



# BeyondTrust

## **Remote Support How to Customize Support Portals**

# Table of Contents

---

<b>How to Customize Support Portals</b> .....	<b>3</b>
<b>Customize the BeyondTrust Support Portal</b> .....	<b>4</b>
Upload Resources to the File Store .....	4
Customize the Public Site Web Template .....	5
Public Site Web Template .....	5
Help Icon .....	6
Show Notices and Business Hours on the Public Portal .....	7
Customer Notices for Alerts and Information .....	7
Public Portal Schedules for Regular Business Hours .....	8
Holiday Hours for Public Portal Availability .....	8
Choose Connection Options .....	10
Modify the Customer Client Appearance .....	13
<b>Customize the Uninstall Message and Exit Surveys</b> .....	<b>16</b>
Uninstall Message .....	16
Exit Surveys and Session Data Downloads .....	17
<b>Advanced: Customize the CSS</b> .....	<b>19</b>
Create the CSS file .....	19
Upload the CSS file to the file store .....	20
Reference the CSS file in the HTML template .....	20
<b>Advanced: Use the API to Integrate BeyondTrust with Your External Site</b> .....	<b>22</b>
Session Generation .....	22
Examples .....	23

## 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.

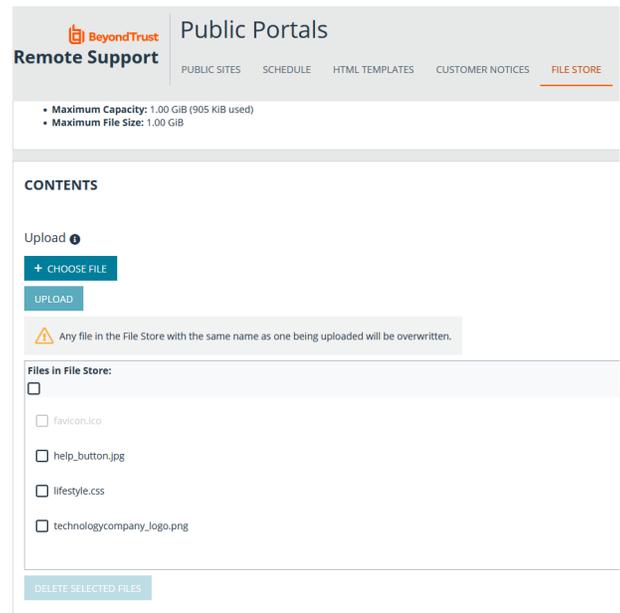
The first section of this document describes how to customize the BeyondTrust support portal using one example, Paxton Thomas Solutions, a fictitious company which provides help desk support for another company, Technology Company. This document focuses on the support for Technology Company in the first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

<b>%CONTENT_AREA%</b>	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 <b>Public Site Configuration</b> page are used to determine which sections are visible. This macro should not be removed.
<b>%POWERED_BY%</b>	Replaced by different links to more information about BeyondTrust, such as <b>Appliance-based Remote Desktop Control by BeyondTrust</b> , <b>See how BeyondTrust works</b> , and <b>Cross-Platform Remote Support Software</b> . If this macro is not defined, the image will be drawn in the bottom-right corner of the page.
<b>%LANGUAGE_SELECTION%</b>	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 <b>Localization</b> tab of the /login admin web interface.
<b>%HEAD_INCLUDES%</b>	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.

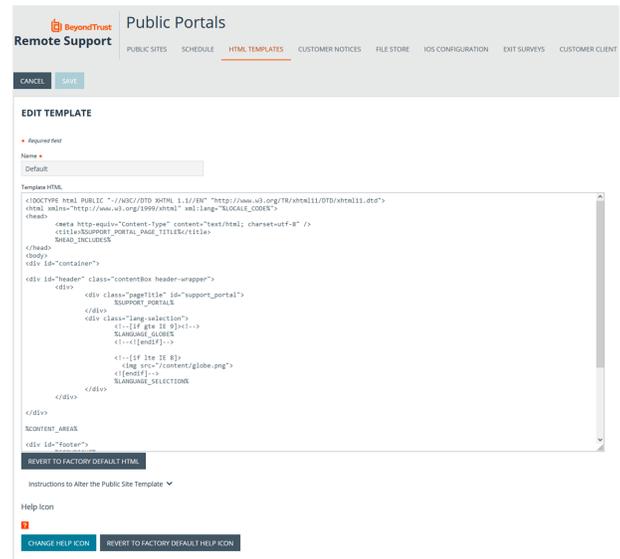
Below are step-by-step instructions to perform some basic the portal customizations. For demonstration, three changes are made:

- 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.

