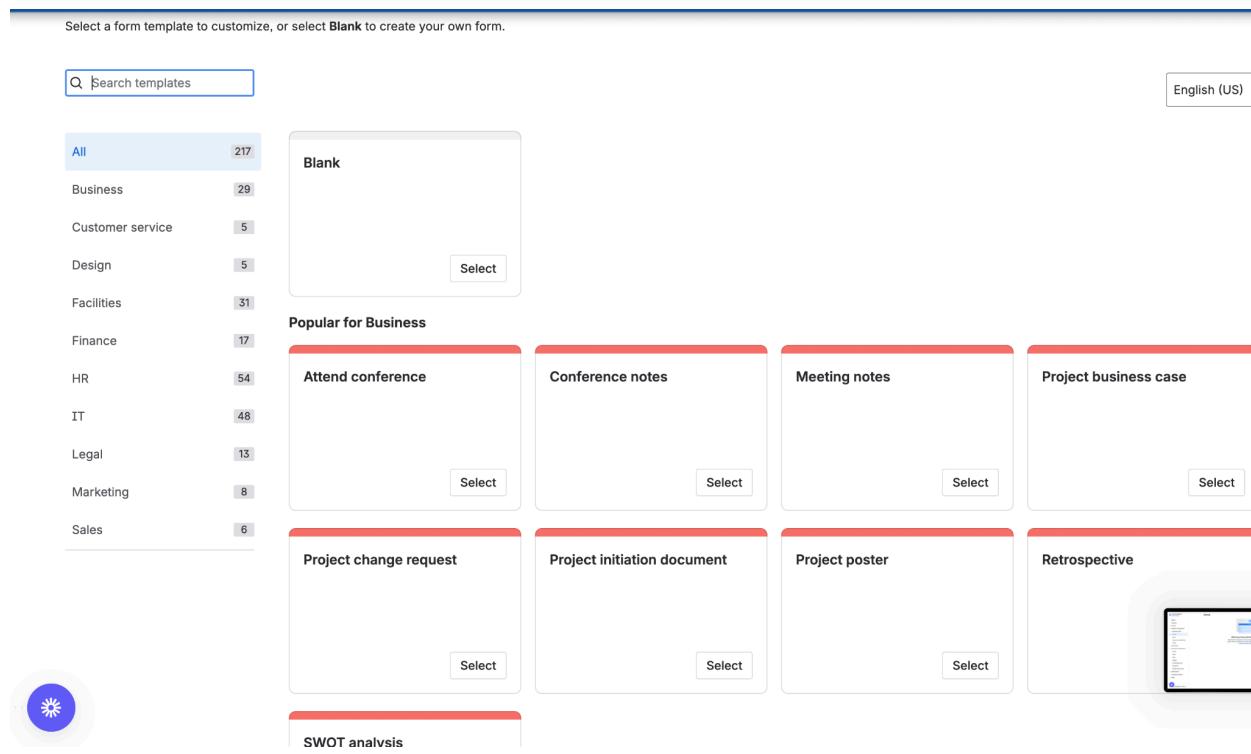
All	217
Business	29
Customer service	5
Design	5
Facilities	31
Finance	17
HR	54
IT	48
Legal	13
Marketing	8
Sales	6

Blank Select

Popular for Business

Attend conference	Conference notes	Meeting notes	Project business case
Project change request	Project initiation document	Project poster	Retrospective
SWOT analysis			

Select Select Select Select



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

Select a form template to customize, or select **Blank** to create your own form.

