Remote Support

How to Customize Support Portals

TC:3/4/2024

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How to Customize Support Portals

BeyondTrust allows you to create web support portals, or public web sites, for your BeyondTrust Appliance B Series. These portals allow your customers to request support utilizing BeyondTrust's remote support software. Each support portal can be configured to support your organization's branding and support processes. This includes customizing logos and allowing customers to start a BeyondTrust session using click-to-chat.

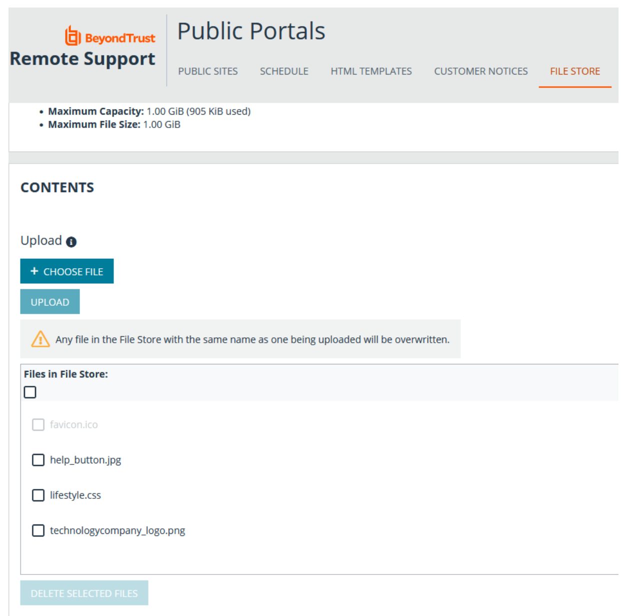
The first section of this document describes how to customize the BeyondTrust support portal using one example, Paxton Thomas Solutions, a fictitious company which provides help desk support for another company, Technology Company. This document focuses on the support for Technology Company in the first section. The second section describes integrating BeyondTrust into an external portal using several BeyondTrust customer examples.

Customize the BeyondTrust Support Portal

Upload Resources to the File Store

The BeyondTrust Appliance B Series provides a file store, located in the **/files** directory, that can be utilized to customize the public site web template. Here is an example of uploading an image file that contains a logo. The logo image is used later to update the HTML template itself.

1. From the **/login** administrative interface, go to **Public Portals > File Store**.
2. Under **Contents**, click **Choose File** and select the file you want to upload.
3. Click **Upload**. In this example, only one file was selected and uploaded: **technologycompany_logo.png**.
4. In the Customize the Public Site Web Template section, you can see how to utilize the file that was stored through this upload process.



***Note:** The maximum size for the entire file store is 1GB. However, file store for cloud deployments may vary.*

For more information, please see "Customize the Public Site Web Template" on page 5.

Customize the Public Site Web Template

Public Site Web Template

HTML templates define the layout and appearance of one or more support portals, and you can use them to alter your public portals accordingly. HTML templates pull Cascading Style Sheets (CSS) and graphical files from the File Store. Template changes require at least a basic understanding of HTML, but this guide will explain how to get started. HTML templates use a number of macros, some of the most important being:

%CONTENT_AREA%	This macro is used to display the main portal sections including the representative list, session key form, issue submission survey form, and content of the post-session landing pages. The options on the **Public Site Configuration** page are used to determine which sections are visible. This macro should not be removed.
%POWERED_BY%	Replaced by different links to more information about BeyondTrust, such as **Appliance-based Remote Desktop Control by BeyondTrust**, **See how BeyondTrust works**, and **Cross-Platform Remote Support Software**. If this macro is not defined, the image will be drawn in the bottom-right corner of the page.
%LANGUAGE_ SELECTION%	Replaced by a language dropdown menu when more than one language is enabled. If only one language is enabled, this macro will be replaced by the name of the enabled language. Languages are managed from the **Localization** tab of the /login admin web interface.
%HEAD_INCLUDES%	Adds the CSS files which control the layout and style of the page. This macro should not be removed.

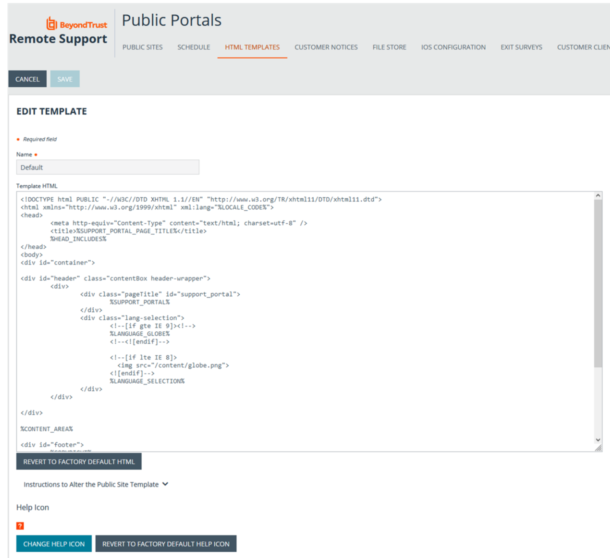
> ***Note:*** *There are other macros included in the default HTML that can be used. Removing and/or commenting out macros is not officially supported.*

Below are step-by-step instructions to perform some basic the portal customizations. For demonstration, three changes are made:

- The title is modified.
- A logo is added.
- A new content box is added.

You can use the following techniques for making modifications to customize your own portal, ensuring visitors know who owns it and from whom they are getting support.

1. From the /login administrative interface, go to **Public Portals > HTML Templates**.



2. Either create a new template, or select from one of the templates listed to edit.
3. Make any necessary changes to the title text by replacing **%SUPPORT_PORTAL_PAGE_TITLE%** and **%SUPPORT_PORTAL%** with your page title.
4. Next add your logo by locating **<div class="pageTitle">** and adding **** on a new line immediately above it.
5. Then add a new content box by locating **%CONTENT_AREA%** and adding the following on a new line above it **<div class="contentBox">helpful text</div>**.
6. Click **Save**.
7. To see the changes made to your portal, navigate to **Public Sites**.
8. Locate which site lists the template you modified and click on the associated address to load the page.

> ***Note:*** *The HTML template can be reverted to the default by clicking* ***Revert to Factory Default HTML****.*

> ***Note:*** *Administrators who wish to prevent search engines from crawling their public sites can enable the* ***Disable Public Site Indexing*** *option on the* ***/login > Management > Security*** *page.*

Help Icon

The next customized item is the help icon. The default icon is an orange box containing a question mark, and this image can be changed. Here are the step-by-step instructions.

