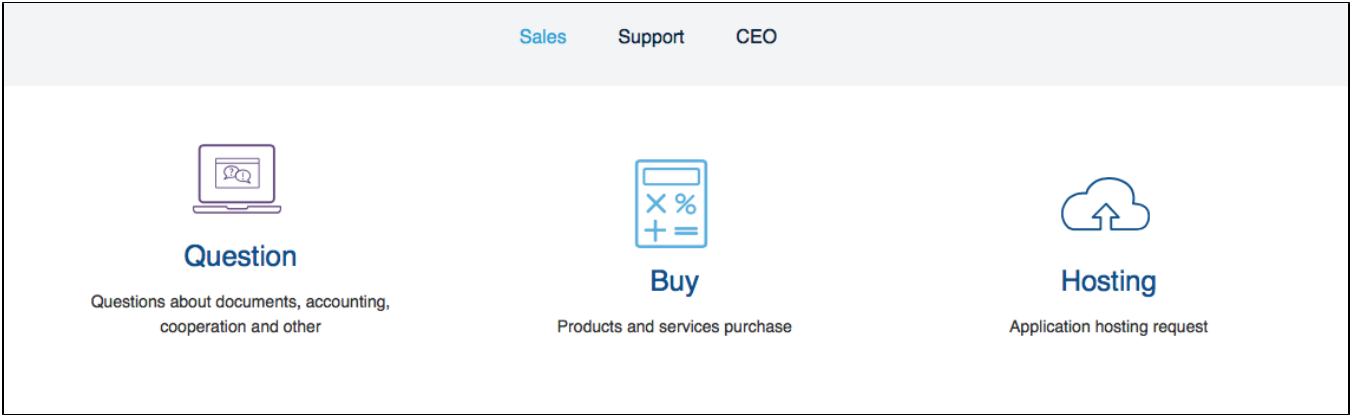


Customer Portal Settings

- [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](#)
- [Customer Portal Items](#)
 - [Upload Avatars for Portal Items](#)
- [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		
Name	Group title (En)	
		<button>Add</button>
Sales	Sales	<button>Delete</button>
Support	Support	<button>Delete</button>
Development	Development	<button>Delete</button>

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	
		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.

Enable Customer Portal ☒

Groups

Name		
		Add
Sales		Delete
Support		Delete
Development		Delete

Edit groups

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

☐ Sales

☒ Support

☒ Development

Save Close

Customer Portal items

Name	Description	Group	Type	Avatar	Actions
		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

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

Enable Customer Portal ☒

Groups

Name		
		Add
Sales		Delete
Support		Delete
Development		Delete

Edit avatar



Close

Customer Portal items

Name	Description	Group	Type	Avatar	Actions
					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

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 from 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:

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:

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



Purchase request

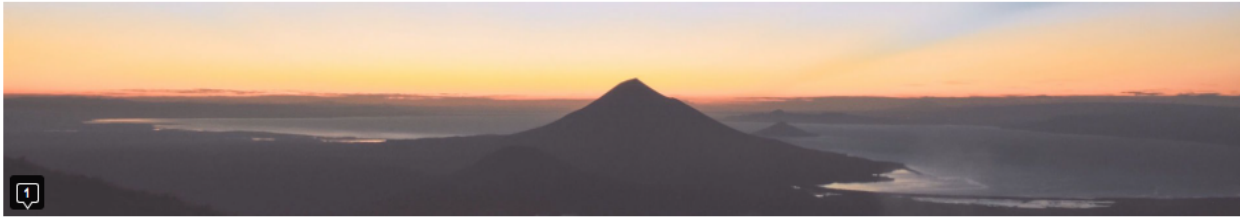
Project estimate, invoice or contact request.



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.

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](#)

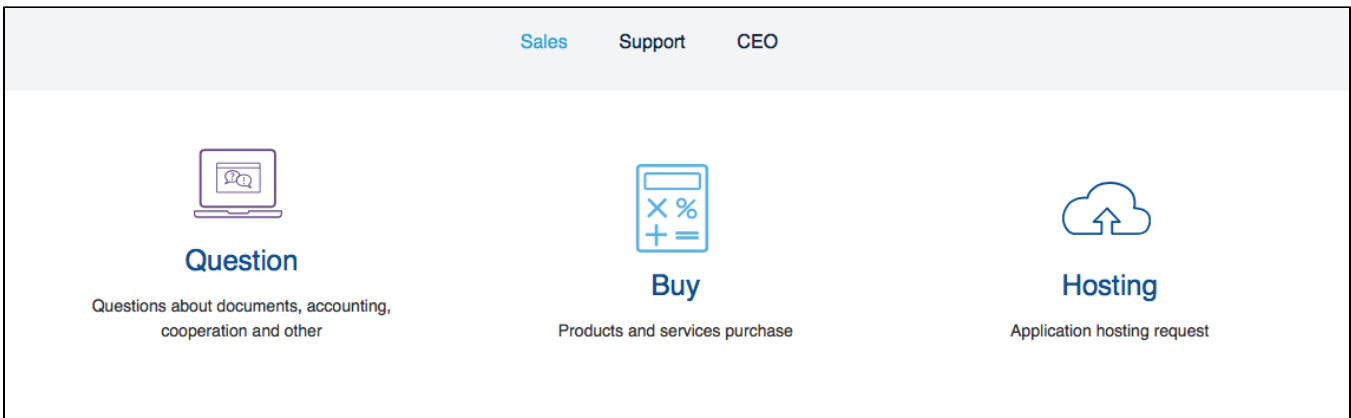
Key	Summary	Type	Created	Updated	Due	Assignee	Reporter	Priority	St

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?](#)
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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.



