

Customer Portal Settings

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

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	Translate
<input type="text"/>	<input type="button" value="Add"/>
<div><div></div>Sales</div>	<div><input type="button" value="Translate"/><input type="button" value="Delete"/></div>
<div><div></div>Support</div>	<div><input type="button" value="Translate"/><input type="button" value="Delete"/></div>

Groups names can be edited or deleted.

Customer Portal items

Name	Description	Project	Issue type	Translate		
<input type="text"/>	<input type="text"/>	Marketing	Task	<input type="button" value="Add"/>		
<div><div></div>Question</div>	Invoices, Contracts, HR, etc	SALE Manual	Deal	<input type="button" value="Translate"/>	Edit groups 1	<div><input type="button" value="Delete"/></div>
<div><div></div>Buy</div>	Purchase products and services	SALES MANAGEMENT	Deal	<input type="button" value="Translate"/>	Edit groups 1	<div><input type="button" value="Delete"/></div>
<div><div></div>Report Bug</div>	Report a bug in the module	Support	Task	<input type="button" value="Translate"/>	Edit groups 1	<div><input type="button" value="Delete"/></div>
<div><div></div>Idea</div>	Products and services improvement ideas	Project	Task	<input type="button" value="Translate"/>	Edit groups 2	<div><input type="button" value="Delete"/></div>



Question

Invoices, Contracts, HR, etc



Buy

Purchase products and services



Application Crash

Report about application crash

Customer Portal Items

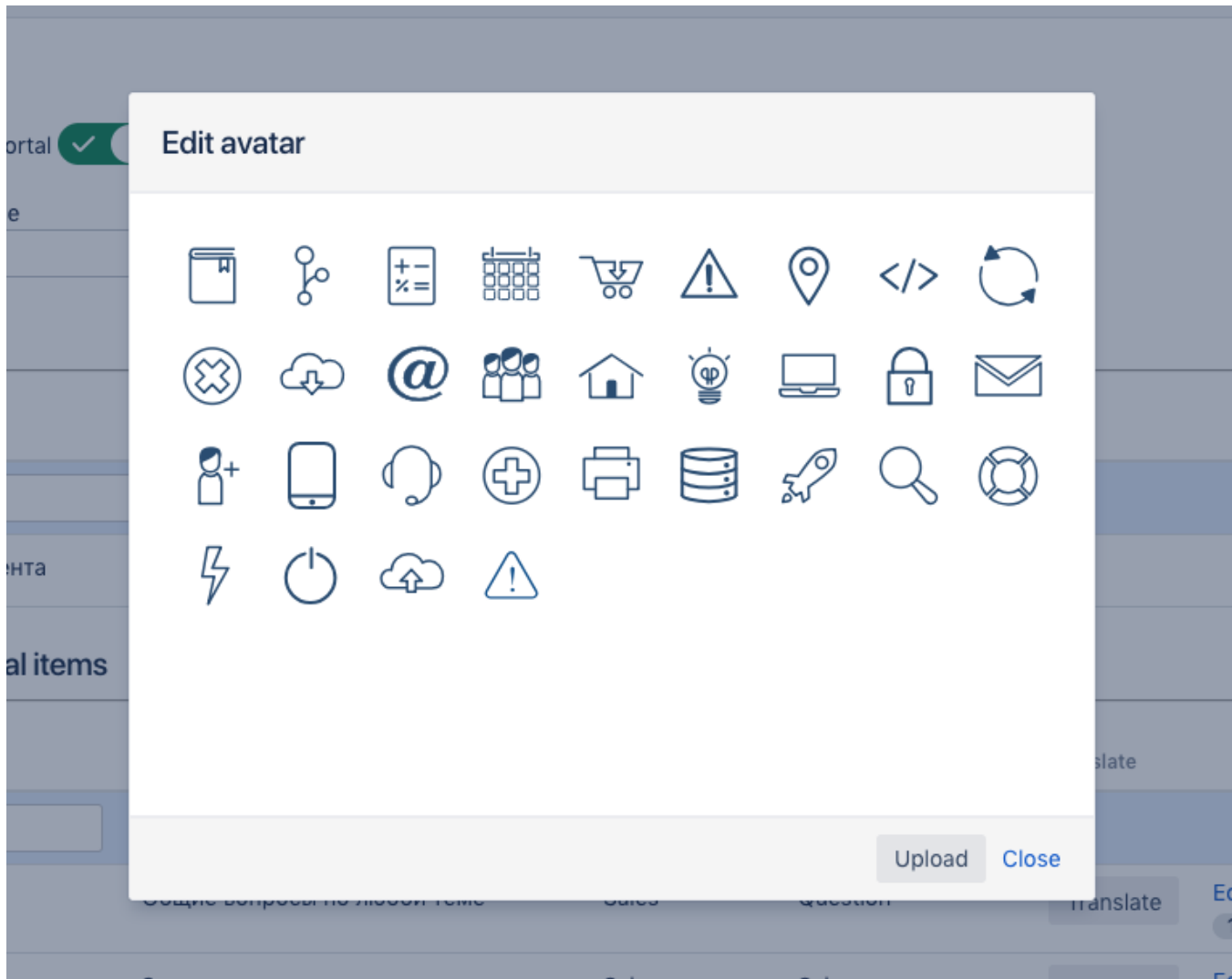
Type in Item's name and description. Then select project and issue type for item to be created by user. Be sure that helpdesk users have permissions to create issues in mentioned projects.

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

The screenshot shows the 'HelpDesk' administration interface. A modal window titled 'Edit groups' is open, allowing the user to select which groups the item will appear in. The modal contains the text: 'Edit the groups if you want this item to appear in on your customer portal'. Below this text are two checkboxes: 'Sales' (checked) and 'Support' (unchecked). At the bottom of the modal are 'Save' and 'Close' buttons.

The background interface shows the 'HelpDesk' section with a sidebar on the left containing links like 'Dashboard', 'Search', 'Customer Satisfaction', 'Open Issue', 'Customer Portal', '& Feel', and 'ment Templates'. The main content area has a toggle for 'Enable Customer Portal' (checked), a dropdown for 'HelpDesk start page' (set to 'Portal main page'), and a table of 'Customer Portal items'. The table has columns for Name, Description, Project, Issue type, and Translate. One item is listed: 'Question' with description 'Invoices, Contracts, HR, etc', project 'SALE Manual', and issue type 'Deal'. Below the table are buttons for 'Translate', 'Edit groups' (with a '1' badge), and 'Delete'.

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)

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.

Enable Customer Portal ☒

HelpDesk start page

✓ Portal main page

Issues list

Groups

Name

Translate



Support

Customer Portal items

Name

Name (in English)

Description

Description (in English)

Project

Issue type

DEMO

Epic



demo

DEMO

Bug