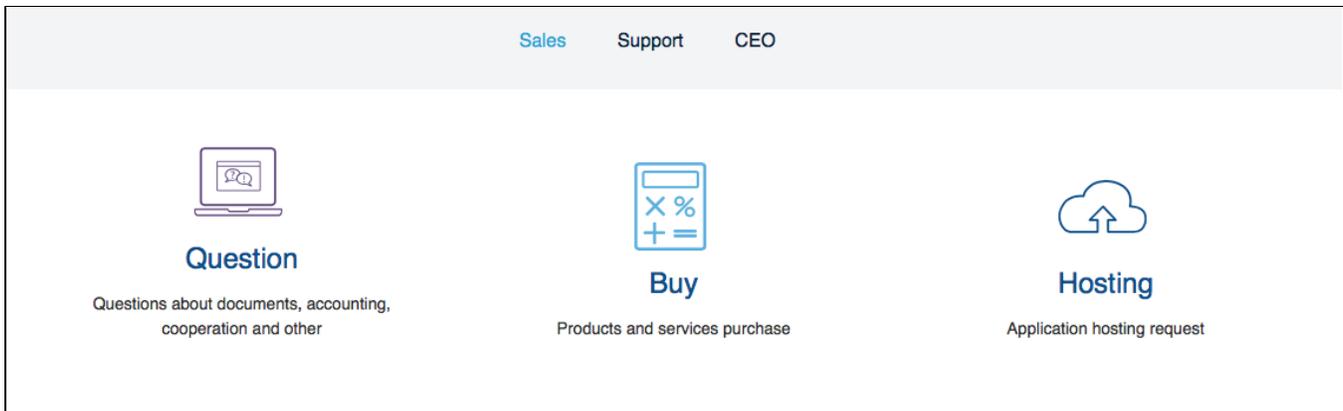


Customer Portal Settings

- [Why Do You Need Customer Portal?](#)
- [Create Groups](#)
- [Customer Portal Items](#)
 - [Upload Avatars for Portal Items](#)
- [Customer Portal's Confluence Integration](#)
- [Why Do You Need Customer Portal?](#)
- [Create Groups](#)
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- [Customer Portal's Confluence Integration](#)

Why Do You Need Customer Portal?

HelpDesk Customer Portal allows users to create issues more easy. Users don't need to choose issue type from dropdown list and to guess which project or issue type corresponds their request, but just select an item and click on issue icon with short description.



To configure it go to HelpDesk administration menu/Customer portal.

Create Groups

Create groups of issues to be shown on Customer Portal main page. Type Group name and press 'Add' button.



Groups names can be edited or deleted.

My issues [Search] [User Profile]

Sales Support Development



Purchase request

Project estimate, invoice or contract request.