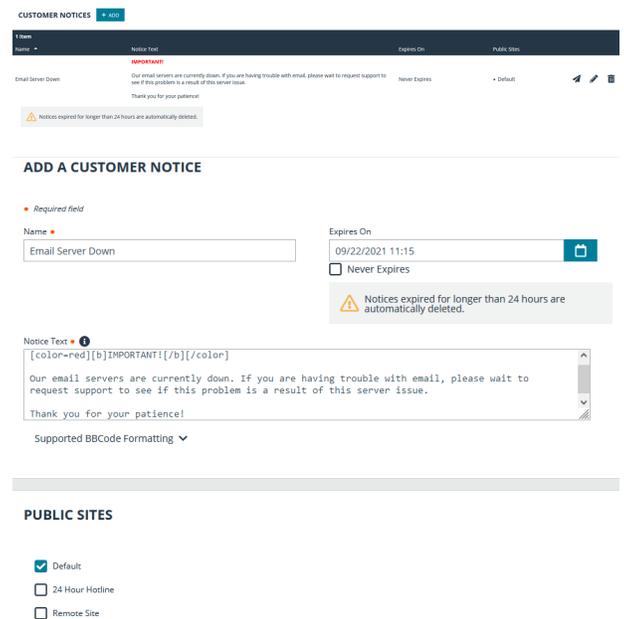
Below are step-by-step instructions to create a customer notice.

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**.

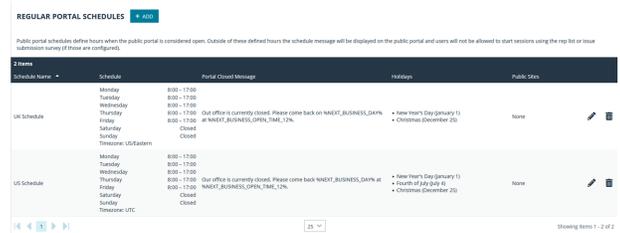
3. Specify a name for this schedule. This name is to identify it in the list of schedules on the /login page. It does not appear to the customer.
4. Create the text to display outside of regularly scheduled hours. Messages can contain macros indicating the next open business day and time. You can use 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.



**REGULAR PORTAL SCHEDULES** + ADD

Public portal schedules define hours when the public portal is considered open. Outside of these defined hours the schedule message will be displayed on the public portal and users will not be allowed to start sessions using the rep list or issue submissions (unless if those are configured).

Schedule Name	Schedule	Portal Closed Message	Holidays	Public Sites
UK Schedule	Monday: 8:00 - 17:00 Tuesday: 8:00 - 17:00 Wednesday: 8:00 - 17:00 Thursday: 8:00 - 17:00 Friday: 8:00 - 17:00 Saturday: Closed Sunday: Closed Timezone: UK/Eastern	Our office is currently closed. Please come back on %NEXT_BUSINESS_DAY% at %NEXT_BUSINESS_OPEN_TIME_12%.	New Year's Day (January 1) Christmas (December 25)	None
US Schedule	Monday: 8:00 - 17:00 Tuesday: 8:00 - 17:00 Wednesday: 8:00 - 17:00 Thursday: 8:00 - 17:00 Friday: 8:00 - 17:00 Saturday: Closed Sunday: Closed Timezone: UTC	Our office is currently closed. Please come back %NEXT_BUSINESS_DAY% at %NEXT_BUSINESS_OPEN_TIME_12%.	New Year's Day (January 1) Fourth of July (July 4) Christmas (December 25)	None

CANCEL SAVE

**EDIT SCHEDULE**

Required field

Schedule Name

UK Schedule

Portal Closed Message

Our office is currently closed. Please come back on %NEXT\_BUSINESS\_DAY% at %NEXT\_BUSINESS\_OPEN\_TIME\_12%.

