



akuiteo
BUSINESS SOFTWARE

User Guide

CUSTOMER PORTAL

Version 4.6

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1 Preface

1.1 REVISIONS

Revision 3	Published in May 2022 <ul style="list-style-type: none">• Forgotten password can now be retrieved (see Logging in (p. 8)).
Revision 2	Published in February 2022 <ul style="list-style-type: none">• Minor corrections.
Revision 1	Published in November 2021 <ul style="list-style-type: none">• Added Re-opening an issue (p. 18) sub-chapter.

1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:
<https://www.akuiteo.fr/akuiteo.clients/>

2 Introduction to the Customer Portal

Your customers are the main users of the Customer Portal.

Your employees have a privileged access to publication features from the Application Desktop to be able to share documents, schedules, FAQs and to provide answers to Help Desk issues. They also have access to the customer's web interface to check the data provided to the customer.

The customer, or an external user, has a unique access to the web interface in order to view schedules and documents, share documents, enter Help Desk issues or read FAQ articles.

Before launching and using the Customer Portal, you must start by [Setting up the Customer Portal \(p. 7\)](#).

Important

The portal is compatible with the following browsers: Chrome, Safari, Firefox and Microsoft Edge Chromium.

3 Setting up the Customer Portal

To set up the Customer Portal, you must:

- 1** Add a user that will be in charge of managing and publishing information on the Customer Portal. For more information, refer to the documentation on the CRM - Third-party module.
- 2** Associate the following DMFs with this user, depending on the modules to use:
 - 21**** CUSTOMER PORTAL
 - 2101** CUSTOMER PORTAL DOCUMENTS
 - 210101 CUSTOMER PORTAL DOCUMENTS VIEW
 - 210102 CUSTOMER PORTAL DOCUMENTS UPLOAD
 - 210103 CUSTOMER PORTAL DOCUMENTS DROPBOX UPLOAD
 - 210104 CUSTOMER PORTAL DOCUMENTS GOOGLE DRIVE UPLOAD
 - 2102** CUSTOMER PORTAL SCHEDULES
 - 210201 CUSTOMER PORTAL SCHEDULES VIEW
 - 2103** CUSTOMER PORTAL FAQ *
 - 210301 CUSTOMER PORTAL FAQ ADD MESSAGE WITH NON-RELEVANT VOTE
 - 210302 CUSTOMER PORTAL FAQ FORCE VOTE
 - 1470** HELPDESK EXTRANET *
 - 147001 HELPDESK EXTRANET INPUT FOR ANOTHER USER
 - 147003 HELPDESK EXTRANET SHOW TASKS
 - 147004 HELPDESK EXTRANET REOPEN ISSUE
 - 147005 HELPDESK EXTRANET SHOW REPORTS TAB
 - 147006 HELPDESK EXTRANET ENVIRONMENT ALERT
 - 147007 HELPDESK EXTRANET MODIFY ENVIRONMENT
 - 147008 HELPDESK EXTRANET DASHBOARDS EXCEL EXPORT
 - 147009 HELPDESK EXTRANET NEW ISSUE
 - 147011 HELPDESK EXTRANET RESUME ISSUE
 - 190403 WEB PORTAL SCHEDULES DELETE
- 3** Link this user profile to an external user (usually your customer contact). For more information, refer to the documentation on the CRM - Third-party module.

4 Logging in

To log into the Customer Portal:

- 1 In a web browser, enter the address in the following format: *https://domainname/akuiteo.clients* or open the Launcher to access the Customer Portal.

Example

<https://www.akuiteo.com/akuiteo.clients/>

Note

To access the Customer Portal from the Launcher, the link to the application must have been initialized from the Administration console. For more information, refer to the *General Guide - Launcher*.

- 2 Enter your login and password, then click on **Log in**.
 - When your customer logs in, the Customer Portal is directly displayed.
 - If, as an employee, you are only linked to a single customer, the Customer Portal is also directly displayed.
 - If, as an employee, you are linked to several customers, a drop-down list is displayed to enable you to select the customer you want to share documents and schedules with. Once you log in, you can switch to another customer at any time from the top right menu > **Change customer**.

As you can see, the Customer Portal interface displays several graphic information areas.

These areas can be clicked on and work as shortcuts that enable you to filter and search for documents or schedules, upload documents or view the changes in published documents.

Tip

You can partition the publication of documents and schedules by customer or project. To do so, you must set up a project-based partitioning of the Customer Portal via **Tools > Setup > Customer portal > General**.

