Customer Portal Settings

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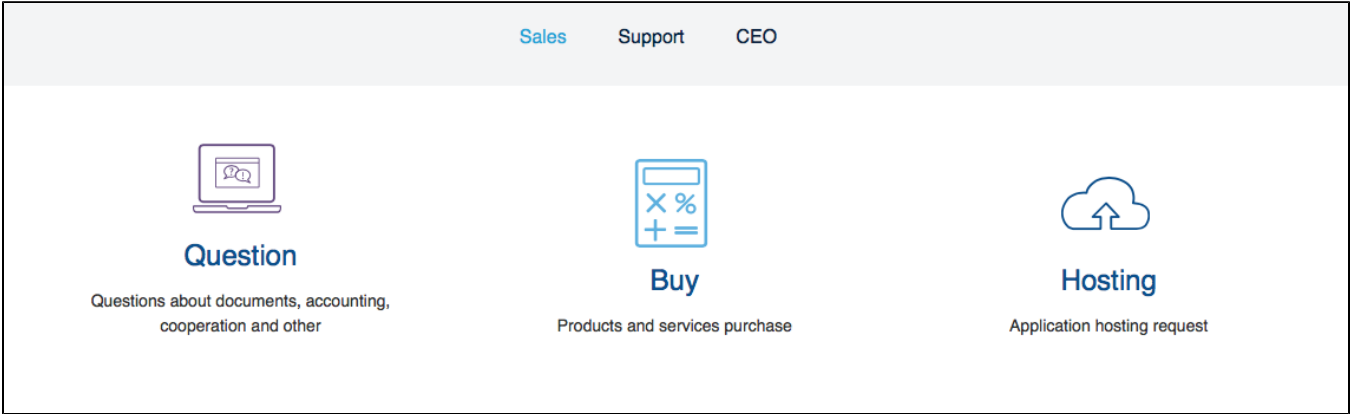
To configure it go to HelpDesk administration menu/Customer portal.

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.

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.

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)
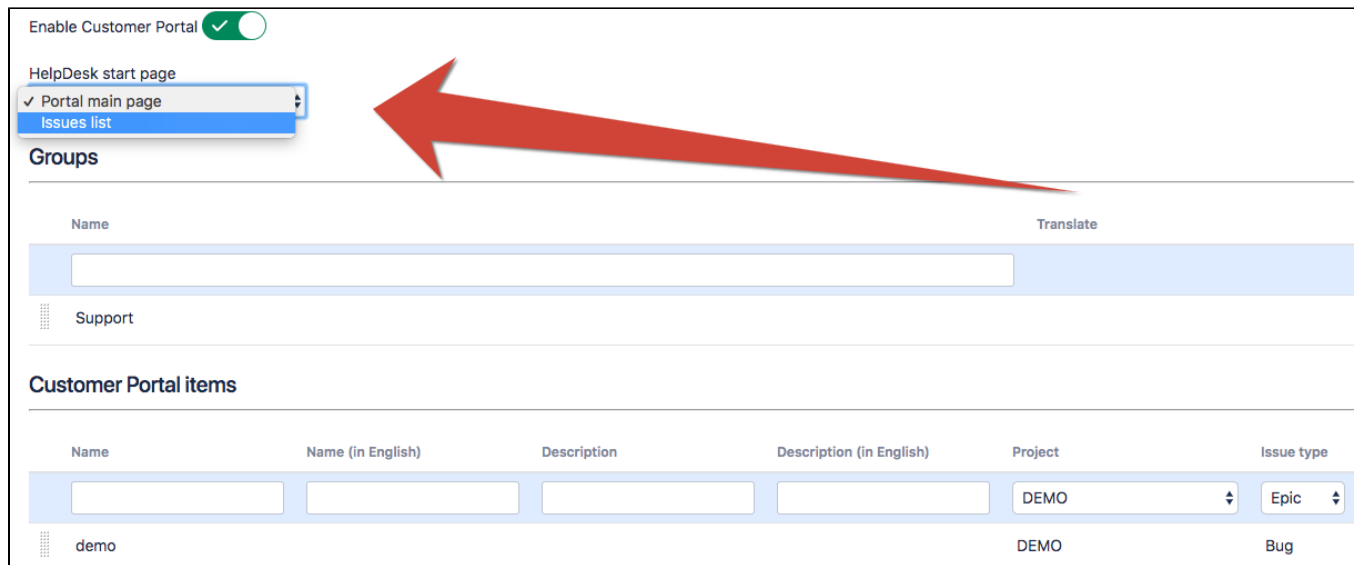
/tmp/aportal

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.

HelpDesk start page

Not all HD users likes the **Portal main page** is enabled by default. Some users ask to make the **Issue list** the main page.

Customer Portal's Confluence Integration

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

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

> (i) 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:
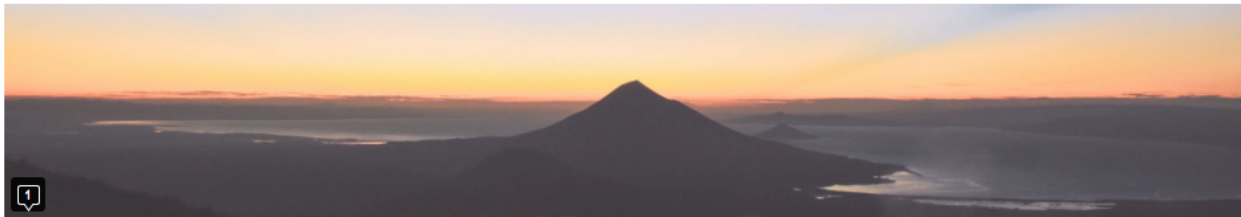
| Sales | Support |

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	Sta

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 it's access permissions.