

# 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 configuration for an automation rule titled "Issue transitioned". The rule is triggered when an issue is transitioned through its workflow. The "From status" dropdown is set to "Leave blank to match all statuses...". The "To status" dropdown is set to "RESOLVED". 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: X

Content-Type application/json X

● 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 X

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?](#)
- [Where to Find Your Webhook](#)
- [How much Twilio service costs?](#)
- [Do I need to have a phone number?](#)
- [Buy and configure a Twilio Phone number](#)
- [Attachments are not loading ?](#)
- [Can several agents use it with a single phone number?](#)
- [You're not receiving tickets after connecting your Twilio account?](#)
- [Custom Request types don't show up in the addon setup](#)
- [You're receiving Whatsapp tickets in your project from different users](#)
- [Do I need to be subscribe to Jira Service Management?](#)
- [Resolution status](#)
- [Where to find your sandbox Join code](#)
- [How to solve "Something's gone wrong" error while clicking on "Link WhatsApp Account"](#)
- [Why there isn't request type to select?](#)
- [Where to find your WhatsApp phone number?](#)
- [Where to Find Your Twilio Credentials](#)