Changing the password

- 1 At the top right of the screen, click on your user name then on **Password**.
- 2 Make the necessary changes in the window and validate.

Next time you want to log in, you will have to enter the new password.

Tip

Did you forget your password? In the login window, fill in the **Login** and click **Forgot your password?**, then confirm the password reset. An email will be sent so that you modify your login credentials.

5 Publishing and managing documents

Akuiteo enables you to publish and remove documents at anytime.

Documents are published and managed from the Application Desktop. You can also publish documents directly from the Customer Portal.

5.1 PUBLISHING DOCUMENTS

Reminder: Make sure your customers are linked to the relevant DMFs. For more information, refer to [Setting up the Customer Portal \(p. 7\)](#).

5.1.1 From the Application Desktop

When you create or add a document from the Application Desktop, you can publish and categorize it in the Customer Portal, or remove it from the Portal.

From a document record sheet

- 1 Open a document record sheet and switch to the modification mode.
- 2 In the **Publication** section, enter the publication period during which the document will be available in the Customer Portal. If you do not set the dates, the document will remain visible until you remove it from the Customer Portal.
- 3 In the **Filed under** field, enter the name of the category and the sub-category if needed.
- 4 In the **Linked third parties** section, add the customer(s) who will be able to access the document from the Customer Portal.
- 5 Save then go to **Edit > Publish the document**.


From the Linked documents tab

- 1 Open a list of documents from the **Linked documents** tab, in a customer record sheet, project record sheet, and so on.
- 2 Right-click on one or several documents in the list and select **Publish/Remove**.

From a search result

- 1 Start a search for documents.
- 2 Right-click on one or several documents in the list and select **Publish/Remove**.

Filing a document under a category

- 1 Open a list of documents:
 - Either from the **Linked documents** tab of a customer record sheet, a project record sheet, and so on.,
 - Or from a document search results.
- 2 Right-click on a document in the list and select **Filed under**.
- 3 In the **Classify documents** window, enter the name of the category and sub-category, then click on **Validate**.
 The update is done automatically in the Customer Portal. The content of duplicate items is automatically overwritten when you recreate categories and sub-categories.

Important

The fields in the **Classify documents** window are case-sensitive. Therefore, be consistent in the way you use uppercase and lowercase letters.

Removing a document

- 1 Open a list of documents:
 - Either from the **Linked documents** tab of a customer record sheet, a project record sheet, and so on.,
 - Or from a document record sheet,
 - Or from a document search results.
- 2 Right-click on a document in the list then select **Publish/Remove**.

5.1.2 From the Customer Portal


The documents management screen is accessed from the **Documents** menu.

Reminder

- It is recommended to set a size limit for documents that can be uploaded and specify the authorized file extensions. To do so, you must modify the following Tomcat parameters in the setup files: **t9gest.uploadmaxsize**, **t9gest.allowext** et **t9gest.disallowext**. For more information, refer to the documentation on Tomcat parameters.
- By default, a document is published with no end date.
- A document added from the Customer Portal can be found at the same location in the Application Desktop.

Adding a file from the computer

- 1 Select the file following the method of your choice:
 1. Drag and drop the document onto the **Drop a document** area.
 2. Click on the **Drop a document** area and select the file.

3. Above the **Drop a document** area, click on  > **File** then select the file.

2 In the **New document** window, enter a title and select a category and a sub-category.

3 Validate by clicking on **Save**.

Adding a web address

1 Click on  then on **Web address**.

2 In the **New document** window, enter the website's address and select a category and a sub-category.

3 Validate by clicking on **Save**.

Adding a file from Dropbox




1 Click on  then on **Dropbox**.

2 In the Dropbox page that opens, log into your account and select the file. Do not forget to enable documents sharing.

3 In the **New document** window, enter a title and select a category and a sub-category. The document URL is shared.

Managing the list display

The following icons are displayed at the bottom of the page:

- : enables you to export the list in Excel format. A file is automatically downloaded on your computer.
- : opens a window that helps you set up the columns that are displayed on the screen.
- : enables you to reload the list.

Deleting a document

To delete a document published from the Customer Portal, click on  in the **ACTIONS** column.

When you delete a document in the Customer Portal, the document is automatically deleted from the Application Desktop as well. You can only delete the documents you have published.

5.2 SEARCHING FOR DOCUMENTS

You can search for published documents in the Application Desktop or directly in the Customer Portal.

5.2.1 From the Application Desktop

Employees can access documents in the Customer Portal depending on their rights.

