Settings

Help Documentation

Settings

My Settings

My Preferences

Agents can adjust a number of settings within SmarterTrack to customize their experience within the interface and the behavior of SmarterTrack. To edit your personal settings in SmarterTrack, log into the management interface with an agent account. Then click on the Settings icon . My Preferences will be loaded in the preview pane, and the following tabs will be available:

Options

- Username - The username that is used to log into SmarterTrack. Only administrators can modify this setting.
- Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow agents to log in using a standard password, authenticate against active directory or by using an external provider that integrates your login with an external, third-party product like a CRM or control panel. Only administrators can modify this setting. Note: If the administrator has chosen password authentication, agents can modify their passwords by using the Change Password button in the content pane toolbar.
- Authentication Domain - When Active Directory authentication is used, this is the domain name used for the authentication of your login username and password. Only administrators can modify this setting.
- Email Address - The agent's email address.
- Display Name - The friendly name used to identify the agent within the SmarterTrack system.
- Display Name for Chat - There are times when agents may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace the agent's real name when they interact with customers via live chat.
- Time Zone - To specify the time zone, select the appropriate time zone from the list. While the default time zone is set by the administrator, agents can adjust their time zone based on their location. This is helpful for those companies that have customer service agents working in different geographic locations.
- Preferred Language - The language the agent would like the Web interface to be shown in. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.
- Theme - Specify the general color theme of the SmarterTrack management interface: Light or

Dark.

• Preview Pane - To specify where the preview pane appears in the management interface, select the appropriate option from the list: Right, Bottom or None. By default, the preview pane appears on the right. Disabling the Preview Pane will display only a list of items (tickets, call logs, tasks, etc.) in the item list and each item must be individually opened in order to view its contents.

Contact Info

Use this tab to input any phone numbers for agents who are connected to, and using, SmarterTrack Communicator. Up to 4 different phone numbers can be added for any given agent. An employee's website and home address can be added on this tab as well.

Portal Settings

• Portal Signature - Agents can use this field to create a signature that will be displayed on Community threads and replies. Simple HTML can be included in these signatures. For example, to bold a word, add the bold> HTML tags around the word. Changes made here will be reflected in the Portal Signature setting found at the Portal | My Settings and vice versa.

• Avatar Provider - SmarterTrack allows agents and users to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.

• Avatar - The display picture as provided by the Avatar Provider or the avatar uploaded via the Choose File button.

• Subscribe to community posts automatically - Checking this box allows you to automatically subscribe to Community threads that you create or post in.

• Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads you're subscribed to that have had a new reply or the status or type changed.

• Email comments of community posts in which I participate - Checking this box allows notification emails when a comment has been added to a Community thread reply that you participated in.

• Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.

• Portal Signature - Using a full HTML editor, agents can customize the signature that appears in posts them make to the Community.

Custom Fields

This tab displays the available custom fields for agent preferences. For more information on custom fields, see Custom Fields .

Tickets

Use this tab to edit the following settings regarding the handling of tickets. These settings allow you to receive and reply to ticket messages directly from your email application/client. NOTE: When replying to tickets from an email client, the reply to the ticket will actually be sent from the SMTP account set up for the department within SmarterTrack, NOT from the user's SMTP account. In addition, replies from an email client will mark the ticket as "Waiting".

- Copy To Address - Adding a Copy To Address means that any ticket that is assigned to the agent will be copied to this email address as well. This includes every message that comes in from the end user, not only the initial ticket message. The agent can reply from their email application/client, and every ticket reply will be stored in and sent out from SmarterTrack using that department's SMTP settings, keeping the agent's personal email information anonymous. Note: This is enabled by default when an email address is entered in this field.
- Other Reply From Address(es) - This field can be used with the Copy To Address setting to allow additional email addresses to send ticket responses. For example, if an alias is entered in the Copy To Address, each email address within that alias may be entered here to allow all members of the alias to reply to tickets. This is also useful if an agent has forwarding set up on their mailbox. Though the ticket message is received in Mailbox A and forwarded to Mailbox B, the agent can reply from Mailbox B.

Live Chat

Use this tab to edit the following settings regarding the handling of live chats:

- Pop-up new chats automatically - Checking this box will display new live chats in a popup window. By default, this option is enabled.
- Play chat sounds - Checking this box will enable SmarterTrack to play sounds when certain timeframes are exceeded or when certain things occur. By default, this option is enabled. Sounds will occur in the following instances: 1. When a chat initially goes into the Queue, before it's taken by an Agent. (When Round Robin is NOT being used for Live Chat distribution.) 2. When a chat enters an IDLE status when being handled by an Agent. 3. When a chat enters a WARNING status when being handled by an Agent. 3. When a chat enters a CRITICAL status when being handled by an Agent. 4. When a chat is being handled by an Agent, but the chat window ins't focused, and a new message is received from an end user.

- Play chat in queue sound - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.

My Events

Using SmarterTrack's extensive event system it's possible to detect events as they occur, generate messages for those events, and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, administrators and agents don't have to query for the status of the items in the system - they just receive messages when specific events occur so they can take care of them.

There are two categories of events in SmarterTrack: agent-level events and system-level events. For more information on system-level events, please see Events . For a complete breakdown of the events system, including how to create a new event and details on the event categories available, see the Events folder found in the Help for Users & Administrators section of the Online Help.

To access agent-level events, log into the management interface with an agent account and click on the Settings icon . Then click on My Events in the navigation pane. A list of configured events will load in the content pane and the following tabs will be available:

Events

Agent-level events configured in this section apply only to the agent configuring the event. In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Events must be selected before choosing an action from the toolbar.
- Name - The name of the event.
- Status - Indication of whether the event is enabled or disabled. The event will only trigger if it is enabled.
- Category - The feature to which the event pertains (Tickets, Survey, Who's On, etc.).
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet to trigger the action.
- Actions - The actions that occur when an event is triggered. Actions include emails, notifications, logging, and other event-specific functions.

To view the settings for a specific event, simply double-click the event and the settings will load in the content pane. To create a new event, click the New button on the content pane toolbar. For more information on how to create a new event, see Creating New Events .

Notification Profiles

Notification profiles determine how event messages are sent. Options include text message or email. Agents can modify the default notification profile or create additional ones using the New button in the content pane toolbar.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.
- Notification Profile Name - The name of the profile.
- Type - The types of notification the agent has enabled for the selected profile.

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enabled - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enabled - Checking this box will enable SMS notifications.
- Enable reminder - Checking this box will allow the agent to receive notifications in a pop-up window.

System Settings

Manage

Brands

A brand is the top level of the SmarterTrack help desk. For smaller companies, the brand is just another name for the company itself so there may only be one brand in SmarterTrack. However, companies with different divisions may want to use SmarterTrack to manage all company communications, separately, for all divisions. In addition, some companies have different brands that specialize in specific products and/or clientele. SmarterTrack can accommodate all of these scenarios by allowing companies to set up separate brands without having to install multiple different instances of SmarterTrack.

The TRUE benefit of Brands, however, is in Employee management. Utilizing a multi-Brand configuration in SmarterTrack allows a company or business to support all of their Brands using a single Agent base. That means that a single Agent can handle sales or support (or billing...or customer service...) requests from multiple Brands at the same time. This allows a company to maximize their coverage while minimizing the need to hire Agents specific to one Brand. Agents can work with customers in each brand separately, and customers of each brand have access to customized and brand-specific web portals.

Features that support branding include tickets, live chats, knowledge base articles, news items and the portal interface, as well as department and group creation. That means that each brand can have its own set of departments and groups, and agents within those brand-specific departments and groups.

To access the Brands section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Brands . Any brands associated to your company will load in the content pane.

To add a new brand, click New in the content pane toolbar. A modal window will display fields for the Brand Name and Host Header. Once saved, the additional brand settings will appear in the content pane. To view the settings for a specific brand, simply double-click the brand or use the Edit button. The brand settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Brand Name - The name of the brand. This can be a company name, a product name, a division of the company, etc.
- Company Website - The URL to the primary website for the brand.
- Host Headers - Host headers allow a Web server to host more than one website domain over a single IP address. In SmarterTrack, the host header will be used to identify which brand is displayed in the portal. For those using self-installed SmarterTrack, please see the KB article Create Host Headers for Use with Brands . For those using the hosted SmarterTrack helpdesk, please see Point Your Own Domain Name at your Hosted SmarterTrack Helpdesk . Note: Host headers cannot be edited after the brand is created.
- Default Font - The font family that will be used by default for items created within or for the brand, such as ticket messages, canned replies, knowledge base articles, etc.
- SMTP Account - SmarterTrack does not utilize an internal SMTP server to send emails messages. Use this drop down to select the mail settings for brand-level notifications (e.g., any one of the email templates). Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings in the Configuration folder. To create a new SMTP account for your Brand, click Add SMTP Account . A modal window will display the following options:

• Server - The outgoing SMTP server name.
• Email Address - The email address from which brand messages are sent.
• Display Name - The name used to identify the mail server. This field is optional but recommended.
• Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
• Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
• SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.
• Google Analytics Site ID - The unique identifier used to track your site in Google Analytics.
• Company Favicon - A favicon is an icon that is associated with a URL and displayed in a browser’s address bar or next to the site name in a bookmark list. Upload a custom favicon for the brand by clicking on Choose File. Then browse for the ICO file. (Favicons must be uploaded in .ico format. Recommended sizes for a favicon are 32x32, 64x64 or 128x128 pixels.) Click Save then navigate to the brand's Portal or refresh the Portal site to see the new favicon. (In some browsers, refreshing the Portal 2-3 times may be required before the browser will pull in the new favicon data.) Note: If multiple brands are configured, the favicon of the Default Brand will be displayed when viewing the Management Interface.
• Company Logo - The logo to use for the brand. Click on Choose File to upload an image.
• Display logo on portal - Checking this box will display the company logo on the Home page of the Portal.

Permissions

Use this tab to edit the following permissions for your brand:

• View Community - From the dropdown, select the role necessary for portal visitors to view, and reply to, various threads in the community. Note: This selection also determines which users can privately message other users at the Portal. Community messaging is enabled for any registered user with permission to view and participate in Community threads.
• Create Community Threads - From the dropdown, select the role necessary for portal visitors to start new threads in the community.
• Minimum Posts to Post Links - Administrators can now control the minimum number of Community posts a user must have before they can post links to other sites or services that are clickable. This is to prevent one-off, drive-by spamming of Community posts from single-post users. By default, this is set to 3.

• Post Links in KB Feedback - Similar to the above, Administrators can limit the type of user that is able to post links in KB feeback. By default, this is set to Registered User with Verified Email as these types of users are generally confirmed by a company.
• View Ticket Requires - From the dropdown, select the role necessary for portal visitors to view tickets in the portal.
• New feedback starts out moderated - Checking this box means that any new feedback left on a knowledge base article will first have to be reviewed and approved by a portal administrator before it is viewable by users. By default, this option is checked.
• Users can change display name - Checking this box will allow users to change their display name. By default, this setting is enabled.
• Users can change email address - Checking this box will allow users to change their email address on file. By default, this setting is enabled.
• Users can change password - Checking this box will allow users to change their login password. By default, this setting is enabled.
• Users can change profile information - Checking this box will allow users to change their profile information on file. Profile information includes phone numbers, address, time zone and preferred language. By default, this setting is enabled.
• Users can upload custom avatars - Checking this will allow users to upload their own, custom avatars for display in the portal, such as in the Community.
• Require approval for custom avatars - Checking this means that any custom avatar use will first need to be approved by portal administrators before they are displayed in the portal.

Portal Options

Use this tab to edit the following options for your brand’s portal:

• Chat Link Style - Use this dropdown to select the live chat link to be displayed on the portal. Any live chat link configured in the Configuration | Live Chat settings will be displayed here.
• Display live chat in portal - Checking this box will display a link to initiate a live chat on the portal. By default, this setting is enabled.
• Display social network links - Checking this box will display social network links in the portal that will allow knowledge base articles and news items to be shared. By default, this setting is enabled.
• Display option to send ticket list by email in portal - Checking this box will allow users to request a list of their tickets be sent to them via email. By default, this option is enabled.
• Enable login form - Checking this box will allow users to login from the portal. By default, this setting is enabled. Note: If this setting is disabled, agents and administrators can only log in through the /Management/Root.aspx site.
• Enable new user registration - Checking this box will allow visitors to register for an account

from the portal. By default, this setting is enabled.

• Enable Gravatar support for automatic avatars - Gravatar is a service that allows users to maintain a consistent online presence across multiple different properties. It's a simple and efficient way to use the same avatar on multiple websites. Checking this box allows users to use their Gravatar images versus uploading a custom image.

• Enable Knowledge Base voting in portal - Checking this box will display helpfulness voting options on knowledge base articles in the portal for both end users and agents.

• Ticket and Chat Privacy Policy URL - By adding in a full URL to this line, then enabling the setting, a required field is added to all ticket and live chat templates that are used. For tickets, the field appears when tickets are submitted via the Portal, and for live chats, the required field appears BOTH on the live chat template used on the Portal as well as the live chat template that appears when live chat is being used on a website, regardless of the type of live chat link that's selected. This filed is required to be checked before a ticket or live chat is actually submitted.

• Privacy, Cookie and Terms of Service Notification - When text is added to this field, the text is displayed as a modal window in the lower, left corner of the Portal and it will have an associated "Accept" button. Both the style of the modal background and the button are controlled using the Cookie Modal Primary and Cookie Modal Secondary color selectors. This setting is used for displaying a Brand's cookie policy or even text relating to Terms of Service, an acceptable use policy or other items. It's an informational modal that requires the user to actually perform an action, proving they've seen the notification and accept its contents. By default, the text area is left blank.

• Primary Color - This is the color for the main menu buttons on the portal (Home, Knowledge Base, News, etc.) and the titles of the news items on the News page. The default is #055E8A.

• Secondary Color - This is the title color of the Recent News items listed on the home page of the portal. Generally, this color will be applied to the text within the dark grey sections of the portal. The default is #222222.

• Primary Button Color - The standard button color for buttons such as Start Ticket, Submit Thread and the icons on used for the Knowledge Base, Community, Tickets, etc. The default is #3A87AD.

• Secondary Button Color - The color for secondar buttons such as Search buttons. The default is #666666.

• Button Text Color - The color for text that appears in both primary and secondary buttons. The default is #FFFFFF.

• Content Background Color - The default color for the main content areas of the portal. The default is #FFFFFF.

• Navigation Bar Color - The color of the top bar of the portal, where the User, Alerts and language selection buttons reside. The default is #545454.

• Cookie Modal Primary Color - The color for the background of the cookie policy modal AND the button text color. The default is #237AFC.
• Cookie Modal Secondary Color - The color for the text of the cookie modal AND the button color. The default is #FFFFFF.
• Text Color - The color for the majority of text as it appears in the portal and on the community. This includes KB text, community posts, etc. The default is #333333.
• Link Color - This is the color for any hyperlinks on the portal, including those used to view knowledge base articles, links to view tickets and threads and any links within the KB articles or Community threads. The default is #0088CC.
• Custom CSS Style Overrides - SmarterTrack allows administrators to stylize their brand portals with fully customizable CSS. Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them. To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can create a version of that style yourself and then paste it in this box to override the default. Realize this will happen wherever that style is used, so changing one style can affect the portal in multiple areas. To revert back to the default style, simply remove your custom style from here and save your changes.

Privacy Policy Options

Many times, businesses want to make sure their privacy policies, terms of service, end user license agreements or other information is presented to users of their Portal. To this end, it's possible to provide users with links to these items as well as ensuring they agree to these policies and/or procedures.

Since there are may ways for businesses to present their portal, and the information contained within the portal -- not to mention, different permissions for starting live chats or tickets with agents -- storing a user's acceptance of the terms or policies provided needs to be accurate, yet generic enough to accommodate all uses of SmarterTrack. As such, a user's acceptance of the item lists in this area are stored as a cookie on the user's local machine. The cookie expires after a year, or when the policy text is changed by an administrator.

• Ticket and Chat Privacy Policy URL - This is the direct link to your privacy policy, EULA, Terms of Service or whatever document you want to put in front of the user of your Portal. Checking the box next to Enabled activates the presense of the URL.
• Privacy, Cookie and Terms of Service Disclaimer - This is the text that is displayed in the modal pop up once the option is enabled. This is generally standard text explaining that

"Cookies are used on this site..." or "All users must agree to our Terms of Service..." Basically, it's how you want to present the information contained in the link provided or explain what the information in the link covers and why.

• Dislaimer Modal Primary Color - This is the background color of the modal that displays the text, above. By default, it's set to #237AFC.

• Dislaimer Modal Secondary Color - This is the color of the text. By default it's set to #FFFFFF.

Custom Links

In order to create a sense of community with end users, companies may want to expand their Web portals and use them as hubs for disseminating news and information. One way to do this is to add custom links on their portal to other websites and resources. For example, link to a blog, to a community forum, to a management interface and more. When adding custom links, administrators define the custom link title that is placed on the Portal and that links to a specific URL. Custom Links are different than external feeds in that External Feeds will actually extract snippets from the feed listed and display that text as a section on home page of the portal, whereas Custom Links create new text that is displayed under the main portal buttons and that links directly to the link URL provided.

To create a new custom link, click Add in the in the content pane toolbar. A modal window will display the following options:

• Brand - Use this dropdown to specify the brand for which the link will display.

• Title - The link name displayed in the portal.

• Link URL - The URL to the linked website.

• Link Target - To specify how the linked site will open, select the appropriate option from the list.

• Role Required - To specify which users have access to the link, select the appropriate role from the list. For more information, see Roles .