New hosting

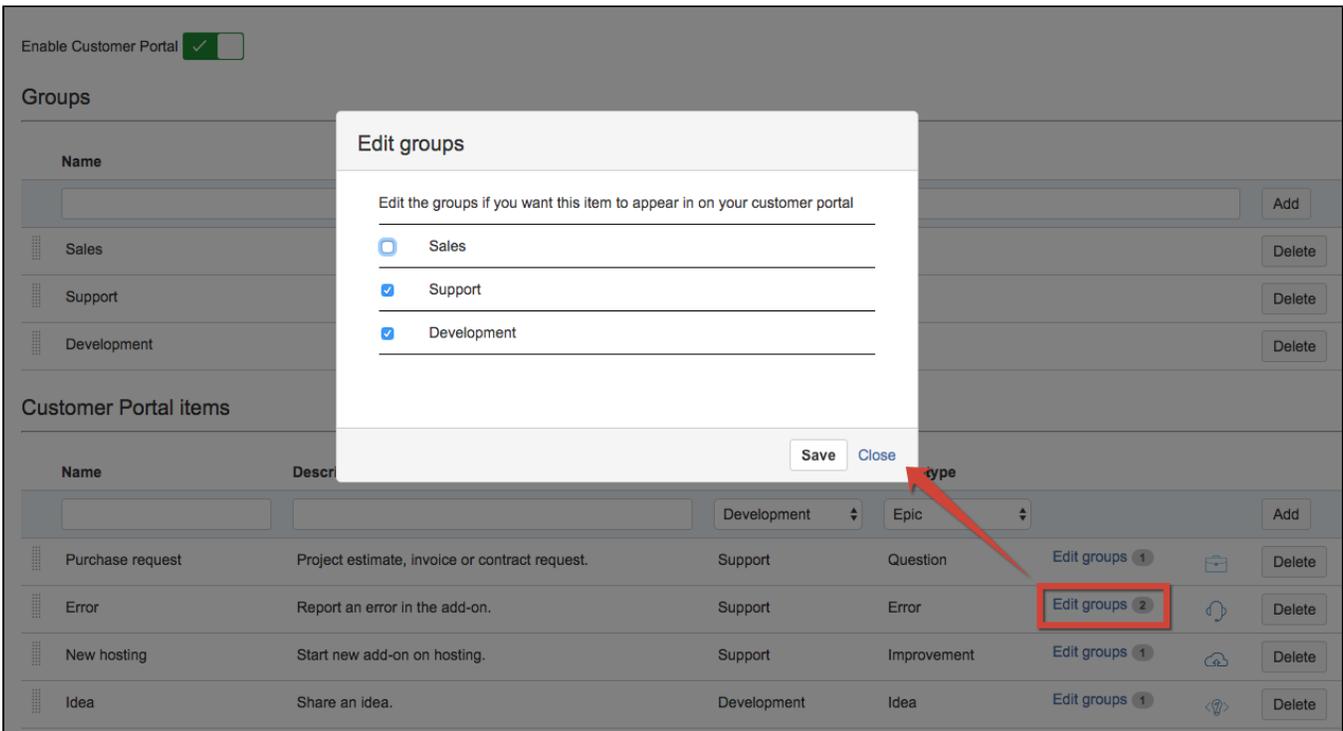
Start new add-on on hosting.