1 Go to **Tools > Documents**.

2 Start the search based on third-parties, publication dates, keywords, owners, and so on.

Published documents can be identified in the search results screen with the  icon.


5.2.2 From the Customer Portal

To quickly find a document in the Customer Portal, you can:

- Enter a text in the search field at the top right of the screen: the search is performed on the text displayed on the screen (document or file name, name of the publisher, etc.) and not on the document's content.
- Filter documents: filter fields are displayed on the left side of the screen. You can filter the results by read/unread documents, categories, sub-categories, contacts who published the document or publication periods.
- Navigate through the table by clicking on the arrows at the bottom of the page.

5.3 DOWNLOADING A DOCUMENT

To download a document published by you or another contact from the Customer Portal:

- Click on the document's title or the file's name in the table.
- Click on .

The file is downloaded on your hard drive and the operation is automatically saved in the history tab of the document record sheet in the Application Desktop.

6 Publishing and accessing a schedule

6.1 PUBLISHING A SCHEDULE

You can publish one or several of your schedules (projects, employees, etc.) in the Customer Portal, for the project's main customer to see.

Reminder: this action must be performed from the Application Desktop.

Publishing a schedule from a graphic view

- 1 Open the desired schedule's graphic view (from **My Akuiteo > My graphic schedule** for example).
- 2 Right-click on an assignment and select **Publish/Remove**.

Publishing multiple schedules from a graphic view

- 1 Open the desired schedule's graphic view.
- 2 Select the assignments you want to publish.
- 3 Right-click on the schedule - not on the assignments - and select **Publish/Remove**.

Publishing from a schedule search list

- 1 Go to **Dashboard > Labor > Schedules** and start a schedule search.
- 2 Right-click on a selection of schedules and select **Publish/Remove**.

Removing a schedule

If you want to unpublish a schedule:

- 1 Open the desired schedule in the Application Desktop.
- 2 Right-click on the schedule and select **Publish/Remove**.

Note that the schedule is only unpublished; it is not deleted from Akuiteo.

6.2 ACCESSING A SCHEDULE

Reminder: this action must not be performed from the Customer Portal.

Click on the **Schedule** menu.

Accessing the schedule

Various links - on which you can click - are displayed above the schedule:

- Today / Month / Week / Day / List: display the schedule over a given period
- Arrows: display the week preceding or following the current week displayed on the screen
- Graphic items: display the schedule based on the indicated item

In **Event**, on the right, you can see the details about a schedule's assignment.

Searching in the schedule

To quickly find a scheduled item, you can enter a text in the search box.

The search is performed on the text displayed on the screen.

Filtering the schedule display


With the items on the left, you can filter per project, task, contributor, place or period.

6.3 SEARCHING FOR A PUBLISHED SCHEDULE

The Dashboard module of the Application Desktop enables you to find and access shared schedules.

Reminder: this action must be performed from the Application Desktop.

- 1 Go to **Dashboard > Labor > Schedules**.
- 2 In the search screen, select **Yes** for the **Published** criteria in the **Publication** section, then start the search.

The search results window is displayed. The  icon in the **Published on** column shows the schedules that are published in the Customer Portal.

To see the information about the publication of assignments from a schedule's graphic view:

- 1 Select an assignment.
- 2 In the screen on the left, scroll down to the **Publication** section.

7 Creating and accessing a help desk issue

7.1 CREATING A HELP DESK ISSUE

A customer can enter a help desk issue online. The help desk management screen can be accessed from the **Help Desk** menu.

7.1.1 From the Application Desktop

When a help desk issue is created from the Application Desktop, you can decide whether to publish the issue on the Customer Portal.

Before publishing the issue, you have to users the users who will be able to view the issues.

- 1 Open an existing help desk issue or create a new one from the **Help Desk** menu.
- 2 From the issue you want to publish online, check the **Customer visible** box and save.
↳ The issue can be accessed from the Customer Portal.

7.1.2 From the Customer Portal

Reminder: The fields with * are required.

- 1 Click on the **Help Desk** menu > **New**.
- 2 Under **Contract**:
 1. Check **Not distributable** if you do not want to publish the issue.
 2. Select the **Contract** linked to the issue. If the contract only offers a single service for only one product, then the application will automatically fill in the **Service Delivery** and **Product** fields.
 3. Select the issue's **Service Delivery**, the related **Product**, the **Site** linked to the contract, the **Version** and **Revision**.
- 3 Under the **Context**:
 1. Select the **Type of ticket** (evolution, correction, etc.) and the issue's level of **Severity** (critical, major, minor).
 2. Enter the issue's references as well as the date on which you want the answer to be delivered.
- 4 Under **Description**:
 1. Enter a **Title** and indicate if there is an **Error code** associated with the issue. E.g.: 404 Error.
 2. Enter a comprehensive description of the issue. For the error to be adequately reproduced, it is recommended to avoid ambiguous terms and to clearly describe the steps.