Autoresponders

Use this tab to configure the autoresponder that will be sent to users after ticket submission. To enable an autoresponder, locate the department it will be associated to from the list of all configured departments. Select the department and click Edit in the content pane toolbar. A modal window will display the following options:

• Enable Autoresponder - Checking this box enables the autoresponder for use.

• Max KB Search Results - By default, the autoresponder displays a list of knowledge base articles related to the ticket content. This is the maximum number of suggested knowledge base article links included in the text of the auto-responder.

- KB Search Folder - The folder(s) SmarterTrack will search in before creating the list of suggested articles.
- View Ticket Online Text - The anchor text of the link for the 'View This Ticket Online' variable. It is enabled by default when that variable is used in the autoresponder body.
- Browse KB Text - By default, the autoresponder displays a link to browse the knowledge base after the list of related articles. Administrators can specify the link text by typing the desired text in this field.

Note: SmarterTrack will only send a maximum of 3 responses to any single email address per 30 minute period. This is to keep SmarterTrack from accidentally spamming individual email addresses or possibly getting into looping issues with improperly configured vacation messages or other external auto-responders. SmarterTrack simply stops sending after sending 3 times. Messages do not sit in the outgoing spool and wait to be sent. In addition, when importing emails, the department autoresponder will not be sent if an email is more than 3 days old.

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see Language and Locale .

Holidays

Use this tab to specify company holidays. To add a holiday, click Add in the content pane toolbar.
Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

Use this tab to create custom messages to be displayed on the portal.

- Main Portal Announcement - The text that displays on the portal home page. Some companies may choose to write a welcome message or a description of the types of services customers might find on the self-service portal. Others may want to add graphics, banner ads or more to completely brand and customize how the portal looks for visitors. The Main Portal Announcement offers a complete WYSIWYG editor that allows all manner of customization. Regardless of what's added, the announcement will appear at the very top of the main content area of the portal.

- Additional Footer for Portal - The text that displays at the top of the portal footer above the SmarterTools copyright information.

Community Categories

SmarterTrack's Community is a centralized location brands can use to communicate with customers and end users, which is a key for any business. Categories are used to separate threads within the Community and can be things like key words, product names and more. Using the Add button in the content pane toolbar, add Categories that appear as options for any new Community threads. Community Categories can be made visible to everyone or to a select role. For more information, see Roles .

Departments

A department is the second level of the SmarterTrack organizational structure. Each brand will be broken down into departments. For example, a brand may have Sales, Support and Human Resources departments. Typically, each department will have its own email address, such as support@example.com or sales@example.com. This section lists all of the departments that are currently available to your organization and provides administrators with the ability to add new departments or edit/delete existing departments.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Departments . Any departments associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department - The name of the department. For example, Sales, Support, Billing, etc.
- Email Importing - The POP email address being used to import tickets into SmarterTrack for the department. If a dash is present for a department, then POP importing is not configured for that department.
- Agents - The number of agents assigned to the department.
- Active Tickets - The number of active tickets within the department.
- Active Live Chats - The number of active live chats within the department.

The following options are available from the content pane toolbar:

- New - Creates a new department.
- Edit - Allows the administrator to make changes to a department's settings.

• Clone - Rather than creating a department from scratch, administrators can clone an existing department and modify settings for the new department as needed.
• Delete - Permanently deletes the selected department(s).

To view the settings for a specific department, simply double-click the department. Alternatively, you can select a department and click the Edit button in the content pane toolbar. The department settings will load in the content pane and the following tabs will be available:

Options

• Brand - The brand to associate to the department.
• Department Name - The name of the department.
• Front Line Group - The default group that gets assigned tickets and live chats. A department can only have one front line group.
• SMTP Account - SmarterTrack does not utilize an internal SMTP server to send emails messages. Use this drop down to select the mail settings for outgoing tickets and department-level communications. Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings in the Configuration folder. To create a new SMTP account for your Department, click Add SMTP Account . A modal window will display and the following options will be available:

• Server - The outgoing SMTP server name.
• Email Address - The email address from which department messages are sent.
• Display Name - The name used to identify the mail server. This field is optional but recommended.
• Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
• Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
• SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.
• Preferred Language - The default language for the department.
• Allow all agents to see the contents of this department - Frequently, agents may need to access tickets in a department that they don't belong to in order to respond to customer inquiries. Enable this setting to mark a department as having their ticket contents visible to all agents. Agents can then find those items and see them in a read-only manner, when searching. Managers are allowed to modify any item found this way, while agents are allowed to add comments only.

• Allow managers outside of this Department to view its contents. By default, only Employees with the Manager role can see the tickets in all Groups within a given Department. However, there are times with Managers in other Departments need to see tickets. This is especially true if 2 Departments work closely together, such as Sales and Support Departments. With this checked, Managers from ANY other Department can view the tickets within the Department being edited.

Tickets

• New Tickets in Portal - The role required to submit a ticket via the portal. For more information, see Roles .

• Custom Field Template - The custom field template used when submitting tickets from the portal. The ticket template specifies which fields the user should complete when submitting a ticket. For more information, see Custom Fields .

• Survey After Ticket Closed - To automatically offer a survey to customers after a ticket status has been changed to "closed" or "closed and locked", select the appropriate survey from the list. For more information, see Surveys .

• Auto-Close After - The number of hours after which a ticket assigned to the department and marked as "waiting" will automatically close. The default setting is 168 hours. NOTE: If any action is performed on a ticket, such as transferring it to another agent or group or even commenting the ticket, the waiting time will reset.

• Auto-Lock After - The number of hours after which tickets assigned to the department and marked as "closed" will automatically lock. (Locked tickets do not automatically reopen when a customer sends a reply.) The default setting is 322 hours.

• Auto-Delete After - The number of days after which tickets assigned to the department with a "closed" or "closed and locked" status will automatically be deleted. The default setting is 365 days.

• Require resolution to close tickets - Checking this box will require agents to add a resolution to a ticket before they are able to close it.

• Require all tasks to be completed to close tickets - Checking this box will require agents to complete any tasks associated to a ticket before the ticket can be closed.

• Send notification to customer when tickets are auto-closed - Checking this box sends an email notification to the customer when a ticket is auto-closed. For more information, see Templates section of Email .

Call Logs

• Custom Field Template - The custom field template used to create a call log. The call log template specifies which fields the agent should complete when logging a call. For more information, see Custom Fields .

• Auto-Delete After - The number of days after which call logs assigned to the department will automatically be deleted.

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. A department's business hours can be inherited from the brand or configured separately. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see Language and Locale .

Holidays

Use this tab to specify company holidays. A department's holidays can be inherited from the brand or configured separately. To add a holiday, click Add in the content pane toolbar.

Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

Use this tab to create custom messages to be displayed on the portal.

• Before Ticket Submission - The text that is displayed at the top of the ticket submission form in the Web portal.

• After Ticket Submission - The text that is displayed after a ticket is successfully submitted from the Web portal.

Groups

Groups are the last level in the SmarterTrack structure. Each department is broken down into divisions called groups. For example, a support department may have Level 1 Support (less experienced support agents), Level 2 Support (more experienced support agents), and Support Management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying levels of access to information. This section lists all of the groups that are currently available to your organization and provides administrators with the ability to add new groups and/or edit/delete existing groups.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Groups . Any groups associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department - The department to which the group belongs.
- Group Name - The name of the group.
- Round Robin - A True/False indication of whether tickets are distributed automatically via round robin distribution. If False, tickets will need to be manually taken from the queue. For an explanation of the two distribution methods, see Ticket Distribution Methods .
- Agents - The number of agents assigned to the group.
- Active Tickets - The number of active tickets within the group.
- Active Live Chats - The number of active live chats within the group.

The following options are available in the content pane toolbar:

- New - Creates a new group.
- Edit - Allows the administrator to make changes to a group's settings.
- Delete - Permanently deletes the selected group(s).

To view the settings for a specific group, simply double-click the group. Alternatively, you can select a group and click the Edit button. The group settings will load in the content pane and the following tabs will be available:

Options

- Department - The department to which the group belongs.
- Group Name - The name givent to the group.

Agents

This tab gives administrators the ability to add, edit, and delete agents from the group. To view or change the settings for a specific employee within the group, simply double-click the employee and the agent-group relationship settings will load in the content pane. To add a new agent to the group, click Add in the content pane toolbar. The following options will be available:

- Agent - A dropdown where you select the name of the employee that is being added to the group.
- Ticket Handling - Select the method of ticket distribution for this agent. If round robin

distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Options include:

• Pull from Queue - By selecting this option, the agent will not receive tickets automatically for the group. The agent will still be a member of the group, so they will be able to see tickets for the group, receive transfers, cherry pick tickets, etc. but they will not receive any tickets automatically. Instead, they'll have to take tickets. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.
• Primary Group - Agents in the primary assignment group will be the first to automatically receive tickets via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
• Secondary Group - Agents in the secondary group will receive automatic round robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.
• Max Tickets - The maximum number of new, active tickets an agent can have at a time. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.
• Chat Handling - This option sets the distribution for live chats to agents within the group. Options include:

• Chat disabled - This option excluded the agent from live chat, so they will NOT receive any live chats.
• Pull from Queue - By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in for the group, receive chat transfers, cherry pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive chat assignments.
• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
• Secondary Group - Agents in the secondary group will receive automatic round robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

- Auto-Inactive - Enter the number of minutes after which an agent is marked as "Inactive" for the particular group. When an agent is inactive in a group, they cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. (Agents can use Active Groups to go active or inactive in each group of which they are a member. Note: Check the enabled checkbox to enable this setting.
- Hand-off on Auto-Inactive - Checking this box will automatically hand off any of an agent’s active tickets to another agent if the agent is automatically made inactive in the group.
- Automatically go active upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging into the management interface. If unchecked, agents will need to manually set themselves as active across their various groups.

Time Estimates

This tab gives administrators the ability to associate specific times with certain ticket and live chat tasks. Assigning ticket and live chat time estimates are helpful when using cost analysis reports. For a very basic example, knowing that an agent will take an average of 10 minutes working on a new ticket tells you that an agent should be able to get through 6 tickets an hour. In an 8 hour shift, that means 48 tickets total. When coupled with agent cost, that number tells you what your support costs would be for that agent for that number of tickets. Managers and business owners can then use that information when making decisions on the types of support to offer (live chat, tickets or both), whether to offer paid or free support, whether to increase costs of goods and/or services to account for support costs, etc. In addition, these estimates can be used to project when a department and/or group is at the point where another agent or two is required in order to handle the workload.

- Ticket Created - The estimated number of minutes agents will spend creating a new ticket.
- Ticket Transferred - The estimated number of minutes agents will work on a ticket that has been transferred to them.
- Ticket Message In - The estimated number of minutes agents will spend working on a new ticket message.
- Ticket Message Out - The estimated number of minutes agents will spend researching and replying to a ticket message.
- Live Chat Started - The estimated number of minutes agents will spend starting a live chat.
- Live Chat Transferred - The estimated number of minutes agents will chat with a customer that has been transferred to them.

Employees

Just as the name implies, Employees, also known as agents, are employees of a company that are placed in various groups within departments to handle customer issues and requests using SmarterTrack. Employees are the ones that will manage tickets, live chats, tasks, write knowledge base articles and more.

To add new employees or edit existing employee settings, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Employees . Any employees associated to your company will load in the content pane. By default, the details for the first employee listed will be displayed.

The following options are available from the actions toolbar:

- New - Creates a new employee.
- Delete - Permanently deletes the selected employee(s).
- Sorting - Sorts the list of employees based on user, email, last login, verfied status or role.
- Refresh - Refreshes the content pane to show the most updated data.
- Clone - Rather than creating a new employee from scratch, administrators can clone an existing employee and modify settings as needed.

To view the settings for a specific employee, simply click the desired employee from the list or double-click on their entry to pop out the configuration window. To add a new employee, click New in the content pane toolbar. The employee settings will load in the content pane and the following tabs will be available:

Options

Use this tab to configure the profile information of the employee:

- Username - The username used to log into SmarterTrack.
- Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow employees to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
- Authentication Domain - When using active directory authentication, the domain used for authentication of the login username and password.
- New Password - When using password authentication, this allows administrators to change the login password by typing a new password in this field.
- Confirm Password - When using password authentication, this allows administrators to verify

the new password by re-typing it in this field.

- Email Address - The employee's email address.
- Display Name - The friendly name used to identify the employee within the SmarterTrack system.
- Display Name for Chat - There are times when agents may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace the agent's real name when they interact with customers via live chat.
- Time Zone - To specify the time zone, select the appropriate time zone from the list.
- Preferred Language - The language the Web interface should be shown in to this employee. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.
- Hourly Cost for Reporting - The hourly cost for the employee to work with tickets and live chats. This field is used for cost analysis reporting and is set to 10.00 by default.

Contact Info

Use this tab to input any phone numbers for agents who are connected to, and using, SmarterTrack Communicator. Up to 4 different phone numbers can be added for any given agent. The employee's website and home address can be entered here as well.

- Website - If the employee has a website, it can be entered here.
- Home Phone - The employee’s home phone number.
- Cell Phone - The employee’s cell phone number.
- Work Phone - The employee’s work phone number.
- Other Phone - The employee’s alternate phone number.
- Address - The physical address of the employee.

Portal Settings

- Avatar Provider - SmarterTrack allows agents to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.
- Avatar - The display picture as provided by the Avatar Provider or one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.
- Avatar approved - Checking this box makes any uploaded custom avatar image appear on live chats, in ticket signatures, in community posts, etc. For agents who specify the use of an avatar provider (e.g., Gravatar), this box is not required in order for the avatar to appear.
- Subscribe to community posts automatically - Checking this box allows the employee to

automatically subscribe to Community threads that they create or post in.
• Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads employees are subscribed to that have had a new reply or the status or type changed.
• Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.
• Portal Signature - Use this field to create a signature that will be displayed in the Portal, such as in Community threads and replies.

Roles

This tab displays the roles assigned to the employee. An employee's permissions are defined by the roles to which he/she is assigned. For more information on roles, see Roles .

Groups

This tab gives administrators the ability to add, edit or remove the employee from a list of configured groups. To view or change an employee’s settings for a specific group, simply double-click the desired row and the agent-group relationship settings will load in the content pane. The following options will be available:

• Agent - The name of the employee that is being configured.
• Group - The name of the group that is being modified.
• Agent is a member of this group - Indicator of whether the employee is part of the group. To add an employee to a group, simply check this box and the remaining agent-group relationship settings will load in the modal window. To remove an employee from a group, uncheck this option and save.
• Ticket Handling - Select the method of ticket distribution for this agent. If round robin distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Options include:

• Pull from Queue - By selecting this option, the agent will not receive tickets automatically for the group. The agent will still be a member of the group, so they will be able to see tickets for the group, receive transfers, cherry pick tickets, etc. but they will not receive any tickets automatically. Instead, they'll have to take tickets. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.
• Primary Group - Agents in the primary assignment group will be the first to automatically receive tickets via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
• Secondary Group - Agents in the secondary group will receive automatic round robin

distributions only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

• Max Tickets - The maximum number of new, active tickets an agent can have at a time for this group. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.

• Chat Handling - This option sets the distribution for live chats to agents within the group. Options include:

• Chat disabled - This option excluded the agent from live chat, so they will NOT receive any live chats.

• Pull from Queue - By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in for the group, receive chat transfers, cherry pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive chat assignments.

• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.

• Secondary Group - Agents in the secondary group will receive automatic round robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

• Auto-Inactive - Enter the number of minutes after which an agent is marked as "Inactive" for the particular group. When an agent is inactive in a group, they cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. (Agents can use Active Groups to go active or inactive in each group of which they are a member. Note: Check the enabled checkbox to enable this setting.

• Hand-off on Auto-Inactive - This setting is used in conjunction with Auto-Inactive. Checking this box will automatically hand off any of an agent’s active tickets to another agent if the agent is automatically made inactive in the group.

• Automatically go active upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging into the management interface. If unchecked, agents will need to manually set their active status across their various groups.

Custom Fields

This tab displays the available custom fields for agent preferences. For more information on custom fields, see Custom Fields .

Tickets

Use this tab to edit the following settings regarding the handling of tickets.

- Copy To Address - Adding a Copy To Address means that any ticket that is assigned to the agent will be copied to this email address as well. This includes every message that comes in from the end user, not only the initial ticket message. The agent can reply from their email application/client, and every ticket reply will be stored in and sent out from SmarterTrack using that department's SMTP settings, keeping the agent's personal email information anonymous. Note: This is enabled by default when an email address is entered in this field.
- Other Reply From Address(es) - This field can be used with the Copy To Address setting to allow additional email addresses to send ticket responses. For example, if an alias is entered in the Copy To Address, each email address within that alias may be entered here to allow all members of the alias to reply to tickets. This is also useful if an agent has forwarding set up on their mailbox. Though the ticket message is received in Mailbox A and forwarded to Mailbox B, the agent can reply from Mailbox B.
- Max Tickets - The maximum number of new, active tickets an agent can have at a time. This field applies to the overall tickets an employee has and is not specific to any groups. Group Max Tickets may still be applied; however, the overall Max Tickets value will override. For example, if the overall Max Tickets is set at 10 and a group's Max Tickets is set at 15, the employee will only be automatically assigned 10 tickets. When configuring this field, take into account the number of groups an agent is part of and the sum number of max tickets they should generally receive from those groups. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.