Customer Portal Items

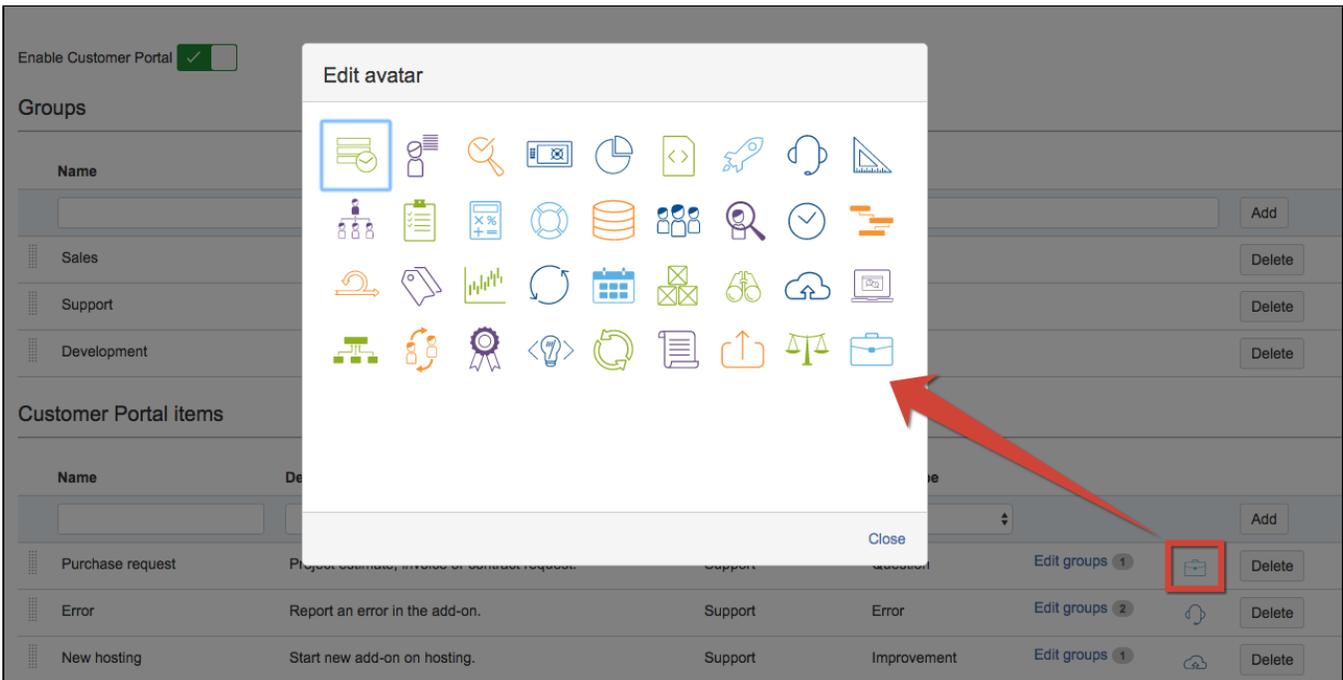
Customer Portal items					
Name	Description	Project	Issue type		
<input type="text"/>	<input type="text"/>	Development ▾	Epic ▾	Add	
⋮ Purchase request	Project estimate, invoice or contract request.	Support	Question	Edit groups 1	Delete
⋮ Error	Report an error in the add-on.	Support	Error	Edit groups 2	Delete
⋮ New hosting	Start new add-on on hosting.	Support	Improvement	Edit groups 1	Delete
⋮ Idea	Share an idea.	Development	Idea	Edit groups 1	Delete

Type in Item's name and description. Then select project and issue type for item to be created by user. Be sure that helpdesk users have permissions to create issues in mentioned projects.

Click on 'Edit groups' to choose groups where items will be shown. One item can be shown in several groups. For example 'Error' can refer to Support group and Development group.



Last step is to choose avatar for item. Click on pictogram and select from library.



Upload Avatars for Portal Items

Starting with 1.7.0 version the item's avatars can be loaded from custom depository.

Folder to store custom user icons fro Helpdesk Portal (jira system user in OS must have full access to the folder - read and write)

/tmp/aportal

Add absolute server address to folder to store custom user icons fro Helpdesk Portal in the field with the same name. Don't forget that JIRA system user in OS must have full access to the folder (read and write).

All images that were added manually to group avatars also will be placed to this folder.

It is better to use .svg format, other formats result worse quality and it is unlikely to store very big images.

Customer Portal's Confluence Integration

To output some Confluence page on Customer Portal's main page enter Confluence page link in the field:

<p>Confluence page link</p> <input type="text" value="https://confluence-test.teamlead.ru/display/DEMO/DEMO"/>

 Notice that protocols of HelpDesk address and Confluence address must be the same (http or https both)

 Notice that Confluence must be enabled to run in an iframe: [Confluence page does not display in an iframe](#)

The Confluence page on the main HelpDesk Customer Portal looks like this:

[Sales](#) [Support](#)



Purchase request

Project estimate, invoice or contact request.



New hosting

Start new add-on on hosting.

✔ Welcome to your first space. Go ahead, edit and customize this home page any way you like. We've added some sample content to get you started.



Goal

Your space homepage should summarize what the space is for, and provide links to key resources for your team.

Key	Summary	Type	Created	Updated	Due	Assignee	Reporter	Priority	St:

Quick navigation

When you create new pages in this space, they'll appear here automatically.

- [Copy with Scaffolding XML of fd](#)
- [Create account](#)
- [Draw io](#)
- [fd](#)
- [fghfgh](#)
- [изображение](#)
- [Picture](#)

Don't forget that the Confluence page should be available for anonymous users as HelpDesk Customer Portal is browsed by external customers. Confluence page is shown according to its access permissions.