1. From the /login administrative interface, go to **Public Portals > HTML Templates**.
2. The default template is available for editing. If you have added other templates, you also can edit those templates.
3. From the **Help Icon** section of the **HTML Templates** page, click on **Change Help Icon** or on the existing help icon itself. Browse to the location where the new icon is stored, select it and click **Open**. You can resize is as needed in the **Crop** dialogue window.

> ***Note:*** *The image size is 16×16 24-bit; any image format, such as .gif, .jpg, .bmp, or .png can be used.*

4. Once the file is uploaded, the existing help icon is replaced with your icon.

> ***Note:*** *The help icon can be reverted to the default by clicking* ***Revert to Factory Default Help Icon****.*

Show Notices and Business Hours on the Public Portal

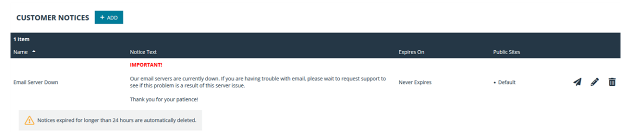
At times, you may need to display temporary messages to customers. Rather than requiring you to modify the HTML template, BeyondTrust provides two ways to display these messages: customer notices and public portal schedule messages.

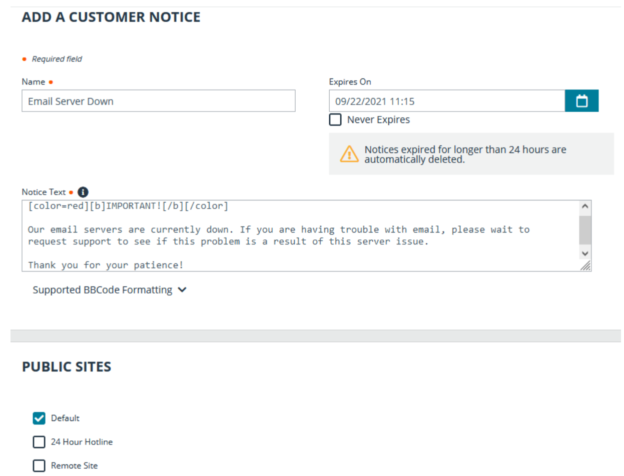
Customer Notices for Alerts and Information

Create notifications to temporarily display on your public site, in Support Buttons, and in the customer client. By making a notice visible to your customers, you could, for example, help alleviate a large number of sessions related to a known issue. You could also alert customers to upcoming service windows or holidays.

Below are step-by-step instructions to create a customer notice.

1. From the /login administrative interface, go to **Public Portals > Customer Notices**.
2. Click **Add** to add a customer notice. To edit an existing notice, click **Edit**.

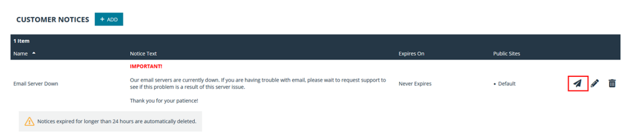




3. Specify a name for this customer notice. This name is to identify it in the list of notices on the /login page. It does not appear to the customer.
4. Add the text to display on the public site, in Support Buttons, and in the customer client. You can use macros, as well as BBCode to do some low level formatting, such as adding bold, colors, or hyperlinks. Click on **Macros** or **BBCode** to display a list of codes and their resulting applications.

> ***Tip:*** *As a best practice, keep messages relatively short so they can be viewed without much scrolling in the customer client. This applies to both the native client and click-to-chat modes.*

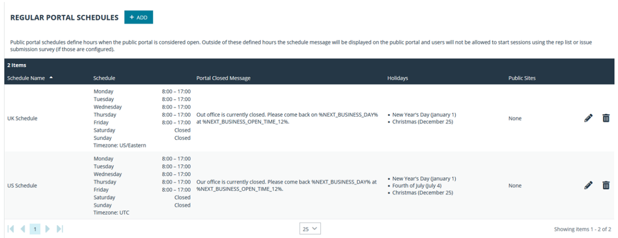
5. If this notice has a definite end time, such as a scheduled maintenance window or upcoming holiday hours, set an expiration date and time. Any notice which has been expired for more than 24 hours is automatically deleted. If the notice does not have a known end date, check **Never Expires**. This notice then remains on your site until it is manually deleted.
6. If you have more than one public site, select which ones should display the notice. You can select multiple portals.
7. After saving a customer notice, it automatically appears on the selected public portals and Support Buttons, as well as in the customer client of any new sessions linked to those portals. If you want to push a message to sessions already in progress, click **Send**.



Public Portal Schedules for Regular Business Hours

Configure one or more schedules of regular business hours for your public portals. Outside of these scheduled hours, session start methods other than session keys are removed from your public site, and a portal closed message displays on your public site.

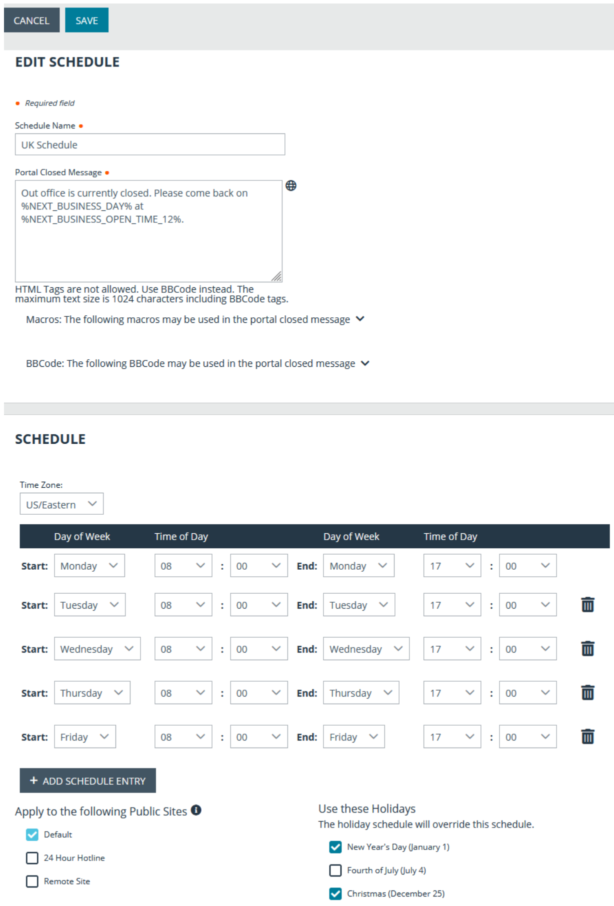
1. From the /login administrative interface, go to **Public Portals > Schedule**.
2. To add a schedule for normal business hours, click **Add**. To edit an existing schedule, click **Edit**.