HTML Tags are not allowed. Use BBCode instead. The maximum text size is 1024 characters including BBCode tags.

Macros: The following macros may be used in the portal closed message

BBCode: The following BBCode may be used in the portal closed message

**SCHEDULE**

Time Zone: US/Eastern

Day of Week	Time of Day	Day of Week	Time of Day
Start: Monday	08 : 00	End: Monday	17 : 00
Start: Tuesday	08 : 00	End: Tuesday	17 : 00
Start: Wednesday	08 : 00	End: Wednesday	17 : 00
Start: Thursday	08 : 00	End: Thursday	17 : 00
Start: Friday	08 : 00	End: Friday	17 : 00

+ ADD SCHEDULE ENTRY

Apply to the following Public Sites

Default  
 24 Hour Hotline  
 Remote Site

Use these Holidays  
The holiday schedule will override this schedule.

New Year's Day (January 1)  
 Fourth of July (July 4)  
 Christmas (December 25)

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.

**HOLIDAY PORTAL SCHEDULES** + ADD

holiday name	Date	Schedule	Portal Closed Message	Regular Schedules
Christmas	December 25	Closed all day	Our offices are currently closed.	<ul style="list-style-type: none"> <li>• UK Schedule</li> <li>• US Schedule</li> </ul>
Fourth of July	July 4	Closed all day	Our offices are closed today. Please come back tomorrow at our usual opening hours. Thank you.	<ul style="list-style-type: none"> <li>• UK Schedule</li> <li>• US Schedule</li> </ul>
New Year's Day	January 1	Closed all day	Our offices are currently closed.	<ul style="list-style-type: none"> <li>• UK Schedule</li> <li>• US Schedule</li> </ul>

Showing items 1 - 3 of 3

---

CANCEL
SAVE

**EDIT HOLIDAY**

\* Required field

Holiday Name  Date  📅

Portal Closed Message

HTML Tags are not allowed. Use BBCode instead. The maximum text size is 1024 characters including BBCode tags.

BBCode: The following BBCode may be used in the portal closed message ▼

---

**SCHEDULE**

Closed all day

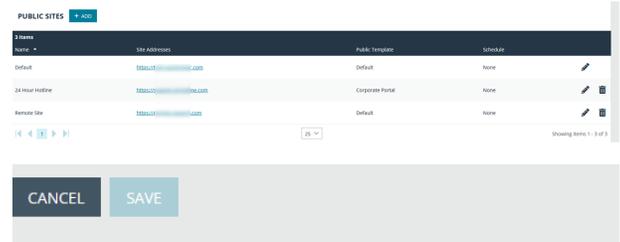
Apply to the following Portal Schedules  
The holiday schedule will override the selected schedules.

UK Schedule  
 US Schedule

## 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.



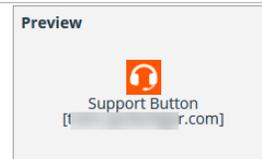
### EDIT PUBLIC SITE

• Required field

Name •  
Default

Site Addresses • i  
[redacted].r.com

Default Support Button Profile  
Default



Public Template  
Default

Require SAML Authentication i



**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.

#### REPRESENTATIVE LIST

Use Representative List  
Public Site and API

Display Help Text

This is a list of available Customer Service Representatives. Click on the name of the Representative that you would like to work with.

Start Session Using Click-To-Chat

#### PRESENTATION LIST

Use Presentation List

Display Help Text

This is a list of available Presentations. Click on the name of the Presentation that you would like to join.

#### SESSION KEYS

Use Session Keys  
Public Site and API

Display Help Text

If you received a Session Key from a Customer Service Representative, enter it here.

