

How to Switch Between Customer Portal View and Agent View

Feature Overview

In this guide, you will learn how to **switch** from the **standard Jira issue view** to the **service desk portal view** using the **'Use request type fields'** toggle.

Quick Steps

 The 'Use request type fields' toggle is only available for **Service Desk Projects** when you are logged in as a **Jira Licensed User**.

Step #	Action
1	Go to the Create Screen
2	Select a Service Desk Project
3	Click on the 'Use request type fields' Toggle
4	Once the toggle is checked, the view will be directly switched to the service desk portal view , and the fields will be updated

Jira plugin for Outlook

Create New

Project*
ITSM project

Issue Type*
[System] Service request

Request Type
Get IT help

Use request type fields

Email content

- Include e-mail as attachment
- Include Inline Images
- Include email content

Summary*
Attaching files to the new Customer

Components
Select

Create

Jira plugin for Outlook

Create New

Project*
ITSM project

Issue Type*
[System] Service request

Request Type
Get IT help

Use request type fields

Email content

- Include e-mail as attachment
- Include Inline Images
- Include email content

Raise this request on behalf of*
Select

Summary*
Attaching files to the new Customer

Create