- [Why Do You Need Customer Portal?](#)
- [Create Groups](#)
- [Customer Portal Items](#)
 - [Upload Avatars for Portal Items](#)
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Why Do You Need Customer Portal?

HelpDesk Customer Portal allows users to create issues more easily. Users don't need to choose issue type from dropdown list and to guess which project or issue type corresponds their request, but just select an item and click on issue icon with short description.

Sales Support CEO



Question

Questions about documents, accounting, cooperation and other



Buy

Products and services purchase



Hosting

Application hosting request

To configure it go to HelpDesk administration menu/ Customer portal.

Create Groups

Create groups of issues to be shown on Customer Portal main page. Type Group name and press 'Add' button.

Groups

Name	Group title (En)	
<input type="text"/>	<input type="text"/>	Add
Sales	Sales	Delete
Support	Support	Delete
Development	Development	Delete

Groups names can be edited or deleted.

My issues

Sales Support Development



Purchase request

Project estimate, invoice or contract request.



New hosting

Start new add-on on hosting.

Customer Portal Items

Customer Portal items					
Name	Description	Project	Issue type		
<input type="text"/>	<input type="text"/>	Development	Epic	<input type="button" value="Add"/>	
Purchase request	Project estimate, invoice or contract request.	Support	Question	Edit groups 1	
Error	Report an error in the add-on.	Support	Error	Edit groups 2	
New hosting	Start new add-on on hosting.	Support	Improvement	Edit groups 1	
Idea	Share an idea.	Development	Idea	Edit groups 1	
				<input type="button" value="Delete"/>	<input type="button" value="Delete"/>

Type in Item's name and description. Then select project and issue type for item to be created by user. Be sure that helpdesk users have permissions to create issues in mentioned projects.

Click on 'Edit groups' to choose groups where items will be shown. One item can be shown in several groups. For example 'Error' can refer to Support group and Development group.

Enable Customer Portal

Groups

Name		
<input type="text"/>	<input type="button" value="Add"/>	<input type="button" value="Delete"/>
Sales	<input type="button" value="Delete"/>	<input type="button" value="Delete"/>
Support	<input type="button" value="Delete"/>	<input type="button" value="Delete"/>
Development	<input type="button" value="Delete"/>	<input type="button" value="Delete"/>