Live Chat

Use this tab to edit the following settings regarding the handling of live chats:

- Max Active Live Chats - To change the number of live chats that can be participated in at a time, type the appropriate number in this field. By default, this option is set to 1.
- Pop-up new chats automatically - Checking this box will display new live chats in a popup

window. By default, this option is enabled.
• Play chat sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.
• Play sound when a chat is queued - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.
• Block live chats while composing call logs - Checking this box will block live chats from popping up while an active agent is composing a call log.

Roles

Every SmarterTrack user (here, the term "user" denotes anyone using SmarterTrack, from an end user to an administrator) is assigned a role, which defines permissions and dictates which features the user has access to. In addition, a user's ability to work within SmarterTrack is dictated by the combination of roles that are assigned to the user. Thererore, if a custom role is created, the permissions assigned to all roles for the user may need to be modified to ensure that the custom role's permissions are actually enforced. This is especially true of the Everyone and Agent roles because the Everyone role applies to everyone that interacts with SmarterTrack, both agents and end users, and because the Agent role is necessary for any employee that is going to interact with end users and customers. By default, SmarterTrack has six predefined roles:

• Everyone - Typically a customer or portal visitor. The Everyone role can view and search Knowledge Base articles, and view articles and news items. The Everyone role is assigned to every user within SmarterTrack and cannot be removed.
• Agent - Typically, an employee that has access to the management interface and that will interact with customers and end users. An agent is able to view and respond to their own tickets and live chats; create their own call logs and follow-up tasks; manage knowledge base articles, news items, and canned replies; use agent chat rooms and agent instant messenger; and view Who's On. It's worth noting that employees with the Agent role can only interact with their own items - they do not have access to other agent's tickets, live chats, etc. In addition, agents are only able to receive tickets for groups that they are members of.
• Manager - Generally an employee that has supervisory capabilities. In addition to having the same permissions as an agent, a manager also has the ability to view all tickets and live chats, for all agents, in any department where they belong to at least one group. Note: Managers must also have the agent role enabled.
• Administrator - An administrator has access to every area of the SmarterTrack installation: the system settings, management interface and database information, all tickets, live chats, call logs and tasks, all Community categories, Brands and reports. Typically, an administrator can also manage departments, groups, and users. Note: For new installations, the administrator must also

have the agent role enabled. For those upgrading from a previous version, the administrator will not have the agent role enabled and can only access the reports and settings areas of the management interface. Administrators must have at least one Agent role and be part of groups in order to view global tickets and live chats.

• Registered User - A customer, website, or portal visitor that has a registered account. Typically, a registered user can submit tickets and/or live chats and view and search Knowledge Base articles and news items. Registered Users can also have Community privileges such as editing posts, deleting posts, etc. However, system administrators may want to limit the Community access this role has so as to limit the potential for abuse of Community topics.

• Registered User with Verified Email - A customer, website, or portal visitor that has a registered account and has successfully confirmed that the email address provided is valid. Typically, a registered user can submit tickets and/or live chats and view and search knowledge base articles and news items. This role also has Community privileges that can be extended by system administrators as these users have verified their contact email addresses.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Roles . The default and custom roles associated to your company will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple roles. Roles must be selected before choosing an action from the actions toolbar.
• Role - The name of the role.
• Role Type - Indicates whether the role relates to company employees or users (customers).
• Users - The number of SmarterTrack users assigned to the role.
• Custom Role - Indicates whether the role is one of the seven predefined roles or if it was created by the administrator to meet specific company needs.

The following options are available from the content pane toolbar:

• New - Creates a new role.
• Edit - Allows the administrator to make changes to a role's permissions.
• Delete - Permanently deletes the selected role(s).

To view the permissions for a specific role, simply double-click the role. The role settings will load in the content window and the following tabs will be available:

Options

Use this tab to specify permissions for the role. The items shown will vary based on whether the role is available for Users or Employees.

- Role Name - The name of the role.
- Role Type - To specify whether the role relates to company employees or end users, select the appropriate option from the list.
- KB Articles - To specify whether users assigned to this role can create, modify, or read Knowledge Base articles, select the appropriate option from the list.
- KB Comments - To specify whether users assigned to this role can create, modify, reply, delete or moderate knowledge base comments, select the appropriate option from the list.
- News - To specify whether users assigned to this role can create, modify, or read news items, select the appropriate option from the list.
- Tickets - To specify whether users assigned to this role can create or reply to Tickets, select the appropriate option from the list.
- Tasks - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Call Logs - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Who's On - To specify whether users assigned to this role can view Who's On visitors, select the appropriate option from the list.
- Reports - To specify whether users assigned to this role can create reports, select the appropriate option from the list.
- Distribution - To specify how much control an employee has over the distribution of his/her workload, select the appropriate option from the list.
- Events - To specify whether users assigned to this role can configure events, select the appropriate option from this list.
- Survey - To specify how much control an employee has over the ability to view survey details, select the appropriate option from this list.
- Community - To specify how much control an employee has over the management, moderation and interaction with the Community, select the appropriate option from this list.
- Users/Organizations - To specify how much control an employee has over the creation and management of users and organizations, select the appropriate option from this list.

KB Articles

Use this tab to specify knowledge base permissions for this role. Note: This tab is only available if the administrator selects custom KB article permissions in the options tab. Knowledge base permissions cover the role's ability to:

- Create
- Modify -- Also controls the ability for agents to "Clear Helpfulness".
- Delete
- Review
- View -- This permission is required for one or all of the preceding permissions.

As an aside, if multiple KB folders are available, permissions can be set and/or modified on a per folder basis.

KB Comments

Use this tab to specify knowledge base commenting permissions for this role. Note: This tab is only available if the administrator selects custom KB comment permissions in the options tab. Knowledge base feedback permissions cover the role's ability to:

- Create (login required)
- Reply
- Edit personal feedback (login required)
- Edit all feedback (login required)
- Delete personal feedback (login required) -- Requires "Edit all feedback" before it can be activated for any other Role.
- Delete all feedback (login required) -- Requires "Delete personal feedback" before it can be activated for any other Role.
- Moderate (login required)

News

Use this tab to specify news permissions for this role. Note: This tab is only available if the administrator selects custom news permissions in the options tab. News permissions cover the role's ability to:

- Create
- Modify
- Delete
- Review

Tickets

Use this tab to specify ticket permissions for this role. Note: This tab is only available if the administrator selects custom ticket permissions in the options tab. The Ticket permission cover the role's ability to:

- Mark (tickets) as Deleted
- View Queue -- This would limit the agent's ability to see the Queue, and would only see tickets assigned to them via Round Robin distribution.

Tasks

Use this tab to specify task permissions for this role. Note: This tab is only available if the administrator selects custom task permissions in the options tab. Task permissions cover the role's ability to:

- Create
- Modify
- Delete
- Change Start and Due Dates -- This permission requires "Modify" before it can be activated for an agent.

Call Logs

Use this tab to specify call log permissions for this role. Note: This tab is only available if the administrator selects custom call log permissions in the options tab. Call log permissions cover the role's ability to:

- Create
- Modify
- Delete

Live Chats

- Participate in Instant Messages
- Participate in Chat Rooms
- Create and Edit Chat Rooms -- This permission requires "Participate in Chat Rooms" before it can be activated for an agent.
- View Queue

Use this tab to specify "internal" live chat options for Instant Messaging and agent Chat Rooms

Who's On

Use this tab to specify Who's On permissions for this role. Note: This tab is only available if the administrator selects custom Who's On permissions in the options tab. Who's On permissions cover the role's ability to "View Who's On Visitors" and interact with them.

Reports

Use this tab to specify report permissions for this role. Note: This tab is only available if the administrator selects custom report permissions in the options tab. Report permissions give managers the ability to only grant access to specific reports for the role.

Distribution

Use this tab to specify distribution permissions for this role. Note: This tab is only available if the administrator selects custom distribution permissions in the options tab. Distribution permission cover the role's ability to:

- Transfer Work Items - limits the role's ability to transfer tickets, live chats, etc. to new groups only.
- Transfer Work Items to Specific Agents - allows the role to transfer tickets, live chats, etc. to both groups and individual agents within the group. Requires "Transfer Work Items" before it can be activated for an agent.
- View Queue - limits the roles' ability to view any tickets and/or live chats that are assigned to the queue.
- Manage Agent Status - Limiting this means an agent can NOT mark themselves as active or inactive in the various groups they're a part of. This would be managed by a user with a role that has this permission, such as a manager or senior agent, if this is restricted for the role.

Events

Use this tab to specify events permissions for this role. Note: This tab is only available if the administrator selects custom events permissions in the options tab. Events permission cover the role's ability to:

- Create and Edit My Events
- Trigger system-level manual events

Surveys

Use this tab to specify survey permissions for this role. Note: This tab is only available if the administrator selects custom survey permissions in the options tab. Survey permissions cover the role's ability to:

- View Summary - Allows the role to see the Survey tab for tickets and live chats. It also will allow agents to see the survey stars on tickets and live chats, and on the User Details Survey and Users/Orgs Survey tabs. It will also allow them to see the Reports > Surveys > By Brand, By Agent, and By Survey survey reports. (IF they have access to the Reports.)
- View Details - Allows the role to view the complete survey results everywhere they see survey stars / survey entries in a grid. (Requires "View Summary" before it can be activated for an agent.) However, they'll only have access to view the Reports > Surveys> By Brand, By Agent, and By Survey reports ONLY if they have permission to view at least one Survey Report.

Community

Use this tab to specify community permissions for this role. Note: This tab is only available if the administrator selects custom community permissions in the options tab. Community permissions cover the role's ability to:

- Moderate -- NOTE: An agent with Moderate permissions cannnot ban any other user or agent with similar permissions.
- Edit all Posts
- Delete any Post
- Change Status

Users / Organization

Use this tab to specify user and organization permissions for this role. Note: This tab is only available if the administrator selects custom user / organization permissions in the options tab. User / Organization permissions cover the role's ability to:

- Edit a user's profile
- Create and Edit organizations
- Add and Edit organization users
- Create a user's profile
- Delete a user's profile

Custom Roles

System Administrators have the ability to create "Custom Roles" for either end users or employees. Custom roles can be extremely useful for things such as adding responsibility to users. For example, if your Community is especially popular, you may want to assign some users moderation roles. This new custom role could allow these users to edit posts, delete posts, report abuse, etc. However, to do this they'd need a custom role. For information on how to create roles, please see the SmarterTrack area of the SmarterTools Knowledge Base .

Configuration

Connected Services

Administrators will use this section to manage any services and applications that are connected to the SmarterTrack installation, including live chat translations, external feeds, ticket transferring across SmarterTrack instances and more. To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Connected Services . The settings will load in the content pane and the following tabs will be available:

Integrations

Use this tab to edit the following settings:

- Max External Feed Articles - The number of articles that will be displayed per external feed. For example, if an external feed is configured to show blog posts on the SmarterTrack portal, only this number of articles will be displayed at a time.
- Map Provider - Using Google Maps, SmarterTrack can display customer location information in Who's On or when an IP address is clicked in a live chat. To enable a map provider, select Google from the dropdown menu.
- API Key - A Google Maps API Key IS REQUIRED in order to use Google as the map provider in SmarterTrack. Getting an API key is free, and, in most cases, using a standard API key will be fine. However, in larger installations, it may be necessary to upgrade your API key to avoid hitting the limitations applied to a standard API license from Google. For more information on obtaining an API Key, see the Get API Key page . Information about Google Maps Usage Limits is also available from the Google Maps API documentation.
- Translation Provider - Select which translation service to use from the list: Google or Azure. By default, the auto-translation method is set to None.
- API Key - For Google Translator only. The API key provided by Google. For more information on obtaining this key, please see the KB Automatically Translate Live Chats .
- Subscriber Key - For Azure Translator only. A security key that allows Microsoft Translate to interact with your SmarterTrack installation. For more information on obtaining this key, please see the KB Automatically Translate Live Chats .
- WHMCS Username - Provide the username of an admin-level user within WHMCS who has

API Access. (Used when integrating SmarterTrack with the WHMCS Addon Module .)
• WHMCS Password - Provide the password associated with the admin username. (Used when integrating SmarterTrack with the WHMCS Addon Module.)
• WHMCS API Key - This is a security feature used to authenticate the integration between SmarterTrack and WHMCS. Enter the exact API Access Key that is configured in the configuration.php file found within the WHMCS directory. For example, if the following line is present in the configuration.php file: $api_access_key = "abc123", enter abc123 in this field. (Used when integrating SmarterTrack with the WHMCS Addon Module.)
• WHMCS URL - Provide the complete URL of your WHMCS control panel. (Used when integrating SmarterTrack with the WHMCS Addon Module.)

The follow options are available from the content pane toolbar:

• Save - Saves the changes made to the options on the tab.
• Test Settings - Use this button to test your translation settings with the appropriate provider.
• Reset Statistics - This button will reset the character count that is tracked for character conversions using the appropriate translation service. This can be used to check against any reports received or viewed at the translation service website to ensure both systems are in sync.

External Feeds

External feeds allow users to have custom RSS feeds, and snippets of the information in articles or news items, displayed on their portal. External Feeds are different than Custom Links in that the feed snippet is displayed on the Portal home page as a section of the Portal. Custom Links create a new button on the Portal home page.

If any external feeds are available, they will be listed on this page. Otherwise, new feeds can be added by clicking Add in the content pane toolbar. External feeds can be associated with all brands or used and customized on a per-brand basis. Furthermore, if multiple feeds are to be displayed on a brand’s portal, they will be displayed in order of how they are listed in the Connected Services settings. Use the Move column to adjust the order of the external feeds, if needed.

SmarterTrack Connections

Administrators can use this section to connect to another SmarterTrack installation for ticket transferring. This can be useful for those organizations working out of separate locations or across sister-companies. When a SmarterTrack installation is connected, agents can choose whether to transfer tickets to the local or connected instance. Note: Both installations must be running the same version of SmarterTrack in order for this feature to work properly.

To add a SmarterTrack instance, click Add in the content pane toolbar. A modal window will display the following options:

- Display Name - The friendly name of the SmarterTrack instance.
- SmarterTrack Base URL - The URL for the SmarterTrack portal.
- Admin Username - A system administrator's username for the SmarterTrack instance.
- Admin Password - A system administrator's associated password for the SmarterTrack instance.

Custom Fields

Some companies may want to gather information for tickets, live chats and call logs that is outside of the default information gathered by SmarterTrack. To do this, administrators can create an unlimited number of Custom Fields. Custom fields can be used to define virtually any additional information a company may need and can be applied to tickets, live chats, call logs, advanced searches, reports, and organizational settings (such as users, groups and departments). In addition, companies can use custom fields when creating communication templates for live chats or tickets to require end users to supply specific pieces of information to aid employees with troubleshooting issues or even looking up accounts as the live chat or ticket response progresses. Custom fields are also available in various summary and trend reports, giving managers the ability to group data items by the custom fields that are created. Note: Custom fields can be used to display up to 512 characters of information per field.

For example, a manager for a support department can add a custom field for the model numbers of their products, and then add that custom field to ticket and live chat templates that SmarterTrack uses. In addition, the custom fields are available when the manager runs reports, such as the Ticket Overview report, and they will be able to group the results by each model number.

Generally, there are two different types of custom fields:

- Regular custom fields are used to gather additional information on items agents may be working on, such as tickets, live chats and call logs. For example, if a company has multiple products for which they provide technical support, they may create a custom field for tickets that specifies which product the customer is requesting assistance with. Taking this example further, a company could use custom fields to require customers to provide specific information before submitting tickets or live chats: the customer's contact details, the browser they're using, their interest in promotional offers or partnership opportunities, etc. These custom fields use the Data type.
- Organizational custom fields are used to gather additional information on users, groups or departments. Unlike regular custom fields, organizational custom fields are created by the

system administrator, but they are viewable by any agent or manager as well by selecting "User Details" from any email address associated with a ticket, live chat or call log. For example, a system administrator may use an organizational custom field to store details on a user, such as a phone number, account number, social media address or a note. These custom fields use the People type.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Custom Fields . A list of custom fields will load in the content pane and the following tabs will be available:

Fields

Use this tab to configure the field definition. If the custom field should be available to users when submitting new tickets or live chats, the field definition will then need to be added to a template.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple field definitions. Custom field definitions must be selected before choosing an action from the toolbar.
• Custom Field - The name of the custom field.
• ID - The auto-generated internal ID that can be used with Web services and External providers.
• Data Type - The format in which the custom field data is provided.
• Applies To - Indicates whether the custom field applies to People or Data.

To view the details for a specific custom field, simply double-click the custom field. The custom field details will load in the content window and the following fields will be available:

• Field Identifier - The name of the custom field.
• Applies To - Custom fields can apply to Data or People. Data custom fields will be seen on tickets, live chats and call logs. They can be filled in by agents or users (if used on a ticket or live chat template). People custom fields are used only by agents and can be seen on user accounts. See above for information on the two different types of custom fields.
• Data Type - To specify the data type (text, drop down list, date, etc.), select the appropriate option from the list.
• Default Value - The default contents of the custom field. This field is optional, and is often left blank. However, it can provide useful in certain circumstances. For example, a company may want to create a custom field that allows customers to opt in or out of promotional emails. To encourage customers to opt in, the administrator may configure the default value to indicate that the customer is willing to receive promotional emails.

Templates

SmarterTrack offers several default templates that can be used for call logs, live chats and tickets. While these will accommodate most users of SmarterTrack, some companies may want to gather information that is not recorded in these default templates. Therefore, custom fields definitions can be used to define the additional information a company may need. These fields can be added to tickets, live chats, advanced searches, reports, and system settings. Note: Specifying which template to use for tickets, live chats and call logs is done using the Custom Field Template setting in the Department settings on the Ticket, Live Chat or Call Logs tabs.