3. Add an image (you can copy and paste an image or upload it from your computer) and customize your text if necessary using the text items bar.

5 Under **Contacts**:

1. Select the creator of the issue in the **Requester** field as well as the **User** - if it differs from the requester.
2. Enter the contact details.

6 Drop the documents linked to the issue (screenshots, attachments, logs, etc) in the **Linked file** area. To delete a document, click on .

7 Click on **Create**.


➡ The issue is created and a number is automatically generated. You can modify the issue at any time.

Note

As you select information in the issue, the list of **Related FAQs** is automatically updated. We recommend you check the list to see if there is an FAQ article that already addresses your issue.

7.2 TRACKING THE ACTIVITIES IN THE HELP DESK

Accessing a Help Desk issue

- 1 From a list of issues, click on the desired issue number. You can use available filters from the left part of the screen: status, type, requester, contract, service delivery, etc.
- 2 Click on the icons located at the top right of the page to:
 - close an issue;
 - duplicate an issue;
 - re-open a resolved issue;
 - print an issue.
- 3 Drop the documents linked to the issue (screenshots, attachments, logs, etc) in the **Linked file** area. To delete a document, click on .
- 4 Click on **Save** to take the modifications into account.

Printing analytical reports

To print summary reports linked to your help desk activities:




- 1 Click on the **Reports** tab.
- 2 Click on the desired report template in the list. The templates that are displayed are the same as the ones in the Help Desk module of the Application Desktop.

- 3 In the **Printing parameters** window, enter the information to display in the graphics, such as dates or the relevant version, and confirm your choice.

↳ The document automatically opens.

Managing the list display

The following icons are displayed at the bottom of the page:

- : enables you to export the list in Excel format. A file is automatically downloaded on your computer.
- : opens a window that helps you set up the columns that are displayed on the screen.
- : enables you to reload the list.

7.3 SEARCHING FOR A HELP DESK ISSUE

You can search for an issue from three different screens depending on the issue state:

- Open: enables you to search for an issue within received or open issues.
- Resolved: enables you to search for an issue within resolved issues.
- Search: enables you to search within all available issues.

Open and Resolved

- 1 Click on **Open** or **Resolved**.
- 2 If you know the issue number, enter it in the **Ticket #** field then click on **Ok**.
- 3 If you want to search by **Product**, select it in the drop-down list and click on **Filter**.

↳ The list of issues is displayed.

Search

- 1 Click on **Search**.
- 2 To start a search, fill in the relevant fields: issue number, product, version, etc.
- 3 Click on **Search**.

↳ The list of issues is displayed.

7.4 RE-OPENING AN ISSUE

For an issue that is resolved or closed externally, it is possible to re-open the issue if you find the initial problem has not been resolved or if the solution provided is not correct.

Note

If the issue must meet a specific deadline for its resolution (Guaranteed Response Time), the contractual deadline is calculated again if the Guaranteed Response Time was not already exceeded before the first resolution.

- 1 Click on the **Resolved** or **Closed** tab.
- 2 Select the issue to re-open to display its details, then click on **Re-opening** at the top right of the issue.
- 3 In the re-opening window, fill in the following fields:

Field	Description
Type of response	Select the task type from the drop-down list. This list displays the task types set up with the Reopening issue box checked.
Comment	Add a comment for the re-opening. This comment is added to the issue's messages.

- 4 Click on **Re-opening**.

↳ The issue is re-opened and the closing task (or the last task before the re-opening) is automatically completed. A re-opening task is created and completed automatically. A new open task is created, that contains the same information than the task preceding the closing task, with the same group and employee assigned to it.

The re-opening message is added to the **Customer response** tab of the re-opening task.

Example

A correction issue includes the following tasks:

1. The qualification task.
2. The software maintenance task.
3. The delivery task.
4. The closing task.

When the customer re-opens this issue, two new tasks are added:

5. The re-opening task, completed automatically.
6. A copy of the delivery task.

7.5 CLOSING AN ISSUE

At any time, you can close an issue that was created by you.

