

How to send CSAT using custom notification when status is Resolved?

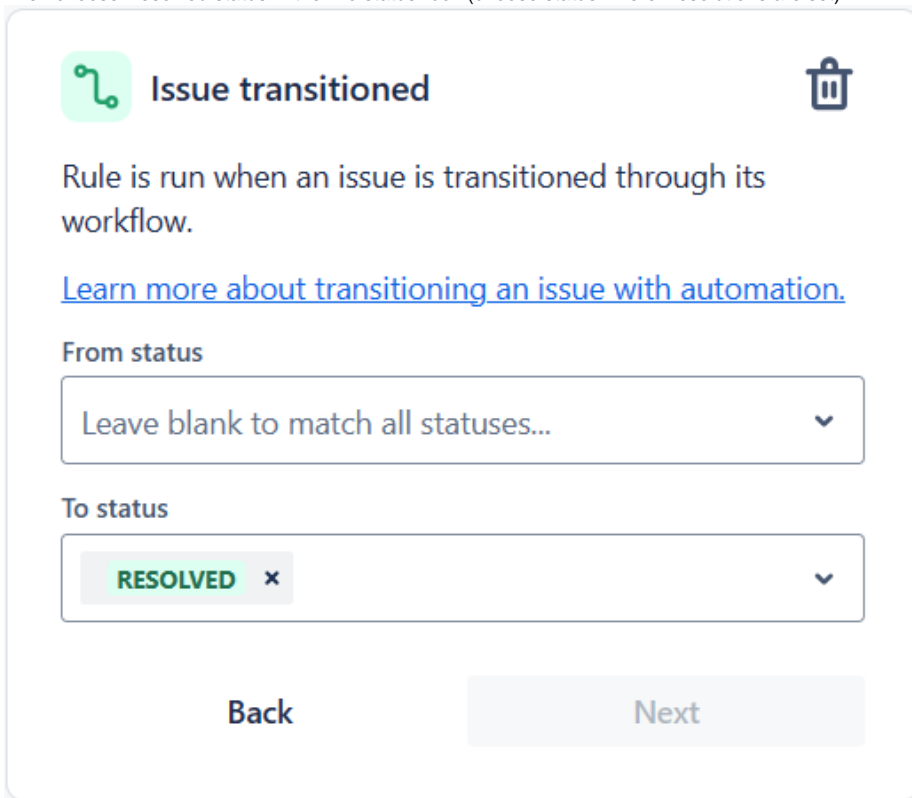
Case:

Jira supports sending automated emails (in our case the CSAT- Customer Satisfaction Survey) when the resolution status is set to **Resolved**. Just By enabling a property in the settings and then creating a rule all this can be done.

If this customer notification is **disabled**, customers will not receive the CSAT notification.

Solution:



1. First, check if the CSAT settings is enabled (it's enabled by Default). To do that, follow the steps below:
 - a. Go to **Project Settings**
 - b. then Satisfaction Settings. (Located in the left panel)
 - c. Check the Collect satisfaction (CSAT) feedback button if it's enabled and enable it if it's not.
2. Now you need to create a Rule which sends a CSAT link to an external customer. Follow the steps below:
3. In your Project Settings > Go to Automation.
4. Click Create Rule
5. In the "Add a Trigger" panel, search for "Issue Transition" and choose is as a trigger.
6. Then choose Resolved status in the "To status" box (choose status where Resolutions are set)



The screenshot shows the 'Issue transitioned' rule configuration in Jira. At the top, there's a green icon with a squiggle and the title 'Issue transitioned'. Below the title, it says 'Rule is run when an issue is transitioned through its workflow.' and provides a link 'Learn more about transitioning an issue with automation.' The configuration section has two dropdown menus: 'From status' with the text 'Leave blank to match all statuses...' and 'To status' with 'RESOLVED' selected. At the bottom, there are 'Back' and 'Next' buttons.


- 7.
8. Now, after clicking on "Next", choose "THEN: Add an action" and search for "Send Web Request" action to generate a customer feedback token key.
9. For the configuration, fill out as shown below:
10. Web Request URL: `https://<insert instance name>.atlassian.net/rest/api/3/issue/{{issue.key}}/properties/feedback.token.key`
11. Headers :
 - a. Authorization: Basic <insert **user_email_address:API_token** encoded in Base64>
 - b. Content-Type: application/json
12. HTTP Method: PUT
13. Web Request body: Custom Data
14. Custom data:

```
{  "token": "test123",  "issueID": "{{issue.id}}"}
```
15. Finally, check the **Delay execution of subsequent rule actions until we've received a response for this web request** box and save.
16. Below, is a representation of the configuration mentioned above:

 **Send web request** 

This action will send a HTTP request to the url specified below:


Web request URL *

`https://gohappyalways.atlassian.net/rest/api/3/issue/{{issue.key}}/properties/feedback.token.key` 


Request parameters must be url encoded, smart values should use: {{value.urlEncode}}.

Headers (optional)


Authorization	Basic bnJvc2xhbkbhdGxhc3NpYW4=	×
Content-Type	application/json	×

 Add

HTTP method *

PUT 

Web request body *

Custom data 

Custom data *

```
{
  "token": "test123",
  "issueID": "{{issue.id}}"
}
```

Wait for response

☒ Delay execution of subsequent rule actions until we've received a response for this web request



☐ Continue running the rule even if the request response is not successful (i.e. non-200 response)

> Validate your web request configuration



[Cancel](#) [Save](#)

> How do I access web request response values in subsequent rule actions?

17. _____
18. After finishing up the "Send Web Request" configuration. Add a new action "Send Email".
19. Set its configuration as below:
20. To: Set the **Reporter**
21. Subject: {{issue.key}} - Please do the Survey
22. Content: {{issue.url.customer}}/feedback?token=test123

 **Send email** 

To *

 Reporter 

Cc Bcc

Subject *

`{{issue.key}} - Please do the Survey`

Content *

`{{issue.url.customer}}/feedback?token=test123`

> More options

[Cancel](#) [Save](#)

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

23. _____
24. After completing the configuration, Click on "Save".
25. Finally, Click on "Turn on rule" and set rule name.
26. For more instructions, you can follow this link [here](#)

Related Pages

- [How to send CSAT using custom notification when status is Resolved?](#)
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