

# Edit Branding, Privacy Policy and Terms of Use

In Durell Portal you can customise your branding, colour scheme, privacy policy and terms of use link. This guide will show you how.

We strongly **recommend using Chrome** instead of Firefox, Safari or any other browser to use all the features listed below.

## Follow the provided link for access

Let's begin by logging into your Durell Portal, using the link sent to you or your office manager.

If this is your first time logging in, the link will take you to create a new password.

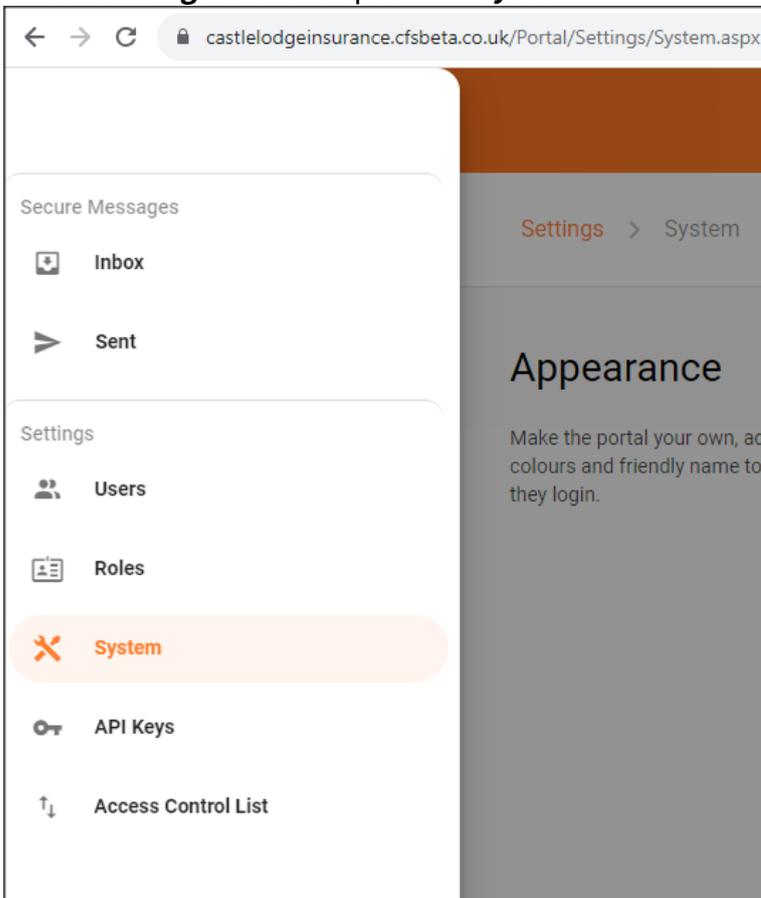
## Where to customise the Durell Portal to your own branding

Once you're logged into the Durell Portal.