3. Specify a name for this schedule. This name is to identify it in the list of schedules on the /login page. It does not appear to the customer.
4. Create the text to display outside of regularly scheduled hours. Messages can contain macros indicating the next open business day and time. You can use macros, as well as BBCode to do some low level formatting, such as adding bold, colors, or hyperlinks. Click on **Macros** or **BBCode** to display a list of codes and their resulting applications.
5. Set a schedule to define when customers can initiate support sessions. Set the time zone you want to use for this schedule, and then add one or more schedule entries. For each entry, set the start day and time and the end day and time.

   If, for instance, the time is set to start at 8 am and end at 5 pm, a customer can start a session at any time during this window. Sessions already in progress are allowed to continue past the schedule end. If session keys are enabled, a representative can send a customer a session key to start a session even outside of the public site schedule.

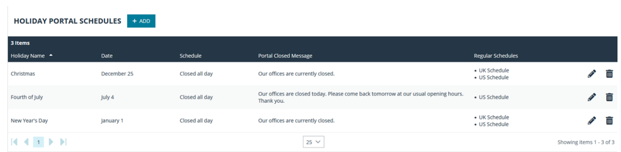
6. If you have already created holiday schedules, you can select which if any of those should apply to this regular schedule. Associations made here also apply to the holiday schedule settings.
7. If you have more than one public site, select which should follow this schedule. You can select multiple portals.



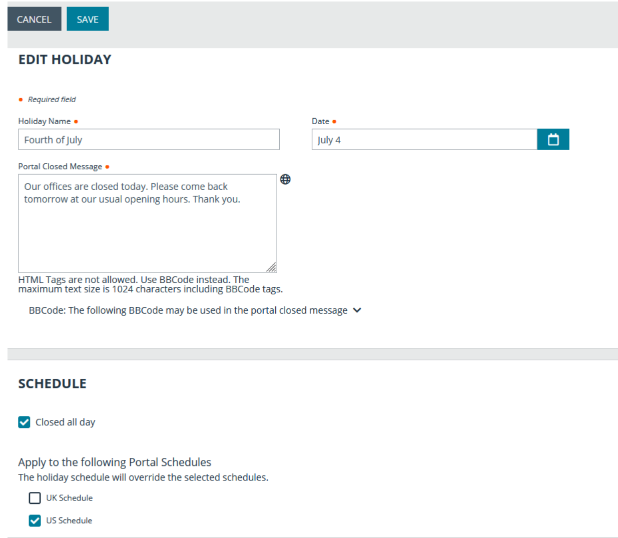
Holiday Hours for Public Portal Availability

When a holiday schedule is applied to a regular schedule, the hours set in the holiday schedule override the normal business hours. Holiday schedules can be used to set days off, days with abbreviated hours, or even days with extended hours.

1. To add a schedule for holiday business hours, click **Add** under Holiday Portal Schedules. Click the Edit icon to edit an existing schedule.



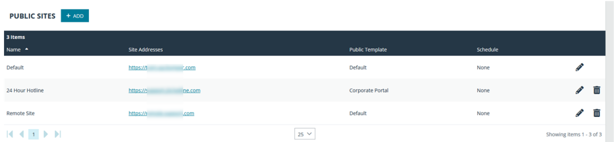
2. Specify a name for this schedule. This name is to identify it in the list of holiday schedules on the /login page. It does not appear to the customer.
3. Set the date when this schedule should apply.
4. Create the text to display outside of scheduled hours for this date. You can use Macros, as well as BBCode, to do some low level formatting, such as adding bold, colors, or hyperlinks. Click on **BBCode** to display a list of codes and their resulting applications.
5. Either select **Closed all day** or set a start time and end time. A modified schedule time can either shorten the regularly scheduled hours or lengthen them.
6. If you have already created regular schedules, you can select which if any this holiday schedule should apply to. Associations made here also apply to the regular schedule settings.



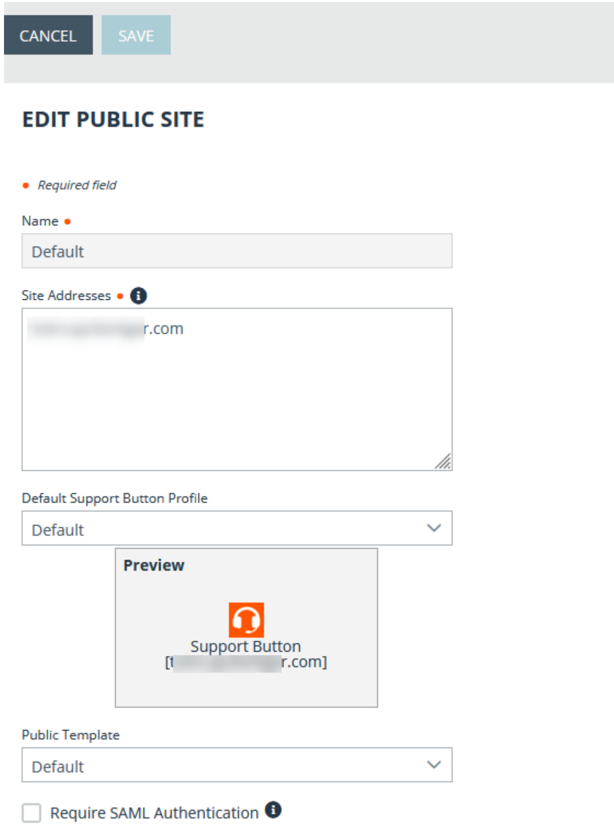
Choose Connection Options

Below are step-by-step instructions for updating the customer-facing support portal connection options.

1. From the **/login** administrative interface, go to **Public Portals > Public Sites**.
2. You can create multiple public sites. To add a site, click **Add**. To edit an existing site, click **Edit**.



