

# Configuration Guide - Embedding The OneDesk Customer Apps in Your Website

## Introduction

Your OneDesk account comes with customer apps that make it easy for your customers to

- 1) Messenger - your customers can chat live with your agents directly from your website. All messages are saved in your OneDesk account and can be linked to tickets or tasks.
- 2) Customer Portal - your customers can review their own or public tickets and tasks and discuss and provide updates and attachments
- 3) Webforms - customizable forms that allow you to decide what information is needed in order for your customers to submit a new ticket, or up to 20 different kinds of items.

The **customer apps widget** offers a unified entry point for your customers. It can be customized to embed one or multiple customer apps. You can adjust which apps are available for your customers live in your OneDesk Administration without the need to perform changes on your website.

The 'Customer Portal' and 'Webforms' apps can be used within the customer apps widget, or can be accessed directly via their own URLs. The 'Messenger' app is only available from the customer communication widget.

## 1. Embedding the Customer Apps Widget in your Website

In order to integrate the OneDesk customer apps widget with your website, you need to add a small JavaScript snippet to all pages on your website where you would like the widget to be available. If your pages are dynamically generated you can add the JavaScript snippet to your page footer.

Please login in your OneDesk with an account that has administrative privileges and navigate to Administration -> Customer Apps. To see all the apps that are available for embedding in the

widget please ensure that “Show Hidden Applications” is turned on.

Customer Apps [Preview](#)

Hide or show the customer apps you wish to make available for your customers Show Hidden Applications

Enabled	Application
<input checked="" type="checkbox"/> Yes	Messenger (Beta)
<input checked="" type="checkbox"/> Yes	Customer Portal
<input checked="" type="checkbox"/> Yes	Webforms

### Colors

Main Color  Main Text Color

Secondary Button Color  Secondary Button Text Color

Body Color

### Customer Apps Language

Download, edit, and upload a file to customize or translate the text on your customer apps.

Language:

### Put The Customer Apps On Your Website

[Generate Snippet](#) | [customer apps documentation](#)

Show Customer Apps as open for first time visitors

Show OneDesk branding on the customer apps

Feel free to enable or disable the available apps based on your needs. You can also adjust the colors and the language of the widget and apps.

Please click on the “Generate Snippet” button. Copy the selected text from the pop-up window (starting from **<script>** and including the **</script>**).

***Paste the copied snippet on all your website pages immediately before the body closing tag </body>.***

The OneDesk widget will appear on all pages where the JavaScript snippet is pasted.

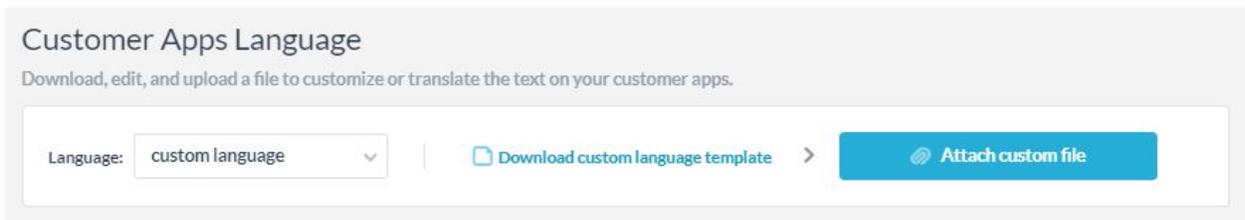
## Options for configuration

As seen previously, you can control some configuration settings that affect all the embedded apps directly in the Administration Portal -> Customer Apps menu.

There are global settings for the customers apps and widget, as well as settings specific to each customer app.

### Administration -> CUSTOMER APPS

- Turn on or off the OneDesk branding displayed below the widget
- Show customer apps as open for first time visitors: When this is checked, the first time a visitor sees the widget on your website, it will be in the open state. After that it's open/closed state will be determined by the way that visitor left it.
- Language -> select english (default) or modify the text in your customer apps. You can use this to translate the portal for your visitors, or to simply modify the text if you would like it to be different. You do this by selecting "custom language" from the drop-down, downloading the template file, modifying it, and re-attaching it.



- Colors -> Modify the colors of the widget and all the customer apps. Once colors have been modified you will need to refresh the browser page (with the widget on it) to see the results.

### Administration -> Messenger

This page will let you configure the settings for the Messenger App:

- Auto message when you are online
- Auto message when you are offline

### Administration -> Customer Portal.

This page will let you configure the settings for the Customer Portal App:

**Customer Portal** [Preview](#)

What items can the visitor see on the portal? [Help](#)

Require Login to See Items

Visitor is allowed to see ...

All published items

Visitor can see their own unpublished items

Check this box if you would like your visitor to always see their items, in addition to those covered by the rule selected above. This makes items visible to the requester even if they are unpublished, and regardless of which project they are in.

What can the visitor do on the portal?

Register Themse...  Follow It...  See the Status of It...

Filters to show on the panel

Item Type  Project  Status | Note: filter options appear only when a visitor has results for that filter.

Use Your Logo On Full-Screen Portal

### Administration -> Webforms

This page will let you configure the settings for the Webforms that appear in the widget or in your portal :

**Webforms**

Visitors can Submit New Items When logged in

Item Type

You can add webforms only for enabled items.

Choose Item Type Create Form

question form [Preview](#) Expand

ticket form [Preview](#) Expand

Any setting that you change in the Administration Portal will be live. You may need to refresh the customer apps to see the changes.

## Display settings

You can adjust the placement and appearance of the widget on your website by setting any of the options below:

### Position on the screen

- `origin=<left|right>`: specifies which corner of the screen to use as reference point (lower left or lower right)
- `x` and `y`: specify how many pixels from the origin

### Appearance

- `type / src / org-name / url`: Do not change the settings.
- `close-color="#25aed8"`: color for the close button
- `open-color="#25aed8"`: color for the open button
- `close-icon`: icon for the close button (specified in any valid HTML format: `<svg>...</svg>` or ``)
- `open-icon`: icon for the open button

## Examples

If you want your Customer App Widget on the left side of the screen, 100px to the right and 20 pixels higher, with the close button colored in green and open button colored in blue, then just add the text in bold below to your widget script:

```
<script type="text/javascript" src="(do not change this)" org-name="your-org-uri (do not change this)" url="(do not change this)" origin="left" x="100" y="20" close-color="green" open-color="blue"></script>
```

If you'd like to replace the open icon with the chat emoticon then adjust the script like this:

```
<script type="text/javascript" src="(do not change this)" org-name="your-org-uri (do not change this)" url="keep original settings here" origin="left" x="100" y="20" open-color="transparent" open-icon="<img src='https://d29fhpw069ctt2.cloudfront.net/icon/image/84627/preview.svg' height='60px' width='60px'>>"></script>
```