Start Session Using Click-To-Chat

Prompt before downloading the Remote Support Customer Client

#### ISSUE SUBMISSION SURVEY

Use Issue Submission Survey  
Public Site and API

Session Queue selection:  Display a list of issues  
 Display a list of available logged-in representatives

Display Issues for All Teams

Include the following fields on the Issue Submission Survey:

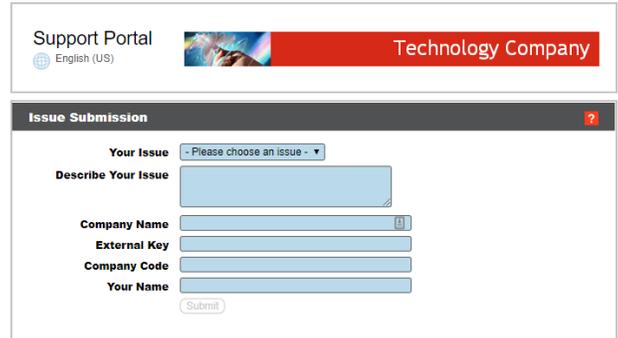
Available Fields	Displayed Fields
	Describe Your Issue
	Company Name
	External Key
	Company Code
	Your Name

Display Help Text

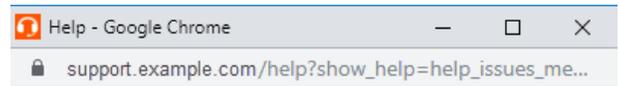
Issue Submission Survey Help Text  
If you need assistance with a new issue, please fill out this form as accurately as possible. A Customer Service Representative will be with you momentarily.

Start Session Using Click-To-Chat

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



An example of the help text is shown here.



If you need assistance with a new issue, please fill out this form as accurately as possible. A Customer Service Representative will be with you momentarily.



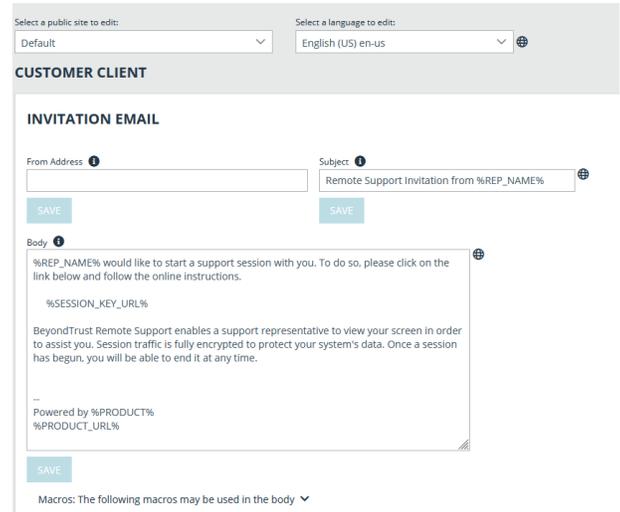
For more information, please see the following:

- [SAML for Single Sign-On Authentication at https://www.beyondtrust.com/docs/remote-support/how-to/integrations/security-providers/saml/index.htm](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](https://www.beyondtrust.com/docs/remote-support/getting-started/admin/custom-fields.htm)