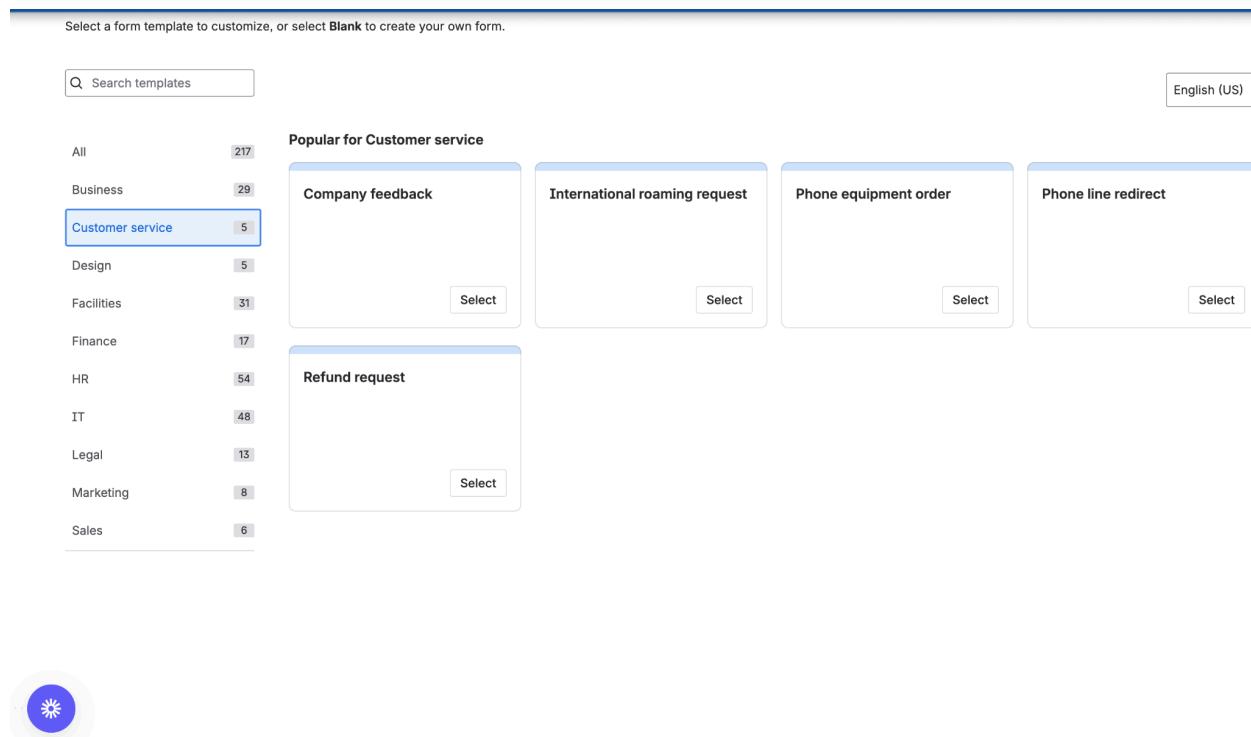
Search templates English (US)

All	217
Business	29
Customer service	5
Design	5
Facilities	31
Finance	17
HR	54
IT	48
Legal	13
Marketing	8
Sales	6

Popular for Customer service

Company feedback	International roaming request	Phone equipment order	Phone line redirect
Refund request			

Select Select Select Select



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

Select a form template to customize, or select **Blank** to create your own form.

Search templates English (US)

All	217
Business	29
Customer service	5
Design	5
Facilities	31
Finance	17
HR	54
IT	48
Legal	13
Marketing	8
Sales	6

Popular for Customer service

Company feedback Select

International roaming request Select

Phone equipment order Select

Phone line redirect Select

Refund request Select



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

CowJacketDemo Service space

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

 Give feedback on the n...

Phone equipment order

Person making request

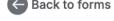
Name	Job title
Phone	Email
Department	Cost center (acct #)

Telephone lines and installations

Installation requested

- New extension including new cabling and socket
- New extension to an existing, inactive socket
- Relocate existing to a new location
- Convert existing extension from analogue to digital
- Relocate an existing extension to an existing inactive, socket
- Swap of telephone extensions
- Other...

New option...

 Back to forms  Save changes

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

CowJacketDemo Service space

- 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
 - Portal
 - Email
 - Chat
 - Widget
 - Knowledge base
 - AI agents
 - External resources

 Give feedback on the n...

Time frame

This equipment is for	Date needed by
<input type="radio"/> Temporary use (three months or less)	e.g. 10/22/2025 
<input type="radio"/> Permanent use	

Section end
Section start: **Temporary**

Approximate ending date
e.g. 10/22/2025 

Section end
Section start

Comments

 Back to forms  Save changes

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.