To view the details for a specific template, simply double-click the template. To create a new template, click Add in the content pane toolbar. The template details will load in a new window and the following settings will be available:

Options tab

Use this tab to display the following setting:

- Display Name - The name of the template.

Field Definitions tab

Use this tab to add existing field definitions to this template. When adding or editing field definitions to a template, the following options are available:

- Custom Field - The custom field to be added to the template.
- Display Name - The text displayed to customers and/or agents that describes the custom field.
- Visibility - To specify whether the field definition is available to users, agents or both, choose the appropriate option from the list.
- Required by Users - Checking this box will require users to complete this custom field.
- Required for Agents to save or send - Checking this box will require agents to complete this custom field before sending a ticket response.
- Required for Agents to close tickets - Checking this box will require agents to complete this custom field before closing a ticket.
- Show in communication view - Checking this box means that custom fields will appear in an agent's compose window when submitting tickets to SmarterTrack. Custom fields will appear once the agent has selected the group the ticket is submitted to or the group that is sending the ticket to the customer.

Time Log Categories

While not directly related to custom fields as detailed above, time log categories add additional customization to the SmarterTrack management interface. Configured by the system administrator, time log categories are available on time logs to help managers see where an agent's time is spent or to organize tasks related to a specific project. To create a new category, simply click Add in the content pane toolbar. A Category modal window will display a field for the Category Name. Once created, time log categories are available to use immediately.

Email

Administrators will use this section to specify the settings relating to email delivery, including POP importing, SMTP accounts, autoresponders, email templates and more.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Email . The email settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

• Default Encoding - To specify the encoding format, select the appropriate option from the list.
• Delete Failed Emails After - The number of days after which undelivered emails are deleted. By default, failed emails are deleted after 30 days. Note: Emails that cannot be delivered are stored in the App_Data/Spool/Failed folder.
• Delete Raw Content After - To specify the values at which raw content should be deleted, type the appropriate number in the fields for days, files, and MB.

• Day(s) - The number of days after which files are purged from the system. By default, raw content is purged after 30 days.
• File(s) - The maximum number of files that will be kept before the files are purged from the system. By default, the maximum number of files is 25,000. Note: SmarterTools recommends keeping this option at the default setting or lower.
• MB - The maximum amount of space available for raw content storage. If this amount of space is exceeded, the files are purged from the system. By default, the maximum amount of space is 10,000 MB.
• Delivery Delay - To specify the number of seconds automated messages from the system are delayed, type the appropriate number in this field. Setting a delivery delay can keep the connection between your help desk and your mail server running smoothly. By default, the

delivery delay is 10 seconds.

• Autoresponder Blacklist - Any email address or domain you add to this text box will be excluded from receiving any departmental auto-responders (e.g., ticket received notifications). Addresses/domains should be entered one per line.

• Filter duplicate incoming emails - Checking this box can prevent SmarterTrack from receiving a large influx of new tickets due to auto-responder loops.

• Remove redundant embedded replies in emails - Checking this box will truncate emails by removing redundant embedded replies. For example, sometimes replies from users can contain multiple copies of previous conversations between that user and the agent. Checking this box removes most, if not all, of that "redundant" content to keep replies shorter, less wieldy, and easier to read and follow.

SMTP

SmarterTrack does not utilize an internal SMTP server to send email messages. Therefore, an external SMTP account must be configured to send ticket responses and system notifications. Accounts configured in this section can be chosen in the Brand and Department settings. By default, a Default SMTP Account will be present. Edit the account or click Add in the content pane toolbar to configure the SMTP settings. A modal window will display the following options:

• Server - The outgoing SMTP server name.

• Email Address - The email address from which messages are sent.

• Display Name - The name used to identify the mail server. This field is optional but recommended.

• Encryption - Select the level of security used for sending emails: None, SSL, or TLS.

• Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.

• SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.

• SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.

POP

POP accounts can be used to import tickets from email. Note: If using a POP server for email, any messages in the account will be downloaded into SmarterTrack and deleted from the mail server. To add a POP account, click Add in the content pane toolbar. A modal window will display the following options:

• Server - The outgoing POP server name on which the email account resides.

• Encryption - Select the level of security used for receiving emails: None, SSL, or TLS.

• Server Port - The port used to connect to the POP server. By default, the POP server port is 110. Note: If SSL or TLS is used, this port will automatically change to the default port necessary to match the security setting.

• Login Username -The identifier used to log into the POP server.

• Login Password - The corresponding password used to log into the POP server.

• Email Address - The full email address associated with the POP account. Some mail servers offer the ability for the Username to be different than the actual email address, or don't allow the full address as the Username. To ensure the proper account is used for POP importing, both the Username and Email Address need to be added when setting up a POP account.

• Import Frequency - The interval, in minutes, that SmarterTrack checks the POP account for new messages. By default, the import frequency is 2 minutes.

• Department - The department that will utilize the POP settings for ticket importing.

• Who Can Start Email Tickets - The role required to submit a ticket via email. For more information, see Roles .

• Leave Messages on Server - By default, when you retrieve email through POP3, the emails are deleted from the mail server. Checking this will cause email messages retrieved via POP to stay on the mail server.

Note: When importing emails, the department autoresponder will not be sent for emails more than 3 days old.

Templates

When certain actions occur within the system, SmarterTrack can send an email based on that action. For example, if a company wants to send a follow-up survey to a customer after a ticket resolution, the system will automatically send an email requesting the customer complete the survey. These system-generated emails are predefined and no new templates can be created. However, administrators can use this section to edit the template content. Each template is sent using the Brand SMTP settings. See below for more information on the available templates:

-Master Template-

This template is used to control the outer HTML appearance of emails sent from SmarterTrack. An HTML and Preview tab are available to edit the HTML and view what the HTML will render in outgoing emails. No variables are available for this template.

Auto-Close Ticket

This email is used when a department is set to automatically close tickets after a certain amount of time. The email notifies the customer that a particular ticket was closed, but that the ticket can be re-opened by simply replying to it. The following variables are available:

- The Subject of the closed ticket [%Subject%]
- The ticket number of the closed ticket [%TicketNumber%]

Community Activitiy Digest

This email is sent on a regular basis and is used to notify the customer of activity on Community threads they are subscribed to. The following variables are available:

- A summary list of all Community activity that the user is subscribed to [%COMMUNITYACTIVITYLIST%]
- The date (on the server) the activity happened [%DATE%]
- The time (on the server) the activity happened [%TIME%]
- Company name as defined in brand settings [%COMPANY%]
- The URL of the customer portal [%PORTALURL%]

Community Comment Notification

This email is used to notify a customer that a comment has been added to their Community post. The following variables are available:

- The title of the Community thread [%SUBJECT%]
- The username of the user that added the comment [%COMMENTUSERNAME%]
- The text of the comment added [%COMMENTTEXT%]
- The URL to the Community thread [%THREADURL%]
- The date (on the server) the comment was added [%DATE%]
- The time (on the server) the comment was added [%TIME%]
- Company name as defined in brand settings [%COMPANY%]
- The URL of the customer portal [%PORTALURL%]

Email Rejected Due to Lock

This template is used to notify a customer that the ticket they are replying to has been closed and locked and offers a way to initiate a new ticket. The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]

- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Email Rejected Due to New Ticket Requirements

This template is used to notify a customer that they don't meet the department's required role for starting a ticket. For example, a billing department may require users to be Registered Users of SmarterTrack, but they are attempting to submit the ticket anonymously. For more information, see Roles . The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Email Rejected Due to Policy

This template is used to notify a customer that the department they're trying to contact does not accept tickets via email. This email will be sent when a POP account is not enabled for the department. Instead, tickets need to be created via the Web portal. For more information, see Email . The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Forgot Login

This template is used to send the password to the registered email account on file when a user forgets his/her login information and they click on the "Fogot Login?" link on the Web portal. The following variables are available:

- Company name as defined in brand settings [%COMPANY%]
- The base URL of the support site [%SITEURL%]
- The password of the account (required) [%PASSWORD%]
- The username of the account [%USERNAME%]

Survey

This template is used to offer a survey to a customer after their ticket is resolved. The following variable is available:

- The customer name [%CustomerName%]
- The username for the customer [%CustomerUsername%]
- The subject of the resolved ticket [%Subject%]
- The survey URL [%SurveyUrl%]
- The ticket number [%TicketNumber%]

Ticket List

This template is used when a customer requests an emailed list of all previous tickets. The following variable is available:

- All Tickets that belong to user [%TicketList%]

Verify Email Address

This template is used to confirm a new user's email address. The following variables are available:

- The brand name for the help desk they are registering for [%BrandName%]
- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address on the account [%EMAIL%]
- The full name for the user signing up [%FullName%]
- The link they need to click on to verify the account (Required) [%LINK%]
- The username on the account [%USERNAME%]

Events

Using SmarterTrack's extensive event system it's possible to detect events as they occur, generate messages for those events and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, administrators and agents don't have to query for the status of the items in the system - they just receive messages when specific events occur so they can take care of them. SmarterTrack's events system can also automate actions to streamline operations. For example, the administrator can configure an event so that the system automatically sends live chat invitations to idle portal visitors.

There are two categories of events in SmarterTrack: agent-level events and system-level events. For more information on agent-level events, please see My Events . For a complete breakdown of the events system, including how to create a new event and details on the event categories available, see the Events folder found in the Help for Users & Administrators section of the Online Help.

To access system-level events, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Events . A list of configured events will load in the content pane and the following tabs will be available:

Global

System-level events configured in this section can apply to the entire SmarterTrack installation. In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Events must be selected before choosing an action from the toolbar.
- Name - The name of the event.
- Status - Indication of whether the event is enabled or disabled. The event will only trigger if it is enabled.
- Category - The feature to which the event pertains (Tickets, Survey, Who's On, etc.).
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet to trigger the action.
- Actions - The actions that occur when an event is triggered. Actions include emails, notifications, logging, and other event-specific functions.

To view the settings for a specific event, simply double-click the event and the event settings will load in the content pane. To create a new event, click the New button on the content pane toolbar. For more information on how to create a new event, see Creating New Events .

Employees

This tab displays all events that were created by individual employees. Administrators will want to look at these events occasionally to ensure that employees are using the event system correctly and productively. To view or modify the settings for an agent’s event, double-click the event and the event settings will load in the content pane.

Notification Profiles

Notification profiles determine how event messages are sent. Options include text message or email. System administrators can modify the default notification profile or create additional ones using the New button in the content pane toolbar. System-level notification profile(s) can be used when an event does not apply to a specific agent but the installation a whole.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.

- Notification Profile Name - The name of the profile.
- Type - The types of notification the agent has enabled for the selected profile.

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enabled - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enabled - Checking this box will enable SMS notifications.
- Enable reminder - Checking this box will allow the agent to receive notifications in a pop-up window.

Forms

This feature is only available to administrators using SmarterTrack Enterprise.

While it's possible to create custom ticket and live chat templates that can be used to collect certain types of data from customers PRIOR to a ticket or live chat being submitted, there's a balance that needs to be found. That balance teeters on asking customers to provide too much or too little information. You don't want to overwhelm customers with fields when they first contact you, but you also need some types of information in order to properly triage issues or questions. That's where SmarterTrack Forms come into play.

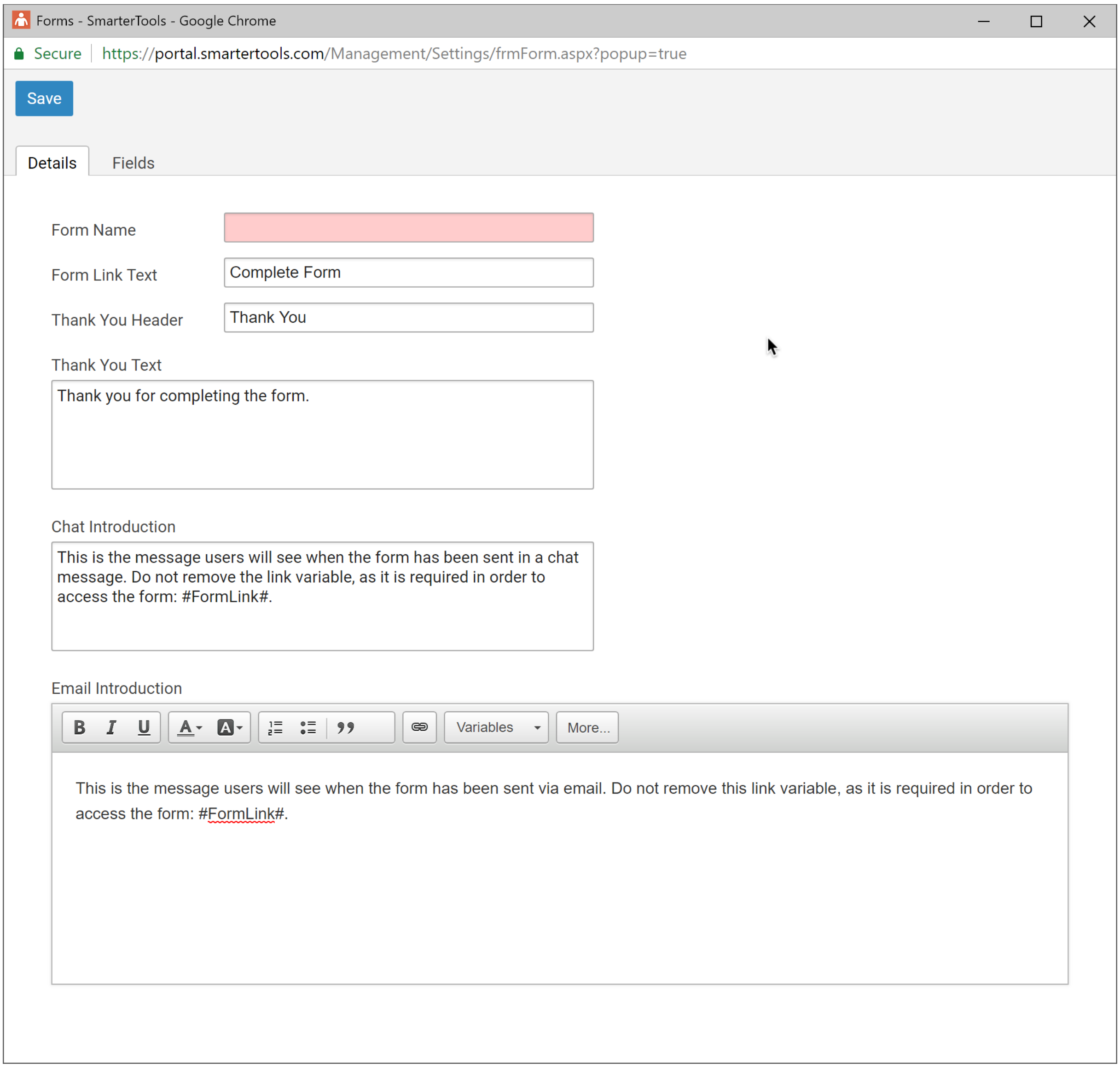
Forms can be used for any number of things: gathering system information; gathering access information for remotely accessing a customer's network; gathering product serial numbers or part numbers and more. That said, a form can only be filled out once. If information is missing or filled out incorrectly, a new form will need to be sent to the user.

To view or manage forms in the system, log into the management interface with a system administrator account. Then navigate to the Settings section. In the Configuration area of the navigation pane, click on Forms. The settings will load in the content pane and the following buttons will be available:

- New - Allows you to create a new form.
- Actions - Lists the Select All and Delete actions.

Creating a Form

Just as with Surveys, it's up to System Administrators to create new forms. To do this, click the New button. When you do this, a new pop-out window opens:



In the new window, two tabs appear: Details and Fields.

Details

This tab displays fields to fill out for general information about the form, as well as the messages users will see when the form is sent to them to be filled out. There is some default text in certain areas, but it can easily be replaced or customized as needed.

- Form Name - The friendly name of the form as it appears in the forms list.
- Form Link Text - The link text you want the user to see, to entice them to click the link. For example, "New User Setup Information" or "New Vendor Registration Form". This is the text used by the #FormLink# variable that's included with the email and chat introduction text.
- Thank You Header - The text that appears at the top of the page that's displayed once a user fills out the form.
- Thank You Text - The full text that appears on the "Thank You" page that appears once a user fills out the form.

- Chat Introduction - This is the text that appears when a form is introduced via live chat. Generally, this text should be short and to-the-point, so the text box is basic, without customization options. The "Form Link Text" that's set will appear within the introduction. Therefore, the #FormLink# variable MUST be included somewhere within this text.
- Email Introduction - This is the email that will be sent to users when the form is requested. This text can be longer and more stylized as it's sent as a reply to the ticket. Just as with the Chat Introduction, the "Form Link Text that's set will need to appear somwehere within this text using the #FormLink# variable.

Fields

Fields are, essentially, the questions you want to ask, items you want to collect, etc. Form fields are like survey questions: you add the items you want to collect and arrange them on the page in the order you want the information collected. In many ways, the field types match the survey question types you can create.

To add a field, click the Add Field button. A modal window will open and the following options are displayed:

- Field Type - This is the type of box you want to create to have filled out by the user. Field types include:
- Header - Text that will appear on the form as a <h2> header.
- Informational - Text that will appear as a label on the form. This is, more or less, introductory text that is not filled out by the user.
- Multiple Selection - Allows users to select one or more options from a list.
- Single Selection - Allows users to select one option from a list.
- Short Response - Allows users to enter a small amount of text in response to your question or statement.
- Long Response - Allows users to enter a larger amount of text in response to your question or statement.
- Yes / No - Allows users to select yes or no in response to your question.
- Checkbox - Allows user to checkmark a statement or question. For example, this could be used to gather consent. ("I accept the Terms and Conditions as outlined in this form.")
- Email Address - Allows users to enter a valid email address.