## Modify the Customer Client Appearance

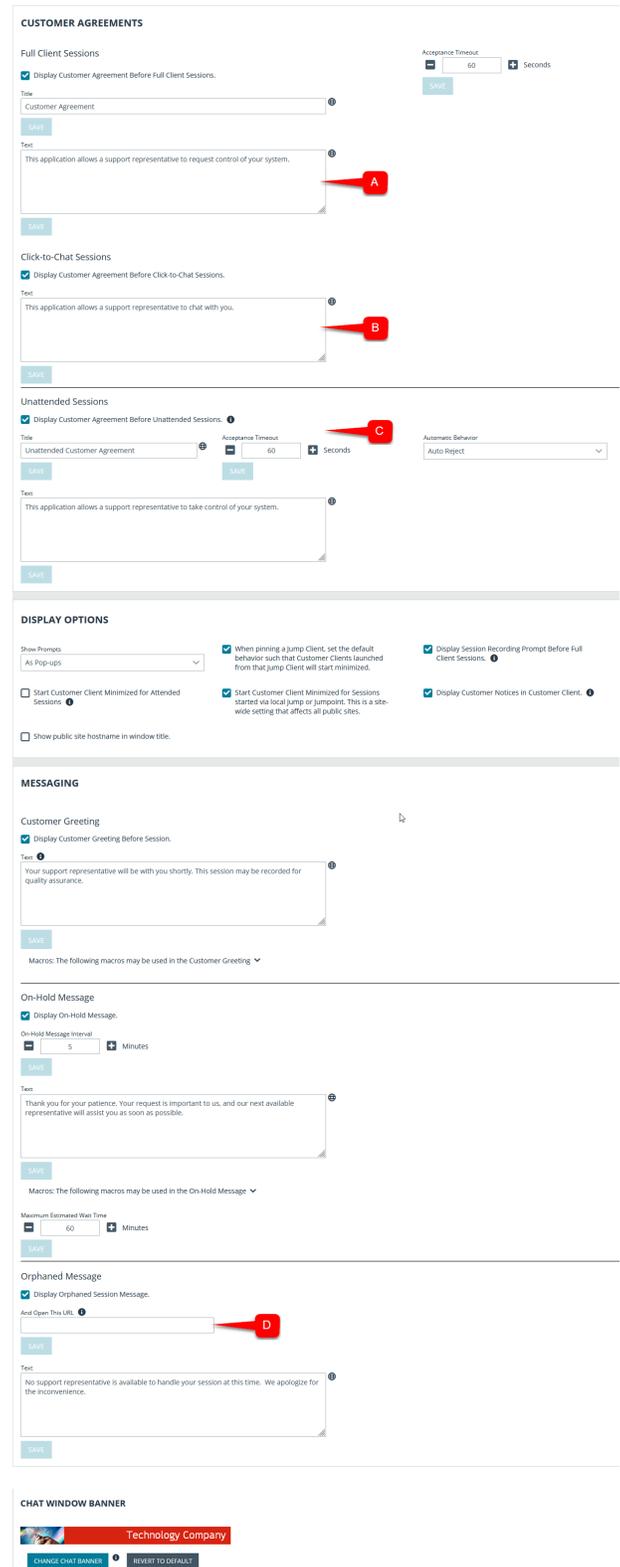
Here are the step-by-step instructions that describe how to update the agreements and the system messages your customers see while waiting for support, as well as how the customer client appears overall.

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.



The screenshot shows the 'CUSTOMER CLIENT' configuration page. At the top, there are two dropdown menus: 'Select a public site to edit:' (set to 'Default') and 'Select a language to edit:' (set to 'English (US) en-us'). Below these is the 'CUSTOMER CLIENT' header. The main section is titled 'INVITATION EMAIL'. It contains three fields: 'From Address' (empty), 'Subject' (set to 'Remote Support Invitation from %REP\_NAME%'), and 'Body' (containing a template email message). Each field has a 'SAVE' button. The 'Body' field contains the following text: '%REP\_NAME% would like to start a support session with you. To do so, please click on the link below and follow the online instructions. %SESSION\_KEY\_URL% BeyondTrust Remote Support enables a support representative to view your screen in order to assist you. Session traffic is fully encrypted to protect your system's data. Once a session has begun, you will be able to end it at any time. -- Powered by %PRODUCT% %PRODUCT\_URL%'. Below the 'Body' field is another 'SAVE' button and a note: 'Macros: The following macros may be used in the body'.

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>.



**CUSTOMER AGREEMENTS**

**Full Client Sessions**

Display Customer Agreement Before Full Client Sessions.

Acceptance Timeout: 60 Seconds

Title: Customer Agreement

Text: This application allows a support representative to request control of your system.

**Click-to-Chat Sessions**

Display Customer Agreement Before Click-to-Chat Sessions.

Title: Click-to-Chat Sessions

Text: This application allows a support representative to chat with you.

**Unattended Sessions**

Display Customer Agreement Before Unattended Sessions.

Title: Unattended Customer Agreement

Acceptance Timeout: 60 Seconds

Automatic Behavior: Auto Reject

Text: This application allows a support representative to take control of your system.

**DISPLAY OPTIONS**

Show Prompts: All Pop-ups

When pinning a Jump Client, set the default behavior such that Customer Clients launched from that Jump Client will start minimized.

Display Session Recording Prompt Before Full Client Sessions.