To do so:

- 1 Open one of your issues and click on **Close**.
- 2 Click on **OK**. The issue is closed.

- 3 Enter a comment, if necessary. The comment will be added to the external description of the issue's last open task.

The PWC_CLOTURE_TXT management rule enables you to set up the way a satisfaction score and comment will be entered and displayed when closing an issue from the Customer Portal. Enable this rule and set up the following information:

Field	Description
If Yes, then the closing comment is required	When Yes is checked, a closing comment must be entered. When No is checked, entering a closing comment is optional.
Satisfaction score input	Enter: <ul style="list-style-type: none">• 0 to hide the satisfaction score;• 1 to display the satisfaction score but its input is optional when closing an issue;• 2 to display the satisfaction score and its input is required when closing an issue.
Label displayed above the score	Enter the label to display above the satisfaction score.
Number of stars...	Enter the number of stars (from 1 to 5 stars) below which a closing comment must be entered. <div>Example If you enter 3, the closing comment must be entered if your customer gives a score of 1 or 2 stars.</div>
Default score at the opening	Enter the number of stars (from 1 to 5 stars) given by default when closing an issue. <div>Example If you enter 5, the default score will be 5 stars when a customer closes an issue. The customer can keep this default score or modify it before closing the issue.</div>

7.6 ENTERING A MESSAGE ON THE CUSTOMER PORTAL

To send a message from an issue to the Help Desk:

- 1 Log into the Customer Portal using your login information.
- 2 Open an issue from the **Help Desk** menu.
- 3 At the bottom of the issue, write a message in the **Messages** section then click on **Send**. Your message is displayed under the issue and can be seen by anyone who has access to this issue.

Once the issue is saved, you receive a confirmation email in your inbox.

Then, you will receive a message with a hyperlink that will redirect you to the Customer Portal where you will be able to see the answer to your message.

Important

You cannot add images to your message. This feature only enables you to send short messages to help you quickly and efficiently communicate with the Help Desk.

8 Publishing and accessing an FAQ

When you create or add an FAQ article from the Application Desktop, you can then publish and categorize it on the Customer Portal, but also remove it from the Portal.

You must first enable a list of DMFs.

8.1 DMFS TO ENABLE

1607** TOOLS FAQ *

160701 TOOLS FAQ NEW

160702 TOOLS FAQ MODIFY

160703 TOOLS FAQ DELETE

160704 TOOLS FAQ SEARCH

160705 TOOLS FAQ PUBLISH

160706 TOOLS FAQ VOTE

160707 TOOLS FAQ RESET VOTES

160708 TOOLS FAQ PROPOSE FAQ

160709 TOOLS FAQ NEW FEATURE

20***** FAQ * *

2001** FAQ FAQ *

200101 FAQ FAQ SHOW VOTE BUTTON

200102 FAQ FAQ SHOW VOTE RESULTS


2103** CUSTOMER PORTAL FAQ *

210301 CUSTOMER PORTAL FAQ ADD MESSAGE WITH NON-RELEVANT VOTE

210302 CUSTOMER PORTAL FAQ FORCE VOTE

8.2 PUBLISHING AN FAQ

8.2.1 Publishing a new FAQ article in the Customer Portal

- 1 From the Application Desktop, go to **Management** > **FAQ** > .
- 2 Enter the information about the article to publish:

- The title and the theme. You must have previously set up the themes in **Tools > Setup > General setup > Cross-cutting > FAQ subject area**.
- The product and the help desk issue associated with the article. There is a hyperlink which you can use to directly access the linked product or help desk issue.

This information is used to automatically categorize articles. This will enable the user to filter an FAQ search from the Customer Portal.

- 3 Enter the end date for the article's publication. Once the date has been reached, the article will be archived and will no longer be displayed in the Customer Portal.
- 4 Enter the questions/answers in the relevant fields. You can also enter a context (optional and not displayed in the Portal).
- 5 Save.
- 6 If needed, add a document to illustrate the FAQ by dropping it on the record sheet.
- 7 Go to **Edit > Publication of the FAQ**.

↳ The article can now be accessed from the Customer Portal.

Note

The **Useful / Unnecessary FAQ** and **Inspections** fields, as well as the **Messages** tab are displayed for informational purposes only. They enable you to track the votes on your article, the number of visits on the page, and read comments left in the Customer Portal. You can reset the visits counter at anytime, via **Edit > Reset the visit counter**.