Depending on the Field Type you select, options will appear that will allow you to customize the question, or data point, so you can collect the information you want. Once you have everything set up, be sure to save your new form.

Sending a Form

As mentioned, forms can be sent to users either via Live Chat or as a reply to a ticket. However, the options for sending a form as a chat reply versus a ticket reply are slightly different.

Sending a Form Via Live Chat

When sennding a form as part of a live chat, simply click the Actions (...) button and select "Send Form" from the dropdown. This will paste the Chat Introduction text as a reply to the chat, along with the Form Link Text. The user simply clicks that link to open the form in a new window.

Sending a Form as a Ticket Reply

When sending a form as a reply to a ticket, Agents have the ability to modify the Email Introduction text, if necessary. Unlike the Chat Introduction, having the ability to edit the Email Introduction is a benefit for agents when replying to tickets. This is because they may want to modify, or personalize the Email Introduction based on any ongoing or previous conversations they've been having with the end user. Crafting Email Introduction text that is viable across many different circumstances is difficult, at best, for a system administrator. Therefore, giving agents the ability to customize the text ensures that the rapport the agent has with the end user is preserved.

Just as with live chats, when an agent is replying to a ticket, they click the Actions (...) button and select Send Form from the dropdown. This opens a reply window and pastes the Email Introduction text as the agent's reply, complete with Form Link Text. The agent can then simply send the reply, and set the appropriate status on that reply, or edit the introduction text before sending the reply.

Regarding ticket status once a form is sent, a completed form will always place the ticket the form is associated with back to an Active status. (Tickets that are Closed and Locked retain that status, even if a form is filled out.) In addition, a comment is added to the ticket denoting the date and time the form was completed, and the Forms tab will display a number on it, noting that there is a new completed form associated with the ticket. The agent can then go to that tab and click the Form link to view the form.

Failover

This feature is only available to administrators using SmarterTrack Enterprise with Failover Functionality.

Administrators can prevent costly downtime by installing a second server that is always connected to the SmarterTrack database in standby mode. In the event that the primary server fails, the secondary server will operate as a backup so your help desk remains online. For more information on Failover, including complete configuration instructions, please see SmarterTrack Failover Functionality .

To view the failover settings within SmarterTrack, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Failover . The failover servers will load in the content pane.

The following columns are available:

- Checkbox - Use these boxes to select multiple servers. Servers must be selected before choosing an action from the toolbar.
- Server Name - The computer name of the server the license key was activated on.
- File Path - The location of the app_data folder in which the configuration file is stored.
- Last Heartbeat - The date and time the SmarterTrack database last communicated to the server.
- Processes - The number of times the license key has been installed on the server.
- Status - The status of the server.
- Primary - The default server that SmarterTrack uses.
- Disabled - The server is not set up to operate as a backup in the event the primary server fails.
- Active - The server actively communicating with the SmarterTrack database.
- Passive - The server that will act as a backup in the event the primary server fails.
- Unavailable - The server is not communicating with the SmarterTrack database.
- Mode - The edition of the SmarterTrack installation on the server.

The following options are available in the content pane toolbar:

- Enable - Allows the selected server to operate as a backup in the event the primary server fails.
- Disable - Prevents the selected server to operate as a backup in the event the primary server fails.
- Set Active - Changes the status of the selected server to active.
- Delete - Permanently deletes the selected server(s) as a potential failover server.
- Refresh - Refreshes the content pane.

Language and Locale

Administrators will use this section to adjust any language and locale settings, including time zone, location, support for multiple languages and translatable strings.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Language and Locale . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Locale for Currency - To specify the format in which currency is displayed for cost calculation reports, select the appropriate option from the list. By default, the locale is set to English (United States) ($1,000.00).
- Default Time Zone - From the list, select the time zone SmarterTrack will use as the default. More often than not, this time zone should match your current location. However, it can be adjusted to account for offices in other geographic locations.

Supported Languages

With support for nearly 60 different languages, SmarterTrack makes it easy to communicate with customers on a global level. Setting up language support for SmarterTrack is a multi-step process. For detailed instructions, please refer to the KB article Set Up SmarterTrack to Support Multiple Languages .

The following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple languages. Languages must be selected before choosing an action from the toolbar.
- Language - The language name and dialect, if available.
- Locale - The language and the geographic location in which the language or dialect is used.
- Default - Indicates if the selected language is the default language.
- Enabled - Indicates whether support for the selected language has been enabled.
- Language Pack Installed - Indicates whether the language pack has been installed into SmarterTrack.

The following options are available from the content pane toolbar:

- New - Allows the administrator to designate a new supported language.
- Edit - Allows the administrator to make changes to a supported language's settings.
- Delete - Permanently deletes the selected supported language(s).

To edit the settings for a specific language, simply double-click the language. The supported language details will load in the content window.

Translatable Strings

Some phrases and words may not be available for translation through a specific language pack. When this happens, administrators can use translatable strings to define these phrases and words. For example, a U.S. company with customers in Spain may create a translatable string to translate the company's department names (Billing, Sales, etc.) into Spanish (Ventas, Facturacion, etc.)

The following columns are displayed when translatable strings have been added:

- Token Name - The identifier for the translatable string. Note: Token names must begin and end with @@.
- Description - A summary describing the purpose of the translatable string.
- Status - Indicates whether the translatable string can be translated into the supported languages.

To edit the settings for a specific translatable string, simply double-click the translatable string. A modal window will display the following options:

- Token Name - The identifier for the translatable string.
- Description - A summary describing the purpose of the translatable string.
- For each supported language that is configured, a field will be available for translation.

Licensing

These settings are not available to those using the Hosted SmarterTrack Helpdesk.

To access licensing information for SmarterTrack, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Language and Locale . The edition, status, upgrade protection expiration date and license level information will load in the content pane.

The following options are available from the content pane toolbar:

- Activate - Activates a new SmarterTrack license key.
- Reactivate - Reactivates a SmarterTrack license key.
- Details - Displays details about the license, including license key, feature, status, upgrade protection expiration, limits and available trials. License details can also be seen by double-clicking on the license.
- Buy Now - Allows the administrator to purchase a new license key.

Live Chat

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, improve customer support and assist more customers concurrently. Administrators will use this section to adjust the general live chat settings for the installation, including quality control settings, notification settings, department permissions and settings, and live chat link integration.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Live Chat . The live chat settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Hand-off - no initial response - When a live chat comes in, but an agent doesn't respond for this amount of time, the chat will either be handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue.
- Hand-off - no follow-up response - If, in the middle of a chat, the agent doesn't reply to the end user within this amount of time, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. Note: An agent is considered to be inactive in a live chat if the agent has not transferred the live chat to another agent, typed in the live chat text box, or does not have the last response in the chat.
- Hand-off - agent disconnected - If, in the middle of a chat, the agent closes the chat window, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue.
- Disallow new chats outside of business hours - Check this box to turn off the live chat feature outside of the business hours that were set up for the department. By default, this option is disabled. Note: Administrators will need to define the business hours for the brand or department.
- Allow end users to send attachments - Check this box to allow users to send files (screenshots, documents, etc.) to agents via live chat. By default, this option is disabled.
- Warn agents if they are the last to go inactive for chat - Checking this box will display a confirmation box to the last agent to log out of a department or group letting them know, and having them acknowledge, that they are the last agent to log out.

Note: Employee chat room and instant messenger are always enabled by default.

Notifications

Use this tab to specify the following settings:

- In queue sound - To specify the how often a sound notifies agents that live chats are in the queue, select the appropriate time interval from the list.
- Idle sound - To specify the how often a sound notifies agents that they have an unanswered live chat, select the appropriate time interval from the list.
- Idle warning sound - How often a sound warns agents that they have a live chat that has not

been responded to. The threshold for when the warning sound begins is determined by the 'after' field.

• Idle critical sound - How often a sound notifies agents that a chat has not been responded to and has reached the critical idle threshold. The critical idle threshold is determined by the 'after' field.

• Duration warning - The number of seconds or minutes a chat lasts before its duration sets off a warning.

• Duration critical - The number of seconds or minutes a chat lasts before its duration sets off a critical alert.

Live Chat Links

Use this tab to create live chat links that can be used on the customer portal or added to a company website. These links and/or images can be used to spawn SmarterTrack live chats wherever the links and/or images are placed.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple links. Custom links must be selected before choosing an action from the content pane toolbar.

• Title - The name of the live chat link.

• Type - The type of live chat link: an Embedded link, displayed as an image or horizontal tab (with custom text), that opens a chat window directly within the site or a Button link, displayed as an image or plain text, that opens its own chat window when clicked.

• Refresh Rate - Indicator of the number of seconds after which the script checks the SmarterTrack server to make sure SmarterTrack is responding and live chat is available.

To create a new live chat link, click Add in the content pane toolbar. To edit an existing live chat link, simply double-click the link. The settings will load in a modal window and the following tabs will be available:

Options tab

Use this tab to edit the following settings:

• Title - The name used to identify the live chat link you're generating. These can signify the brand you're creating the links for, the website the links will go on, or any other naming convention you choose.

• Type - This setting determines the type of live chat link that will be used: an Embedded link, displayed as an image or horizontal tab (with custom text), that opens a chat window directly within the site or a Button link, displayed as an image or plain text, that opens its own chat window when clicked. An embedded live chat link is displayed in any corner of a website, where it lies directly on top of the website's user interface. When a visitor clicks on the live chat link, the chat window will display above or below the link. (A square popout button allows the embedded chat window to be popped out into an external window, if the visitor desires.) When an embedded live chat has begun, a visitor can continue communicating while browsing the site, as the chat window will persist across all pages. In addition, if the brand's portal and company website share the same live chat link, the chat can continue while the visitor navigates to the company's support portal. A button live chat link can be placed anywhere on a website where the applicable HTML code can be added. In addition, it can have its own CSS class applied. When clicked on by a visitor, a chat window will open in an external window.

• Refresh Rate - The number of seconds after which the script checks the SmarterTrack server to make sure SmarterTrack is responding and live chat is available. By default, the refresh rate is 30 seconds.

• Position - Determines where the live chat link will be displayed on the website: Bottom Right, Bottom Left, Top Right or Top Left. Note: This setting is only visible when the Embedded live chat type has been selected.

• Background Color - The color in which the live chat window will be displayed. Note: The text color will automatically adjust to be visible based on the color chosen for the background.

• Style - SmarterTrack includes standard live chat styles for determining how chat conversations are displayed. Select one of the styles by previewing it in the preview window to the right of the live chat settings.

• Departments to Include - If there are multiple departments created within SmarterTrack, it is possible to select which department(s) will be available for live chat when using the live chat script.

Live Chat Online tab

Use this tab to edit the following settings:

• Display As - Select how the live chat link will be displayed when live chat is online. The options available here are determined by the Type of live chat chosen on the Options tab. Live chat links can be displayed as an Image or Tab for embedded-type chats or as an Image or Plain Text for button-type chats. In addition, varying settings will display based on the selection made here.

• Text - The hyperlink text displayed for the live chat link. Note: This setting is only visible when Plain Text is chosen as the display for button-type chats.

• Anchor Title - The text displayed when a visitor's mouse pointer hovers over the live chat online link. This text is also available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.

• Chat Introduction - The chat introduction is text that will be displayed above the live chat image or link for new visitor sessions to invite visitors to participate in a live chat. Note: This setting is only visible for embedded-type live chat links.

• Navigate URL - The website URL to which customers are directed if they click on the live chat online image. Note: This setting is only available for button-type live chat links.

• Navigate Target - The HTML code that specifies whether the URL opens in a new window or the current window. For example, _blank will indicate that the URL should open in a new window. This is an optional field and if left blank will open the URL in a new window by default. Note: This setting is only available for button-type live chat links.

• CSS Class - The cascading style sheet class used to format the image on the company website, if there is one available. This is an optional field. Note: This setting is only available for button-type live chat links.

• Image - The image displayed when live chat is online. Administrators can link to an image hosted publically, upload their own image or choose from a variety of pre-made options.

Live Chat Offline tab

Use this tab to edit the following settings:

• Display As - Select how the live chat link will be displayed when live chat is offline (i.e., all agents are logged out or unavailable, it is outside of business hours, etc.). The options available here are determined by the Type of live chat chosen on the Options tab. Live chat links can be displayed as an Image or Tab for embedded-type chats or as an Image or Plain Text for button-type chats. Administrators can also choose Hidden to not show a live chat link when live chat is not available. Varying settings will displayed based on the selection made here.

• Header Text - The text displayed on the horizontal tab. Note: This setting is only visible when Tab is chosen as the display for embedded-type chats.

• Text - The hyperlink text displayed for the live chat link. Note: This setting is only visible when Plain Text is chosen as the display for button-type chats.

• Anchor Title - The text displayed when a visitor's mouse pointer hovers over the live chat offline link. The text displayed when a visitor's mouse pointer hovers over the live chat online link. This text is also available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.

• Tab Color - The color in which the horizontal tab will displayed. The Header Text color will automatically adjust to be visible based on the tab color chosen. Note: This setting is only visible when Tab has been chosen as the display for embedded-type chats.

• Chat Introduction - The chat introduction is text that will be displayed above the live chat image or link for new visitor sessions to invite visitors to submit a ticket or leave a message. Note: This setting is only visible for embedded-type live chat links.

• Navigate URL - The website URL to which customers are directed if they click on the live chat offline image. Note: This setting is only available for button-type live chat links.

• Navigate Target - The HTML code that specifies whether the URL opens in a new window or the current window. For example, _blank will indicate that the URL should open in a new window. This is an optional field and if left blank will open the URL in a new window by default. Note: This setting is only available for button-type live chat links.

• CSS Class - The cascading style sheet class used to format the image on the company website. This is an optional field. Note: This setting is only available for button-type live chat links.

• Image - The image displayed when live chat is offline (i.e., all agents are logged out or unavailable, it is outside of business hours, etc.). Administrators can link to an image hosted publically, upload their own image or choose from a variety of pre-made options.

Departments

Use this tab to adjust the live chat permissions and settings per department. Each department configured will be displayed on its own row. Select a department and click Edit in the content pane toolbar to open the department's live chat settings in a modal window. The following tabs will be available:

Options

• New Chats in Portal - The role required to submit a ticket via the portal. For more information, see Roles .

• Custom Field Template - The custom field template used to submit live chats. The live chat template specifies which fields the user should complete when submitting a live chat. For more information, see Custom Fields .

• Survey to Offer After Chat - To automatically offer a survey to customers after a live chat, select the appropriate survey from the list. For more information, see Surveys . Surveys are displayed immediately after a chat ends.

• Estimated Wait Time - The estimated number of seconds that a customer may need to wait to live chat with an agent. By default, the estimated wait time is set to 30 seconds.

• Search Knowledge Base before starting a new chat - Checking this means that when customers initiate live chats to a department via the Web portal, prior to the chat actually being submitted, the end user will be presented with a screen listing possible KB articles that are relevant to their questions. By default, this setting is enabled.

• Search Knowledge Base before starting a new ticket - Checking this means that when customers submit tickets via a live chat link when live chat is not available, prior to the ticket actually being submitted, the end user will be presented with a screen listing possible KB articles that are relevant to their questions. By default, this setting is enabled.

Custom Messages

Use this tab to create custom messages to be displayed within the live chat window:

• Not Available Message - The title text displayed on the live chat window when live chat is offline, indicating that live chat is not available.
• Before Live Chat - The title text displayed on the live chat window before a live chat has been started.
• Waiting for Live Chat - A message notifying customers of their estimated wait time to chat with an agent.
• Agent Welcome in Live Chat - The text that is displayed as the initial message from the agent to the end user. The welcome message appears after the user's initial live chat question.
• After Live Chat - The text that is displayed after a live chat has ended.
• Chat Invite Message - The text automatically inserted in the live chat invitation window when visitors are invited to live chat via Who’s On.

Website Integration

Use this tab to get the live chat link script needed to integrate SmarterTrack’s live chat with your company website.

• Live Chat Link - Use this dropdown menu to choose from the list of configured live chat links. The live chat link script will change based on which link is chosen.
• Host Header - In those instances where customers are utilizing multiple brands and have host headers setup for each, a unique live chat script can be generated for each brand that is set up. Leaving this as the default means that the script will be generated for the SmarterTrack Base URL.
• Control ID - This is a unique identifier for the live chat link script that is used at the location where the live chat link/image will appear on the page.
• Support HTTPS - Select this option to allow SmarterTrack to make connections over HTTPS when visitors initiate live chats.
• Put the following right before the page's ending </body> tag: - This is the actual script that will be placed on your website, between the main <BODY> HTML tags. The BODY end tag will generally be at the very bottom of the Web page's source. The code should be copied and pasted exactly as it appears, and it should be placed at the very bottom or your Web page so that the script is the LAST thing called when your website renders. This will prevent any potential issues with SmarterTrack prohibiting your website from loading when customers visit.
• Put the following on your page where you want your chat link to appear - When using a button-type live chat link, copy and paste this script in the location where you want your live chat status to appear. For embedded-type live chat links, it’s recommended to put this HTML in

the website's footer, if possible, as embedded-type chat link's positioning is determined by its live chat setting.