Start Customer Client Minimized for Attended Sessions.

Start Customer Client Minimized for Sessions started via local Jump or Jumpoint. This is a site-wide setting that affects all public sites.

Display Customer Notices in Customer Client.

Show public site hostname in window title.

**MESSAGING**

**Customer Greeting**

Display Customer Greeting Before Session.

Text: Your support representative will be with you shortly. This session may be recorded for quality assurance.

Macros: The following macros may be used in the Customer Greeting

**On-Hold Message**

Display On-Hold Message.

On-Hold Message Interval: 5 Minutes

Text: Thank you for your patience. Your request is important to us, and our next available representative will assist you as soon as possible.

Macros: The following macros may be used in the On-Hold Message

Maximum Estimated Wait Time: 60 Minutes

**Orphaned Message**

Display Orphaned Session Message.

And Open This URL: <https://www.remote.support.com/faq>

Text: No support representative is available to handle your session at this time. We apologize for the inconvenience.

**CHAT WINDOW BANNER**

Technology Company

CHANGE CHAT BANNER | REVERT TO DEFAULT

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.



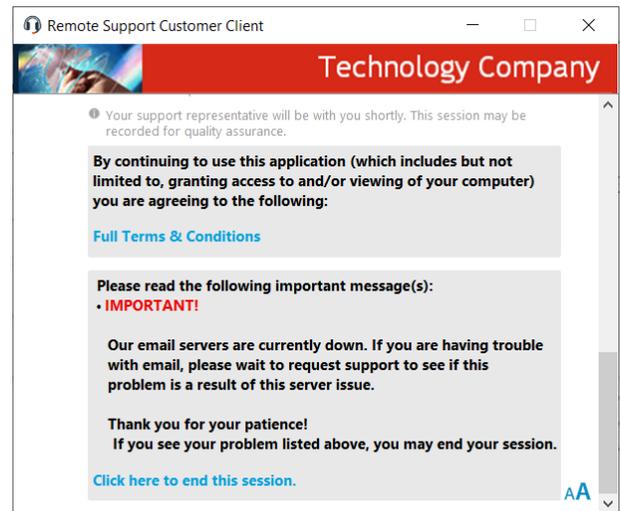
**Note:** This image must be a .png or .bmp file. The recommended width is 480 pixels. The recommended height is 40 pixels.

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.

### POST-SESSION BEHAVIOR

Show the uninstall message when the support session ends.

Custom Uninstall Message ⓘ

Thank you for using BeyondTrust Remote Support!  
 Your session has now ended.  
 Your computer can no longer be accessed or controlled using BeyondTrust Remote Support.

SAVE

Support Portal  
English (US)

Technology Company

**Support Session Complete**

Thank you for using BeyondTrust Remote Support!  
 Your session has now ended.  
 Your computer can no longer be accessed or controlled using BeyondTrust Remote Support.

**Download Session Data**

[View Chat Transcript](#)  
[Download Chat Transcript](#)

**Survey**

Please rate your experience with this support representative (1-worst, 5-best):

1  
 2  
 3  
 4  
 5

Comments:

[Submit](#)

Copyright © 2002-2019 BeyondTrust Corporation. Redistribution Prohibited. All Rights Reserved.  
 BeyondTrust Remote Support