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

Portal description
Submit a request or report a problem.

Portal instructions
Enter text to help your customers complete this form correctly.

Customer request form ⓘ

Aa Summary REQUIRED ...>
≡ Description What are the details of your request? REQUIRED ...>

Forms Attach an existing form to this request type, or create a new form using a template. Attach form >

Description fields ⓘ

Drag and drop paragraph text fields here

Context fields ⓘ

→ Status

Give feedback

Discard View Save changes

Fields ⓘ

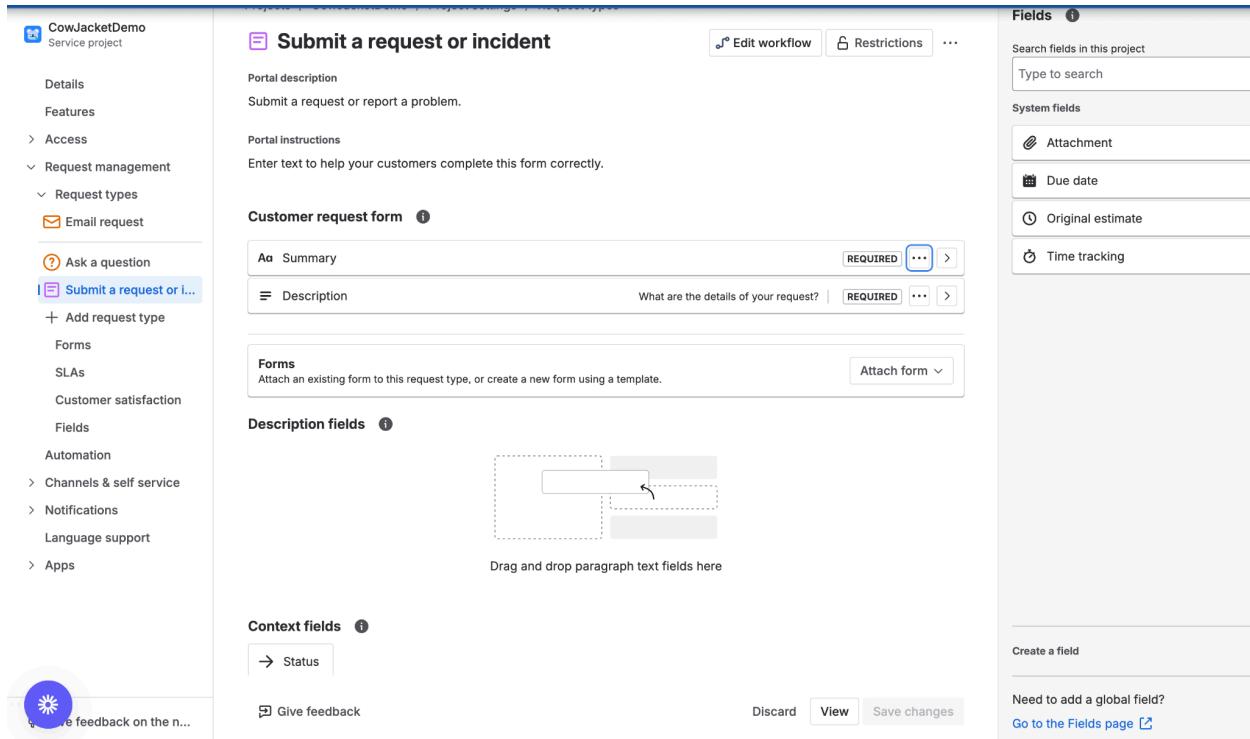
Search fields in this project
Type to search

System fields

Attachment
Due date
Original estimate
Time tracking

Create a field

Need to add a global field?
[Go to the Fields page](#)



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

The screenshot shows the 'Submit a request or incident' form configuration page. On the left, there's a sidebar with various project management and service delivery options. The main area displays the form fields: 'Summary' (REQUIRED) and 'Description' (REQUIRED). Below these is a 'Forms' section where you can attach an existing form or create a new one. A context menu is open over the 'Attach form' button, with 'Select existing' being the chosen option. To the right, there's a 'Fields' panel listing system fields like 'Attachment', 'Due date', 'Original estimate', and 'Time tracking'. At the bottom, there are buttons for 'Discard', 'View', and 'Save changes'.