Management Interface

Administrators will use this section to configure settings that affect the management interface of SmarterTrack, including basic settings, color scheme and CSS modifications.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Management Interface . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- SmarterTrack Base URL - The URL for the SmarterTrack portal.
- Enable simultaneous login to the portal and management interface - Checking this box will allow employees to log into both the portal and management interface at the same time. By default, this setting is disabled.
- Enable automatic time log creation - Checking this box will allow time logs to be automatically calculated and created for call logs, tickets and live chats when the agents who owns the call log, ticket or live chat has it open for at least one minute.
- Login Background - Use this option to select the background image(s) that displays on your login screen. Use the default images that come with SmarterTrack or a solid color background.

Knowledge Base

Use this tab to edit the following setting:

- Items Stale After - The number of days after which articles become stale. Stale articles are still available in the portal, but should probably be reviewed and then have the stale date reset after review. By default, articles are stale after 90 days.

Security

Administrators will use this section to adjust the general settings pertaining to the security of the SmarterTrack installation, including the configuration of password requirements, IP blacklists, upload limitations and more.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Security . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Captcha - When enabled, a captcha will appear when registering a new account, or submitting a new ticket from the portal or thread from the Community (if the user's email address isn't verified). Choose to use SmarterTrack's built-in captcha or Google reCAPTCHA. Instructions on obtaining an API key for Google reCAPTCHA can be found here: https://www.google.com/recaptcha/intro/android.html . When the site key and secret key have been obtained, enter them in the corresponding fields.
- Enable brute force protection - When checked, this setting enables SmarterTrack's brute force protection. Therefore, if a "user" attempts to log into SmarterTrack more than 10 times in 5 minutes they are locked out for 5 minutes. After 5 minutes they are able to attempt additional log ins.
- Enable password reset - When checked, this setting allows agents, managers and administrators to reset their passwords from the management interface login screen. Clicking the link and filling out the username and CAPTCHA will send an email with a password reset link to the email address associated with the username. Note: If using external providers or active directory authentication, this feature should not be enabled.
- Force all traffic over HTTPS - Select this option to force all SmarterTrack traffic over HTTPS. This improves SmarterTrack security by allowing all traffic to be encrypted. Prior to enabling this setting, SmarterTrack must be set up as a site in IIS and have a valid SSL certificate in place for the SmarterTrack site. Note: Administrators managing SmarterTrack on their own servers must ensure this SSL certificate is in place. However, Administrators using the Hosted SmarterTrack solution can simply enable this setting, as a secure connection is already in place on the SmarterTools servers.
- Moderate new user community posts - When checked, threads submitted in the Community by new users must be approved by moderators before showing publicly. A user is considered new until they are at least 7 days old and have at least 5 replies or comments on threads.
- Allow interface to be embedded in another site (not recommended) - At times, an administrator may wish to embed pieces of the customer facing portal (e.g.: KB articles, News items, etc) within a third-party site. This is an advanced feature that has security considerations and requires extensive HTML knowledge. Select this option to allow SmarterTrack’s interface to be embedded in another site.

Password Requirements

Use this tab to configure the minimum password requirements for registered users.

- Minimum Password Length - The minimum number of characters the password must have.
- Require numbers - Select this option to force users to include a number in the password.
- Require uppercase letters - Select this option to force users to include a capital letter in the password.
- Require lowercase letters - Select this option to force users to include a lowercase letter in the password.
- Require symbol - Select this option to force users to include a symbol in the password.
- Require password does not match username - Select this option to ensure that the username and password do not match.
- Disable password strength for existing passwords - Select this option to allow changes to the password requirements to only affect new users or new passwords.

Blacklist

Use this tab to edit the following setting:

- IP Blacklist (one per line) - Adding IP addresses to this list prevents users from that IP from being able to leave feedback for any knowledge base articles. Only one IP address may be listed on a line.

Uploads

Use this to specify the types of files that can be uploaded to SmarterTrack. (NOTE: By default, the maximum size allowed for any attachments is 2MB.)

- Allowed extensions for document uploads in HTML editor (one per line) - These are the file types that agents can attach to tickets via the Management Interface. In general, agents should be able to attach any file type to a ticket. To allow this, simply add an asterisk (*). However, there may be times when administrators will want to limit file attachments to simply images or documents. To restrict agents to specific file types, add the extensions here, one per line, and include the dot (i.e., .JPG not simply JPG).
- Allowed extensions for end user file uploads (one per line) - These are the file types that customers and end users can upload to agents when submitting tickets from the portal or starting live chats, either from the portal or from the custom integration of Live Chat into your own website. This list also impacts attachments to tickets that are started from, or replied to, via email. If an incoming email has an disallowed attachment type, a comment is automatically added to the ticket so that the agent knows something is missing. In general, it's a good idea to limit customers from uploading file types that may prove harmful, such as program files. To restrict end users and allow only specific file types, add the extensions here, one per line, and include the dot (i.e., .JPG not simply JPG).

Organization

When creating an Organization , it's possible to add new Members by domain. However, there are many times when customers will use free email services such as Gmail or Yahoo! when they register. Therefore, when adding new Members by domain, administrators will want to exclude free email services when adding Members by Domain. This will ensure that not ALL users of Gmail, for example, are added as Members to any specific Organization.

Therefore, by default, SmarterTrack blocks the domains listed on this page from being added when adding in Members by Domain. This list is fully editable by system admininstrators and can be amended as needed.

Surveys

This feature is only available to administrators using SmarterTrack Enterprise.

SmarterTrack's survey feature allows companies to solicit customer feedback that will give managers a better perspective into customer satisfaction and loyalty. Obtaining customer feedback in a timely and useable format helps to ensure that the company is meeting and exceeding customer expectations and gives insight into key changes that should be made to improve the overall success of the company.

With SmarterTrack, business owners and managers can create different surveys for each department or a single survey that's used for the company as a whole. Separate surveys can even be created for live chats and tickets, so questions can be crafted based on each type of interaction. Full reporting is available for managers and business owners, and agents will see their survey results displayed right on any completed ticket or live chat.

To view or manage surveys in the system, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Surveys . The settings will load in the content pane and the following tabs will be available:

In general, the following details can be found on each survey in the content pane:

- Name - The name of the survey.
- Surveys Offered - The number of times the survey has been offered to customers.
- Surveys Answered - The number of times customers completed the survey.

Keeping track of the number of surveys completed versus the number offered can give insight into how successful a particular survey is received. If a low percentage of surveys are answered, it may be worthwhile to revisit the survey and make adjustments to try and gain a higher percentage of responses.

To view a survey, simply click a survey and it will display in the preview pane. If you would rather view the survey in a popup window, double-click the survey instead. Note: Double-clicking a survey also enables you to edit the survey.

To create a new survey, click New in the content pane toolbar. This will open the survey editor, which the administrator will use to create the new survey. For step-by-step instructions on how to create a survey, see the KB article Create a Survey . When creating a new survey or editing an existing one, the following tabs will be available:

Options

This tab allows the administrator to specify basic information regarding the survey. The available options are:

- Survey Name - Type the name of the survey in this field.
- Survey Link Text - This is the text that will appear at the bottom of a ticket or in an agent's signature, if these options are used.
- Welcome Text - Type survey instructions or a welcome message in this field. The text will appear at the top of the survey when it is opened from a link. Note: Surveys displayed after a Live Chat session will instead show text from the "Custom Message After Live Chat" setting in each department.
- Thank You Text - Type a closing message in this field. This customer will see this text after successfully submitting the survey when it was opened with a link. Note: This message will not be shown for a survey taken for a Live Chat, as the window closes immediately after submission.

Questions

This tab allows administrators to create, edit or modify the order of survey questions. If the administrator is editing a survey, a list of the current questions will load in the content pane.

In general, the following columns are available to the agent:

- Checkbox - Use these boxes to select multiple questions. Questions must be selected before choosing an action from the content pane toolbar.
- Move - Use these arrows to modify the order of survey questions.
- Question - The text of the question being asked.
- Question Type - The type of question (Yes/No, Rating, etc.).
- Weight - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

If the administrator is creating a new survey, questions will need to be added using the Add Question button in the toolbar. The settings shown will vary based on the Question Type chosen. The settings shown per type are listed below:

Short Answer

- Question - The text of the question that is being asked.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

Long Answer

- Question - The text of the question that is being asked.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

Single Selection

- Question - The text of the question that is being asked.
- Weight - A number assigned that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score. Note: You cannot associate a negative number with the weight.
- Render As - This dictates how users will see the question displayed: Radio Buttons or a Drop Down List.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.
- Options (option : value) - Use this box to enter the options from which users can choose. Options should be listed on per line, with a value assigned to each. For example, your question may ask "How well did the agent have an understanding of the topic being discussed?" Your three options may be entered as such (one per line): "Very good understanding of topic : 10", "Mediocre understanding of topic : 5", "No understanding of topic : 1". By the values entered, you indicate that the "Very good" option has a greater positive impact on the overall survey result.

Multiple Selection

- Question - The text of the question that is being asked.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

• Options (one per line) - Use this box to enter the options from which users can choose. Options should be listed on per line.

Yes/No

• Question - The text of the question that is being asked.
• Weight - A number assigned that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.
• No Value - Enter the value associated to a No answer. For example, your question may be "Did the agent have a good understanding of the topic of discussion?" Entering a value of 0 here will cause the survey score to be lower if the user chooses No.
• Yes Value - Enter the value associated to a Yes answer. For example, your question may be "Did the agent have a good understanding of the topic of discussion?" Entering a value of 1 here will cause the survey score to be higher if the user chooses Yes.
• Render As - This dictates how users will see the question displayed: Radio Buttons or a Drop Down List.
• Required Question - Check this box if users should be required to answer the question in order to complete the survey.

Rating

• Question - The text of the question that is being asked.
• Weight - A number assigned that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.
• Lower Limit - This is the lowest number on the rating scale.
• Upper Limit - This is the highest number on the rating scale.
• Required Question - Check this box if users should be required to answer the question in order to complete the survey.

Note: The difference between upper and lower limits cannot be greater than 20. In addition, make sure that the question is phrased so that the positive response is the higher score. (In other words, the upper limit equals the positive response and the lower limit equals the negative response.)

Tickets

Administrators will use this section to adjust ticket settings, including those related to service quality, signatures, balancing the workload, quality control and more.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Tickets . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Stop Idle Events After - Idle events run on tickets that sit, without activity, for a certain amount of time. However, idle events can tax SmarterTrack if there isn't an upper limit set that stops from firing after a certain amount of time, especially if more than one idle event set. Therefore, it’s wise to set the number of days after which idle waiting tickets no longer trigger event actions.
- Auto Save Frequency - This sets how often drafts are automatically saved as drafts when agents are typing up replies to tickets.
- Max Messages in Replies - The number of previous messages automatically included in the text of a ticket response. By default, ticket replies include the text of three previous messages. All replies to tickets are stored by SmarterTrack, but not all replies necessarily need to be included in each ticket response.
- Show Agents When Transferring - To specify whether an agent can select a specific agent when transferring tickets, select the appropriate option from the list.
- Default Reply Option - This determines whether the Reply or Reply All action is the default selection while viewing tickets. (Agents can use the reply button dropdown menu to manaully select Reply or Reply All, regardless of this setting.)

Timing

Timing settings are a good way to set up service quality levels for departments. For example, if tickets need to be replied to within a given amount of time, or if there is a limit set on how long a ticket remains open before it's resolved.

- Idle Warning After - The amount of time an agent has not responded to a ticket. After this threshold has been reached, the agent will receive a warning notification.
- Idle Critical After - The amount of time an agent has not responded to a ticket before the ticket becomes critical. After this threshold has been reached, the agent will receive a critical notification.
- Duration Warning After - The amount of time a ticket remains open before its duration sets off a warning.
- Duration Critical After - The amount of time a ticket remains open before its duration sets off a critical alert.

Signatures

To ensure consistency among all departments and groups within the company, administrators can create custom signatures that agents will use on all ticket correspondence. Alternately, different signatures can be created for each group and/or each department, as the needs arise.

Signatures can also include custom images, such as agent photos, icons and logos, apart from the agent avatar. To include a custom image, simply use the standard <img src= > HTML tag in the Source view and link to an image hosted on your own server or some other hosting service such as Picasa or Flickr. Note: Images should be sized and placed so that they do not interfere with the other pieces of an agent's signature.

To view a specific signature, simply double-click the signature. To create a new signature, click New in the content pane toolbar. A signature window will load and the following options will be available:

• Brand - To assign the signature to a specific brand, select it from the list.
• Department - To assign the signature to a specific department, select it from the list.
• Group - To assign the signature to a specific group, select it from the list

When creating new signatures, the WYSIWYG editor can be used to set font types, set colors, add links and more. In addition, variables can be used to pull information from the system to customize the signature based upon how users, department, groups, etc. are set up. The following variables are available:

• Survey Name - SmarterTrack allows user signatures to include links to any survey that is available for the brand and department. Any survey created that is specific to a department can be added to the signature created. In the signature itself, the text display will match whatever was added for the "Survey Link Text" created when the survey was initially created. For more information, see Surveys .
• Agent Avatar [#agentavatar#] - The avatar information for each employee.
• Email Address [#useremail] - The email address of the agent.
• Current Brand [#companyname#] - The brand that the agent is part of.
• Department Name [#departmentname#] - The department the agent belongs to.
• Display Name [#userdisplayname#] - The "friendly" name of the agent.
• Username [#username#] - The username assigned to the agent.

Rebalance Rules

To ensure an even workload is assigned to agents, administrators can set rebalance rules. Rebalance rules allow the system to automatically redistribute tickets among the available agents based on the parameters set by the administrator. For example, a support department with two active agents may receive a high volume of tickets that are evenly distributed among both agents. Later that day, a third agent may login and the rebalancing rule can be set to automatically redistribute any unanswered active tickets among all three agents at that time.

Note: Rebalance rules are NOT meant to be a way to redistribute tickets on an hourly basis. Instead, they are intended to run twice or three times a day. For example, rebalancing tickets during shift changes or for periodic redistribution if agents are taken out of the rotation. In addition, any tickets that have been viewed by agents either by opening the ticket in a new window or by previewing the ticket in the preview pane, and therefore "held" by those agents, as well as any pinned tickets, are NOT redistributed when the rebalance rules take effect.

To view a specific rebalance rule, simply double-click the rule. To create a new rule, click New in the content pane toolbar. The rebalance rule will load in a pop-up window and the following options will be available:

- Rule Name - The name of the rebalance rule.
- Group - The group to which the rebalance rule applies.
- Agents - Check the agent(s) to which the rebalance rule applies.
- Hold After Compose - The time frame after which a submitted ticket can be reassigned to another agent. By default, this option is set to 30 minutes.
- Hold After Read - The time frame after which a ticket that has been read can be reassigned to another agent. By default, this option is set to 10 minutes.
- Hold After Assigned - The time frame after which a ticket that has been assigned to an agent can be reassigned to another agent. By default, this option is set to 20 minutes.
- Rebalance Pinned After - The time frame after which pinned tickets can be reassigned to another agent. By default, this option is set to 2 hours.

- Enabled - Check this box to reassign pinned tickets to another agent. By default, this setting is disabled.
- Execute on Interval - The time frame after which the rebalancing rule will be applied to tickets in the system. By default, this option is set to 1 hour.

- Enabled - Check this box to reassign tickets at a specific interval.
- Execute on Schedule - The times at which the rebalancing rule is applied to tickets in the system. A maximum of three times per day can be scheduled.

- Enabled - Check this box to reassign tickets at a certain time each day.
- Execute when an agent starts receiving tickets - Check this box to reassign tickets when an agent logs in and actively accepts tickets for this group.

• Execute when an agent stops receiving tickets - Check this box to reassign tickets when an agent logs out of the system and/or stops receiving tickets for this group.

Quality Control

SmarterTrack's quality control feature provides a method to ensure agents provide the required level of service to customers by allowing managers to review ticket responses as the response is sent to the customer. A practical use for this feature is when it is combined with a structured training program for new agents. Managers can review a high percentage of responses by new agents to ensure that the new agent is replying to the entire issue rather than a select subset of issues, that the spelling and grammar used are up to company standards and more. Of course, quality control can just as easily be used as part of a company's regular quality control measures. More seasoned agents may not require the same oversight as trainees, but oversight can still be administered to ensure the highest levels of customer service possible.

To view the quality control settings for a specific agent, simply double-click the agent. To create a new quality control rule, click New in the content pane toolbar. The following quality control settings will be available:

• Agent - The agent being monitored.
• Forward To - The email address to which an agent's ticket responses are forwarded.
• Frequency - The number of ticket replies copied to the manager(s). The number of copied replies is based on a ratio in which the formula is 1 ticket for every X replies where X is the number entered in this field. For example, if 5 is entered in the frequency field, 1 out of every 5 tickets will be copied to the manager.

VOIP

SmarterTrack Communicator is a SIP-compliant voice over IP (VOIP) softphone that seamlessly integrates a company's phone system with SmarterTrack. Because it is configurable within SmarterTrack, all settings, profiles and agent information is pushed to whatever desktop or laptop an agent logs into. This greatly increases an agent's flexibility and also limits the amount of management and administration needed. Administrators can use this section to manage those settings related to SmarterTrack Communicator.

Note: The VOIP settings within SmarterTrack apply ONLY to SmarterTrack Communicator. While third-party VOIP clients can be used with SmarterTrack, those configurations would all be take place with the phone server or softphone client. A benefit of using Communicator is that it provides a centralized location for configuration.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on VOIP . The settings will load in the content pane and the following tabs will be available:

Options

- Purge Recordings After - Use this option to determine when SmarterTrack Communicator recordings are purged from the system. The number of days or size (MB) can be used to determine the purge threshold.
- Enable personal calls - Enable this option to allow agents to make personal calls while using SmarterTrack Communicator.