- Click on the **Menu** button in the top left



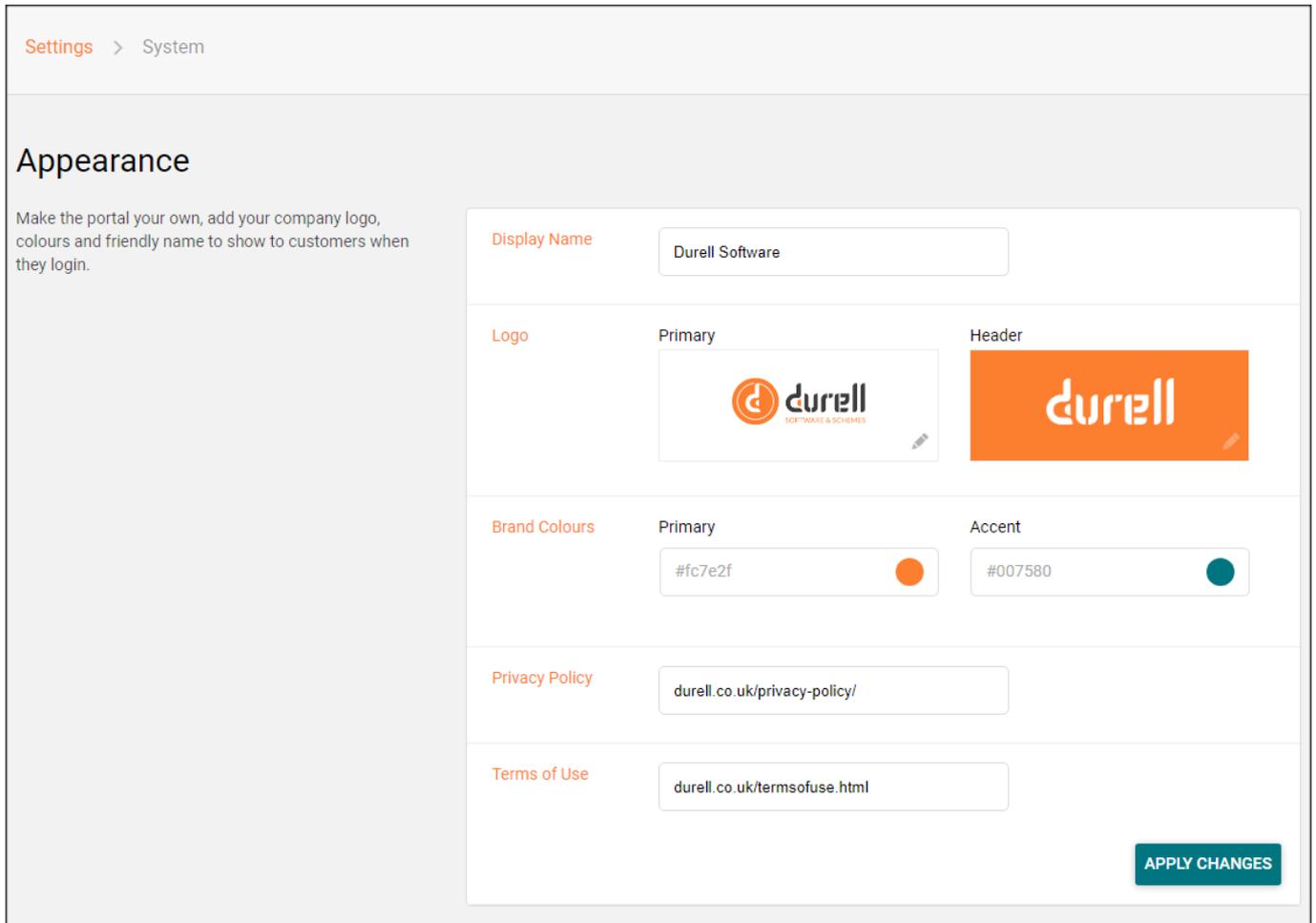
- Under **Settings** click the option **System**



## Appearance section

The branding setup is in the **Appearance** section of the settings page displayed below.

Don't forget to click the **APPLY CHANGES** button at the bottom right of the section to update your Durell Portal when you are finished.



The screenshot shows the 'Appearance' section of the Durell Portal settings. The breadcrumb trail is 'Settings > System'. The section title is 'Appearance' with a sub-instruction: 'Make the portal your own, add your company logo, colours and friendly name to show to customers when they login.' The settings are organized into several rows:

- Display Name:** A text input field containing 'Durell Software'.
- Logo:** Two options: 'Primary' (showing a full-color logo with a pencil icon) and 'Header' (showing a white logo on an orange background with a pencil icon).
- Brand Colours:** Two color pickers. 'Primary' is set to '#fc7e2f' with an orange circle. 'Accent' is set to '#007580' with a teal circle.
- Privacy Policy:** A text input field containing 'durell.co.uk/privacy-policy/'.
- Terms of Use:** A text input field containing 'durell.co.uk/termsfuse.html'.

An 'APPLY CHANGES' button is located at the bottom right of the settings area.

### Display Name

The first option in the **Appearance** section you can change is the **Display Name** for your portal. Edit this simply by amending the text in the field

This is a 'friendly' or short name of your business, it is used around the Portal in place like the tab name, in email footers and notifications.

### Logo

The second option in the **Appearance** section you can change is the **Logo**. Click the pencil  icon within the **Primary** or **Header** logo boxes to edit what is being used.

**Primary Logo:** This logo will be used on the login and any loading screens.

The primary version of the logo should be in full colour, high definition and with a transparent background.