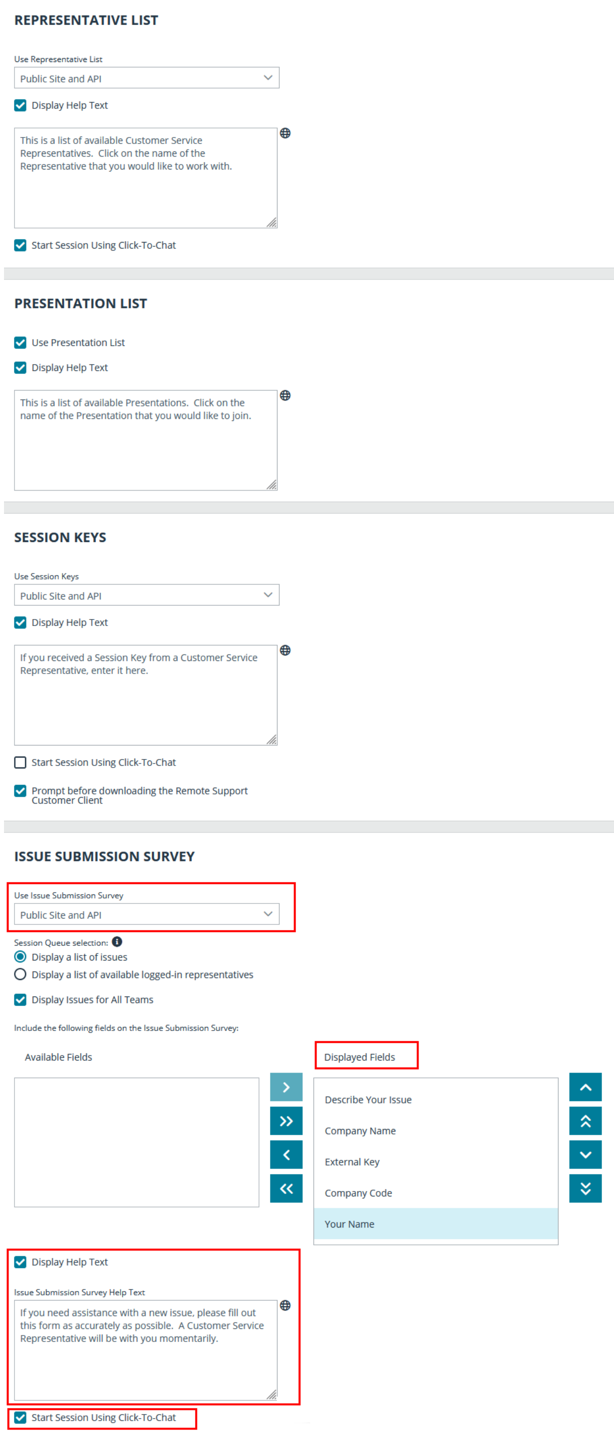
3. Specify a name for the site, as well as any DNS or IP addresses that your customers will use to access this specific site.
4. Select the default Support Button profile to use with this site and the HTML template to use.
5. Additionally, select whether this site should require SAML authentication or not and display customer notices or not.



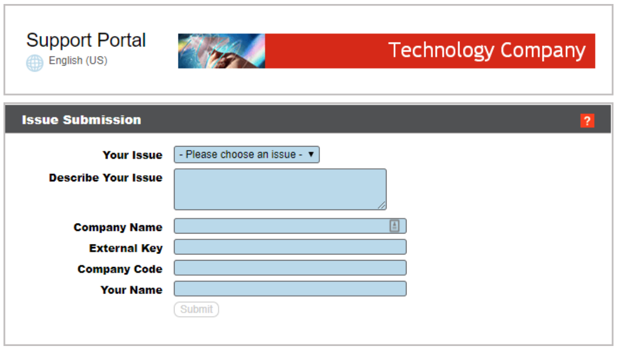
***Note:** The **Require SAML Authentication** option is available only if **SAML For Public Portals** is configured on the **Users & Security > Security Providers** page in **/login**. If this option is selected, customers must authenticate with an identity provider before a session is initiated using the public support portal.*

Also, note that a Support Button cannot be deployed from a session that was started from a SAML authenticated public portal and a Support Button cannot be used to start a session with a public portal that requires SAML authentication.

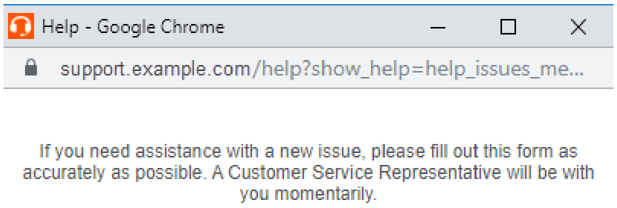
6. Choose which session start options you want available: a list of available representatives, a list of active presentations, a field for submitting one-time session keys, and a form to submit issue descriptions. Enable the options you want available and disable the others. In this example, only the issue submission survey is enabled.
7. The issue submission survey can display either a list of issues or a list of available representatives. In this example, the issue list is enabled, and issues are displayed for all configured teams. You can manage which issues will display on the selected public site. You can also create up to 30 custom fields to display in the issue form.
8. Modify the help text to make the instructions specific to your support site and customer base.
9. **Start Session Using Click-To-Chat** is enabled by default. Sessions begin with browser-based chat, not requiring customers to download or install the full BeyondTrust customer client. This is the recommended way to start sessions. If it becomes apparent that the full support tools are needed, such as controlling the customer's system through screen sharing, the representative can always prompt the customer to download the full customer client.



The customized customer support portal is depicted in the image shown here.



An example of the help text is shown here.



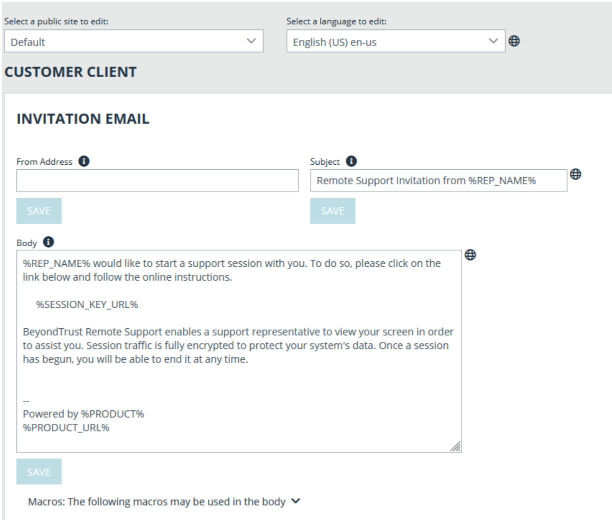
For more information, please see the following:

- *SAML for Single Sign-On Authentication at https://www.beyondtrust.com/docs/remote-support/how-to/integrations/security-providers/saml/index.htm*
- *Custom Fields: Create and Modify Fields for Public Portal Issue Submissions at https://www.beyondtrust.com/docs/remote-support/getting-started/admin/custom-fields.htm*

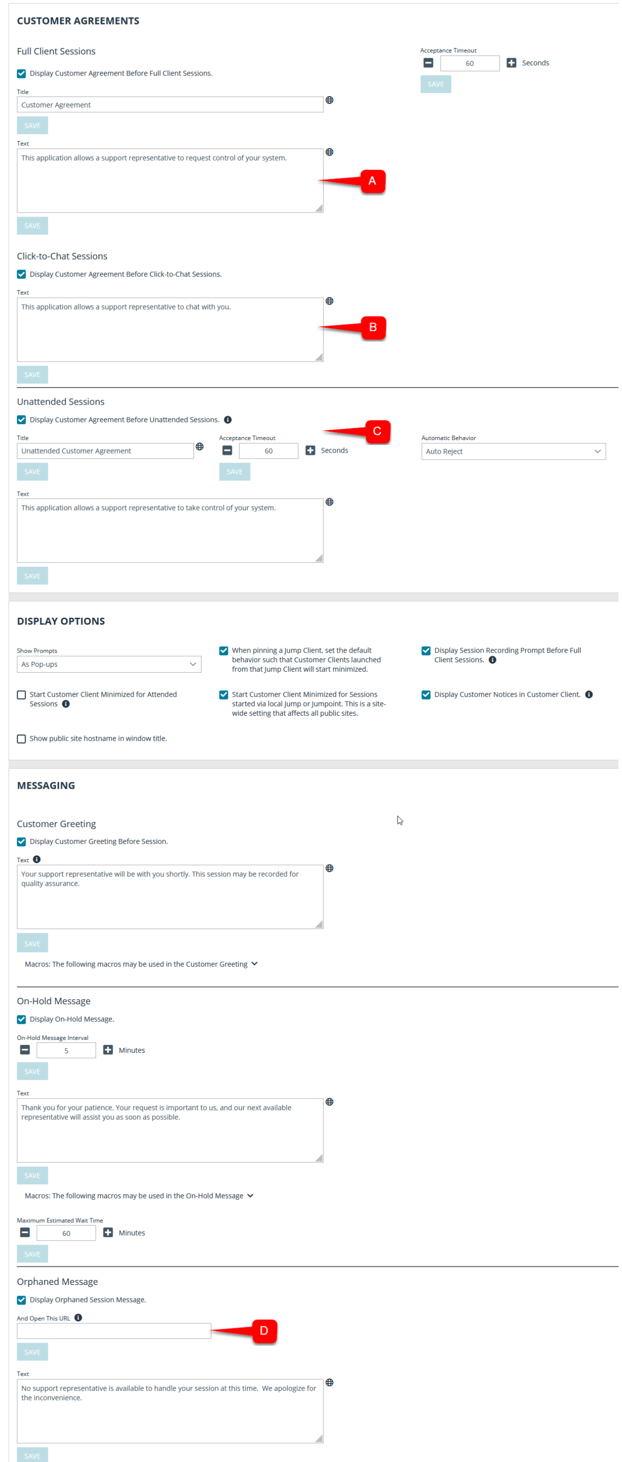
Modify the Customer Client Appearance

Here are the step-by-step instructions that describe how to update the agreements and the system messages your customers see while waiting for support, as well as how the customer client appears overall.

1. From the /login administrative interface, go to **Public Portals > Customer Client**.
2. You can modify the customer client for each public site. Select the public site to edit.
3. Edit the text of the email that is sent to customers when a representative sends a session key email.



4. Next, you may customize the way the customer client displays. In this example, the **Customer Agreement**, item **A**, is enabled, and the text in the agreement is modified for Technology Company.
5. A separate click-to-chat agreement, item **B**, is also displayed and customized.
6. The **Acceptance Timeout**, item **C**, sets how long the customer has to accept the agreement before the session closes; this timeout can be modified as appropriate to your needs.
7. Choose if the customer should be prompted to allow or deny session recordings. Also choose if customer notices should display in the customer client.
8. The **Customer Greeting**, **On Hold Message**, **Click-to-Chat Elevation Prompt**, and **Orphaned Session Message** can all be modified, as well.
9. If no representatives are available, the customer can be redirected to an orphaned session URL, item **D**. In this example, the customer's browser will open to https://www.remote.support.com/faq.



10. You may also upload a custom image file to serve as the customer client chat window banner.

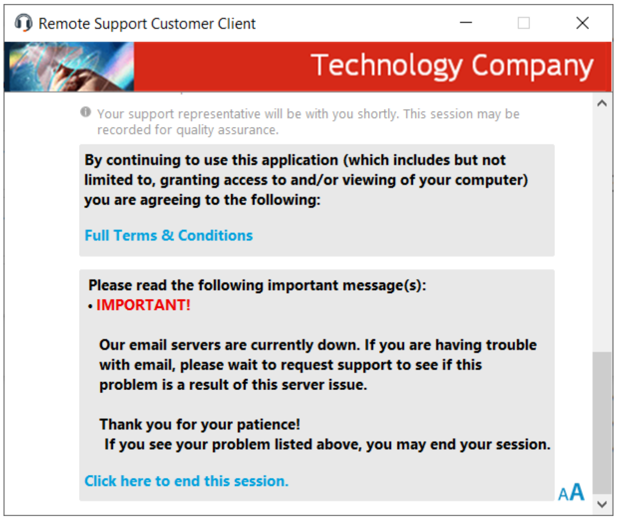
11. From the **Chat Window Banner** section of the **Customer Client** page, click **Change Chat Banner** to select and upload a new banner.

> ***Note:*** *This image must be a .png or .bmp file. The recommended width is 480 pixels. The recommended height is 40 pixels.*

12. Once the file is uploaded, all new sessions will use that image. Currently running sessions will not be affected.

> ***Note:*** *The chat window banner can be reverted to the default by clicking* ***Revert to Default****.*

13. Depicted to the right is the BeyondTrust customer client after the customizations for Technology Company. This is what customers will see when they download the customer client and allow a support representative for Technology Company to support their system.