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
- I **Submit a request or i...**
- + Add request type
- Forms
- SLAs
- Customer satisfaction
- Fields
- Automation
- > Channels & self service
- > Notifications
- Language support
- > Apps

 Give feedback on the n...

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 ⓘ

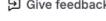
Aa Summary REQUIRED ... >

= 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
- Features
- > Access
- ✓ Request management
 - ✓ Request types
 - ✉ Email request
 - ⌚ Ask a question
- I **Submit a request or i...**
- + Add request type
- Forms
- SLAs
- Customer satisfaction
- Fields
- Automation
- > Channels & self service
- > Notifications
- Language support
- > Apps

 Give feedback on the n...

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 ⓘ

Aa 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

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
- Features
- > Access
- < Request management
 - > Request types
 - Email request
 - Ask a question
- I Submit a request or i...
- + Add request type
- Forms
- SLAs
- Customer satisfaction
- Fields
- Automation
- > Channels & self service
- > Notifications
- Language support
- > Apps

Leave feedback on the n...

Submit a request or incident

Portal description
Submit a request or report a problem.

Portal instructions
Enter text to help your customers complete this form correctly.

Customer request form

Aa Summary REQUIRED ... >

≡ Description REQUIRED ... >

Attached form
Phone equipment order Edit Delete >

Description fields

Drag and drop paragraph text fields here

Context fields

→ Status

Give feedback View Save changes

Fields i

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](#)

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**

The screenshot shows the Jira Service Management interface for the project 'cowjacket-cx'. The left sidebar has a tree view of 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, and Apps. The 'AI agents' link is highlighted with a red oval. The main content area is titled 'AI agents' and features a graphic of a computer monitor displaying various service management dashboards. Below the graphic, the text reads 'Supercharge self-service with AI and automations'. It explains that Rovo agents and virtual service agents answer common questions, resolve requests, and gather information, potentially saving team hours every day. A blue button at the bottom right says 'Find out how to activate AI'.

https://cowjacket.atlassian.net/jira/servicedesk/projects/COWCX/settings/virtual-agent

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

This screenshot is identical to the one above, showing the 'AI agents' settings page. However, the 'Portal' link within the 'Channels & self service' section of the sidebar is now highlighted with a red oval. The rest of the interface and content are the same as the previous screenshot.

https://cowjacket.atlassian.net/jira/servicedesk/projects/COWCX/settings/channels/portal-settings

On your portal homepage, copy the url under portal details

The screenshot shows the Jira Service Management interface. On the left, there's a sidebar with 'Project settings' expanded, showing 'cowjacket-cx' as a 'Service project'. Under 'Portal', 'Email', 'Widget', 'Knowledge base', 'AI agents', and 'External resources' are listed. 'Customize portal' is also visible. The main content area is titled 'Portal' and 'Portal details'. It features a large blacked-out placeholder for a logo. Below it, 'Channel access' is set to 'OPEN' (Anyone can submit requests to this project). There are links for 'Edit customer permissions', 'Customization', and 'Customize portal'. A section for 'Service project information' includes fields for 'Portal name*' (set to 'cowjacket-cx') and 'Introduction text' (containing 'Welcome! You can raise a request for cowjacket-cx using the options provided.'), with a 'Save' button. At the bottom, there's a 'Logo' section with an 'Add logo' button.

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.

The screenshot shows a web browser window with a blue header bar. The address bar says 'Search Brave or type a URL'. The main content area has a blue background with a city skyline silhouette. It's titled 'Help Center / cowjacket-cx' and shows a message: 'Welcome! You can raise a request for cowjacket-cx using the options provided.'. Below this is a form with a large input field labeled 'Submit a request or incident' containing the placeholder 'Submit a request or report a problem.' A note says 'Required fields are marked with an asterisk *'. There's a dropdown for 'Raise this request on behalf of' with 'Example Customer (example@atlassian-demo.invalid)' selected. The 'Summary' field is empty. At the bottom, there's a rich text editor with a toolbar and a large input field for 'What are the details of your request?*'.