**Header Logo:** This logo is displayed on the top left of your header bar, next to the menu icon. The header version should be a small version (200px tall) with a transparent background that will be shown in headers and other similar locations in the Portal to reinforce your brand.

For the best result make any text the full height of the header logo to ensure it is legible at small size.

### Brand Colours

You can select a primary and an accent colour to match the Portal to your branding. It's easy to select colours from your main logo directly in the Portal.

For the best result use a dark colour for the primary and a complimentary bright colour for the accent.

If you use a dark primary colour then your header logo should be a bright complimentary colour or white, so that is easily visible with the primary colour as a background.

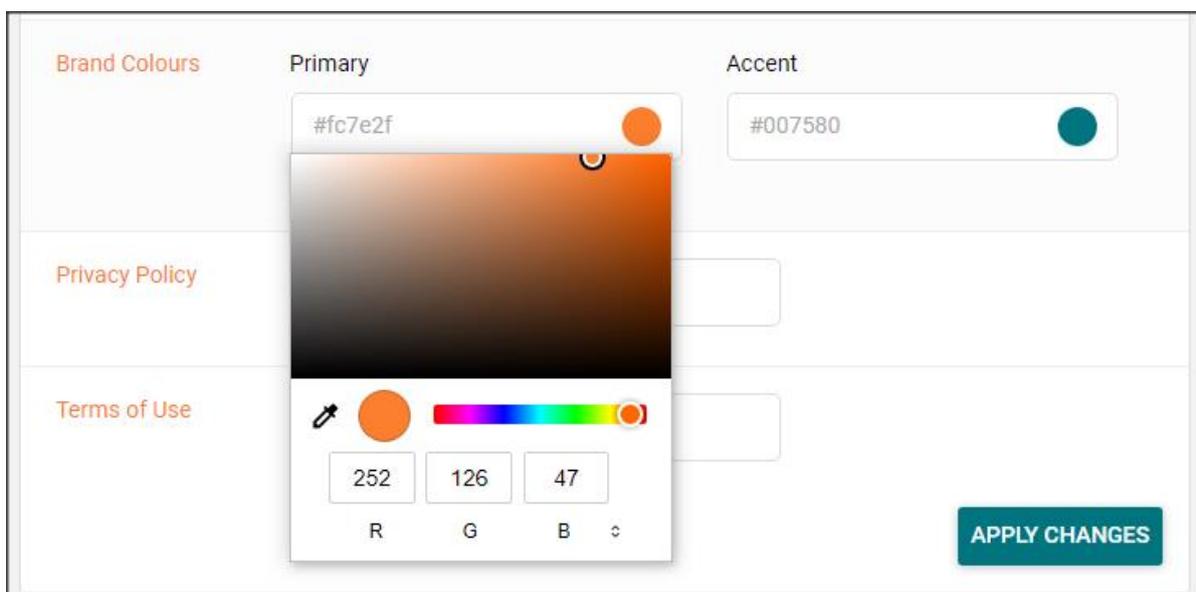
To set your colours, click within either the **Primary** or **Accent** colour fields, to open a mini-window for colour selection

**Primary** colour: This is used on the header bar.

**Accent** colour: This is used on all buttons.

Here are the different methods of selecting the right colour:

- Colour Swatch - Select a colour from the colour swatch



- Pipette/eyedropper – If you don't have the RGB, HSL or HEX colour reference, try using the pipette. By clicking on the **pipette/eyedropper**  icon you can open your website and select any colour you want to use. This is particularly useful if you wish to use a colour from within your logo.
- RGB – Key in the RGB values of a colour
- HSL – Click on the small **up and down arrow**  to key in the HSL reference of a colour
- HEX – Click on the small **up and down arrow**  to key in the HEX reference of a colour

### Privacy Policy and Terms of Use

**You need to link to your Privacy Policy in the Durell Portal.** You should already have your Privacy Policy displayed on your own website so just add the address of that web page in the **Privacy Policy** field. If you don't have one, ask your web site developer to add one to your web site, this is a key component of data protection regulation!

Similarly, you can optionally enter the web address for a **Terms of Use** page from your website. This link displays in the Portal as terms and our clients often use it to display their general Terms of Business web page instead of Terms of Use.