Brand Configurations

Brand-level VOIP settings allow administrators to set up basic information about how SmarterTrack handles VOIP calls. From the list of configured brands, double-click a brand name to edit its associated VOIP settings. A modal window will display the following options:

- Country Code - The country code associated with the phone number.
- Phone Number - The primary phone number for the brand.
- Max Lines per Agent - The maximum number of phone lines each agent will have available.
- Chats Before Unavailable - The number of live chats an agent will require before they become unavailable for phone calls.
- Enable automatic call recording - Note: The default server location for recorded Communicator calls is C:\Users\[USERNAME]\AppData\Roaming\SmarterTrackCommunicator\Recordings. Call recordings associated to call logs are compressed after 7 days of inactivity to reduce disk space and reduce the number of files on the server.

VOIP Accounts

Use this tab to configure the individual agent VOIP accounts. To create a new VOIP account, click New in the content pane toolbar. This will open the VOIP account editor, which can be used to create the new account. In the modal window, the following tabs are available:

Options tab

This tab allows the administrator to specify basic information regarding the account. The available options are:

- Agent - The agent to associate with the VOIP account.
- Group - The group to associate with the VOIP account/agent.

• Country Code - The country code associated with the phone number.

• Phone Number - The agent's phone number. A direct line is not required.

• Extension - The agent's extension.

• Max Phone Lines - The maximum number of phone lines the agent will have available.

• Min Call Log Length - The minimum amount of time a call needs to last before a call log is automatically created.

SIP tab

As SmarterTrack Communicator is a SIP-compliant softphone, a phone server's SIP information is required for each VoIP account that is created. In most cases, this information can be taken directly from the phone server itself.

• VOIP Username - The agent's VoIP username as it appears in the phone server.

• VOIP Password - The agent's password as it appears in the phone server.

• SIP Server - The phone server's SIP address (e.g., sip.ringcentral.com).

• SIP Port - The listening port used for SIP. The default is 5060.

• SIP Domain - The full domain for the SIP phone server (e.g., sip.ringcentral.com:5090)

• SIP Auth Name - The username the phone server assigns to the agent.

• Outbound Proxy Server - The address of the outbound proxy server, if one is being used.

• Outbound Proxy Port - The port used by the outbound proxy server.

• Use Session Description Protocol (SDP) - Check this box in order for the phone server to pass session information to SmarterTrack Communicator. For example, session announcements or session invitations.

STUN tab

Simple Traversal of UDP through NATs (STUN) is a protocol for assisting phone servers that are behind NAT firewalls and/or routers.

• STUN Server - The STUN server's address (e.g., stun.ringcentral.com).

• STUN Port - The STUN server's port. The default is 3478.

Extensions

A list of all configured groups can be found on this tab. If there is an extension for the group as a whole, it should be entered here.

Who's On

Who's On is a great way to take stock of your website traffic, and then act on that knowledge, by allowing agents and managers to see who is on a website, where they are from, where they were prior to coming to the website and then follow visitors as they travel from page to page. For example, sales agents can see when a visitor lands on a specific page and possibly invite the visitor to a live chat or even push a live chat to the visitor to entice them to buy. By default, Who’s On will track only the SmarterTrack portal; however, integration with a company website is also available.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Who's On . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Enable Who's On - Who’s On is not enabled by default. Check this option to begin analyzing your real-time visitor traffic.

Website Integration

When Who’s On is enabled, it will automatically begin monitoring SmarterTrack portal traffic. Use this tab to integrate Who’s On with your company website as well. The following settings are available:

- Host Header - In those instances where multiple brands are utilized and host headers are set up for each, a unique Who’s On script can be generated for each brand that is set up. Leaving this as the default means that the script will be generated for the SmarterTrack Base URL.
- Virtual Page - Virtual pages can be used to alter the name of the page displayed in in Who’s On. This is beneficial in differentiating Web pages that would otherwise be rendered as the same page. For example, your company’s shopping cart may be shown as one page. If you want to know when a user is in the checkout section specifically, you can create a new Who’s On script to put in that section with a virtual page of “Checkout”. Then, when viewing your website traffic, you’ll see when a customer moves from modifying their shopping cart to actually checking out. Virtual pages can also be used to simply shorten URL names. If the initial page URL is lengthy, the administrator may want to create a virtual page with a shorter identifier.
- Support HTTPS - If your SmarterTrack installation is configured with HTTPS, check this box to ensure Who’s On works on your website, secured or unsecured.
- Put the following right before the page’s ending </body> tag - This is the actual script that will be placed on your website, between the main <BODY> HTML tags. The BODY end tag will generally be at the very bottom of the Web page's source. The code should be copied and pasted exactly as it appears, and it should be placed at the very bottom or your Web page so that the script is the LAST thing called when your website renders. This will prevent any potential issues with SmarterTrack prohibiting your website from loading when customers visit.

Tools

Automation with Web Services

SmarterTrack was built with custom configuration and integration in mind. In addition to being able to customize the look and feel of SmarterTrack, developers and/or system administrators have the ability to code to the SmarterTrack application using Web services. These Web services allow developers and/or system administrators to automate a variety of different actions, giving them the ability to add tickets to SmarterTrack on-the-fly, add notes, create users and more.

Web services are intended for use by high-volume and automated business environments and hosting companies as they develop procedures to manage their SmarterTrack system and workflow. In addition, the API Documentation assumes a basic understanding of web service technologies and ASP.NET programming.

Note: The SmarterTrack Web Services documentation may include services that have not been released to the public yet or are not available in the version you are using.

Diagnostics

Administrators will use this section to fine-tune the performance of SmarterTrack. By default, SmarterTrack is set to run optimally on the majority of systems, regardless of how busy the help desk is. However, there may come times when system administrators want to manage these settings and customize the performance of SmarterTrack. Note: These are advanced settings and it is not recommended to change them without understanding the impact of the changes.

Administrators may also use this section to adjust or review the SmarterTrack log files. (SmarterTrack creates daily log files containing information about license activations, SMTP connections, POP connections and errors.)

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Tools area of the navigation pane, click on Diagnostics . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Heartbeat Interval - The amount of time between communication attempts to the server to refresh tree view counts, reminder popups and counts, live chat popups, and other automatic functions. By default, this option is set to 10 seconds.

• Who's On Interval - The amount of time between communication attempts to the server to refresh visitor information displayed in Who's On. By default, this option is set to 8 seconds.
• Delete Log Files After - The number of days after which the log files are deleted. Deleting log files on a regular basis will minimize the amount of disk space that SmarterTrack uses. By default, log files are deleted after 14 days.
• Email Address to Receive Errors - When an email address is entered here, an email will be sent each time an error is written to the Error log.
• Enable short query logging - Checking this box will allow SmarterTrack to keep a short log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.
• Enable full query logging - Checking this box will allow SmarterTrack to keep a very detailed log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.
• Enable lock tracing - Checking this box will allow SmarterTrack to keep a detailed log about objects being cached in server memory. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.
• Enable cache tracing - Checking this box will track all system level locks to identify points of conflict in the software. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.

Administrators can use the Self Diagnostic button in the content pane toolbar to test the SmarterTrack server for errors. SmarterTrack will perform a test and display the results in a popup window. SmarterTrack's self diagnostic tool will review a variety of different settings to help administrators troubleshoot potential issues. For example, the tools will check file permissions, internet connectivity, folder permissions and more.

Current Thread Status

Use this tab to start and stop background threads. Changing the status of background threads may disable certain areas of the application and will affect functionality. For this reason, it is not recommended to change the status of background threads unless instructed to do so by the SmarterTools Support Department for debugging purposes. A number appears in the tab itself to show the total number of threads available to manage.

Below is a list of each thread, what it controls and the consequences of disabling the thread.

• Auto-Inactive Thread - This thread controls automatically sets an Agent to an "inactive" status, and will then hand off tickets and/or live chats. If it's disabled, Agents will not be automatically set to an inactive status.

• Auto-Purge Deleted Items Thread - This thread controls automatically purging deleted tickets, chats, call logs, tasks, canned replies, news items, KB articles, groups, departments and users every 90 days. If it is disabled, deleted items will not be automatically purged.

• Call Log Watcher Thread - This thread watches the call log and will automatically delete call logs older than 7 days. This thread also checks to make sure the database is not being upgraded when it runs, and that an update of SmarterTrack is not running. If it is, then this thread will run after these updates are complete. If it's disabled, call logs are not automatically deleted.

• Chat Manager Thread - This thread calculates chat wait times, auto assigns live chats, removes ended/abandoned chats and automatically deletes chats older than 7 days. If it is disabled, therefore, wait times would not be captured, chats would not be auto-assigned, and abandoned/ended chats would not be removed.

• Cleaner Thread - This thred automatically cleans out various folders: Raw Content, Call Recording, Temp, Failed Emials, Logs, User Handshakes, Orphaned Ticket Attachments and Zip Files. Essentially, any folder that holds metadata. If it's disabled, none of that information would automatically be purged, and the folders would grow in size and, possibly, compromise total disk space.

• Email Import (POP) Thread - This thread turns .eml files in the email folder that are pulled in from any POP accounts that are set up into actual tickets. Therefore, if it's disabled, tickets would no longer be created from any .eml files imported via any POP accounts.

• Email Report Thread - This thread controls the automatic sending, via email, of any Report. If it's disabled, therefore, no Reports -- scheduled or otherwise -- would be sent out.

• Event Processing Thread - This thread controls any system-level events such as version updates, license renewals, etc. It also controls ticket and live chat counts, and knowledge base article status. (E.g., when they go stale.) This thread also checks to make sure the database is not being upgraded when it runs, and that an update of SmarterTrack is not running. If it is, then this thread will run after these updates are complete. If it's disabled, therefore, ticket and live chat counts wouldn't work, KB articlet status isn't checked, etc.

• Indexing Thread - This thread automatically creates a list of indexable strings that are used when using regular and advanced search. If it's disabled, those searchable strings will not be created, essenatially criplling SmarterTrack's search features.

• POP Download Thread - This thread handles the importing of .eml files via POP and running POP imports from the various accounts that are set up. If it's disabled, therefore, POP importing would stop.

• SMTP Delivery Thread - This thread manages the Spool, sending ticket replies using the SMTP accounts that are set up and then clearing the Spool after messages are sent. If it's disabled, therefore, ticket replies will not be sent.

- Task Watcher Thread - This thread watches adn runs Tasks and also deletes completed Tasks that are older than 7 days. If it's disabled, this does not occur.
- Ticket Watcher Thread - This thread watches Tickets and runs checks for auto-closing tickets, auto-locking tickets, auto-deleting of tickets, ticket rebalance rules and ticket assignments. If it's disabled, therefore, tickets will not auto-assign, rebalancing will not work, and any other automatic ticket tasks will not run.
- Task Scheduler Thread - This thread runs the Task Scheduler and manages any recurring Tasks. If it's disabled, therefore, this does not occur.

Log Files

Use this tab to view or delete log files. The following columns are available:

- Checkbox - Use these boxes to select multiple log files. Log files must be selected before choosing an action from the toolbar.
- File Name - The name of the log file.
- Date - The date the log file was created.
- Size (bytes) - The size of the log file in bytes.

To view a specific log file, simply double-click the file and it will load in a pop-up window. To delete a log file, select the log file(s) to delete and click the Delete button in the content pane toolbar. A number will appear on the tab itself that displays the total number of log files that are available to view.

External Providers

Administrators with programming knowledge can extend the functionality of SmarterTrack through the use of external providers. By integrating external providers into SmarterTrack, companies can do the following and more:

- Integrate their login system to LDAP.
- Copy the user's ID that the billing system uses into a custom field in SmarterTrack for easy reporting.
- Show and hide custom fields based on the department a user has chosen.
- Redirect any tickets that have certain custom field values or keywords to an escalation department.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Tools area of the navigation pane, click on External Providers . The settings will load in the content pane and the following tabs will be available.

NOTE: For techincal details, refer to the examples found in the SmarterTrack External Provider Technical Documentation .

Options

Use this tab to enable external providers. For each external provider enabled, the corresponding tab will become active:

• Enable login provider - Checking this box will enable the login provider and allow the administrator to configure the settings on the corresponding external provider tab.
• Enable registration provider - Checking this box will enable the registration provider and allow the administrator to configure the settings on the corresponding external provider tab.
• Enable custom field provider - Checking this box will enable the custom field provider and allow the administrator to configure the settings on the corresponding external provider tab.
• Enable ticket provider - Checking this box will enable the ticket provider and allow the administrator to configure the settings on the corresponding external provider tab.
• Enable live chat provider - Checking this box will enable the live chat provider and allow the administrator to configure the settings on the corresponding external provider tab.
• Enable user information provider - Checking this box will enable the user information provider and allow the administrator to configure the settings on the corresponding external provider tab.
• Enable events provider - Checking this box will enable the events provider and allow the administrator to configure the settings on the corresponding external provider tab.

Login

A login provider can be implemented that allows SmarterTrack to query existing systems for user login, authentication, and creation. Every time a user logs in or returns to the site with a login already stored in their cookies, this provider is called. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

• Web Service URL - The URL to the Web service.
• Web Service Password - The password used to authenticate the Web service.
• Forgot Password URL - The URL used to recover password information for SmarterTrack users.
• Custom Login URL - The URL to which all users will be redirected in order to login. When a URL is entered here, users will be redirected to the specified site instead of seeing the standard login modal.
• Default Role for Users - To specify whether users are considered registered or anonymous after logging in, select the appropriate option from the list. Note: If users are considered

anonymous, the administrator will have to manually grant the user role to new users. For this reason, it is recommended to select registered users as the default role.
• Mark email addresses as verified - Checking this box will automatically verify that email addresses for users are valid.
• Enable single sign-on cookies from other sites - Checking this box will allow the Web service to accept session cookies from another site.

Registration

A registration provider can be implemented that allows SmarterTrack to work with existing systems for user registration. When a user registers in the existing system, this provider can be called. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

• Web Service URL - The URL to the Web service.
• Web Service Password - The password used to authenticate the Web service.

Custom Fields

A custom field provider can be implemented to allow a custom set of fields to be displayed when creating tickets and live chats. The custom field provider is called when a ticket or live chat is first created and allows the administrator to add or pre-fill fields based on the user's login credentials or other information. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

• Web Service URL - The URL to the Web service.
• Web Service Password - The password used to authenticate the Web service.

Ticket

The ticket provider is called right before a ticket is started. It can be implemented to allow the system to redirect the ticket to another department, set other customer fields (like a customer ID in an external billing system), or reject the creation of the item. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

• Web Service URL - The URL to the Web service.
• Web Service Password - The password used to authenticate the Web service.

Live Chat

The live chat provider is called right before a live chat is started. It can be implemented to allow the system to redirect the live chat to another department, set other customer fields (like a customer ID in an external billing system), or reject the creation of the item. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

User Information

The user information provider can be implemented to automatically pull information from an external database and display the information in the Communication tab of tickets. A business can use this provider to display important customer information (recent purchases, licensing information, number of past tickets, etc.) so that agents have all available details when viewing tickets. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Events

An events provider can be implemented to automatically update third-party software and databases when agents perform specific actions. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Spool

All incoming and outgoing SmarterTrack messages are processed through the spool. If your email server is down, messages in the spool will retry at regular intervals until it comes back up. Administrators can manage incoming and outgoing messages in the spool, retry failed messages, delete failed messages or view the raw content of any message.

To manage the spool, log into the management interface as an adminstrator. Then click on the Settings icon . In the Tools area of the navigation pane, click on Spool . The spool contents will load in the content pane. Two tabs are available for toggling between the Outgoing spool and Incoming spool. The outgoing spool is for messages sent from SmarterTrack. The incoming spool is for messages imported into by SmarterTrack.

The following options are available from the content pane toolbar:

- Raw Content - Allows an administrator to view the raw content of the selected message, including the message header. Double-clicking on a spool item also displays the raw content of the message.

• Actions

• Select All - Selects all messages in the spool.
• Retry - Retries the failed message(s).
• View - Allows the administrator to set the sort order for messages in the spool.
• Delete - Permanently deletes the message(s) from the system.

Events

Events Overview

SmarterTrack can detect events as they occur, generate messages for those events, and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. Using Events in SmarterTrack, administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

There are two categories of events in SmarterTrack: agent-level events and system-level events:

• Employee-level events are created by agents and they are specific to each agent's role and permission level within SmarterTrack. For more information on agent-level events, please see My Events .
• System-level events can only be set by administrators and cover both agent- and system-level items such as SMTP errors, idle times and more. For more information on system-level events, please see Events .

The Events folder, which can be found in the Settings folder of the Help for Users and Administrators section, can be used for more information on creating new events and what event categories and types are available. For each event category (the feature the event is related to: Call Logs, Knowledge Base, Tickets, etc.) there is a corresponding document detailing the types, conditions and actions available.

My Events

When clicking My Events all events that are created by an individual agent are displayed for the Agent. The following items are displayed for My Events:

• Name - The Event's friendly name.
• Enabled - When checked, that Event is enabled. When unchecked, the Event is disabled.
• Category - The primary category the Event was created for. (E.g., Tickets, Call Logs, etc.)

- Event Type - The type of Event created. (E.g., Ticket Count for Department, Task Deleted, etc.)
- Conditions - A list of the conditions that need to be met for the Event to fire.
- Actions - A list of the actions to be taken when the Event fires.