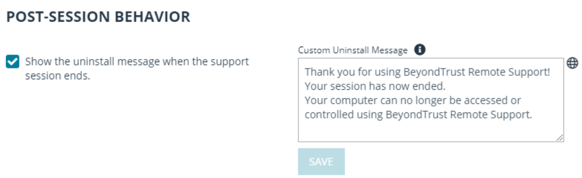


Customize the Uninstall Message and Exit Surveys

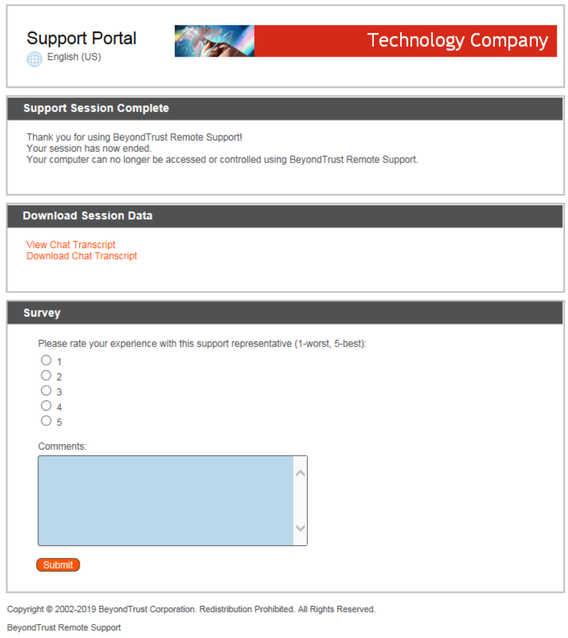
Uninstall Message

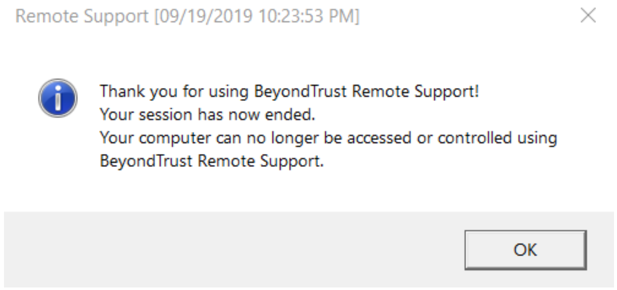
Here are the step-by-step instructions to modify the post-session display. The changes described allow you to customize the text displayed at the end of a BeyondTrust support session.

1. From the **/login** administrative interface, go to **Public Portals > Customer Client**.
2. In the **Post-Session Behavior** section, check the box to include the uninstall message. The uninstall message can also be customized.



3. Depicted to the right is the landing page to which customers are directed at the end of the session. You can see how the **Support Session Complete** message is displayed on this page.
4. Shown below is the message customers will see when the session ends.

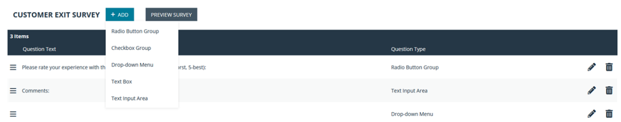




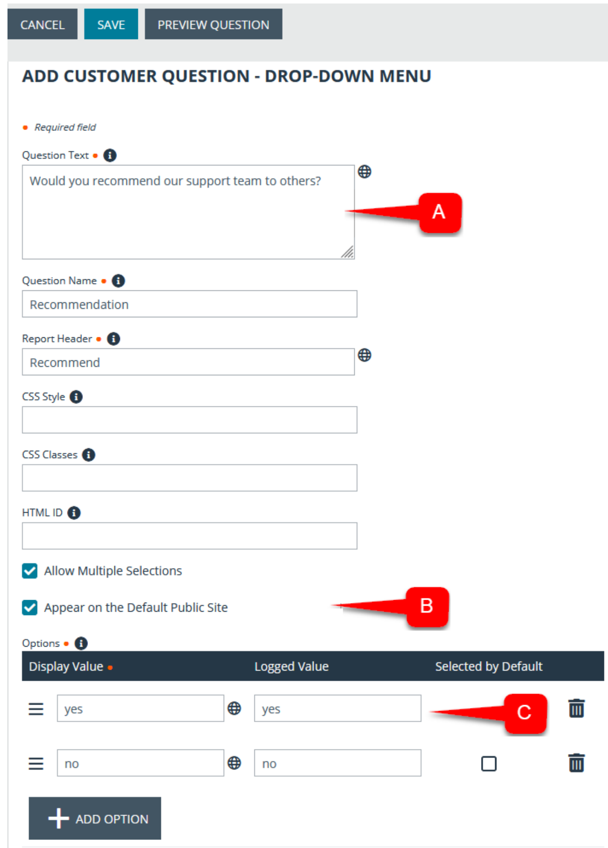
Exit Surveys and Session Data Downloads

Here are the step-by-step instructions to create and display a customized exit survey and to enable your customers to download the chat log and/or the video recording of their BeyondTrust support sessions.

1. From the **/login** administrative interface, select **Public Portals > Exit Surveys**.
2. Under **Customer Exit Survey**, click **Add**.
3. From the dropdown menu, select the type of question you want to add. In this example, a dropdown menu is being added.



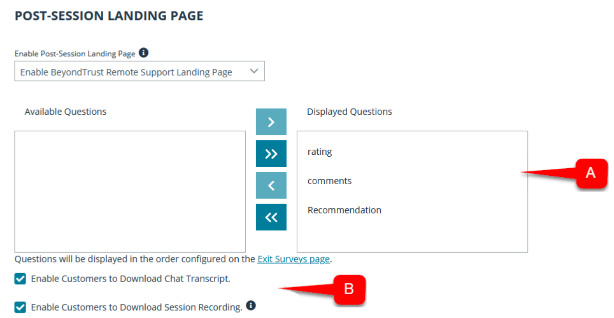
4. Add the question text and response options. In this example, the question, item **A**, is *Would you recommend our Support Team to others?* The options *Yes* and *No* are added as the options for the dropdown menu, item **C**.
5. Checking the option **Appear on the Default Public Site**, item **B**, will automatically add this question to the exit survey for the default site. Only ten questions can be displayed on any given survey.