8.2.2 Automatically publishing an FAQ from a help desk issue

Follow the steps below to document an issue in an FAQ article:

- 1 Open an existing help desk issue or create a new one from the **Help Desk** menu.
- 2 Switch the issue (standard format) to the modification mode and go to **Edit > New FAQ**. The FAQ screen is displayed and contains the issue and its answer.
- 3 Go to **Edit > Publication of the FAQ**.

↳ The article can now be accessed from the Customer Portal.

From the **Edit** menu of a standard issue, you can also select:

- **Vote**: Increments the number of votes. Multiple votes are not allowed: a user can only vote once for an FAQ.
- **Reset votes**: Resets the number of votes.
- **Propose FAQ**: Indicates that this help desk issue can be included in an FAQ. It will then have to be validated by the person in charge of the publication. Issues that are proposed as FAQs can be found from the search screen of a standard issue, by selecting the **Candidate FAQ** criteria in the **Additional criteria** tab.
- **List of linked FAQs**: Automatically starts a search for the FAQs linked to this help desk issue.

8.2.3 Removing an FAQ article from the Customer Portal

- 1 Go to **Management > FAQ** and start a search.
- 2 Open the article to remove then go to **Edit > Unpublish the FAQ**.
↳ The article will no longer be displayed in the Customer Portal.

8.3 SEARCHING FOR AN FAQ

- 1 From the Customer Portal, Click on **FAQ**.
- 2 In **Search for an FAQ**, select the relevant filter to display the questions / answers related to:
 - the product;
 - the theme: a topic on a specific module or field for example;
 - a specific version;
 - specific product revisions.
- 3 Enter a text in the search box if necessary and validate by clicking on **Ok**.
- 4 In the search results, click on the desired article. The content is displayed at the center of the page. You can also directly read the related FAQ articles displayed on the right of the screen by clicking on them.
- 5 You can also:
 - vote for the displayed article;
 - print the displayed article;
 - download the documents linked to the FAQ article.

9 Accessing invoices

DMF	020504 SALES INVOICES SEARCH
-----	------------------------------

As a customer's contact, you can search for and access the list of your customer's invoices.

The invoices screen can be accessed from the **Invoices** menu.

Printing an invoice




To print an invoice, click on the invoice line or directly on the printing icon.

Searching for an invoice

To quickly find an invoice, enter its reference number in the search box and click on **Ok**.

Managing the list display

The following icons are displayed at the bottom of the page:

- : enables you to export the list in Excel format. A file is automatically downloaded on your computer.
- : opens a window that helps you set up the columns that are displayed on the screen.
- : enables you to reload the list.

10 Accessing the checkbooks summary

To track checkbooks from the Customer Portal, you can access them directly from the dedicated screen.

To do so, click on the **Help Desk** menu > **Checkbooks** tab.

This feature requires the DMF 210602 CUSTOMER PORTAL HELP DESK VIEW CHECKBOOKS.

11 Customizing the Customer Portal interface

You can customize the way the Help Desk menu is displayed in the Customer Portal (colors, fonts, etc.). For all menus of the Portal, you can add a logo to replace Akuiteo's logo or change the colors and background image.

Reminder: this action must be performed by an administrator with css knowledge.

11.1 CUSTOMIZING THE HELP DESK INTERFACE IN THE CUSTOMER PORTAL

- 1 Make sure the DMF to customize the Customer Portal is enabled: 2104** CUSTOMER PORTAL CUSTOMIZATION.
- 2 Log into the Customer Portal.
- 3 Click on the **Help Desk** tab and open an issue.
- 4 At the top right of the screen, click on the connection menu and select **Customize this page**.
- 5 In the customization page, select the section to modify on the left.
- 6 On the right, a block is displayed to let you modify the css parameters such as the color, the font, the borders, etc.
- 7 Click on **Validate** after each modification.

Note

You can cancel all changes made by clicking on **Delete customization**.

11.2 INSERTING YOUR COMPANY'S LOGO AND MODIFYING THE INTERFACE

- 1 Create a folder on the server such as `C:\test` for instance.
- 2 From `<server_name>\webapp\akuiteo.clients\`, copy the `\css` and `\img` folders and paste them into `C:\test`.
- 3 Stop the Tomcat server.

- 4** Open the context.xml file and add the following code: `<Environment name="t9gest#cssImageDir" type="java.lang.String" value="c:\test" override="false"/>`
- 5** Restart the Tomcat server.
- 6** Replace the logo in `C:\test\img` and modify the css file, depending on your needs.

Your Customer Portal interface is updated.