System Administrator Events

When viewing Events as a system administrator, there is a bit more to it. First of all, system admins can create their own Events. In addition, system admins can view any Events created by agents. As such, system admins have different tabs: Global, which shows all system admin Events, and Employees, which displays all Events that have been created by individual Agents. Regardless, the following items are displayed:

- Name - The Event's friendly name.
- Enabled - When checked, that Event is enabled, When unchecked, the Event is disabled.
- Owner - Only displayed on the Employees tab, this is the Agent who created the Employee Event.
- Category - The primary category the Event was created for. (E.g., Tickets, Call Logs, etc.)
- Event Type - The type of Event created. (E.g., Ticket Count for Department, Task Deleted, etc.)
- Conditions - A list of the conditions that need to be met for the Event to fire.
- Actions - A list of the actions to be taken when the Event fires.

Creating New Events

To add a new agent-level event, click the Settings icon . Then expand the My Settings folder, click My Events in the navigation pane and click New in the content pane toolbar.

To add a new system-level event, click the Settings icon . Then expand the Configuration folder, click Events in the navigation pane and click New in the content pane toolbar. Note: Only administrators can add system-level events.

This will open a new event window with the following fields:

- Name - The friendly name of the event.
- Category - The feature to which the event pertains (Tickets, Survey, Who's On, etc.)
- Type - The type of action that will cause the event to fire. The types seen are based on the Category chosen.

After completing the fields in the new event window, the following tabs will load in the content pane:

Conditions

Use this tab to further customize the event as needed. Depending on the event category and type selected, different event condition criteria will be available. For more information on the various event action criterions, see the corresponding event category page in the Events folder found in the Help for Users and Administrators section. In general, the following settings are available:

- Name - The name of the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.

Actions

Use this tab to determine the action that should be triggered when the event occurs. For new events, click Add Action in the content pane toolbar. Depending on the event category and type selected, different action options will be available. Furthermore, for each action chosen, there will be various settings for further configuration. For more information on the various event actions, see the corresponding event category page in the Events folder found in the Help for Users and Administrators section. In general, the following settings are available:

- Action - The action that occurs when an event is triggered.
- Maximum Frequency - To specify how frequently the action is performed, select the appropriate option from the list. For example, if you set a maximum frequency of 15 minutes for an event that means the event will only fire once in that 15 minute period regardless of how many times the event conditions are met.

Manual Events

Manual events allow agents and managers to add multiple actions to a single event, then trigger the event whenever they want versus waiting for the system to execute them automatically. For example, agents may want to transfer a ticket to another department, send a canned reply to the customer, adjust the custom fields in preparation to track the ticket, and SMS the agent that will receive the transferred ticket. Instead of the agent having to perform all of these actions separately, manual events can make all this happen with just one click.

Active Group Events

Administrators can receive notifications or automate actions based on the following agent status events:

- Agent Auto-Inactive
- Agent Status AFK

- Agent Status for Live Chat Changed
- Agent Status for Tickets Changed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent - The agent whose status changed.
- Status - The status that will trigger the event.
- Is AFK - The AFK status that will trigger the event.

Actions

Depending on the event type selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Call Log Events

Administrators and agents can receive notifications or automate actions based on the following call log events:

• Call Log Attached to Ticket
• Call Log Created
• Call Log Deleted
• Call Log Detached from Ticket
• Call Log Modified
• Call Log Time Log Created
• Manual Call Log Event

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
• Event Type - The event that triggers the action.
• Time of Day - The time frame during which the event occurs.
• Day of Week - The day(s) of the week during which the event occurs.
• Subject - The words that will trigger the event if found within the call log subject.
• Acting Agent - The agent that added a comment to the call log.
• Department - The department that will trigger the event.
• Group - The group that will trigger the event.
• Agent Assigned - The agent assigned to the call log.
• Phone Number - The phone number that will trigger the event.
• Name - The name that will trigger the event.
• Email Address - The email address that SmarterTrack uses to send email.
• Incoming Call - The type of call that will trigger the event. Note: If the type of call is an incoming call, type "true" in the field. If it is not, type "false" in the field.
• Start Date - The start date of the call.
• End Date - The ending date of the call.
• Description - The words that will trigger the event if found within the description of the call log.

Actions

Note: Event criteria based on any custom fields the administrator has established may also be available.

Depending on the event type selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Transfer Call Log - Transfers the call log to the Group and Agent specified
- Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Chat Room Events

Administrators and agents can receive notifications or automate actions based on the following chat room events:

- Chat Room Invite
- Chat Room Joined
- Chat Room Left

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
• Event Type - The event that triggers the action.
• Time of Day - The time frame during which the event occurs.
• Day of Week - The day(s) of the week during which the event occurs.
• Agent - The agent that invited, joined, or left the agent-to-agent chat.
• Name - The name of the chat room that triggers the event.
• Sent Message - The words that will trigger the event if found within a sent message of the chat.

Actions

Depending on the event selected, the following actions are available:

• Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
• Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Community Events

Administrators and agents can receive notifications or automate actions based on the following Community event:

• New Community Thread Created
• New Reported Abuse

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Thread Type - The Type of thread that triggers the event.
- Display Name - The display name of the user that triggers the event.
- User’s Email - The email address of the user that triggers the event.
- Type - The activity in the thread that triggers the event.
- Type of Abuse - The type of abuse in the thread that triggers the event.
- Reported By - The reporter’s display name that triggers the event. Note: If the user’s display name is not set this will revert to the username.
- Email of Reporter - The email address for the reporter that triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Knowledge Base Events

Administrators and agents can receive notifications or automate actions based on the following knowledge base events:

- KB Article Created
- KB Article Deleted
- KB Article Flagged for Review
- KB Article Modified
- KB Article Reviewed
- KB Article Stale

- KB Feedback Abuse Reported
- KB Feedback Approved
- KB Feedback Blocked
- KB Feedback Created
- KB Feedback Deleted
- KB Feedback Edited
- Manual KB Event

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Agent - The agent that modifies or creates articles.
- Folder - The folder in which the knowledge base article is saved.
- Article Title - The words that will trigger the event if found within the article title.
- Keywords - The words that will trigger the event if listed as article keywords.
- Summary - The words that will trigger the event if found within the article summary.
- Body Text - The words that will trigger the event if found within the body of the article.
- Marked as Draft - The article status that will trigger the event.
- Marked as Private - The article status that will trigger the event.
- Flagged for Review - The article status that will trigger the event.

Actions

Depending on the event selected, the following actions are available:

- Alter Item Properties - Allows you to automatically change an article's Draft, Public/Private and Review status.
- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Live Chat Events

Administrators and agents can receive notifications or automate actions based on the following live chat events:

- Live Chat Attached to Ticket
- Live Chat Comment Added
- Live Chat Count for Agent
- Live Chat Count for Department
- Live Chat Count for Group
- Live Chat Deleted
- Live Chat Detached from Ticket
- Live Chat Ended
- Live Chat Idle
- Live Chat Incoming Message
- Live Chat Outgoing Message
- Live Chat Started
- Live Chat Time Log Created
- Live Chat Transferred
- Manual Live Chat Event

Regarding Idle Events

Idle Events are very resource intensive as, when an Idle Event fires, it has to cycle through all live chats in the system. Therefore, it's a good idea to create no more than six (6) Idle Events for your help desk. While Idle Events are the most intensive, all events have an impact on the system, so be pragmatic and systematic when planning out what events to use and how to use them. A properly-running help desk should have no more than 24 events in total set up to cover all scenarios.

In addition, in those circumstances where customers want to set IDLE events for "waiting" chats, the best way to set these is to use a conditional wait time versus an absolute value. For example, rather than set the event to fire if a wait time is 5 minutes, set it to fire if the wait time is "between 5 and 15 mintues." This is a more efficient way of setting up the event and will ensure it fires off as intended.

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Idle Minutes - The number of minutes a live chat is idle before the event is triggered.
- Acting Agent - The agent that added a comment to the live chat.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent Assigned - The agent assigned to the live chat.
- Open Date - The date the live chat was initiated.
- Customer Name - The name of the customer.
- Customer Username - The customer's username.
- Customer Email - The customer's email address.
- Question - The words that will trigger the event if found within a the text of the chat.
- Customer IP - The customer's IP address.
- Language - The language that will trigger the event.
- Messages Sent - The number of messages sent during the live chat.
- Messages Received - The number of messages received during the live chat.

Note: Event criteria based on any custom fields the administrator has established may also be available.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.

- End Chat - Ends the chat by the agent.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Transfer Live Chat - Transfers the chat to the Group and Agent specified
- Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

POP Events

Administrators can receive notifications or automate actions based on the following POP events:

- POP Connection Failed
- POP Download Failed
- POP Import Failed
- POP Login Failed

Conditions

Depending on the event selected, the following event criteria are available:

- • Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- • Event Type - The event that triggers the action.
- • Time of Day - The time frame during which the event occurs.
- • Day of Week - The day(s) of the week during which the event occurs.
- • Server Name - The name of the server that SmarterTrack failed to connect to.
- • Server Port - The port that SmarterTrack attempted to connect to on the server.
- • Login Username - The username used to authenticate with the server.
- • SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.

Actions

Depending on the event selected, the following actions are available:

- • Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- • Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- • Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- • Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- • Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

SMTP Events

Administrators can receive notifications or automate actions based on the following SMTP events:

- • SMTP Connection Failed
- • SMTP Delivery Failed
- • POP Login Failed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- SMTP Server - The name of the server that SmarterTrack failed to connect to.
- Server Port - The port that SmarterTrack attempted to connect to on the server.
- Email Address - The email address that SmarterTrack uses to send email.
- SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.
- Requires Authentication - The authentication required connect to the server. Note: If the server requires authentication, type "true" in the field. If it does not, type "false" in the field.
- Customer Email - The customer's email address.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Survey Events

Administrators and agents can receive notifications or automate actions based on the following survey event:

- Survey Answered

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Survey Name - The survey that triggers the event.
- Survey Rating - The rating that triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Task Events

Administrators and agents can receive notifications or automate actions based on the following Task events:

- Manual Task Event
- Task Created
- Task Deleted
- Task Due
- Task Modified
- Task Started

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Subject - The words that will trigger the event if found within the task subject.
- Acting Agent - The agent that added a comment to the ticket.
- Agent Assigned - The agent that is assigned the task.
- Old Agent Assigned - The agent previously assigned the task.
- Status - The task status that will trigger the event.
- Priority - The priority level that will trigger the event.
- Related Item - A related email ticket, live chat or call log.
- Description - The words that will trigger the event if found within the description of the task.
- Start Date - The start date of the task.
- Due Date - The due date of the task.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Create Task - Creates a new task with the customized Subject, Description, Priorty and Status specified.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

- Set Task Priority - Sets the task priority (low, normal, high, urgent). This is generally used in conjunction with another action.
- Set Task Status - Sets the task status (Under Consideration, In Progress, On Hold, In Review, Completed, Rejected, Approved). This is generally used in conjunction with another action, such as "Send Canned Reply".
- Transfer Task - Transfers the task to the Agent specified
- Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Ticket Events

Administrators and agents can receive notifications or automate actions based on the following ticket events:

- Manual Ticket Event
- Ticket Closed by User
- Ticket Commend Added
- Ticket Count for Agent
- Ticket Count for Group
- Ticket Count for Department
- Ticket Created
- Ticket Deleted
- Ticket Duration
- Ticket Followed Up
- Ticket Follow-up Due
- Ticket Follow-up Scheduled
- Ticket Idle
- Ticket Messages Received

- Ticket Messages Sent
- Ticket Priority Changed
- Ticket Status Changed
- Ticket Time Log Created
- Ticket Transferred

Regarding Idle Events

Idle Events are very resource intensive as, when an Idle Event fires, it has to cycle through all tickets in the system. Therefore, it's a good idea to create no more than six (6) Idle Events for your help desk. While Idle Events are the most intensive, all events have an impact on the system, so be pragmatic and systematic when planning out what events to use and how to use them. A properly-running help desk should have no more than 24 events in total set up to cover all scenarios.

In addition, in those circumstances where customers want to set IDLE events for "waiting" tickets, the best way to set these is to use a conditional wait time versus an absolute value. For example, rather than set the event to fire if a wait time is 5 minutes, set it to fire if the wait time is "between 5 and 15 mintues." This is a more efficient way of setting up the event and will ensure it fires off as intended.

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Duration Minutes - The number of minutes since the ticket has been submitted before the event is triggered.
- Acting Agent - The agent that added a comment to the ticket.
- Old Department - The department assigned to the ticker prio to transfer.
- Old Group - The group assigned to the ticket prior to transfer.
- Old Agent Assigned - The agent assigned to the ticket prior to transfer.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent Assigned - The agent assigned to the ticket.
- Customer Email - The customer's email address.
- Subject - The words that will trigger the event if found within the ticket subject.
- Priority - The priority level that will trigger the event.

- Status - The ticket status that will trigger the event.
- Idle Minutes - The number of minutes a ticket is idle before the event is triggered.
- Follow-up Due Minutes - The number of minutes prior to the due date and time that will trigger the event.
- Follow-up Past Due Minutes - The number of minutes after the due date and time that will trigger the event.
- Pinned to Agent - The ticket status that will trigger the event.
- Messages Sent - The total number of outgoing tickets that will trigger the event.
- Messages Received - The total number of incoming tickets that will trigger the event.
- Body Text - The words that will trigger the event if found within the body of the ticket.
- Comment Type - The type of comment (note, resolution, transfer note) that will trigger the event.

Note: Event criteria based on any custom fields the administrator has established may also be available.

Actions

Depending on the event type that is selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Offer Survey - Iniates a survey to the end user. Note: Surveys will only be sent for closed tickets if there is at least one incoming message present.
- Pin Ticket to Agent - Pins the ticket to the assigned agent.
- Send Canned Reply - Automatically sends a specific canned reply.
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired. For example, if six tickets trip an email ticket IDLE event, only one email is sent.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting. For example, if six tickets trip an email ticket IDLE event, one email is sent for each ticket that fires the

event.

• Send Reply to Ticket - Automatically sends an email reply to the ticket. The reply is customized based on the event.

• Set Ticket Priority - Sets the ticket priority (low, normal, high, urgent). This is generally used in conjunction with another action.

• Set Ticket Status - Sets the ticket status (active, waiting, closed, closed and locked). This is generally used in conjunction with another action, such as "Send Canned Reply".

• Transfer Ticket - Transfers the ticket to the Group and Agent specified

• Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

User Events

Administrators and agents can receive notifications or automate actions based on the following survey event:

• New User Registered

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

• Event Type - The event that triggers the action.

• Time of Day - The time frame during which the event occurs.

• Day of Week - The day(s) of the week during which the event occurs.

• Username - The username of the new user which triggers the event.

• Email Address - The email address of the new users which triggers the event.

• Full Name - The full name of the new user which triggers the event.

- Phone Number - The phone number of the new user which triggers the event.
- IP Address - The IP Address of the new user which triggers the event.
- Brand - The brand the new user belongs to which triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Who's On Events

Administrators and agents can receive notifications or automate actions based on the following Who's On events:

- Live Chat Accepted
- Live Chat Invitation Ignored
- Live Chat Invited
- Live Chat Rejected
- Online Activity

In addition to the events listed above, administrators can receive notifications or automate actions on the following Who's On events:

- Online Visitor Purged
- Online Visitor Removed

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
• Event Type - The event that triggers the action.
• Time of Day - The time frame during which the event occurs.
• Day of Week - The day(s) of the week during which the event occurs.
• Acting Agent - The agent that added a comment to the ticket.
• Department - The department that will trigger the event.
• Group - The group that will trigger the event.
• Sent Message - The words that will trigger the event if found within a sent message of the chat.
• Customer Name - The customer that will trigger the event.
• Customer Email Address - The email address that will trigger the event.
• IP Address - The IP address that will trigger the event.
• Host Name - The host name that will trigger the event.
• Host Domain - The host domain that will trigger the event.
• Session Start Time - The time frame during which the customer visited the website or portal.
• Hits - The number of times a page is hit before triggering the event.
• Duration Minutes - The number of minutes the visitor has been on the website or portal.
• Idle Minutes - The number of minutes a ticket sits idle before the event will trigger.
• Country - The geographic location of the visitor that will trigger the event.
• Region - The geographic location of the customer that will trigger the event.
• Language - The default browser language of the user that will trigger the event.
• Browser - The Web browser that will trigger the event.
• Operating System - The operating system that will trigger the event.
• Live Chat Status - The live chat status that will trigger the event.
• Initial Page - The Web page that will trigger the event if viewed at the beginning of the customer's session.
• Initial Virtual Page - The virtual page that will trigger the event if viewed at the beginning of the customer's session.
• Initial Page Title - The title of the initial page.
• Initial Referrer - The Web page that the user was on prior to coming to site that will trigger the event.
• Current Page - The Web page that will trigger the event.
• Current Virtual Page - The virtual page that will trigger the event.
• Current Page Title - The title of the current page the visitor is browsing.
• Current Referrer - The referrer that will trigger the event.
• Live Chat Invites Sent - The number of live chat invites sent by an agent(s) that will trigger the

event.

• Live Chat Invites Rejected - The number of live chat invites rejected by customers that will trigger the event.

• Live Chat Invites Accepted - The number of live chat invites accepted by customers that will trigger the event.

• Live Chat Invites Ignored - The number of live chat invites ignored by customers that will trigger the event.

• Invitation Last Sent Date - The date the customer last received a live chat invitation.

• Last Live Chat Date - The date the customer last participated in a live chat.

• First Live Chat Date - The date the customer first participated in a live chat.

Actions

Depending on the event selected, the following actions are available:

• Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.

• Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .

• Purge From List - Purges a visitor's entry from the Who's On list.

• Remove From List - Removes a visitor's entry from the Who's On list.

• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired. For example, if six tickets trip an email ticket IDLE event, only one email is sent.

• Send Live Chat Invitation - Send a live chat invitation to the recipient on the portal or company website. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.