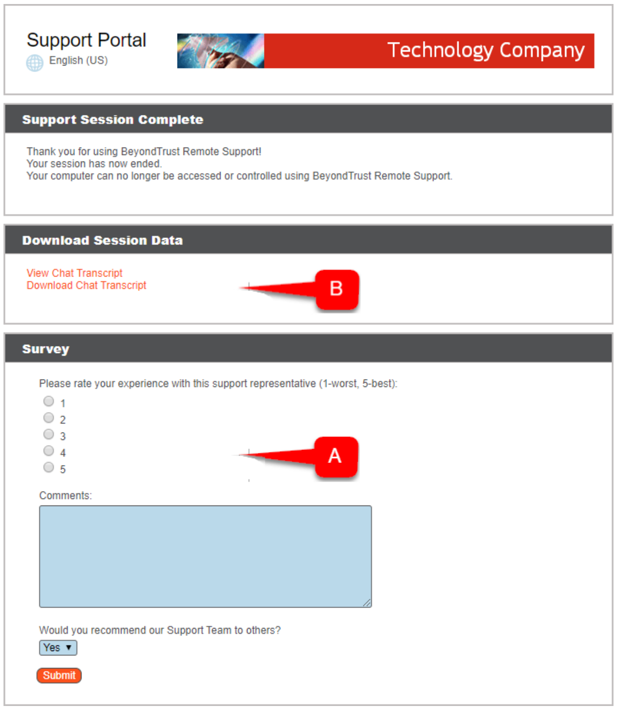


You must add the questions you want to ask to each public site you have configured. Here are the step-by-step instructions to add the *Recommendation* question to the default site.

1. From the **/login** administrative interface, go to **Public Portals > Public Sites**.
2. Edit the site for which you want to enable the survey, and then scroll to the bottom of the page.

3. From the dropdown in the **Post-Session Landing Page** section, select **Enable BeyondTrust Remote Support Landing Page**.
4. From the list of **Available Questions**, item **A**, select the questions you would like your customer to see and move them to the **Displayed Questions** list by clicking the **Add** button.
5. As shown with item **B**, the options **Enable Customers to Download Chat Transcript** and **Enable Customers to Download Session Recording** are checked. These settings allow Technology Company customers to download copies of support session chat transcript and screen sharing recordings to meet any compliance mandates, internal or external.
6. Depicted to the right is the landing page to which customers are directed at the end of the session. You can see how the customer exit survey, item **A**, appears at the bottom of the page. These questions could be reordered or even eliminated completely. Item **B**, the session data download links, is also displayed.





Advanced: Customize the CSS

Advanced users can customize the cascading style sheets (CSS) files on their BeyondTrust public site. By modifying the CSS, you can choose the fonts, colors, and so forth on your public site.

IMPORTANT!

BeyondTrust Technical Support does not offer technical assistance with CSS customization, as this is typically handled by the BeyondTrust Services division. Furthermore, BeyondTrust cannot guarantee that a custom CSS will be compatible with all future feature enhancements and appearance improvements. Therefore, if you customize the CSS of your public portal, be careful to thoroughly test BeyondTrust upgrades with your custom CSS prior to upgrading your production BeyondTrust site.

To customize the CSS of your BeyondTrust public site, follow the basic process below.

1. "Create the CSS file" on page 19
2. "Upload the CSS file to the file store" on page 20
3. "Reference the CSS file in the HTML template" on page 20

Create the CSS file

***Note:** To create your CSS file, BeyondTrust recommends starting with the default CSS files and modifying them in a plain text editor. The default CSS files are added by the **%HEAD_INCLUDES%** macro in the default HTML template. The three default CSS files are **common.css**, **public.css**, and **mobile.css**. Most of the CSS rules are in **common.css**, but a number of crucial rules are in **public.css**. The **mobile.css** file is used when the public site is loaded on mobile devices. It is feasible to include the contents of all three CSS files in a single file to simplify the CSS customization process.*

The steps below demonstrate how to make simple changes to your public site using a custom CSS file.

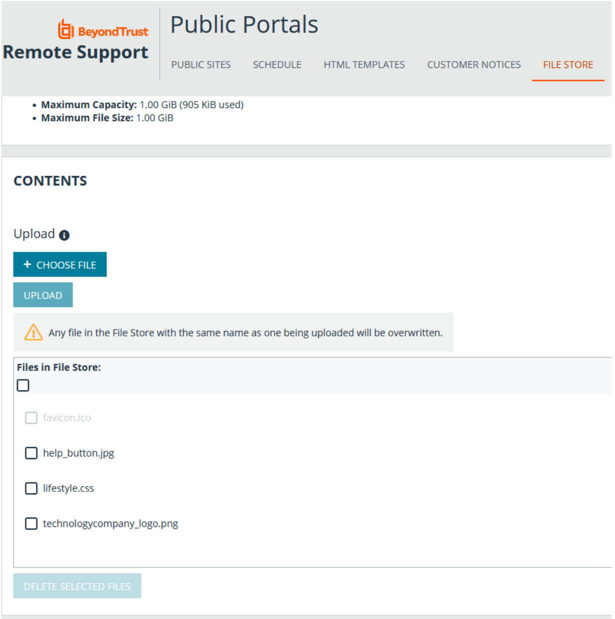
1. Create a new .css file, open it in a text editor, and create three headings:
   - /* COMMON CSS */
   - /* PUBLIC CSS */
   - /* MOBILE CSS */
2. Open each of the default CSS files in your browser by loading the following links, replacing "support.example.com" with the URL of your BeyondTrust site:
   - https://support.example.com/content/common.css
   - https://support.example.com/content/public.css
   - https://support.example.com/content/mobile.css
3. Select all of the text in each CSS file and paste the contents of each into the corresponding sections of your new CSS file.
4. In a browser, go to your public site URL, open your browser's developer tool, and inspect the various elements to identify what CSS attributes control them.
5. Modify the appropriate CSS attributes in your CSS file based on the information from your browser's developer tool and save your CSS file once you are finished.

Upload the CSS file to the file store

1. Go to **/login > Public Portals > File Store**.
2. Under **Contents**, click **Choose File**.
3. Select your CSS file using the file browser and click **Upload**.