Remote Support [09/19/2019 10:23:53 PM] ✕

i

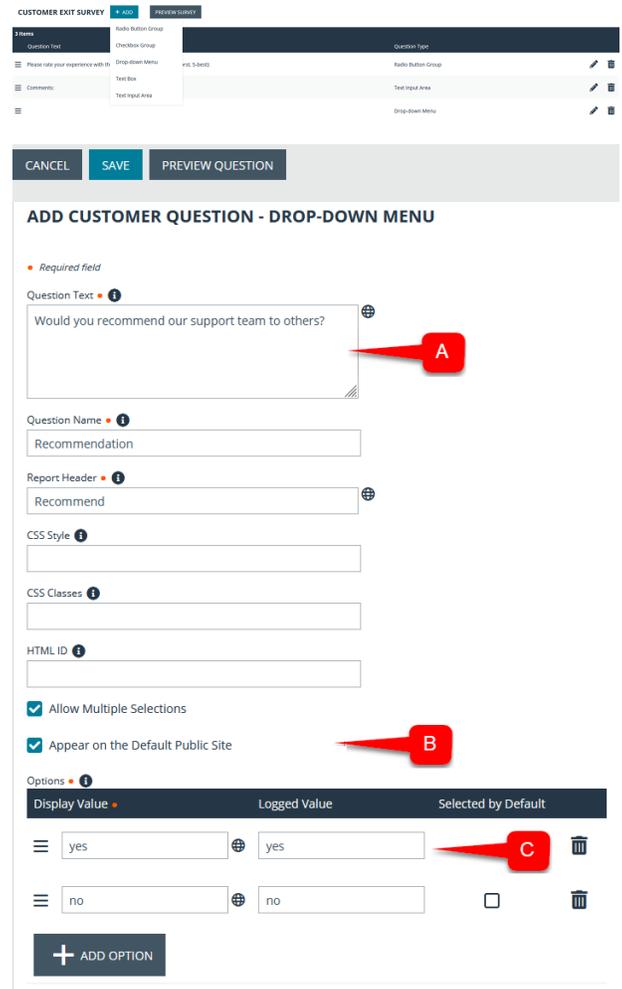
Thank you for using BeyondTrust Remote Support!  
 Your session has now ended.  
 Your computer can no longer be accessed or controlled using  
 BeyondTrust Remote Support.

OK

## 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.



**CUSTOMER EXIT SURVEY** + Add [Refresh Survey]

3 Items	Health Status Group	Question Type
Question Text	Checklist Group	Radio Button Group
Please rate your experience with us	Drop-down Menu	Yes/No
Comments	Text Box	Text Input Area
	Text Input Area	Drop-down Menu

CANCEL SAVE PREVIEW QUESTION

### ADD CUSTOMER QUESTION - DROP-DOWN MENU

**Required field**

Question Text **1**  
Would you recommend our support team to others? **A**

Question Name **1**  
Recommendation

Report Header **1**  
Recommend

CSS Style **1**

CSS Classes **1**

HTML ID **1**

Allow Multiple Selections

Appear on the Default Public Site **B**

Options **1**

Display Value	Logged Value	Selected by Default
yes	yes	<input checked="" type="checkbox"/> <b>C</b>
no	no	<input type="checkbox"/>

+ ADD OPTION

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.

**POST-SESSION LANDING PAGE**

Enable Post-Session Landing Page ⓘ  
 Enable BeyondTrust Remote Support Landing Page ▾

Available Questions	Displayed Questions
	rating
	comments
	Recommendation

Questions will be displayed in the order configured on the [Exit Surveys page](#).

Enable Customers to Download Chat Transcript. **B**

Enable Customers to Download Session Recording. ⓘ

**Support Portal**  
 English (US)

Technology Company

Support Session Complete

Thank you for using BeyondTrust Remote Support!  
 Your session has now ended.  
 Your computer can no longer be accessed or controlled using BeyondTrust Remote Support.

Download Session Data

[View Chat Transcript](#)  
[Download Chat Transcript](#)

Survey

Please rate your experience with this support representative (1-worst, 5-best):

1  
 2  
 3  
 4  
 5

Comments:

Would you recommend our Support Team to others?

## 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

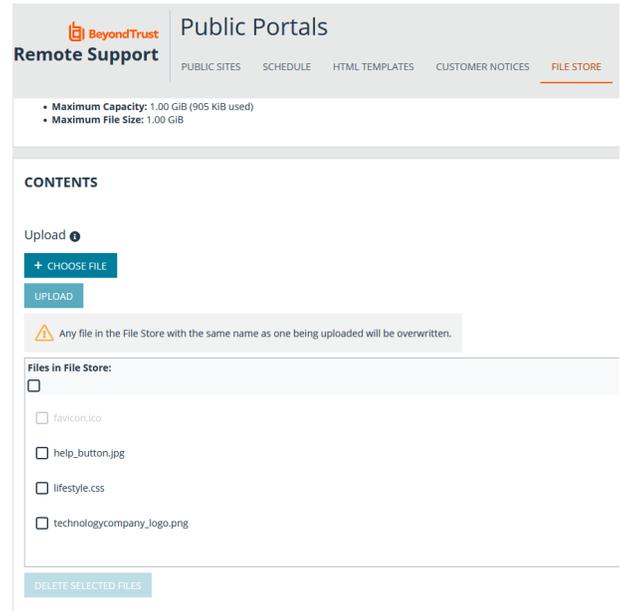
1. Go to **/login > Public Portals > File Store**.
2. Under **Contents**, click **Choose File**.
3. Select your CSS file using the file browser and click **Upload**.