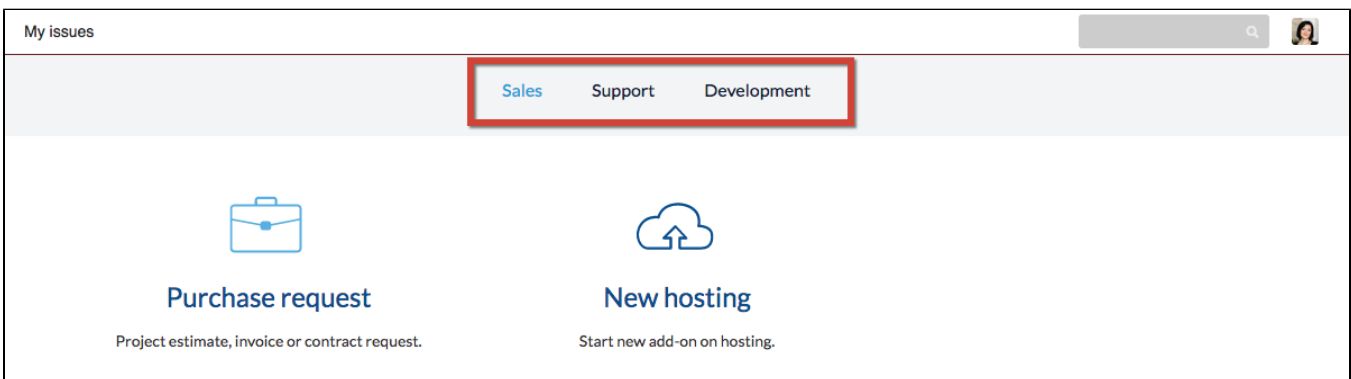
To configure it go to HelpDesk administration menu/Customer portal.

Create Groups

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

Groups		
Name	Group title (En)	
		<button>Add</button>
Sales	Sales	<button>Delete</button>
Support	Support	<button>Delete</button>
Development	Development	<button>Delete</button>

Groups names can be edited or deleted.



Customer Portal Items

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

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	
	<button>Add</button>
 Sales	<button>Delete</button>
 Support	<button>Delete</button>
 Development	<button>Delete</button>

