



# Tools

Help Documentation

## 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 thread automatically cleans out various folders: Raw Content, Call Recording, Temp, Failed Emails, 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 article 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, essentially crippling 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 and 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 technical 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 settings on the corresponding external provider tab. 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 administrator. 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.