**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.



The screenshot shows the 'Public Portals' interface with the 'FILE STORE' tab selected. It displays the maximum capacity (1.00 GiB) and maximum file size (1.00 GiB). Under the 'CONTENTS' section, there are buttons for 'Upload' (with a sub-button '+ CHOOSE FILE') and 'UPLOAD'. A warning message states: 'Any file in the File Store with the same name as one being uploaded will be overwritten.' Below this, a list of files in the store is shown: 'favicon.ico', 'help\_button.jpg', 'lifestyle.css', and 'technologycompany\_logo.png'. A 'DELETE SELECTED FILES' button is at the bottom.

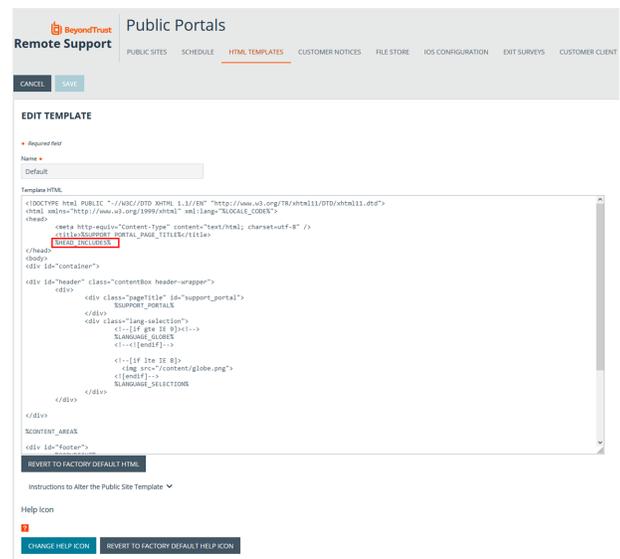
## Reference the CSS file in the HTML template

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.



The screenshot shows the 'Public Portals' interface with the 'HTML TEMPLATES' tab selected. It displays an 'EDIT TEMPLATE' form with a 'Name' field set to 'Default'. Below the form is a code editor showing HTML code. A red box highlights the '%HEAD\_INCLUDES%' placeholder in the code. Below the code editor are buttons for 'REVERT TO FACTORY DEFAULT HTML' and 'Instructions to Alter the Public Site Template'. At the bottom, there are buttons for 'CHANGE HELP ICON' and 'REVERT TO FACTORY DEFAULT HELP ICON'.

**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.

**i** For more information, please see the following:

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



Techs Currently Online:

Session Key:

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.



The screenshot shows a support portal for Barry Trent. At the top, there is a banner with a globe and a person working on a laptop. The text on the banner reads: "Barry Trent", "Customer Support Since 1985", "IT Services and Consulting", "Secure Online Technical Support", and "Onsite Upgrades and Installation". Below the banner are navigation links: "About", "Customer Support", "Resources", and "Help Desk". A green bar contains the word "Connect". Below this is a breadcrumb trail: "Home > Connect". The main heading is "Connect to an Online Support Representative". The text below reads: "To initiate a remote support session, please complete the following form. After clicking Submit, you will be required to run an executable that will be sent to you." Below this is a note: "Required fields are marked with \*". The form itself is enclosed in a red border and contains: "Name: \*" with a text input field, "Email: \*" with a text input field, "Describe Your Issue:" with a large text area, and a checkbox labeled "I have read and agree to the Terms of Service" with a "Submit" button. At the bottom of the form area are links for "Terms of Service", "Privacy Policy", "Copyright", and "Disclaimer".