> ***Note:*** *If you already have the file uploaded, the existing version will be overwritten by the uploaded version automatically.*

> ***Note:*** *The maximum size for the entire file store is 1GB.*



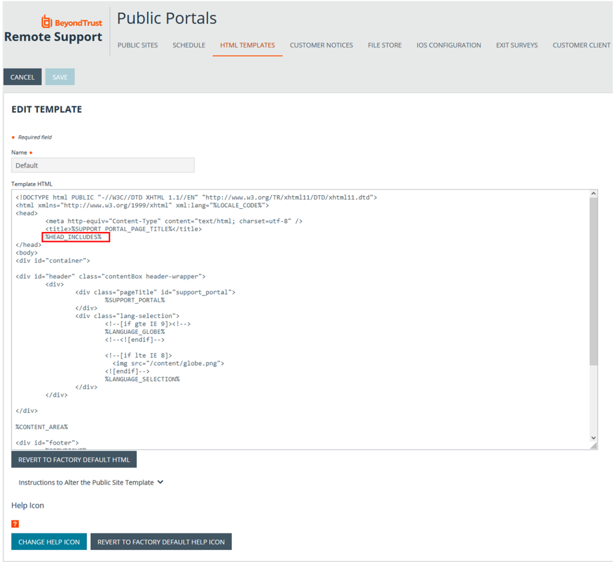
Reference the CSS file in the HTML template

1. Go to **/login > Public Portals > HTML Templates**.
2. Select the template to edit, or create a new one.
3. Locate the line with **%HEAD_INCLUDES%**, add a line after it, and enter the following code, where **stylesheet.css** is the name of your CSS file in the file store. This is case sensitive.

   <link href="/files/stylesheet.css?view=1" rel="stylesheet" type="text/css" />

4. Save your changes, switch to the **/login > Public Portals > Public Sites** tab, and click the URL of the site which is using the HTML template you just saved.

   If no site is currently using your template, edit or create a site which does so. Once the site loads, it should reflect your CSS customizations.



Example:

```
<head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
    <title>%SUPPORT_PORTAL_PAGE_TITLE%</title>
    %HEAD_INCLUDES%
    <link href="/files/stylesheet.css?view=1" rel="stylesheet" type="text/css" />
</head>
```

Advanced: Use the API to Integrate BeyondTrust with Your External Site

The BeyondTrust Application Programming Interface allows your development team to utilize the BeyondTrust functionality within your own support processes and external portals. The BeyondTrust API allows you to:

- Generate BeyondTrust sessions
- Manage BeyondTrust sessions
- Access BeyondTrust's reporting features
- Back up your BeyondTrust site configuration

While the BeyondTrust API supports the different areas described above, this document only contains customer examples that utilize the BeyondTrust API to generate BeyondTrust sessions. This document does not show examples for the other three areas supported by the BeyondTrust API, and it is not intended to show you actual coding examples.

It is important to note that using the BeyondTrust API requires knowledge of API usage and programming as a prerequisite. It is each customer's responsibility to manage their specific integration needs.

For more information, please see the following:

- *For detailed API information, the BeyondTrust API Programmer's Guide at www.beyondtrust.com/docs/remote-support/how-to/integrations/api*
- *For information about BeyondTrust's professional integration services, www.beyondtrust.com/services*

Session Generation

Using the API, sessions can be generated in the same three ways as with the BeyondTrust public site, previously described in this document. These methods include:

1. Selecting a named representative
2. Submitting a unique session key
3. Submitting an issue submission form

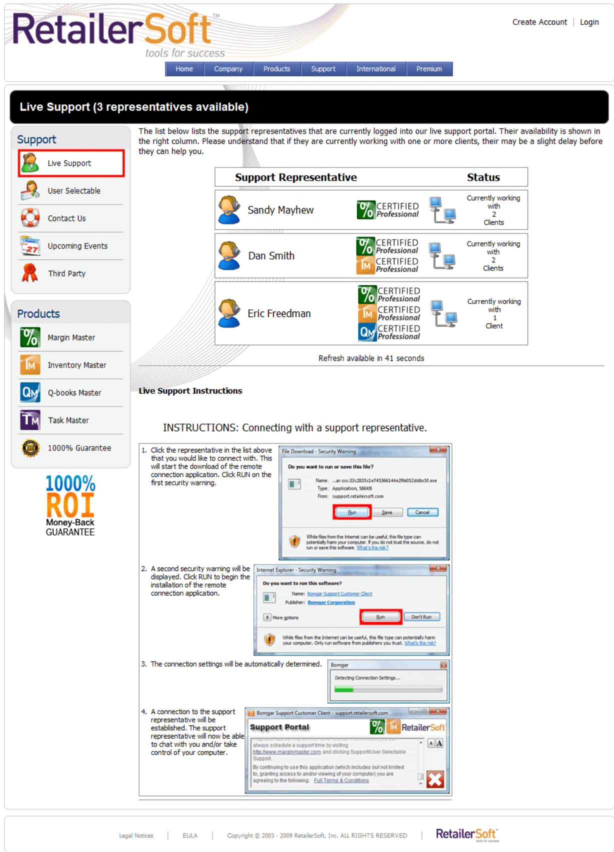
Examples

IMPORTANT!

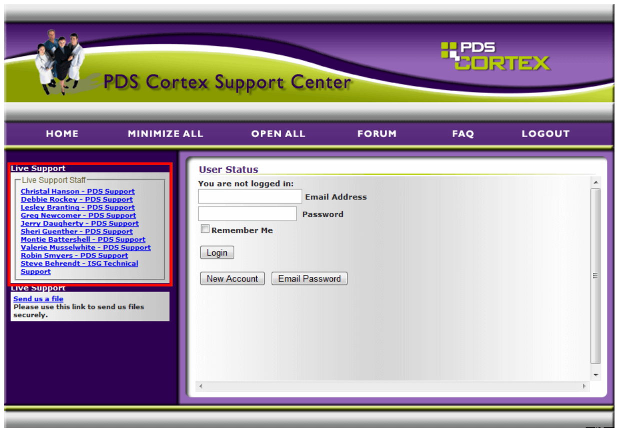
These sites are provided as examples only. Please do not contact these companies for assistance with your BeyondTrust solution. Instead, please visit www.beyondtrust.com/support.

Depicted to the right is an example of one of BeyondTrust's customers, Computer Integrated Solutions, who utilizes the BeyondTrust API. Once a CIS customer selects **Live Support** from the main CIS web site, the actual support page is shown. The customer can then start a session by entering a unique session key, which is supported by the BeyondTrust API.

Another example of a BeyondTrust customer is RetailerSoft, who utilizes the BeyondTrust API to start sessions. At this site, customers can start a session by selecting a support representative. This representative list uses the BeyondTrust API functionality of selecting a named representative.



In the customer example to the right, PDS Cortext Support Center uses the BeyondTrust API to start a session by selecting a named representative.



Depicted to the right is another example of a BeyondTrust customer, Barry Trent, who uses the BeyondTrust API to start sessions using the issue submission form.