Customer Portal items

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

Edit groups

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

☐ Sales

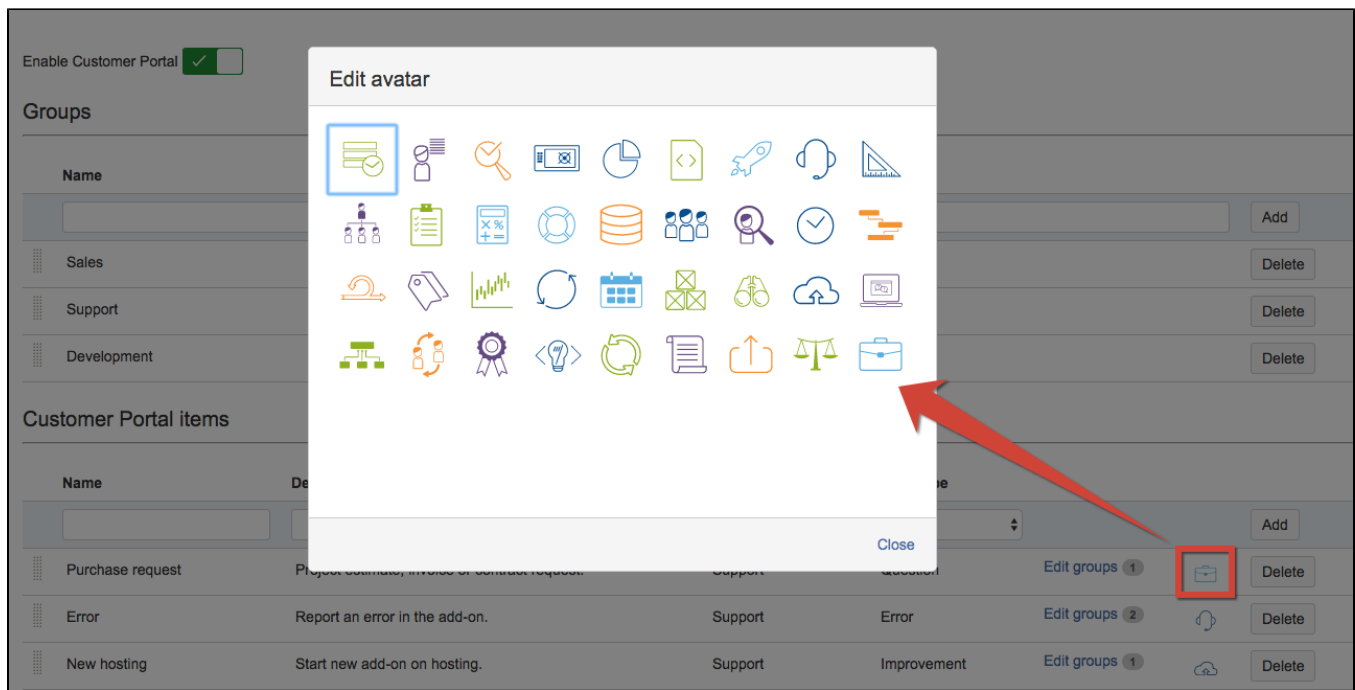
☒ Support

☒ Development

Save

Close

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)

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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

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:

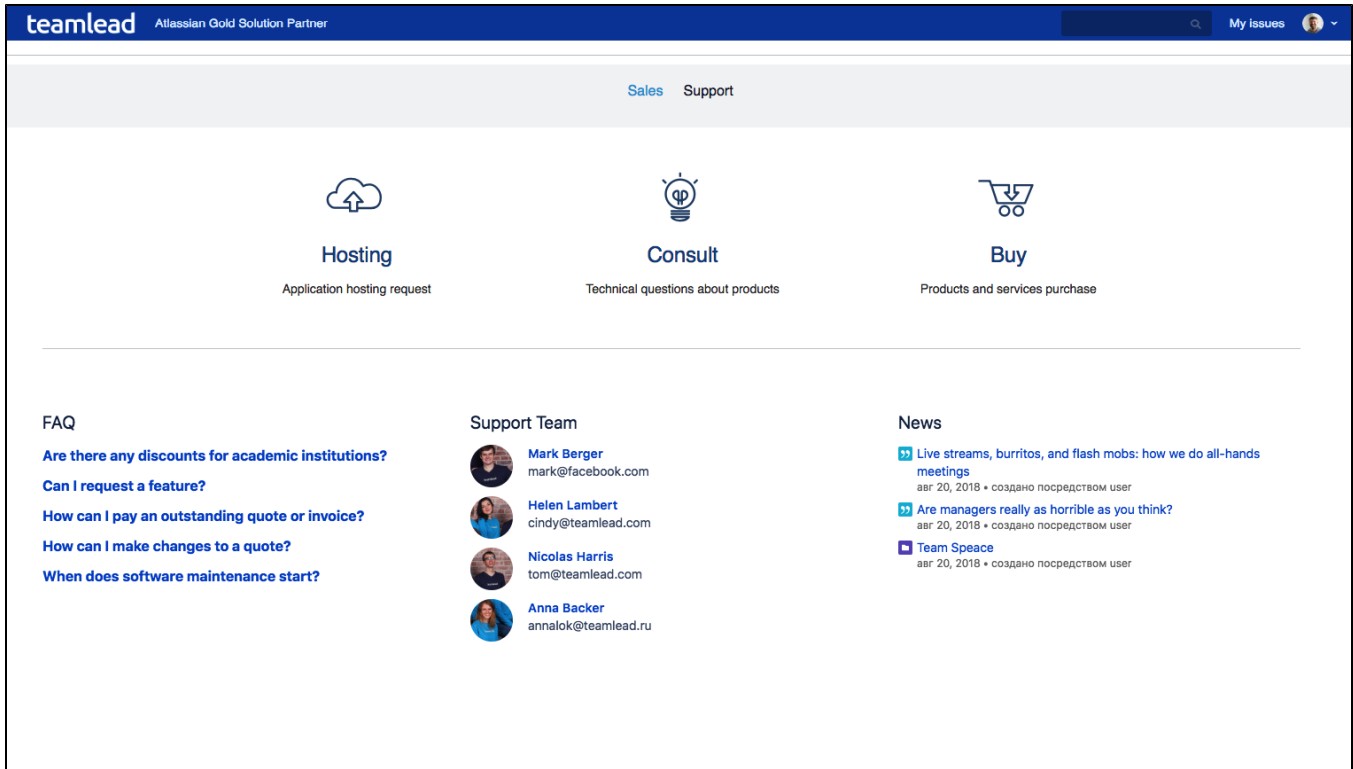
Confluence page link

<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:



The screenshot displays the teamlead HelpDesk Customer Portal. The header features the teamlead logo and 'Atlassian Gold Solution Partner' status. A navigation bar includes '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 links like 'Are there any discounts for academic institutions?', 'Support Team' listing Mark Berger, Helen Lambert, Nicolas Harris, and Anna Backer, and 'News' with articles such as 'Live streams, burritos, and flash mobs: how we do all-hands meetings'.

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.