Edit groups

Edit the groups if you want this item to appear in on your customer portal

Sales

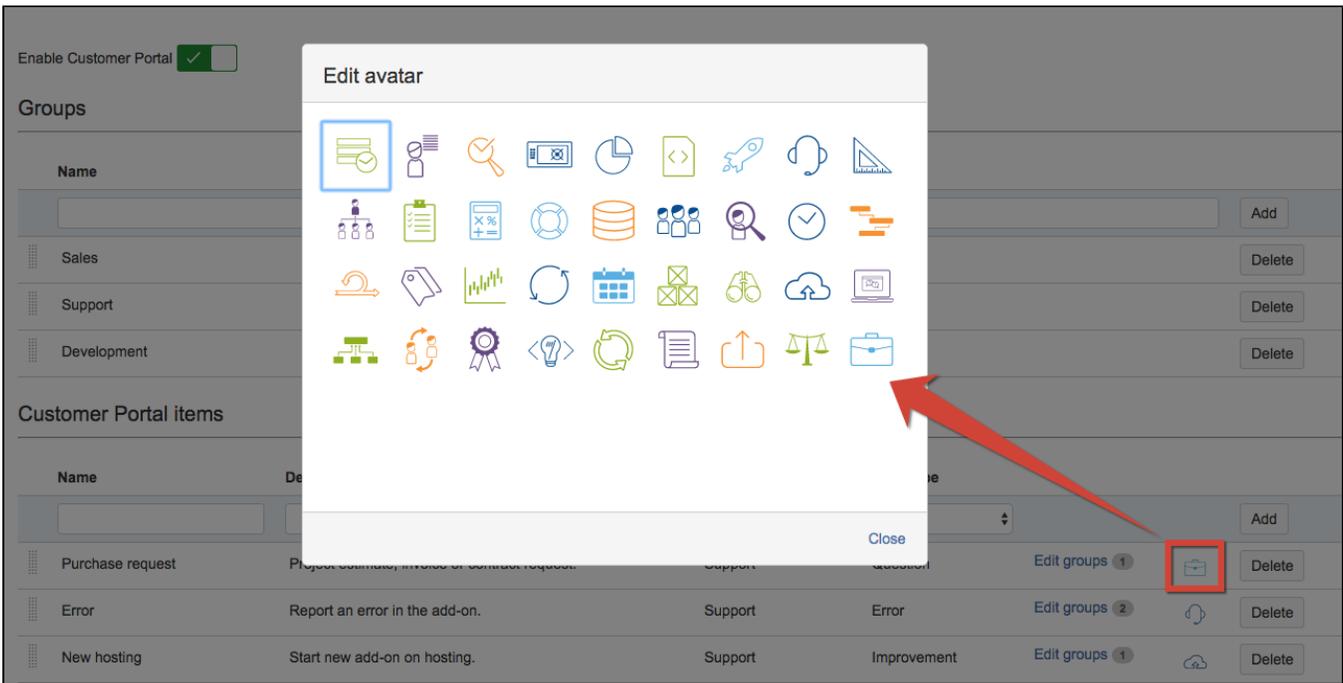
Support

Development

Customer Portal items

Name	Description	Project	Issue type		
<input type="text"/>	<input type="text"/>	Development	Epic	<input type="button" value="Add"/>	
Purchase request	Project estimate, invoice or contract request.	Support	Question	Edit groups 1	
Error	Report an error in the add-on.	Support	Error	Edit groups 2	
New hosting	Start new add-on on hosting.	Support	Improvement	Edit groups 1	
Idea	Share an idea.	Development	Idea	Edit groups 1	
				<input type="button" value="Delete"/>	<input type="button" value="Delete"/>

Last step is to choose avatar for item. Click on pictogram and select from library.



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Customer Portal's Confluence Integration

To output some Confluence page on Customer Portal's main page

1. Install this add-on on to your Confluence instance

File	Modified
Java Archive hd-integration-for-confluence-0.0.1.1.jar	Sep 20, 2018 by Anastasia Zarukina (Teamlead)

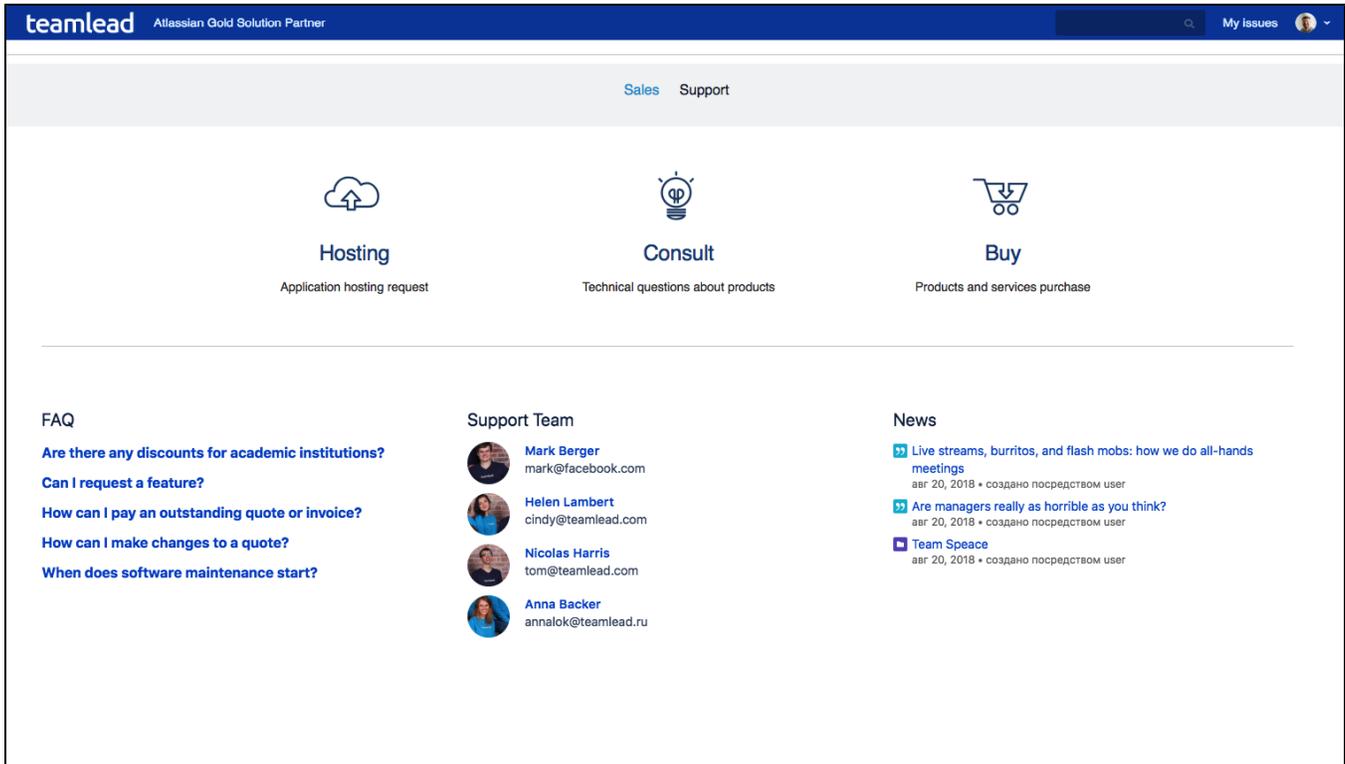
2. Enter Confluence page link in the field:

Confluence page link

 Notice that protocols of HelpDesk address and Confluence address must be the same (http or https both)

 Notice that Confluence must be enabled to run in an iframe: [Confluence page does not display in an iframe](#)

The Confluence page on the main HelpDesk Customer Portal looks like this:



The screenshot shows the teamlead customer portal interface. At the top, there is a blue header with the teamlead logo and the text "Atlassian Gold Solution Partner". Below the header, there is a navigation bar with "Sales" and "Support" tabs. The main content area is divided into three columns: "Hosting" (Application hosting request), "Consult" (Technical questions about products), and "Buy" (Products and services purchase). Below this, there are three sections: "FAQ" with four questions, "Support Team" with four team members (Mark Berger, Helen Lambert, Nicolas Harris, and Anna Backer), and "News" with three articles.

teamlead Atlassian Gold Solution Partner

Sales Support

Hosting
Application hosting request

Consult
Technical questions about products

Buy
Products and services purchase

FAQ

- [Are there any discounts for academic institutions?](#)
- [Can I request a feature?](#)
- [How can I pay an outstanding quote or invoice?](#)
- [How can I make changes to a quote?](#)
- [When does software maintenance start?](#)

Support Team

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-  **Nicolas Harris**
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-  **Anna Backer**
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News

-  [Live streams, burritos, and flash mobs: how we do all-hands meetings](#)
авг 20, 2018 • создано посредством user
-  [Are managers really as horrible as you think?](#)
авг 20, 2018 • создано посредством user
-  [Team Space](#)
авг 20, 2018 • создано посредством user

Don't forget that the Confluence page should be available for anonymous users as HelpDesk Customer Portal is browsed by external customers. Confluence page is shown according to its access permissions.